



**The Digital Fundraising Checklist for
NONPROFIT
Organizations**

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INTRODUCTION FOR NONPROFITS

The world is changing. People have never been more energized, but rising above the all the digital noise has never been more challenging. Technology is accelerating at the speed of Marty McFly in a DeLorean time machine, but here's the thing: your supporter base expects you to keep up.

In 2007, a nonprofit could experiment in the online space and continue to thrive by communicating and fundraising offline. In 2017, a tactical online engagement strategy is the difference between building authentic, human connections with your constituents and insolvency.

We're here to help ensure long-term sustainability for your nonprofit. Whether you're a seasoned digital expert looking for the latest tips or a nonprofit pro looking to modernize your organization, our Online Engagement Checklist will help you infuse web, mobile, and social into your supporter growth and retention initiatives.

Here are our go-to 2017 online engagement hacks, tools, and resources for digital marketing, online fundraising, online advocacy, and peer-to-peer fundraising.



DIGITAL MARKETING STRATEGIC CHECKLIST

10 Ways to Boost Engagement with Digital Marketing

- ❑ **1. Add optional interest-focused checkboxes to your opt-in forms.** Provide relevant content to supporters by giving them opportunities to tell you what programs or issues they want to learn more about. *Bonus resource:* [Email Marketing Best Practices](#)
- ❑ **2. Create an automated email welcome series.** After a new subscriber signs up, use the opportunity to share your organization's story, educate them about your work or current initiatives, and provide them with resources to become more involved. *Bonus resource:* [Why Welcome Emails are the Most Important Email You will Send](#)

5 Emails to Include in your Welcome Series

- A heartfelt thank you note
- A personal introduction to your leadership and board members
- An overview of your mission and focus areas
- Specific stories or videos showing impact
- Ways supporters can get involved and learn more

- ❑ **3. Optimize for mobile.** Craft emails that are easy to scan, optimized for mobile, and mobile-responsive. Keep copy minimal with actionable bullets and large call to action buttons. *Bonus resource:* [Beyond Responsive Design: How to Optimize your Website for Mobile Users](#)
- ❑ **4. Segment your subscribers.** There are an infinite number of ways to do this. Here are a few ideas: Segment by interest, donors from non-donors, supporter giving history or level, geographical location. *Bonus resource:* [Segmentation Ideas for Nonprofits and Member-Based Organizations](#)
- ❑ **5. Encourage social media post shares.** Sync the timing of your action alerts or appeals with attention grabbing, branded social posts. Extend social reach by creating custom lists and running targeted Facebook ads to those supporters and similar 'look-a-like' audiences. *Bonus resource:* [Facebook Ads: Create a Value-Based Lookalike Audience](#)

Imitation is the sincerest form of flattery. Here are the 10 most engaging nonprofits on social media [3]:

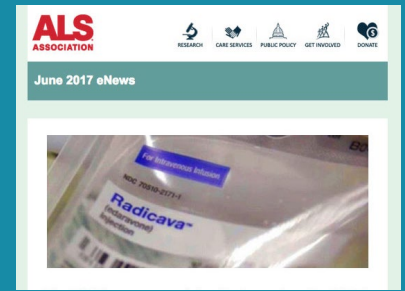
- | | | |
|-------------------------------|----------------------------------|-----------------|
| 1. Planned Parenthood | 5. St. Jude | 9. Greenpeace |
| 2. Alzheimer's Association | 6. World Wildlife Fund | 10. Make a Wish |
| 3. Disabled American Veterans | 7. Girl Scouts | |
| 4. Cystic Fibrosis Foundation | 8. Wildlife Conservation Society | |

- ❑ **6. Be visual.** A picture is worth a thousand words. Demonstrate your impact by posting videos and photos of your volunteers or field personnel at work on your blog and social media. *Bonus resource:* [Why your Nonprofit Should Care About Visual Storytelling](#)
- ❑ **7. Get found with on-page SEO.** Optimize individual web pages in order to rank higher and earn more organic website traffic when people search for your organization and your cause. *Bonus resource:* [It's Time to Stop Doing On-Page SEO like it's 2012](#)
- ❑ **8. Create Donor Personas.** Get a better picture of who your donors are, what they care about, and how to talk to them about your cause. Donor personas will help you create more inspiring, tailored asks based on demographics, behavior, and informed research about what motivates them! *Bonus resource:* [How to Identify your Nonprofit Donor Personas](#)
- ❑ **9. After donating, keep supporters engaged.** On donation thank you pages, include links to your blog demonstrating your nonprofit's impact, or relevant articles and news pieces. *Bonus resource:* [5 Thank You Page Best Practices for Any Nonprofit](#)
- ❑ **10. Replicate your most engaging Facebook posts.** Visit your nonprofit's Facebook page and click 'engagement' to determine your most engaging posts. *Bonus Resource:* [7 Easy Post Ideas that Drive Social Media Engagement](#)

