LITTLE GREEN LIGHT

Using online forms to simplify your workload

by Hunter Williams

Introduction

Welcome to this ebook on how to use online forms to simplify your workload. This guide is for anyone working at a nonprofit who is interested in putting technology to work -- to wow your supporters and provide a way for you and your team to receive information that can help you build stronger relationships with those who matter most to your organization.

There are lots of ways online forms can be used, and some really nifty benefits to using them. For instance, by using online forms, you'll be able to automate processes that previously might have been manual and time-consuming. You can also make it possible for your donors to give online, and set it up so that they will receive an automatic thank you from your organization. You can also use an online form to add new subscribers to your email list automatically, or make it possible for your volunteers to submit their hours online, all without having to enter a single piece of data!

In this ebook, we'll provide lots of examples of online forms, including payment (or donation) forms and forms that are used for data collection purposes. We'll also offer some best practice tips for using these types of forms as well as share some ways that using Little Green Light forms can make form building fun and easy!

Disclaimer: Although most of the examples in this ebook come from the Little Green Light (LGL) forms service, the concepts are generally applicable to any form provider service (e.g., Wufoo, Formstack, Google Forms, etc.) and donor management system. (It's just that we really like the LGL way of doing things. :))

Types of online forms

Online forms come in all shapes and sizes. What they all have in common is that they're a way to collect information from your supporters in an electronic format. Some forms may even have the capability to process payments.

Here are a few examples of some different types of online forms:

Payment forms

- Donation forms (e.g., one-time or recurring donations)
- Event registrations & ticket purchases
- Membership forms & payments

Data collection forms

- Volunteering
- Alumni updates
- Program-related
- Relationship management

For examples showing how people use LGL forms for all kinds of purposes, check out our Pinterest board at www.pinterest.com/lglcrm/online-forms/

Payment Forms

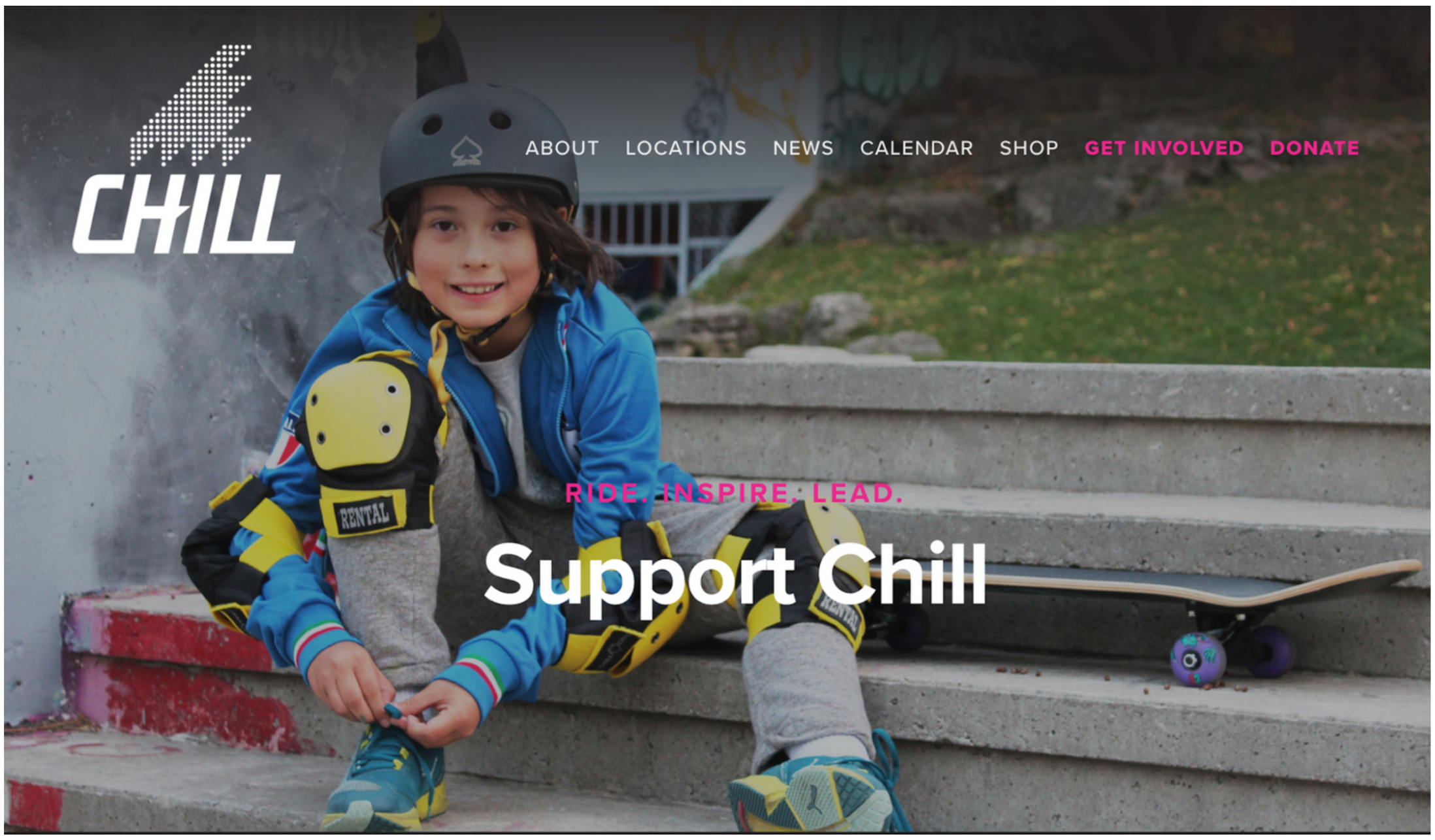
Donation forms

One type of payment form you can create is a donation form. In addition to collecting your donor's name and contact info and the amount of their gift, your online donation form provides a great opportunity to share key messages about how donations advance your cause and offers a great opportunity to collect important information about your donors.

