**A Mobile and Social Fundraising Success Checklist for Nonprofits**

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**[](http://www.amazon.com/Mobile-Good-How--Fundraising-Nonprofits/dp/0071825460)**

**The following is an excerpt from**[***Mobile for Good: A How-To Fundraising Guide for Nonprofits***](http://www.amazon.com/Mobile-Good-How--Fundraising-Nonprofits/dp/0071825460)**.**

*Mobile for Good* is written as practical how-to guide in simple language with a companion “Mobile and Social Fundraising Success Checklist” at the end. By reading the book and implementing the steps necessary to launch a comprehensive mobile and social fundraixsing plan – and checking off the must-do items as you go along – by the end of the book your nonprofit will have in place mobile and social fundraising plan flexible enough to adjust to rapid changes in fundraising and communication technology that will occur over the next decade.

However, for those nonprofits that have purchased the [ebook version of *Mobile for Good*](http://www.amazon.com/Mobile-Good-How-Fundraising-Nonprofits-ebook/dp/B00HSO0XDA/ref=tmm_kin_swatch_0?_encoding=UTF8&sr=&qid=) it is impossible to use the checklist since ebooks are static in their functionality and content. Interactive, web-based ebooks are coming and will transform education and publishing in the near future, but until the technology arrives, you can copy and paste the text below in Word document.

**Mobile and Social Fundraising Strategic Plan**

□ Conduct an online communications and fundraising audit.  
□ Organize a meeting to ensure organizational buy-in.  
□ Write a mobile and social fundraising strategic plan.  
□ Create a budget.  
□ Create a system to track and report on success.  
□ Implement your strategic plan.

**Websites**

□ Decide whether to launch a new responsively designed website, to mobile-optimize your current site, or launch a separate mobile website.  
□ Select a Content Management System (CMS) and hosting service.  
□ Hire a website and graphic designer.  
□ Write content and secure photos for all website pages.  
□ Launch a blog inside your website.  
□ Prominently feature a “Donate” button and social network icons on your home page and every page of your website and blog.  
□ Add an e-newsletter subscription form to your home page and every page of your website and blog.  
□ Add social sharing and comment functionality.  
□ Select a website and blog analytics service.  
□ Get master copies of Photoshop files for all website and blog graphics from your designer.  
□ Configure your website and blog for search engine optimization (SEO).  
□ Test your website on multiple mobile devices before launch.  
□ Follow and study the [World Wildlife Fund](http://worldwildlife.org/), [Sex, Etc.](http://sexetc.org/), [Mercy Corps](http://www.mercycorps.org/), [Malaria No More](http://www.malarianomore.org/), and [Best Friends Animal Society](http://bestfriends.org/).

**Email Communications**

□ Select an email communication software.  
□ Design e-newsletter and email fundraising appeal banner images.  
□ Design e-newsletter and email fundraising appeal templates that are mobile compatible.  
□ Prominently feature a donate button and social network icons in your e-newsletter and email fundraising appeals.  
□ Get master copies of Photoshop files for all e-newsletter graphics from your designer.  
□ Add social sharing functionality.  
□ Create campaign-specific landing pages for email fundraising campaigns.  
□ Create an e-newsletter subscribe page on your website for effective promotion on social networks.  
□ Create an e-newsletter subscribe graphic to better promote your e-newsletter on social networks.  
□ Experiment with online contests to build your email list.  
□ Follow and study [UNICEF](http://www.unicefusa.org/), [SOS Children’s Villages](http://www.sos-usa.org/), [ONE Campaign](http://www.one.org/us/), [National Park Foundation](http://www.nationalparks.org/), and the [Electronic Frontier Foundation](https://www.eff.org).

**Online Fundraising**

□ Select a Constituent Relationship Management (CRM) system.  
□ Select an online fundraising software that is mobile compatible.  
□ Create a donate page on your website and ensure that the donation process occurs on one page.  
□ Set default donation amounts.  
□ Add an optional mobile alert opt-in field, if applicable.  
□ Add charity rating graphics.  
□ Include program versus operating expense graphics.  
□ Write and add giving impact statements.  
□ Include tribute giving as an option on your donate page.  
□ Create a separate donate page for tribute giving for effective promotion in email communications and mobile and social media.  
□ Design promotional graphics for your tribute giving campaign for your website, blog, email communications, and social networks.  
□ Create an ad for your tribute giving campaign for print materials.  
□ Include monthly giving as an option on your donate page.  
□ Create a separate donate page for monthly giving for effective promotion in email communications and mobile and social media.  
□ Design promotional graphics for your monthly giving campaign for your website, blog, email communications, and social networks.  
□ Create an ad for your monthly giving campaign for print materials.  
□ Design a “Donate Monthly” button for your monthly giving campaign and add it to your website and blog.  
□ Create a system to thank your monthly donors on a regular basis.  
□ Ensure that your thank-you landing page includes social network icons, social sharing functionality, and a thank-you video or slideshow.  
□ Ensure that your thank-you follow-up email is custom-branded and includes social network icons, social sharing functionality, and a thank-you video or slideshow.  
□ Create a “More Ways to Give” page.  
□ Create an annual thank-you and program achievement infographic or presentation and include it in your donor thank-you communications.  
□ Add your tribute giving and monthly giving campaigns to your “More Ways to Give” page.  
□ Follow and study [Partners in Health](http://www.pih.org/), [Feeding America](http://feedingamerica.org/), [American Cancer Society](http://www.cancer.org/), [African Wildlife Foundation](http://www.awf.org/), and [charity: water](http://www.charitywater.org/).

