

FUNDRAISING RESOURCE GUIDE · 2

Online Giving Experience: A Practical Checklist

Review the path from the first invitation to the thank-you.

A supporter should be able to understand your cause, find the giving page, complete a gift, and know what happens next. Use this checklist to review that experience from their point of view.

01

Invite

02

Give

03

Confirm

04

Thank & update

How to use this checklist

Open your website on a phone and a computer. Follow the same links a supporter would use, then review the confirmation and follow-up. If your giving provider offers a test mode, use it. Otherwise, arrange an authorized small test gift and account for any fees.

Mark each item as ready, needs attention, or not applicable. This is a planning tool, not a validated score or a prediction of fundraising results. Prioritize anything that prevents a gift, creates uncertainty, or leaves a supporter without confirmation.

Before the giving page

- ☐ The web address and organization name are easy to recognize, and the page opens without a security warning.
- ☐ A clear Donate or Give link is easy to find on both a phone and a computer.
- ☐ The invitation explains what the gift will support and gives the reader a clear next step.
- ☐ Links from emails, social posts, and website buttons reach the intended giving page without a confusing detour.

THE SUPPORTER'S POINT OF VIEW

Make giving clear and easy

On the giving page

- ☐ The form is readable and usable on a phone, including its buttons, fields, and error messages.
- ☐ The page makes the organization's identity clear and keeps competing links or distractions limited.
- ☐ A brief explanation connects the gift to a specific purpose without promising an unverified result.
- ☐ Any images support the message, have appropriate permission, and do not obscure the form or slow the experience unnecessarily.
- ☐ Giving amounts are clear, and supporters can choose a different amount when the platform allows it.
- ☐ The form requests only information needed to process and acknowledge the gift, with optional fields clearly marked.
- ☐ Available payment methods are clear and work for the supporters you expect to reach.
- ☐ Supporters can understand the total before submitting, including any optional fee contribution and whether the gift is one-time or recurring.

After the gift

- ☐ A confirmation clearly states that the gift was received and summarizes the amount and any recurring schedule.
- ☐ A receipt or acknowledgment arrives as expected, with accurate organization and transaction details.
- ☐ The supporter receives a warm thank-you that relates to the cause and explains what comes next.
- ☐ Your team has a thoughtful follow-up plan for supporters who need personal attention, based on their preferences and your capacity.
- ☐ Gifts are recorded securely, and only the people who need the information can access it.
- ☐ Supporters can receive a meaningful progress update and can find a way to ask questions or manage their communication preferences.

Make a manageable action plan

Turn the review into a short action plan

Do not try to change everything at once. Write down what you observed, choose the most important changes, and assign someone to each one.

- Fix first: Broken links, failed payments, unclear recurring settings, missing confirmations, or a form people cannot use.
- Improve next: Unclear wording, unnecessary fields, distracting content, or a thank-you that does not explain what happens next.
- Review later: Test different wording or giving amounts after the experience works reliably. Compare results over time and avoid drawing conclusions from a handful of gifts.

A simple team worksheet

- What did we notice? Record the page, device, and issue.
- Why does it matter? Explain the effect on the supporter.
- What will we change? Name one specific action.
- Who will do it, and by when? Assign an owner and date.
- How will we confirm it works? Repeat the supporter journey after the change.

Trust comes from the whole experience

Clear invitations, understandable choices, reliable forms, and thoughtful follow-up all contribute to a supporter's experience. This review can help your team find friction, but no checklist guarantees more donations. Listen to supporter feedback and review the journey again when your campaign or giving provider changes.

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