Here are a few ideas to consider:

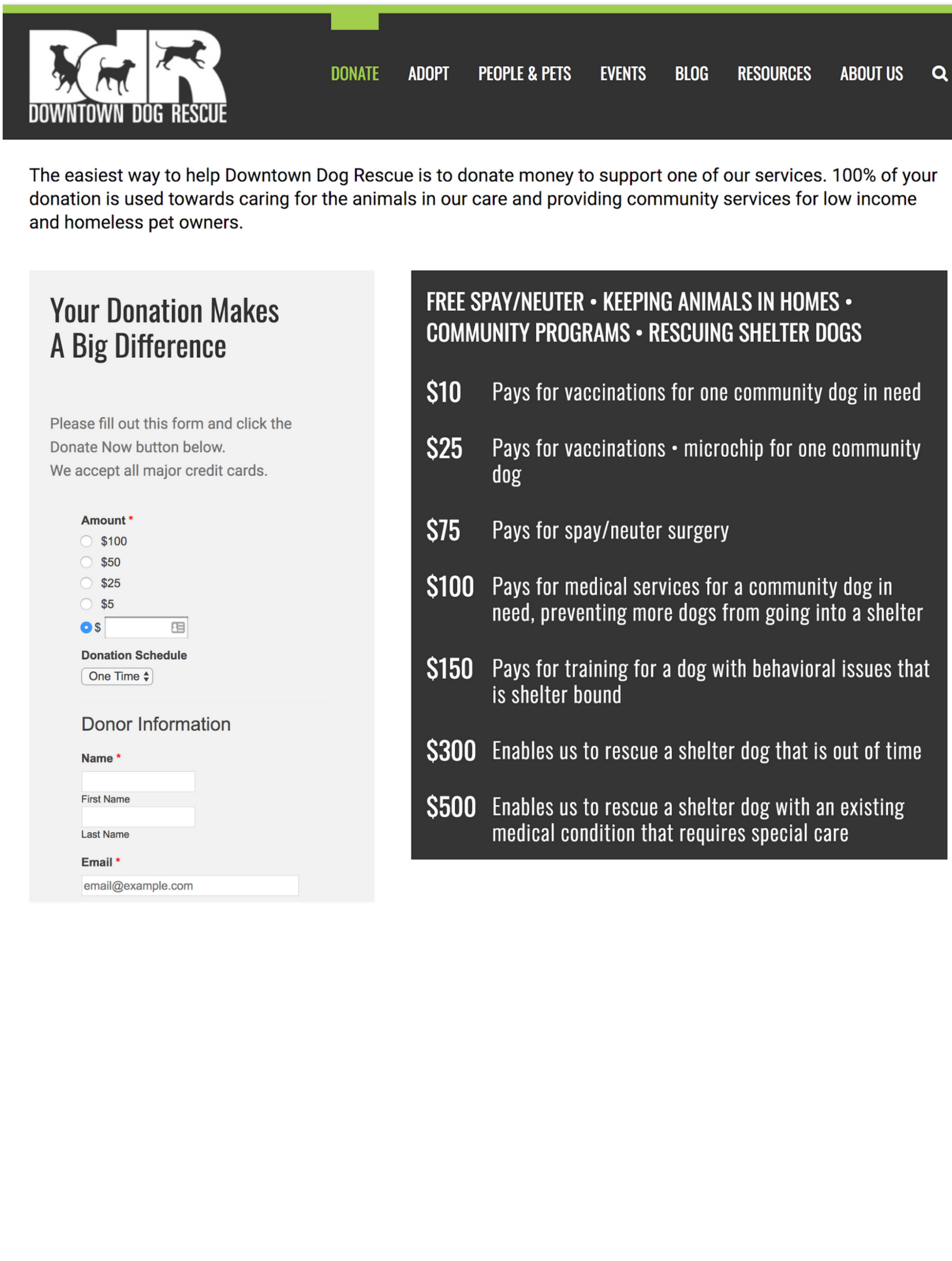
Idea #1: Lead with a compelling image

Hopefully, you can find an image that perfectly captures your mission, like this one from the Chill Foundation, whose mission is "Inspiring youth to overcome challenges through boardsports".



Idea #2: Spell out what the donation will accomplish

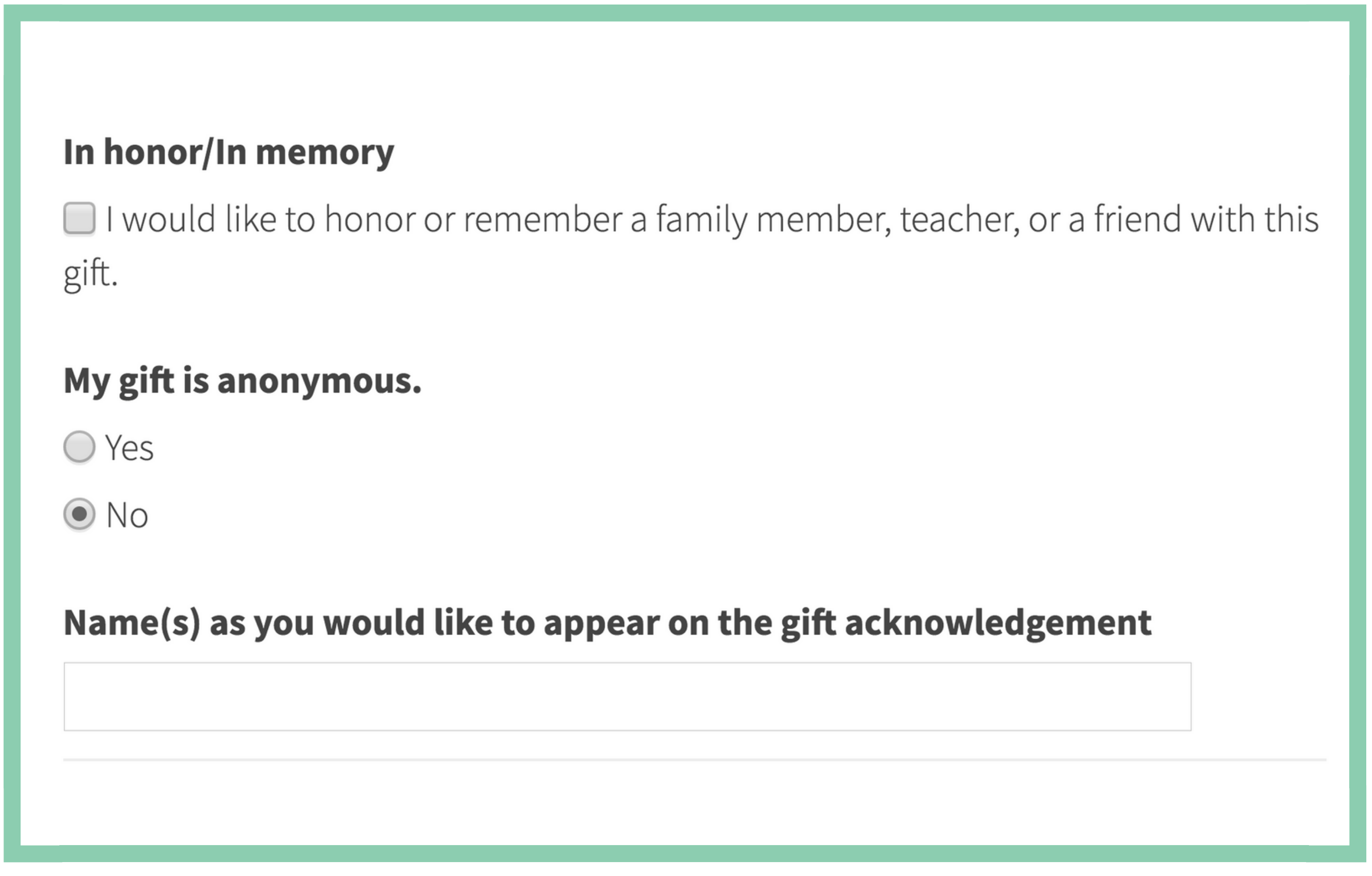
Donors want to feel connected to the impact of their donation. Provide a specific benefit for donations at various levels, such as what Downtown Dog Rescue shows on its donation page.



