

## Digital Fundraising Infrastructure: Checklist + Resources

### A. CHECKLIST

1. PLANNING	
<input type="radio"/>	Do you have a fundraising or marketing calendar?
<input type="radio"/>	Do you have a fundraising planning document, like OGSM Matrix (Objectives, Goals, Strategies, Measures) or similar?
<input type="radio"/>	Do you have a budget for paid fundraising marketing?
<input type="radio"/>	Do you have a bank of stories (with permission)?
2. PROCESSES AND POLICIES	
<input type="radio"/>	Do you have a Gift Acceptance Policy?
<input type="radio"/>	Do you collect media releases and consents from participants?
<input type="radio"/>	Is there a policy for responding to complaints and donor inquiries?
<input type="radio"/>	Does documentation exist for importing gifts from 3 <sup>rd</sup> party processors into the donor database?
<input type="radio"/>	Does documentation exist for importing or syncing gifts from the primary processor to the donor database?
<input type="radio"/>	Does documentation exist for importing secondary platform donors into the email marketing platform?
<input type="radio"/>	Does documentation exist for monthly donor management: processing, reactivation, receipting, etc.?
<input type="radio"/>	Are there formal brand guidelines including logos in all formats, colours, approved photography, etc.?
3. ANALYTICS	
<input type="radio"/>	Do you have a Google (Gmail) account to create and manage properties?
<input type="radio"/>	Is Google Universal Analytics (UA) installed? (n/a after June 2023)
<input type="radio"/>	Is Google Analytics 4 (GA4) installed and functioning?
<input type="radio"/>	Is Google Tag Manager (GTM) installed?
<input type="radio"/>	Do you have a Google Search Console account?
<input type="radio"/>	Is Remarketing enabled in GA?
<input type="radio"/>	Do you have an audience in GA for "All Users"?

<input type="radio"/>	Do you have an audience in GA for “New Users (membership 540 days)”?
<input type="radio"/>	Do you have an audience in GA for “Returning Users (membership 540 days)”?
<input type="radio"/>	Is eCommerce tracking for UA/GA enabled?
<input type="radio"/>	Is search engine indexing enabled for pages you want visible in search?

**4. WEBSITE/DOMAIN**

<input type="radio"/>	What was the website built with, and are you able to access the backend?
<input type="radio"/>	Is SSL Certificate (https://) valid?
<input type="radio"/>	Is there an up-to-date privacy policy on the website?
<input type="radio"/>	Is there a cookie consent banner on the website?
<input type="radio"/>	Is there an email signup form that is connected to the email marketing platform?
<input type="radio"/>	Does the website use a favicon?
<input type="radio"/>	Is the Charitable Registration Number published? (regulations may differ depending on your location)
<input type="radio"/>	Is the Board of Directors published on the website?
<input type="radio"/>	Is the website mobile-friendly (i.e. dynamically formats)?
<input type="radio"/>	Is the donation form embedded into the website, if possible to do so?

**5. GIFT PROCESSING**

<input type="radio"/>	What is the primary online donation processing tool?
<input type="radio"/>	If the donation processor can be linked to UA/GA4, has this been completed?
<input type="radio"/>	If the donation processor can be linked to GTM, has this been completed?
<input type="radio"/>	If the donation processing tool allows monthly giving, is this enabled?
<input type="radio"/>	Does the donation page associate impacts/outputs to gift amounts?
<input type="radio"/>	Does the donation form match website styling and charity branding?
<input type="radio"/>	Are donation confirmation messages being used and are they customized?
<input type="radio"/>	Is the automated donation confirmation email copy personalized?
<input type="radio"/>	Do you accept cryptocurrency donations? If so, which and how?
<input type="radio"/>	If accepting cryptocurrency, is there a formal policy in place?
<input type="radio"/>	If accepting cryptocurrency, are there clearly documented procedures?

**For Canadian organizations:**

<input type="radio"/>	Do you have a PayPal Business Account, and verified with the PayPal Giving Fund Canada?
<input type="radio"/>	Has your charity account been claimed on CanadaHelps?