DIGITAL MARKETING TOOLS CHECKLIST

- ❑ [Moz Keyword Finder](#)
Moz's keyword tool helps you identify keyword ranking opportunities. The free version of the tool allows for two keyword searches per day.
- ❑ [Grammarly](#)
With a free chrome extension, Grammarly proofreads emails and social media posts for you.
- ❑ [Bit.ly](#)
Quickly shorten links and share them on social media.
- ❑ [RiteTag](#)
Provides instant feedback on your hashtag choices and identifies trending topics relevant to your content.
- ❑ [Tweriod](#)
Analyzes your Twitter account to show you the best time to tweet for more exposure.
- ❑ [Google Trends](#)
See what the world is searching for.
- ❑ [Hotjar](#)
Discover how your web visitors interact with your website content.
- ❑ [Typeform](#)
Interact with your donors, get event feedback and more with this form-building tool.
- ❑ **For your RSS:**
 - [Hubspot Marketing Blog](#)
 - [Moz](#)
 - [Kivi's Nonprofit Communications Blog](#)
 - [Whole Whale](#)
 - [Salsa Blog](#)

GENERAL NONPROFIT EXAMPLES

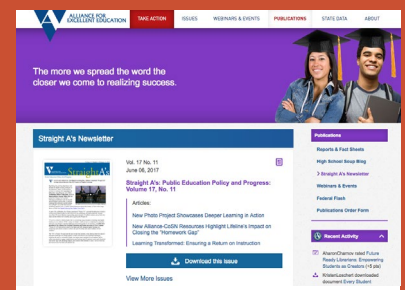


Click to View a Great Example of an Email Newsletter



Click to View a Great Example of a Social Post

ADDITIONAL EXAMPLE



Click to View a Great Example of an Sign Up Form

ONLINE FUNDRAISING STRATEGIC CHECKLIST

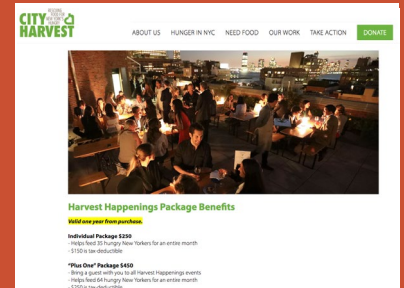
12 Tips to Optimize Online Giving

- ❑ **1. Say thank you.** Create a thank you email series to express gratitude to your donors and share how their gift made an impact. Donors who feel they have truly made a difference are much more likely to continue giving to your organization. *Bonus resource:* [The Power of an Awesome Donor Thank You Letter](#)
- ❑ **2. A/B Test Donation Pages.** Just having a donation page isn't enough. Maximize your donation page conversion rate by testing and iterating on design, copy, layout, etc. *Bonus resource:* [How to Start A/B Testing Websites](#)
- ❑ **3. Optimize your donation page for mobile.** 18% of all online donations come from mobile device users. Up 200% in the last year. Don't just make a donation page that is usable on a mobile device. Build pages that optimize for donations on mobile phones. *Bonus resource:* [10 Donation Form Optimization Hacks to Raise More Funds!](#)
- ❑ **4. Add a matching gifts option on donation thank you pages.** Make giving as easy as possible by optimizing your donation process for mobile devices. *Bonus resource:* [Ultimate Matching Gifts Guide.](#)
- ❑ **5. Prominently feature a “donate” button on every page of your website.** People can't donate if they don't know how! *Bonus resource:* [Nonprofit Fundraising: 8 Ways to Boost Donations with a Donate Button](#)
- ❑ **6. Keep donors active.** Add more ways to get involved on donation thank you pages, such as signing up to volunteer. *Bonus resource:* [Why Marketers Should Ditch Thank You Messages for Thank You Pages](#)
- ❑ **7. Experiment with monthly giving.** Monthly gifts improve cash flow and makes giving feel more manageable for donors. *Bonus resource:* [9 Things your Nonprofit Needs to Know about Monthly Donations](#)
- ❑ **8. Retain branding across experiences.** Create branded fundraising graphics and messaging about specific programs and keep them consistent across email appeals, social, all donation and thank you pages, and all autoresponders and thank you emails. *Bonus resource:* [8 Building Blocks of Strong Nonprofit Brands](#)
- ❑ **9. Get the word out.** Publicize fundraising campaigns on your blog, social media channels, and newsletter. Bonus: Add an 'I donated!' button on your donation thank you pages so constituents can share their good deed on social (and information about your campaign with their personal online network!) *Bonus resource:* [22 Strategies to Take your Fundraising to the Next Level](#)
- ❑ **10. Customize your donation pages.** Your online fundraising campaign is unique – make sure your donation page reflects the specific program, campaign, or fund. Boilerplate templates drag down conversion rates! Bonus resource: 12 Donation Page Best Practices from Study of Top Organizations (With Examples) *Bonus resource:* [How to have a Killer Online Donation Page](#)
- ❑ **11. Tweet (and post and pin and snap) campaign updates so your followers can help you reach your goal.** This is particularly effective with time-sensitive campaigns, like Giving Tuesday or emergency appeals. *Bonus resource:* [Social Media for Nonprofits: A Comprehensive Guide](#)
- ❑ **12. Add merchandise purchase options to event registration forms.** Take it from us – never underestimate the power of swag. *Bonus resource:* [How Not to Waste Money on Branded Swag](#)