Idea #3: Collect attribution details

Find out if the donation is a tribute gift (i.e., a memorial or honorary gift) and set up a process for notifying the honoree or family members.

And learn how your donor would like to be recognized in your year-end honor roll.



Idea #4: Allow the donor to select how their gift will be used

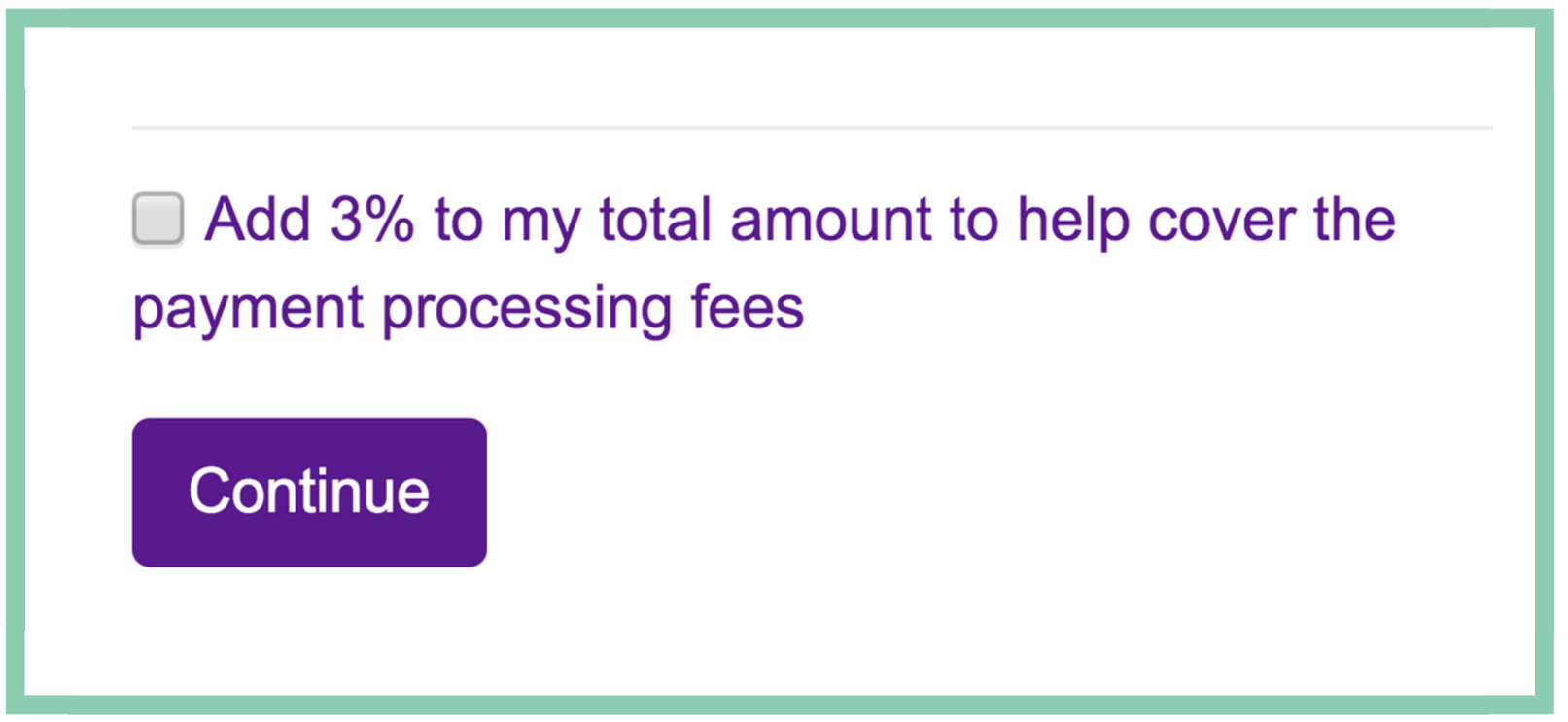
Allow donors to choose a project for their donation and be sure to use that information in your donor thank you!

LGL Tip: In Little Green Light, you could use a "Fund" to track this designation.

Idea #5: Offer donors a way to maximize their gift

Ask your donors to cover the payment processing fee. Many will.