<input type="radio"/>	Is your CanadaHelps page up to date?
<input type="radio"/>	Does your CanadaHelps form use smart sums and gift descriptions?
<input type="radio"/>	Are UA/GA\$ and GTM codes attached to all CanadaHelps donation forms?
<b>6. TAX RECEIPTING AND WRITTEN ACKNOWLEDGEMENTS</b>	
<input type="radio"/>	Are your tax receipts or written acknowledgements of charitable contributions in compliance with the regulations of your jurisdiction's governing body? (See Resources for links)
<b>7. DONOR DATABASE</b>	
<input type="radio"/>	Do you have a donor database, and use it?
<input type="radio"/>	Does the donor database have an integration with the primary donation processor, or is it a manual export/import process?
<input type="radio"/>	Does the database have an integration with an email marketing platform?
<input type="radio"/>	Do gift records capture digital source (e.g. website)?
<input type="radio"/>	Does the database document consent type and date for your jurisdiction's privacy regulations (e.g. CAN-SPAM, CCPA, CASL, GDPR)?
<input type="radio"/>	Does the database offer an API for data import/export (e.g. email lists, donations)?
<b>8. EMAIL MARKETING</b>	
<input type="radio"/>	Do you have an email marketing tool/platform?
<input type="radio"/>	Does the email marketing platform segment audiences?
<input type="radio"/>	Is the email marketing platform connected to Google Analytics?
<input type="radio"/>	Does the email marketing platform integrate with the donor database, and if yes, is it connected?
<input type="radio"/>	Is your domain verified for sending in the email marketing platform?
<input type="radio"/>	Have you tested email deliverability statistics?
<input type="radio"/>	Do emails include an unsubscribe link that works?
<b>9. SEARCH ENGINE OPTIMIZATION</b>	
<input type="radio"/>	Are header tags properly applied (H1, H2, H3, etc.) on your website?
<input type="radio"/>	Does the website use basic and up-to-date meta tags?
<input type="radio"/>	Have you run a PageSpeed Insights test?
<input type="radio"/>	Does the website have a sitemap (.xml) and has it been submitted to Search Console?
<b>10. SEARCH ADVERTISING</b>	
<input type="radio"/>	Do you have a Google Ads Account?
<input type="radio"/>	Is the GA4 account linked to the Google Ads Account?

<input type="radio"/>	Have you applied for the Google Ad Grants program, and if so is it active and in good standing?
<b>11. SOCIAL MEDIA</b>	
<input type="radio"/>	Do you have a Facebook page?
<input type="radio"/>	Do you have a Meta Business Manager account and are you able to access it currently?
<input type="radio"/>	Is your website domain verified in Meta Business Manager?
<input type="radio"/>	Has a Facebook Event pixel been created and installed?
<input type="radio"/>	Has the charity successfully applied for Facebook Charitable Giving Tools?
<input type="radio"/>	Has 2FA been enabled for all Facebook page admins?
<input type="radio"/>	Does the charity have a "professional" Instagram account?
<input type="radio"/>	Have the Facebook page and the Instagram account been linked in Meta Business Manager?
<input type="radio"/>	Has the charity uploaded a Customer List as Custom Audience in Meta Ads Manager?
<input type="radio"/>	Has the charity created a 1% Lookalike Audience of Customer List in Meta Ads Manager?
<input type="radio"/>	Has the charity created a 5% Lookalike Audience of Customer List in Meta Ads Manager?
<input type="radio"/>	Has the charity created a 1% Lookalike Audience of Page Followers in Meta Ads Manager?
<input type="radio"/>	Has the charity created a 5% Lookalike Audience of Page Followers in Meta Ads Manager?

## **B. RESOURCES**

### **1. Planning**

[How to Collect Donor Stories](#) (The Storytelling Collective)

[The OGSM 3-in-1 Template](#)

### **2. Processes and Policies**

[Sample Gift Acceptance Policy](#) (Bloomerang)

[Sample Media Consent Form](#) (Philanthropy Without Borders)

[Process Documentation: The Ultimate How-To with Examples](#) (Asana)

### **3. Analytics**

[\[GA4\] Link Google Ads and Analytics](#)

[Getting Started with Google Search Console](#) (Google)

[\[GA4\] Examples of audiences in Google Analytics and how to create them](#)

[\[GA4\] Set up cross-domain measurement](#)

### **4. Website/Domain**

[Test your site rendering at different screen resolutions](#) (Screenfly)

### **5. Gift Processing**

[CanadaHelps Cryptocurrency Donation Page](#)

[Book: Bitcoin and the Future of Fundraising \(2020\)](#)

[PayPal Giving Fund Canada](#)

### **6. Receipt Compliance**

[Official donation receipt requirements from CRA](#)

[Official donation receipt samples from CRA](#)

[The CRA's additional guidance about computer-generated receipts](#)

[IRS Publication 1771](#)

### **7. Donor Database**

[Zapier for Salesforce Integrations](#)

[Canada's Anti-Spam Legislation and Your Nonprofit](#) (via ONN)

## **8. Email Marketing**

[Free Email Deliverability Test and Report](#) (mail-tester.com)

[Samples and Guide: The New Donor Welcome Series Timeline](#) (NextAfter)

[Email Segmentation for Nonprofits: 7 Easy Segments that Increase Donations](#) (WholeWhale)

[Mailchimp A/B Testing Guide: How to do it and what to test](#) (WholeWhale)

## **9. Search Engine Optimization**

[A Quick and Easy Guide to Meta Tags in SEO](#)

[Google PageSpeed Insights Test and Report](#)

[Free SEO Tools from Moz](#)

## **10. Search Advertising**

[Google's official Ad Grant Conversion Tracking Guide](#)

[Fixing ads and appealing Google's policy decisions](#)

## **11. Social Media**

[How to turn on the two-factor authentication requirement in Meta Business Manager](#)

[How to create a customer list custom audience in Meta Business Manager](#)

[How to create a Lookalike Audience on Facebook Ads Manager](#)

[How to create a customer list in Google Ads](#)