**Social Fundraising**

□ Select a social fundraising software.  
□ Create a fundraising guide for your fundraisers.  
□ Offer contests that reward fundraisers who raise the most funds during the campaign.  
□ Create an email list solely for fundraisers, and throughout the year keep them updated on the causes that they raised money for.  
□ Create a mobile list for fundraisers and occasionally text them fundraising tips and event updates.  
□ Design promotional graphics for your social fundraising campaign for your website, blog, email communications, and social networks.  
□ Create an ad for your social fundraising campaign for print materials.  
□ Design a “Fundraise” button for your social fundraising campaign and add it to your website and blog.  
□ Add your social giving campaign to your “More Ways to Give” page.  
□ Send follow-up thank-you emails to social fundraising campaign donors with your nonprofit’s branding and social network icons.  
□ Send follow-up campaign update emails.

**Crowdfunding**

□ Select a crowdfunding software.  
□ Write your project summary and set up your crowdfunding campaign(s).  
□ Donate to your own crowdfunding campaign before launch.  
□ Design promotional graphics for your crowdfunding campaign for your website, blog, email communications, and social networks.  
□ Create an ad for your crowdfunding campaign for print materials.  
□ Add your crowdfunding campaigns to your “More Ways to Give” page.  
□ Send follow-up thank-you emails to crowdfunders with your nonprofit’s branding and social network icons.

**Mobile Fundraising**

□ Select a text-to-give software.  
□ Launch a mobile alert campaign.  
□ Add a mobile alert subscription form to your home page and every page of your website and blog.  
□ Add a mobile alert icon to your website, blog, and e-newsletter and email fundraising appeal templates in proximity to your social networks icons.  
□ Add your text-to-give campaign to your “More Ways to Give” page.  
□ Create text-to-give and mobile alert promotional graphics for your website, blog, email communications, and social networks.  
□ Create ads for your text-to-give and mobile alert campaigns for print materials.  
□ Sign up for Google for Nonprofits and Google Wallet.  
□ Follow and study the [National Wildlife Federation](http://www.nwf.org/), [Humane Society of the United States,](http://www.humanesociety.org/) [Human Rights Campaign](http://www.hrc.org/), [Greenpeace](http://us.greenpeace.org/site/PageServer), and the [American Red Cross](http://www.redcross.org/).

**Mobile and Social Content Strategy**

□ Write a mobile and social content strategy.  
□ Create an editorial calendar.□ Integrate mobile and social media into print materials.  
□ Integrate mobile and social media into news articles and press releases.  
□ Integrate mobile and social media into your blog.  
□ Integrate mobile and social media into image and infographic campaigns.  
□ Integrate mobile and social media into video.  
□ Integrate mobile and social media into online petition campaigns.  
□ Integrate mobile and social media into online contests.  
□ Integrate mobile and social media into your online store.  
□ Integrate mobile and social media into e-books and digital reports.  
□ Integrate mobile and social media into smartphone and tablet apps promotions.

**Facebook**

□ Design and upload custom graphics to your Facebook Page.  
□ Optimize your page for Facebook Graph Search.  
□ Launch a Facebook Group, if applicable.  
□ Experiment with Facebook Events.  
□ Add Facebook Location to your page and request to merge existing Facebook Places Pages.  
□ Follow and study the [Trevor Project](https://www.facebook.com/TheTrevorProject), [People for the Ethical Treatment of Animals (PETA)](https://www.facebook.com/officialpeta), [Doctors Without Borders](https://www.facebook.com/msf.english), [Amnesty International](https://www.facebook.com/amnestyglobal), and the [American Civil Liberties Union (ACLU)](https://www.facebook.com/aclu.nationwide).

**Twitter**

□ Design and upload custom graphics to your Twitter account.  
□ Organize followers into Twitter lists.  
□ Unfollow if you have mass followed.  
□ Host and participate in tweet chats.  
□ Follow and study [Oxfam International](https://twitter.com/oxfam), [Natural Resources Defense Council (NRDC)](https://twitter.com/nrdc), [Idealist](https://twitter.com/idealist), [Gates Foundation](https://twitter.com/gatesfoundation), and the [Acumen Fund](https://twitter.com/Acumen).