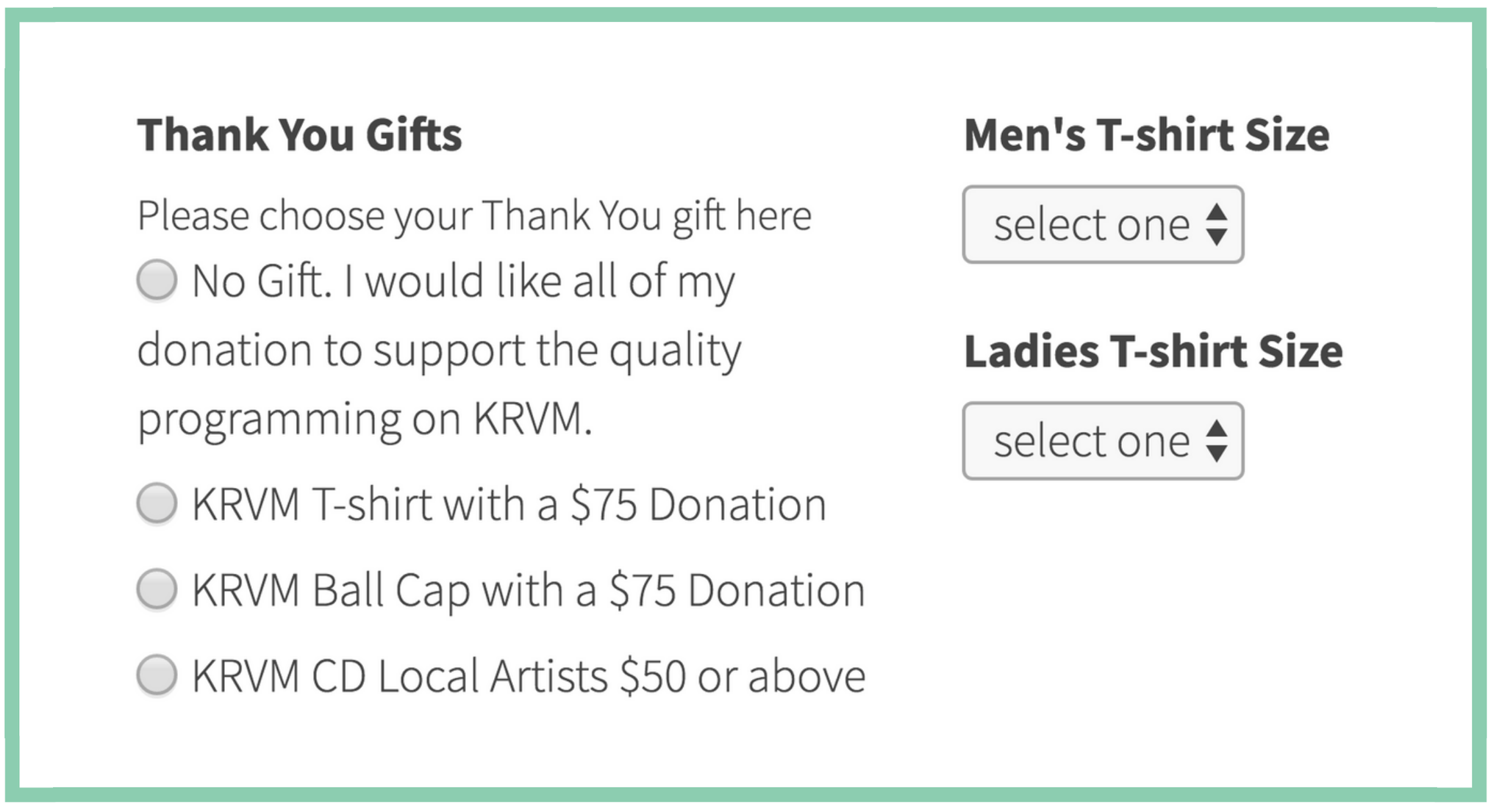
Statistic: On one donation form we reviewed, 35% of 1,300 donors opted to cover the payment processing fee.



Idea #6: Use your form to allow donors to select a recognition gift

Use a radio button (meaning only one option can be selected) to let donors choose the recognition gift they'd like to receive. Include an option for "no gift".

LGL Tip: When using an LGL form, you can set up a conditional rule so that this field will show only when the gift amount is over a certain amount or is a recurring donation. That's a handy way to keep your form from looking too busy and only showing information that is relevant to the person completing the form.



Idea #7: Ask questions to learn more about your donors

Perhaps there's a major donor just waiting to be discovered, or a future volunteer or program participant who's completing your form. It's okay to ask questions to help you to discover this, but we recommend keeping these extra questions short and easy to answer.

Another option to consider would be to ask if the donor's employer has a matching gift program. (According to Double the Donation, 65% of Fortune 500 companies do!)

Please send me information on:

- [ ] Including Academy of the Stars in my will.
- [ ] How to donate stock.

I want to learn more about

- [ ] Volunteering
- [ ] Adopting a scholar

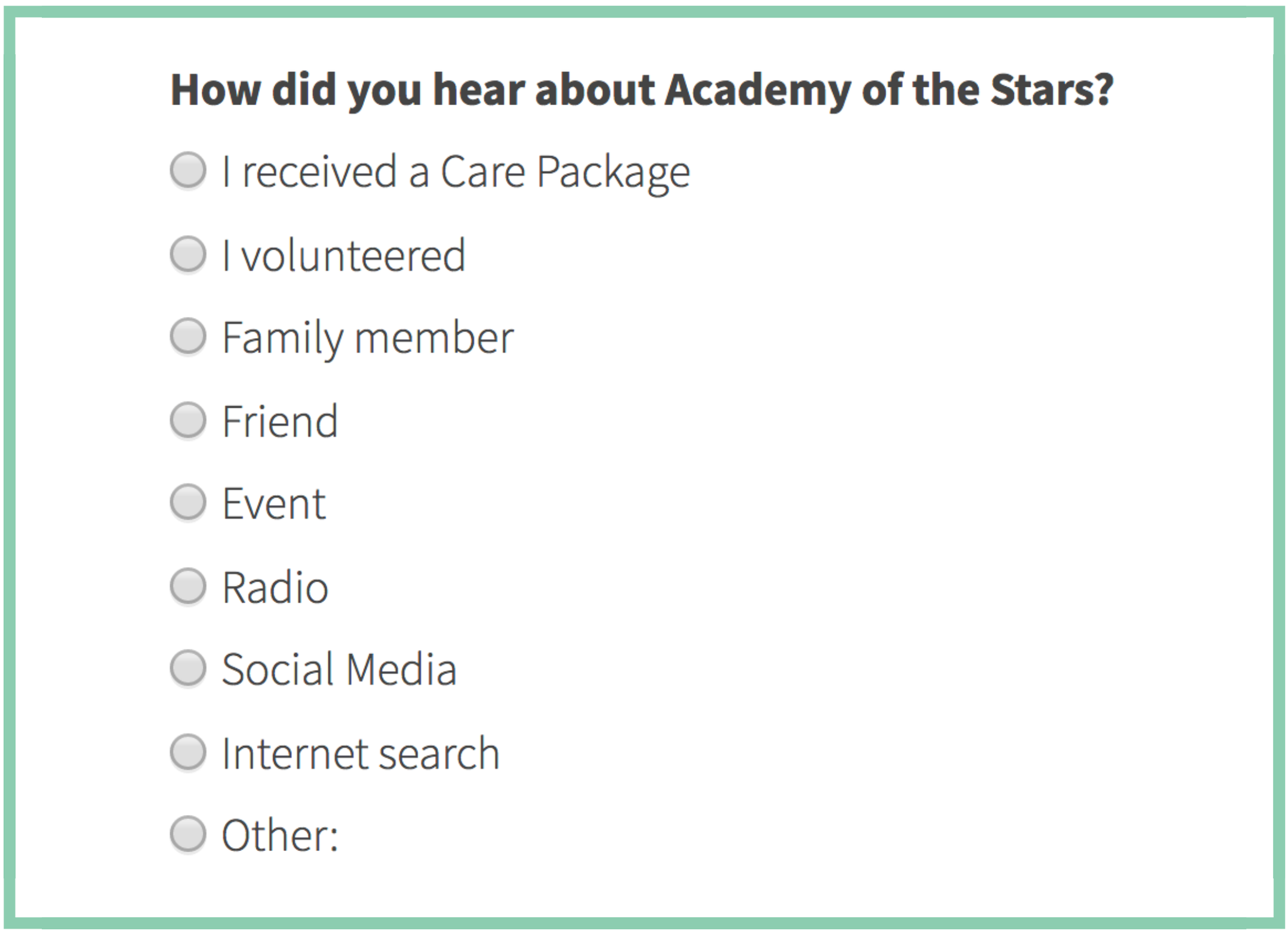
Gift Information

- [ ] This gift is anonymous
- [ ] This gift is from a law firm/organization
- [ ] My company/employer will match my donation

Idea #8: Ask your donors how they learned about your organization

Tracking the source of your donors will help you understand which of your marketing or outreach channels are most effective.

