

Streamline Your Organization – and Raise More Money – with Online Forms

You'll be amazed at all the things an online form can do for you.

By Leeyen Rogers

Your nonprofit has many moving parts that can make you feel caught up in a whirlwind, especially if you have a big event coming up (which, at many nonprofits, is all the time). Keeping a pulse on many people, projects, and responsibilities at the same time can feel nearly impossible, but there is a helpful solution: online forms.

You can keep organized and move things along automatically with online forms management software. Online forms and the data that you collect with them assure that all the information you need is accessible in one place. Better yet, today's online forms technology is easy to use yet delivers powerful functionality. Your forms can be up and running in minutes. Read on for ways that online forms can help you hit all the bases at your nonprofit.

Recruit the help that you need

A nonprofit's staff is the heart of the organization. Nonprofits have the special challenge of making strong hires (and selecting great volunteers) who are passionate about the organization's mission. Many nonprofit leaders don't like to use generic job applications because such forms don't ask for all relevant information, such as answers to mission-specific questions.

That's one place where online forms come in handy. Using form builders, you can customize every form field to fit your needs. Ask questions that will help you quickly weed out applicants who aren't a good fit, and allow other candidates to provide important information. For example: "Why are you interested in our organization's mission?" "This role includes direct contact with animals. What's your relevant experience with animals?" "Which languages do you speak and at what level of proficiency?"

“Assure that all the information you need is accessible.”

Manage staff, volunteers, and board members seamlessly

You can use directive online forms to organize workflow and help people stay on track. Staff and board members can track projects and send comments and suggestions through forms. You can use forms to match volunteers with their interests and skill sets, collect their contact information, and find out which days and times they're available to help out.

Online forms are also useful for scheduling meetings with many different individuals and across groups. Time slots can be filled with a form: Just have staff self-select when they'll be doing what with a date/time picker chart.

Plan special events, recruit sponsors, and get auction donations

For many nonprofits, events are a major driver of awareness and dollars. But they can be a huge hassle to plan. Online forms cut through problems so that you'll reach more supporters, use less staff time, and raise more money. The event planning process can be tracked with a form that includes vendors to contact and projects to complete. Customized forms help you organize tasks months or even years in advance, making sure that you'll never miss any important steps or deadlines.

Instead of going back and forth with phone calls and e-mails, you can simplify the time-consuming process of soliciting sponsors and donations for auctions. Once a sponsor has agreed to donate products or services to be auctioned, simply send an online form that collects the need-to-know information: the company, the item(s), the quantity, the approximate worth, the company logo for promotional materials, and any additional notes. The form can also detail any incentives your nonprofit is providing companies who donate, by way of promotional exposure. Laying out different levels of benefits based on tiered levels of support can increase average donations.

After your sponsors have submitted the form, they'll receive an automated, customized page to express your appreciation,



“Your donation form should do more than collect payments.”

let them know about next steps, and include any additional information you want to give them. The page can also encourage them to continue their interactions, whether that be with the organization’s website or social media profiles.

Collect feedback

Online forms can help you collect opinions through surveys and condense the results to a readable format. Polls and surveys can help inform decisions, and can be automatically made into visual reports to be reviewed in important meetings. Systemizing processes within the same group and between different groups can be a tremendous time-saver. This is especially helpful if your organization includes many stakeholders who aren’t full-time staff; they can get their voices heard without e-mails and face-to-face meetings.

Online form builders integrate with business tools that your nonprofit may already use, like Google Docs, Box, Dropbox, and Excel. When you need to collect information, you can send a form to many people at once, and the data collected can automatically populate one of your information storage products. You can make meetings more productive by looking over suggestions that were collected with your online form ahead of time, so that your meeting itinerary and goals can be more effectively addressed.

Accept donations online

Your donation form should do more than just collect payments. It should tell your organization’s story and provide helpful payment amount options, including how to make recurrent donations. It should also thank donors after they submit a payment.

First, start with a story. Setting the stage and giving potential donors a compelling reason why they should donate will increase their engagement, the likelihood of them donating, and the average amount of a gift.

Your donation form can feature a short video that serves as a powerful elevator speech — a short version of who your organization is, what you do, and how your mission can be furthered with a donor’s support. In your introduction to your donation form, ask for a gift and explain why it matters. Tie the ask to something tangible if possible (for example, “Your gift of \$20 will prevent a 4x4 plot of rainforest from being deforested this year.”)

“Never miss deadlines again.”

Once donors submit the forms that finalize the donation, you can send them to a custom thank-you page. Here you can reaffirm that your organization appreciates their gifts and offer ways they can continue to engage with your nonprofit, such as prompting them to sign up to be an e-mail subscriber, to check out your organization’s social media profiles, or to share the donation form with their friends and family. Again, you can add a short paragraph about how their gift will be used.

Send out custom RSVP forms

Let people know all about that fabulous fundraising bash or community event your organization is hosting. Your event invitation should include a pitch about why your organization is important and what you’re working toward, and should include basics like date, time, venue, and ticket price. With an online form builder, you can even add a Google Maps widget to your event invitation, making it easier for people to get a feel for the location.

Useful extras include single-click options that event attendees can use to receive parking and public transportation information. They can click on a field to note any dietary concerns and on another field to add the event to their calendars. There are quick sharing options via e-mail and social media.

Make sure that your online form is branded and features your nonprofit’s logo. Your form provides a great opportunity to send messages that reflect your organization, reinforce your brand, and solidify support. 

Leeyen Rogers is the VP of Marketing at JotForm (Jotform.com), an online form-building tool based in San Francisco.

Continue the Journey

For more ways to raise money and organize your organization for greater effectiveness, see these articles at NonprofitWorld.org:

How to Foster a Positive Funding Relationship (Vol. 32, No. 4)

Exploring the Options: Online Donation Payment Choices (Vol. 26, No. 4)

Gain New Supporters with Online Forms (Vol. 35, No. 2)

Create a Donation Page that Rocks (Vol. 33, No. 1)

Accomplish More by Climbing the Productivity Pyramid (Vol. 36, No. 3)

Using E-Mail & the Web to Acquire & Cultivate Donors (Vol. 21, No. 1)