**Google+**

□ Design and upload custom graphics to your Google+ Page.  
□ Merge your YouTube channel with your Google+ Page.  
□ Optimize your page for Google Search.  
□ Experiment with Google+ Communities.  
□ Experiment with Google+ Events.  
□ Claim your Google+ Local Page.  
□ Host and participate in Google+ Hangouts.  
□ Follow and study [Zoo Atlanta](https://plus.google.com/+ZooAtlanta/posts), [New York Public Library](https://plus.google.com/+newyorkpubliclibrary/posts), [KQED Science](https://plus.google.com/+KQEDSCIENCE/posts), [American Heart Association](https://plus.google.com/+AmericanHeart/posts), and the [American Association of Retired Persons (AARP)](https://plus.google.com/+AARP/posts).

**LinkedIn**

□ Design and upload custom graphics to your LinkedIn Page.  
□ Add products and services to your page and request recommendations.□ Experiment with LinkedIn Groups.  
□ Ensure that all staff members have maximized their LinkedIn profiles.  
□ Follow and study the [United Nations Development Program (UNDP)](https://www.linkedin.com/company/1861), [Public Broadcasting Service (PBS)](https://www.linkedin.com/company/239252), [Program for Appropriate Technology in Health (PATH)](https://www.linkedin.com/company/9100), [Conservation International](https://www.linkedin.com/company/12533), and the [Environmental Defense Fund](https://www.linkedin.com/company/11198).

**YouTube**

□ Design and upload custom graphics to your YouTube channel.  
□ Maximize your channel and video titles for YouTube SEO.  
□ Create introduction and closing slides.  
□ Utilize InVideo Programming.  
□ Create YouTube PlayLists.□ Sign up for the YouTube Nonprofit Program.  
□ Add a Google Wallet donate button to your channel.  
□ Experiment with call-to-action overlays and video annotations.  
□ Follow and study [WITNESS](https://www.youtube.com/user/Witness), [Museum of Modern Art (MoMA)](https://www.youtube.com/user/MoMAvideos), [Big Cat Rescue](https://www.youtube.com/user/BigCatRescue), [Anaheim Ballet](https://www.youtube.com/user/AnaheimBallet), and the [American Society for the Prevention of Cruelty to Animals (ASPCA)](https://www.youtube.com/user/aspca).

**Pinterest**

□ Name, describe, and build your boards.  
□ Learn to brand and embed text on images.  
□ Follow and study the [Wilderness Society](http://www.pinterest.com/wildernessorg/), [Plan International](http://www.pinterest.com/planglobal/), [National Committee to Preserve Social Security and Medicare (NCPSSM)](http://www.pinterest.com/ncpssm/), [EarthShare](http://www.pinterest.com/earthshare/), and the [Cleveland Clinic](http://www.pinterest.com/clevelandclinic/).

**Instagram**

□ Learn to share screenshots.  
□ Add hashtags to captions.  
□ Download and experiment with third-party Instagram apps.  
□ Follow and study [Water.org](http://instagram.com/water), [Surfrider Foundation](http://instagram.com/surfrider), [Oceana](http://instagram.com/oceana), [Los Angeles County Museum of Art (LACMA)](http://instagram.com/LACMA), and [DoSomething.org](http://instagram.com/DoSomething).

**Tumblr**

□ Design and set up your Tumblr theme.  
□ Prioritize images, quotes, and humor.  
□ Follow and study [To Write Love on Her Arms (TWLOHA)](http://twloha.tumblr.com/), [Nature Conservancy](http://natureconservancy.tumblr.com/), [Human Rights Watch](http://humanrightswatch.tumblr.com/), [Gay & Lesbian Alliance Against Defamation (GLAAD)](http://glaad.tumblr.com/), and [First Book](http://firstbook.tumblr.com/).

**Real-Time Communications and Fundraising**

□ Create a system to respond to breaking news and crisis situations.  
□ Launch a Cause Awareness Day Campaign.  
□ Experiment with live reporting from events and conferences.  
□ Experiment with Storify, Share As Image, EventStagram, LiveStream, and Square, if applicable.  
□ Download the Studio, Magistro, Evernote, Flipboard, and Foursquare apps, if applicable.</CL>

**New Media Managers**

□ Hire a skilled part- or full-time new media manager or adjust current job descriptions of current staff.  
□ Ensure that volunteers and interns are trained in mobile and social media.  
□ Learn photo and video editing skills.  
□ Learn HTML skills.  
□ Build a consistent brand across all your organization’s chapters, if applicable.  
□ Build your online brand in multiple time zones, if applicable.  
□ Proactively manage mobile and social media burnout.  
□ Get master copies of Photoshop files for all social network custom graphics from your designer.  
□ Study and mimic the mobile and social fundraising campaigns of large nonprofits similar to yours in mission and programs.