LGL Tip: In Little Green Light, you can use a custom category to track this information about your constituents.



Event registration forms

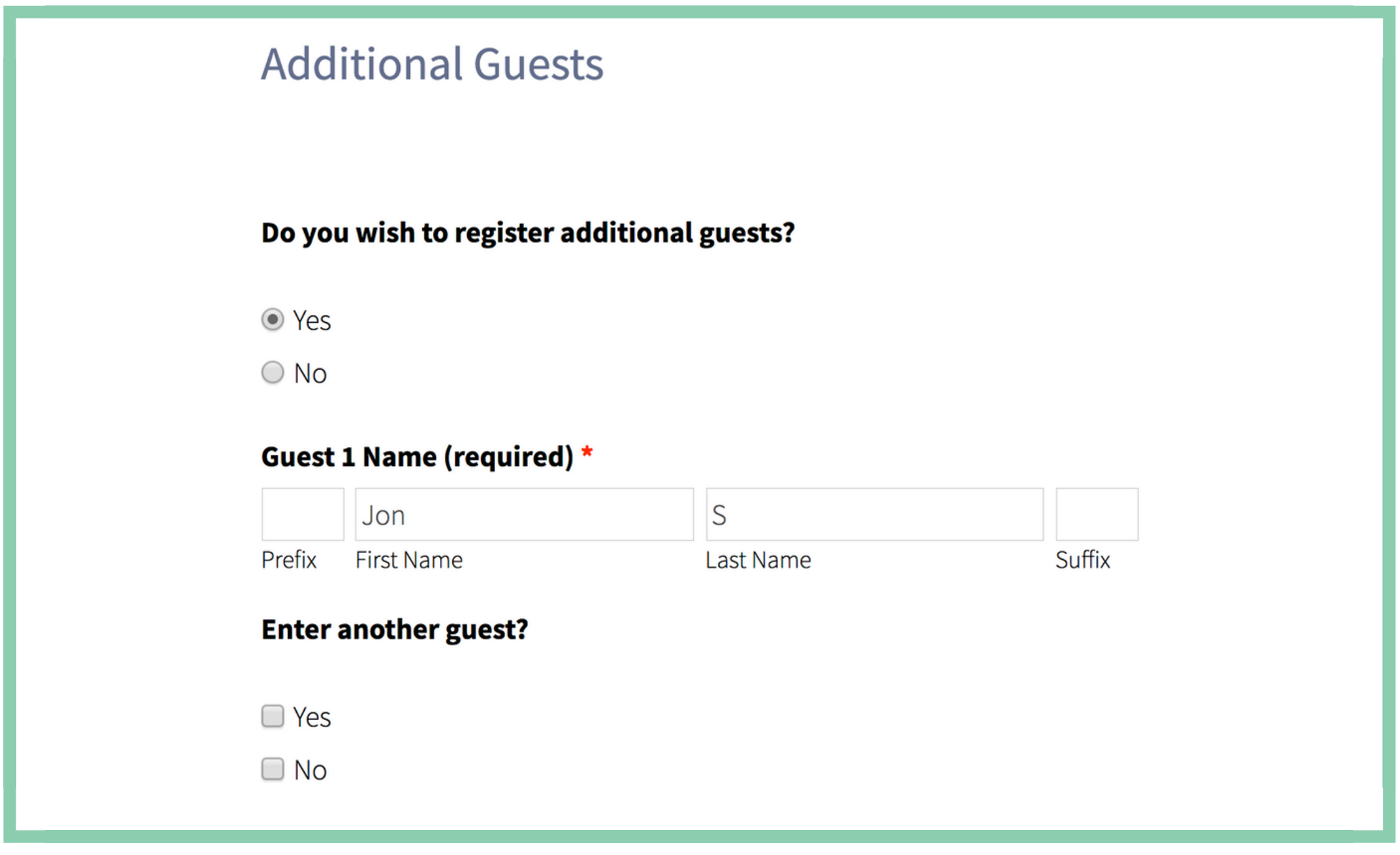
Another type of payment form you can create is an event registration form. In addition to allowing for ticket purchases, event-type forms can also collect information about guests, number of tickets required, and other event-related information.

Here are a few tips on using online forms for events.

Tip #1: Keep your form as brief as possible

Try to keep your forms as short as possible, but allow them to expand as needed. Keeping unnecessary fields out of your form will increase the speed of completion and reduce abandon rates.