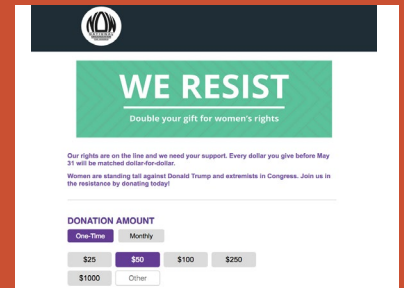
ONLINE FUNDRAISING TOOLS CHECKLIST

- ❑ **Headline Analyzer**
Entice online gifts and boost your email open rates with a click-worthy email subject line.
- ❑ **Create a matching gifts program**
65% of Fortune 500 companies offer matching gift programs.
- ❑ **Google Ad Grants**
If eligible, your nonprofit could receive \$10,000 of in-kind advertising each month through Google. Full details on site.
- ❑ **Use automated gift acknowledgement**
Send donors a thank you email that includes all relevant receipt information as soon as the gift is made. Personalize your auto-response messages with Salsa's dynamically populating fields for truly individualized interactions.
- ❑ **Create mobile ready donation forms**
14% of all online giving was done on a mobile device in 2015. Use Salsa to make sure your forms are mobile responsive.
- ❑ **Measure your impact**
Monitor the success of your communication outreach with visual reports and track campaigns with Salsa's dashboard analytics.
- ❑ **Make stand out event registration forms** to boost fundraising, excitement, and attendance.
- ❑ **For your RSS:**
[John Haydon](#)
[Fired-Up Fundraising with Gail Perry](#)
[Julia Campbell #501 Social Blog](#)

GENERAL NONPROFIT EXAMPLES



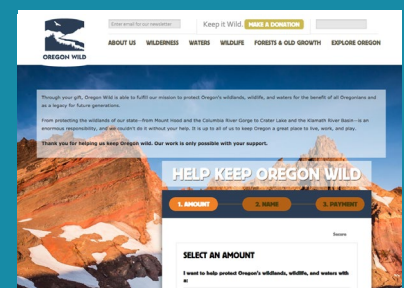
Click to View a Great Example of an Event Registration Form



