

DONATION FORM AUDIT GUIDE

Does Your Donation Form Convert When It Matters Most?

Your donation form is not just a transaction page. It is the moment a donor decides to act. Use this checklist to evaluate your form across ten key areas and identify exactly where friction is costing you gifts.

15 to 20%

of donations lost to
form friction

4 to 10x

lifetime value of recurring
vs. one-time donors

60%+

of nonprofit traffic
arrives via mobile

Donation forms fail not because donors do not want to give, but because friction, distrust, or a mismatched experience gets in the way at the critical moment. The ten areas in this checklist cover form design, recurring giving, trust signals, mobile performance, and post-gift experience. Work through each section with your actual form open. The audit questions are designed to surface specific gaps, not general observations.

The highest-performing donation forms are never finished. They are continuously improved.

Checklist: Donation Form Audit Guide

Use this guide to evaluate your donation form, ensuring every element reduces friction, builds trust, and makes it easy for motivated donors to complete their gift.

Form Design and Conversion



1

Form Fields: Fewer Is Almost Always Better

Every required field increases cognitive load and gives donors a reason to abandon. A well-optimized form requires name, email, and payment details only. Count your required fields. Would removing any cause a real operational problem, or just a minor inconvenience?



2

Suggested Amounts: Data-Driven and Impact-Labeled

Suggested amounts anchor donor perception of what is normal. Base them on your actual median and average gift data. Label each with a specific, tangible impact statement. '\$25 feeds one family for a week' outperforms '\$25' alone. Three to four options is optimal.



3

Payment Methods: More Options, Less Abandonment

Donors have strong payment preferences. At minimum accept credit/debit cards, ACH bank transfer, and Apple Pay or Google Pay. Display accepted payment method icons before the form begins to reduce uncertainty and increase confidence.

Recurring Giving and Revenue



4

Recurring Giving: Visible, Prominent, and Easy to Choose

Monthly donors have 4 to 10x the lifetime value of one-time donors, yet most forms treat recurring giving as a secondary option. Present a clear 'Give Once / Give Monthly' toggle at the top of the form, before the amount selector. Consider defaulting to monthly.



5

Donor-Covered Fees: Transparent, Opt-In, and Positively Framed

Offer fee coverage as an opt-in option immediately below the amount field. Show the exact dollar amount, not a percentage, and display the adjusted total dynamically. Frame it as 'so 100% of your gift reaches [mission]' rather than 'to offset our costs.'

Trust and Brand



6

Trust Signals: Visible, Specific, and Well-Placed

Donors are entering sensitive financial information on a page that may feel unfamiliar. Layer trust signals near the payment fields: SSL/security badge, your EIN, and a privacy policy link. Add third-party credibility such as Charity Navigator or GuideStar if available.



7

Brand Consistency: The Form Should Feel Like Your Organization

Place a screenshot of your homepage next to your donation form. A donor should not be able to tell they left your site. Match colors, fonts, logo, and voice. Ideally host the form on your own domain. A third-party URL introduces doubt at the moment of commitment.



8

Mobile Experience: Tested, Fast, and Tap-Friendly

Open your form on a real phone right now. Measure load time (target: under 3 seconds). Confirm numeric keyboards appear for card and zip fields. Verify the Donate button is visible without scrolling. Complete a full test donation end-to-end, not just a visual inspection.

Post-Gift Experience and Growth



9

Post-Gift Experience: The Confirmation That Builds the Relationship

The moment after a gift is one of the highest-engagement moments in the donor relationship. Make the confirmation page warm and specific. Name the gift amount and connect it to mission impact. Ensure the receipt email arrives within 5 minutes, includes your EIN, and sounds like a person wrote it.



10

Measurement: Tracking, Testing, and Improving Over Time

If you cannot state your form's current completion rate in 60 seconds, measurement is your highest-priority improvement. Set up conversion tracking, establish a baseline, and schedule a quarterly review. A/B test suggested amounts, CTA copy, or form length at least once per year.

Quick-Score Your Form

Run through each category. Check off items your form already does well, then prioritize the gaps.

Category	Items	Score Yourself
Form Design and Conversion	3 items	/3
Recurring Giving and Revenue	2 items	/2
Trust and Brand	3 items	/3
Post-Gift Experience and Growth	2 items	/2
TOTAL	10 items	/10

Score	What It Means
9 to 10	Strong: your form is well-optimized and donors experience minimal friction from first click through confirmation.
6 to 8	Good foundation, but identifiable gaps in trust, friction, or experience are costing you completed gifts.
0 to 5	High risk: donors are likely disengaging before completing their gift. Prioritize form fields, mobile experience, and trust signals first.

Ready to optimize your donation form?

iDonate builds high-converting donation forms purpose-built for nonprofits. Our Giving Specialists will review your current form, identify friction points, and show you exactly how iDonate can help more of your motivated donors complete their gift.

[Book a Free Donation Form Audit Session](#)

About iDonate

iDonate is the intelligent online giving solution purpose-built for modern nonprofits. We help organizations raise more for their mission by delivering mobile-first donation experiences that are easy to set up, highly customizable, and seamlessly integrated. Learn more at www.idonate.com