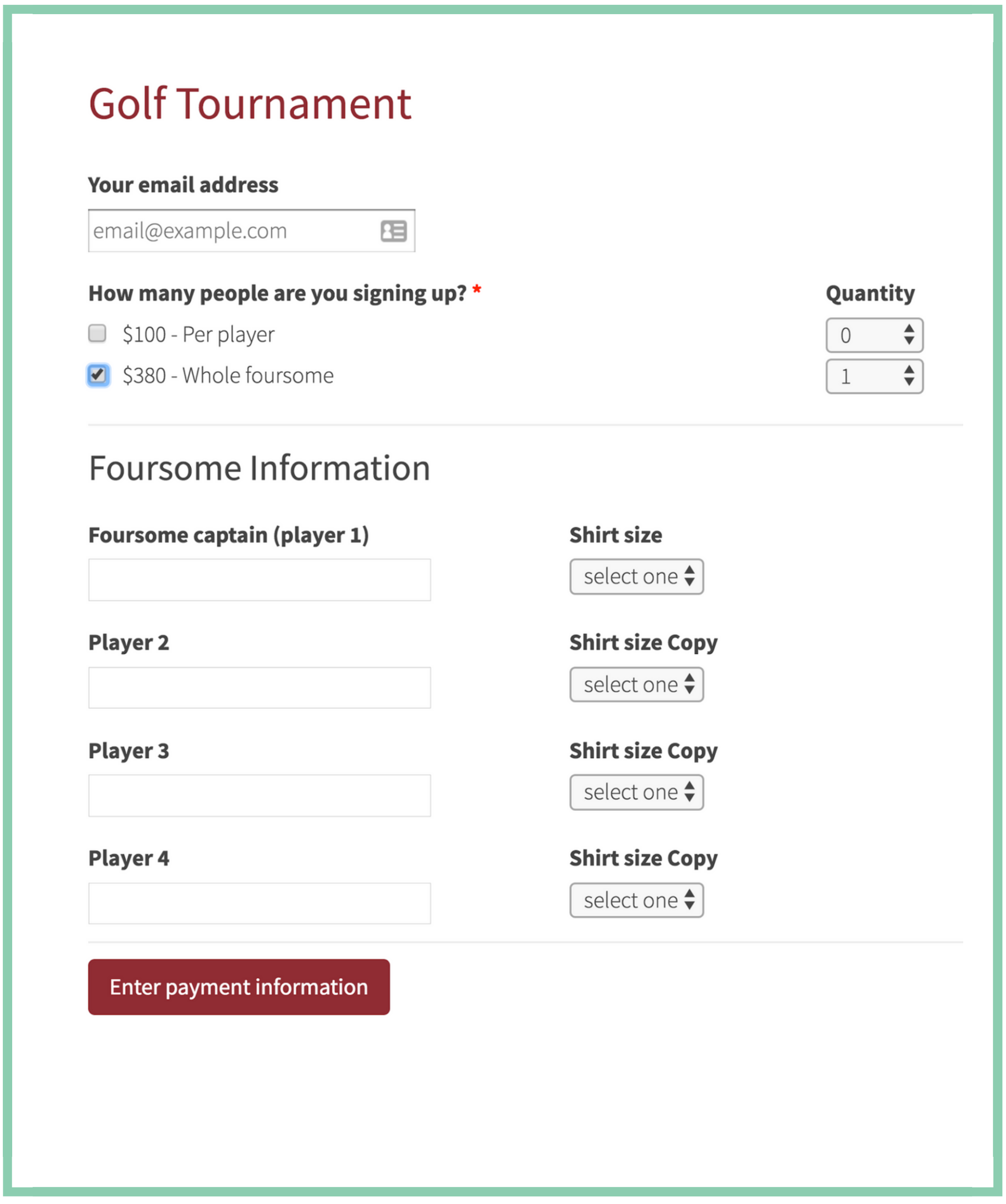
For example, first ask if the registrant wishes to add a guest, and then only display a field for the guest name when the registrant selects “Yes”.



Tip #2: Anticipate how many tickets most users will need

You can set a different price for a single ticket versus a set of tickets (i.e., for a foursome). In this example, we also ask for the names of each attendee and their shirt size.

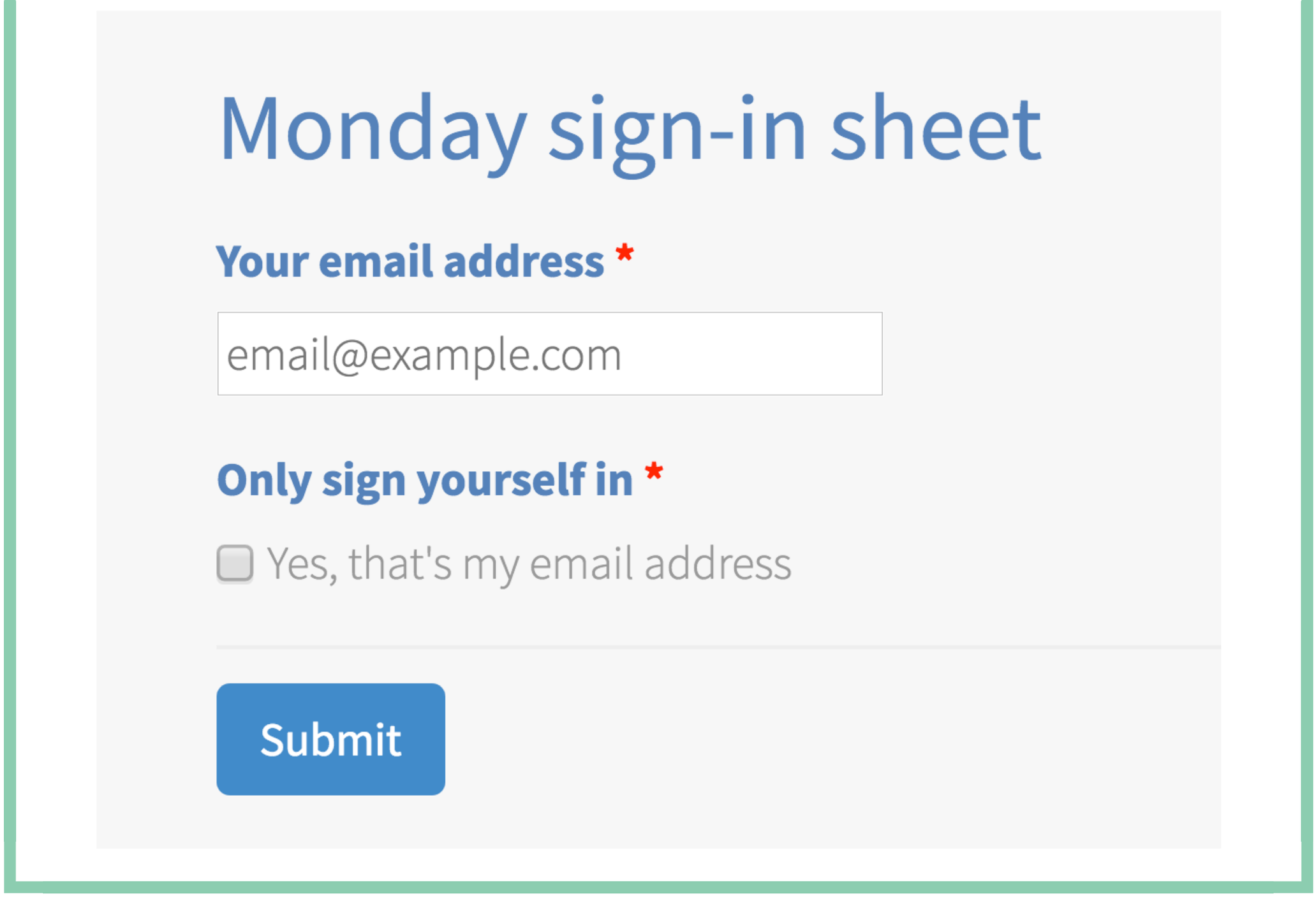
The number of name entries can be conditional based on the number of tickets being ordered.



Tip #3: Attendance sign-in

Forms are a great way to collect attendance information from people who show up at your event or class.

LGL Tip: You can set your form to return back to the blank form upon submission, so it's ready again for the next person.