Click to View a Great Example of an Online Donation Form



Click to View a Great Example of a Facebook Live Fundraiser



Click to View a Great Example of an Online Donation Form

ONLINE ADVOCACY STRATEGIC CHECKLIST

10 Advocacy Strategies to Supercharge your Impact

- 1. Engage donors on their terms.** Donors who initially gave online may be more interested in continuing an online-only relationship. Prospects who attended an event are often more open to in-person volunteer or advocacy opportunities. *Bonus resource:* [5 Tips for More Effective Member Engagement](#)
- 2. Be transparent.** People want to know what they're being asked to get involved with, and they want to be able to evaluate the likelihood of their participation resulting in real, notable outcomes. *Bonus Resource:* [6 Easy and Instant Ways to Make your Nonprofit More Transparent](#)
- 3. Give concrete direction.** The action you're requesting of your advocates and the actions they're requesting of their target have to be both measurable and concrete. Someone receiving a request should understand exactly what is being asked of him or her. *Bonus resource:* [5 Steps to Planning an Advocacy Campaign](#)
- 4. Automate action alert emails and social posts to go live at the same time for maximum impact.** *Bonus resource:* [6 Secrets to Rock Multi-Channel Integrated Nonprofit Fundraising Campaigns](#)
- 5. Draft direct, unified online messaging for constituents** to share on social media, email, or text. *Bonus resource:* [21 Social Media Tips for Nonprofits](#)
- 6. Use online engagement to fuel offline actions.** Create downloadable actionable tip sheets or guides with instructions for canvassing your neighborhood or how to participate in town hall meetings with their members of Congress. *Bonus Resource:* [3 Steps to Bridge the Gap Between Online and Offline Channels](#)
- 7. Provide talking points for constituents to use in the field.** Modify these points for local public events, district office visits, coordinated calls, and public town halls. *Bonus resource:* [6 Strategies and Techniques for Running an Advocacy Campaign](#)
- 8. Share your impact.** How many signatures have you gathered? How many postcards have been sent? How many people came out to march with the organization? Keep your base updated about how many actions have been taken and how it is affecting policy being debated on the floor. *Bonus resource:* [How to Harness the Power of Data for Better Nonprofit Storytelling](#)
- 9. Keep people updated.** Supporters want to know the results of their efforts. Tell them what their collective actions accomplished and, if applicable, share actionable immediate next steps. *Bonus resource:* [9 Ways to Grow your Supporter List Using Online Advocacy](#)
- 10. Amplify your supporters' voices via multiple channels.** Your coalition can be the vehicle where advocates become bold and inspired enough to get involved and to raise their voice. Make sure they can do it loud and clear through petitions, multi-channel actions through legislator emails, web forms, Facebook pages and Twitter handles. Try providing supporters with an easy 'click to call' mechanism to phone or tweet their representative. *Bonus resource:* [Empowering Nonprofits to Drive Positive Change via Social Media](#)

ONLINE ADVOCACY TOOLS CHECKLIST

Facebook Frame Studio

Create a temporary Facebook profile frame that followers can add to their Facebook picture to raise awareness about your nonprofit.

Thunderclap

Organizations big and small use Thunderclap to leverage their social networks and make their messaging go viral.

Online petitions

Use Salsa to virtually collect signatures in support or protest of specific policy or societal issues.

Canva

This clean and user-friendly graphic design tool makes it easy for designers and non-designers alike to create high quality visuals quickly.

Targeted actions

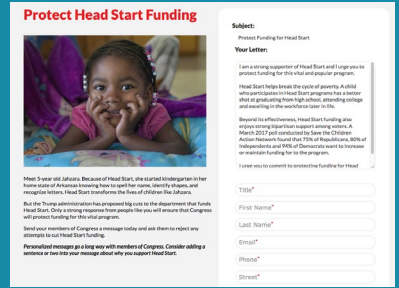
With Salsa you can auto-match constituents with CEOs, legislators, and leaders.

Tweet/Facebook a Rep

Help supporters put extra pressure on your legislator by posting directly to the Rep's social media pages.

For your RSS: [The Storytelling Nonprofit](#) [The Agitator](#) [Bolder Advocacy](#)

GENERAL NONPROFIT EXAMPLES

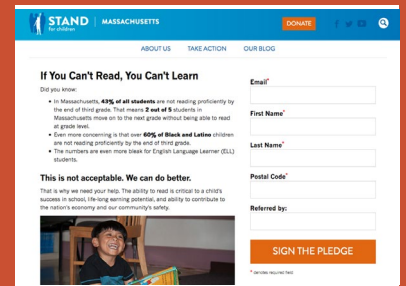


[Click to View a Great Example of a Targeted Action Form](#)



[Click to View a Great Example of an Online Petition Form](#)

ADDITIONAL EXAMPLE



[Click to View a Great Example of an Online Petition Form](#)

P2P FUNDRAISING STRATEGIC CHECKLIST

11 Ways to Transform Supporters into Fundraising Rock Stars

- ❑ **1. Establish a clear campaign goal and budget.** It's essential that participants and donors understand what you are working towards. *Bonus resource:* [Peer-to-Peer Fundraising: The Nonprofit's Guide](#)

Start with these three questions:

- What are you trying to fund?
- Are you funding something specific, like a program, or something more general, like operational funds?
- How much funding do you need to accomplish your objective?