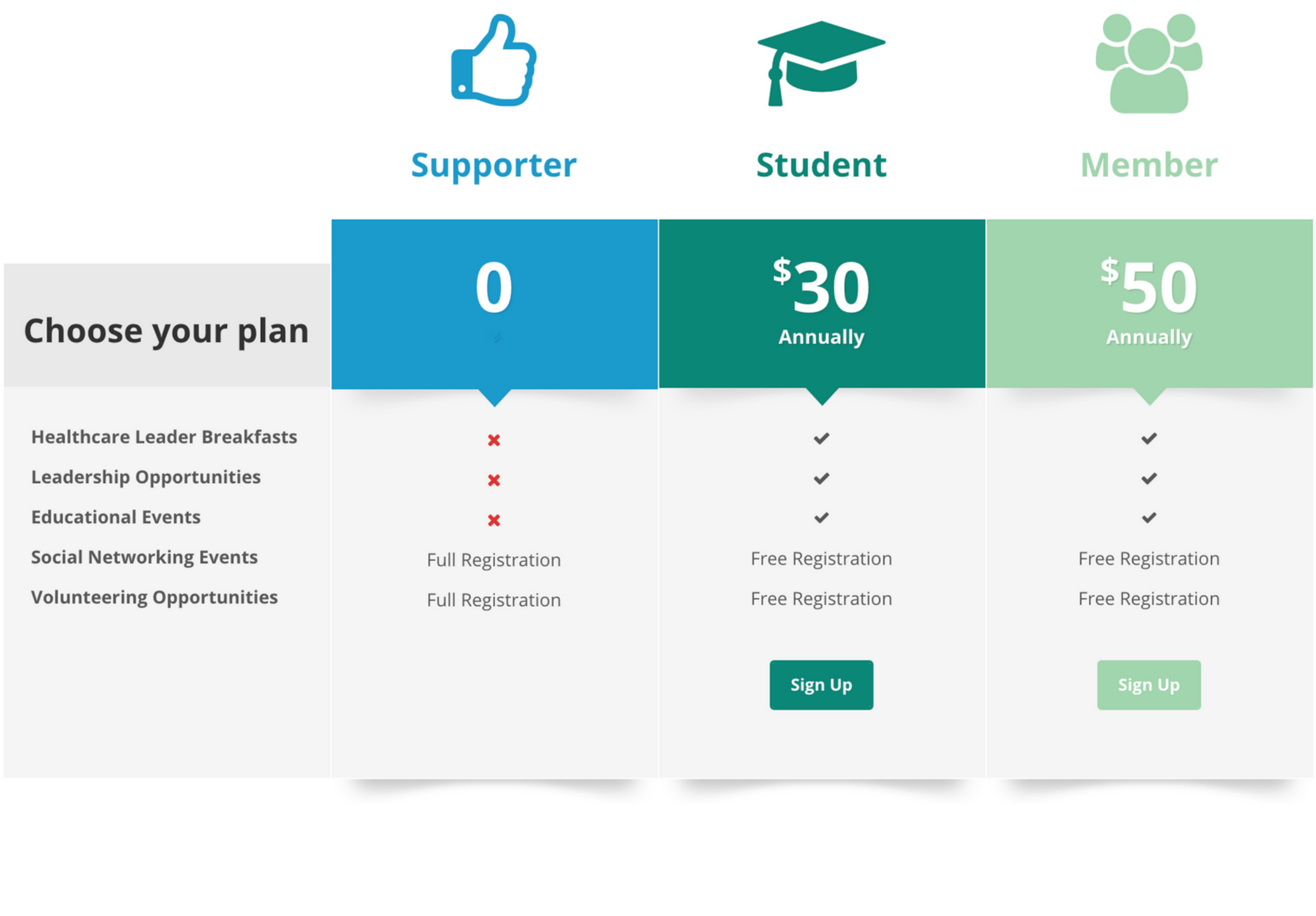
Membership forms

Next we'll discuss membership forms. If your nonprofit organization accepts memberships, check out these ideas on how some Little Green Light customers have created forms to manage their membership programs.

Membership Form Idea #1: Create a splash page

Sometimes you'll want to create a nice-looking "splash page" from which you can link to various forms.

Boston Young Healthcare Professionals presents its membership tiers in a really nice-looking graphical display, with each tier linking to the appropriate form. (Note that this display was not created using Little Green Light or our forms service.)