- ❑ **2. Provide key messaging for fundraisers to use on different platforms like email, social media, and texting.** Creating a list of messages and taglines for participants will help keep communications about the campaign uniform across multiple channels. *Bonus resource:* [6 Ways Nonprofits Can Help Supporters Become Peer-to-Peer Fundraising Champions](#)
- ❑ **3. Set up a campaign website.** Share inspiration, impact stories, additional fundraising resources, guest blog posts from fundraising superstars, and campaign information. *Bonus Resource:* [Planning a DIY Peer to Peer Campaign](#)
- ❑ **4. Offer team captains extra support.** Share leadership resources, important campaign information, and email templates they can use to coach fundraisers to meet their goal. *Bonus resource:* [Oh Captain, My Captain: The Role of Team Captain in Peer to Peer Success](#)
- ❑ **5. Share fundraising updates.** Be sure to update the campaign website, blog, and any social pages or groups with periodic updates so fundraisers can see what the campaign has accomplished so far. *Bonus resource:* [Perfecting Peer-to-Peer Fundraising: 10 Social Media Best Practices](#)
- ❑ **6. Create a campaign hashtag.** Consider creating a reoccurring themed social series that runs the length of the campaign, like #FundraisingFriday. You can keep participants engaged and provide them with fresh resources each week! *Bonus resource:* [6 Tips for Creating a Killer Campaign Hashtag](#)
- ❑ **7. Encourage social sharing.** On donation thank you pages, create an "I donated!" button for supporters to share on Facebook and Twitter. *Bonus resource:* [How to Create a Peer to Peer Fundraising Campaign on Facebook](#)
- ❑ **8. Create branded graphics and posts for people to share on their personal social pages.** Remember to size graphics correctly for each platform! *Bonus resource:* [12 Ideas for Powerful P2P Fundraising](#)
- ❑ **9. Give participants a fundraising tip sheet with fun ways to raise money to help them get started.** *Bonus resource:* [Peer to Peer Fundraising: Tips from the Field](#)
- ❑ **10. Guide supporters on when and how often to share on social.** For participants who prefer to fundraise offline, provide short scripts for fundraising calls and fundraising email templates. *Bonus resource:* [8 Ways to Make your P2P Fundraising Campaign a Social Community](#)
- ❑ **11. Use automated gift acknowledgment emails to thank donors right away.** Be sure to include exactly how their donation will make an impact! *Bonus resource:* [9 Clever Ways to Thank Your Donors](#)

P2P FUNDRAISING TOOLS CHECKLIST

Facebook for Nonprofits

Learn about Facebook's new fundraising tools and inspire others to share your message.

Build online registration forms to boost sign ups.

With Salsa, its easy to build customized event types and stay connected with registrants!

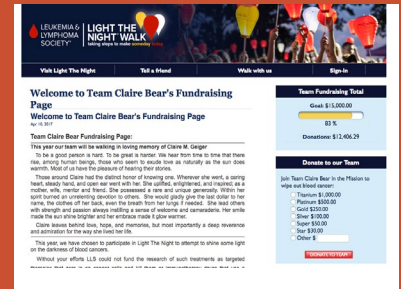
Empower fundraisers with our P2P app!

It's easier than ever to solicit funds, thank donors, and track progress on the go.

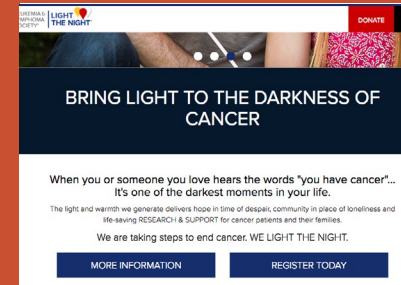
Keep registrants engaged with automated coaching emails.

Keep fundraisers inspired and motivated from start to finish!

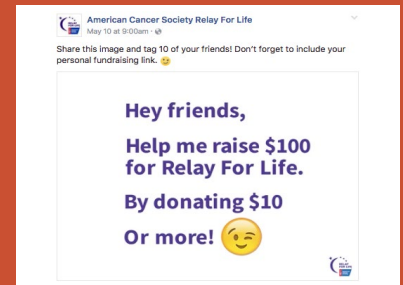
GENERAL NONPROFIT EXAMPLES



Click to View a Great Example of a Team Donation Page



Click to View a Great Example of an Event/DIY Site



Click to View a Great Example of a Social Post

ADDITIONAL EXAMPLE



Click to View a Great Example of an Event/DIY Site

INTRODUCING THE SALSA ENGAGEMENT PLATFORM



[LEARN MORE HERE >](#)

Say goodbye to data silos and tired strategies that won't scale for grassroots support. Start building rich donor profiles, personalizing your communications, and inspiring actions online, on social, on mobile and offline!



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