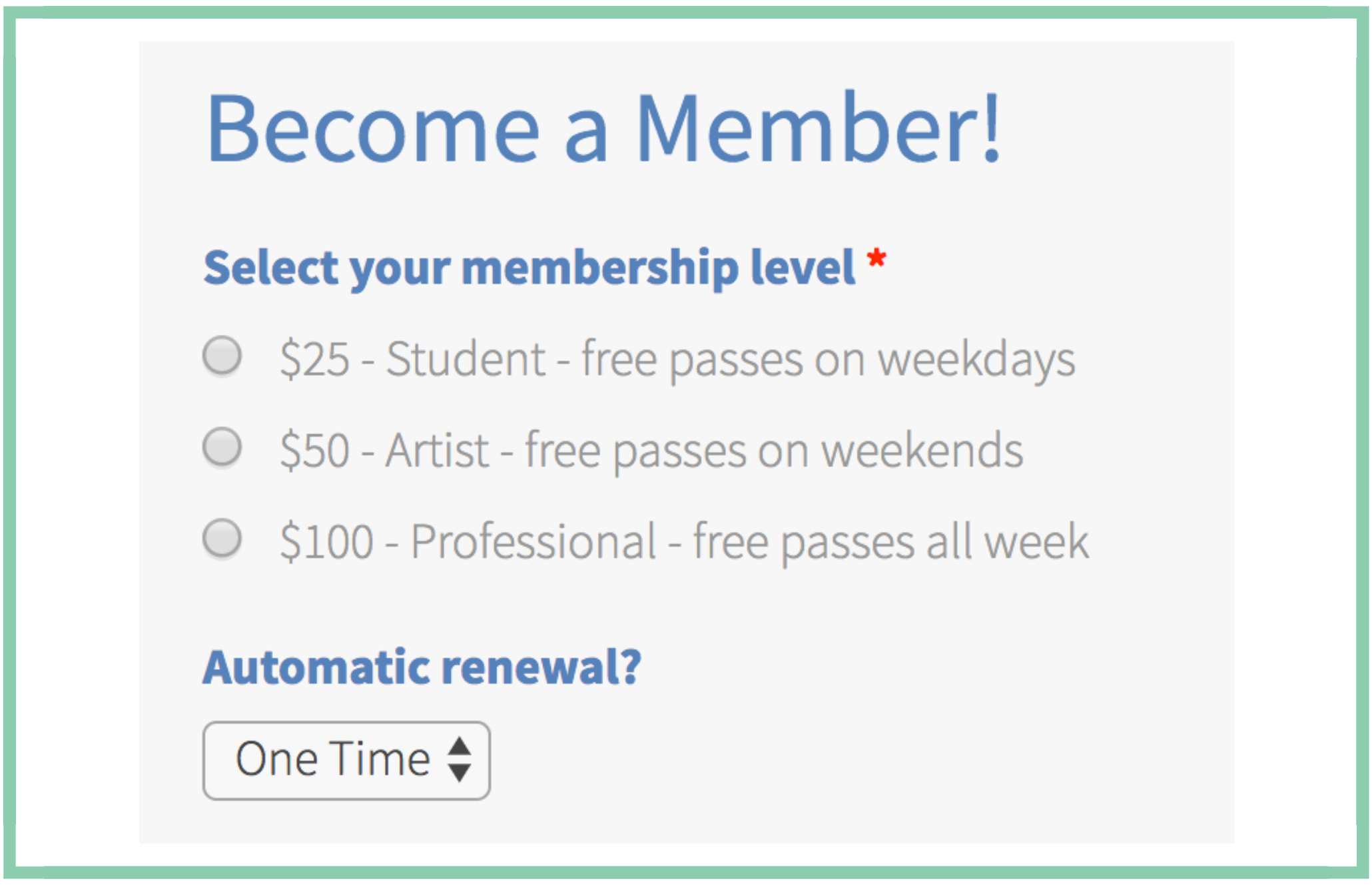


Membership Form Idea #2: Clearly spell out membership benefits

There is a bit of a balancing act required here to keep your form quick and easy to understand, but also to clearly state what members will receive as part of their membership.

We recommend giving your members the option to auto-renew their membership, but suggest requiring them to select their preferred renewal option rather than selecting one for them.

LGL Tip: In Little Green Light, you can select which recurring schedule you'd like to offer, and you can set which one you want as the default value. In the example below, we chose the "One Time" option to show as the default versus the "Annually" option.



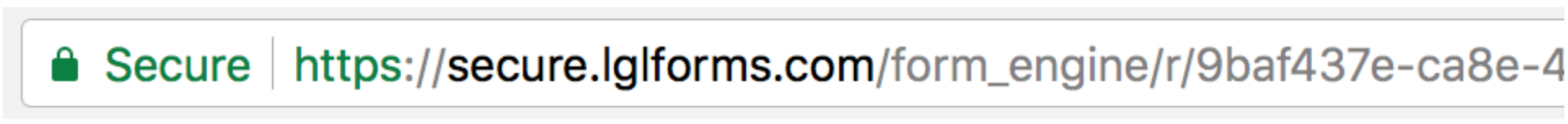
A quick note about online payment forms and keeping them secure

Regardless of whether you create online forms for donations or payments, it's important that you use all the tools available to ensure the security of that form.

In Little Green Light, the following security measures are available, and we encourage you to use them!

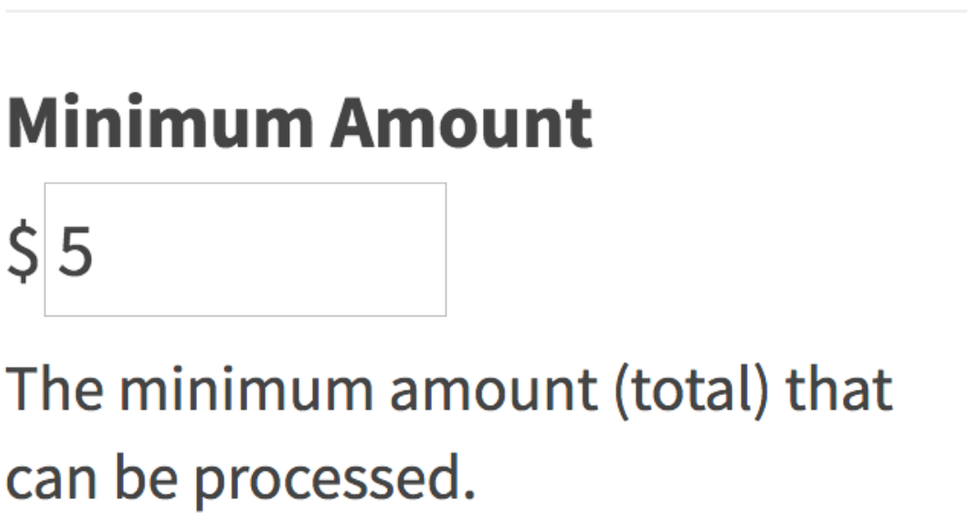
Security Measure #1:

Always make sure any page where people are entering credit card information shows the padlock and uses "https://" at the beginning of the URL (the "s" stands for "secure").



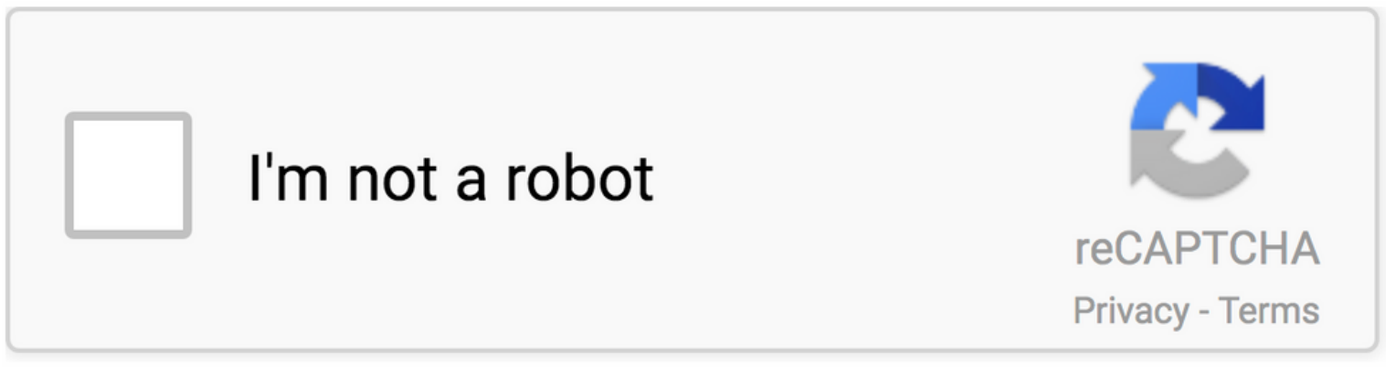
Security Measure #2:

Set a minimum amount to prevent bad actors with stolen credit cards from testing out your form with a very small charge.



Security Measure #3:

Add a reCaptcha widget to keep bots from filling out your form.



Data Collection

Forms

Data collection forms

In the previous section, we covered payment-based forms. But online forms can also be great for collecting information even when no payment processing is required.

In this section, we will review a few different types of data collection forms, including Volunteer forms, Alumni Update forms, Program forms, Contact forms, and more!

Volunteer forms

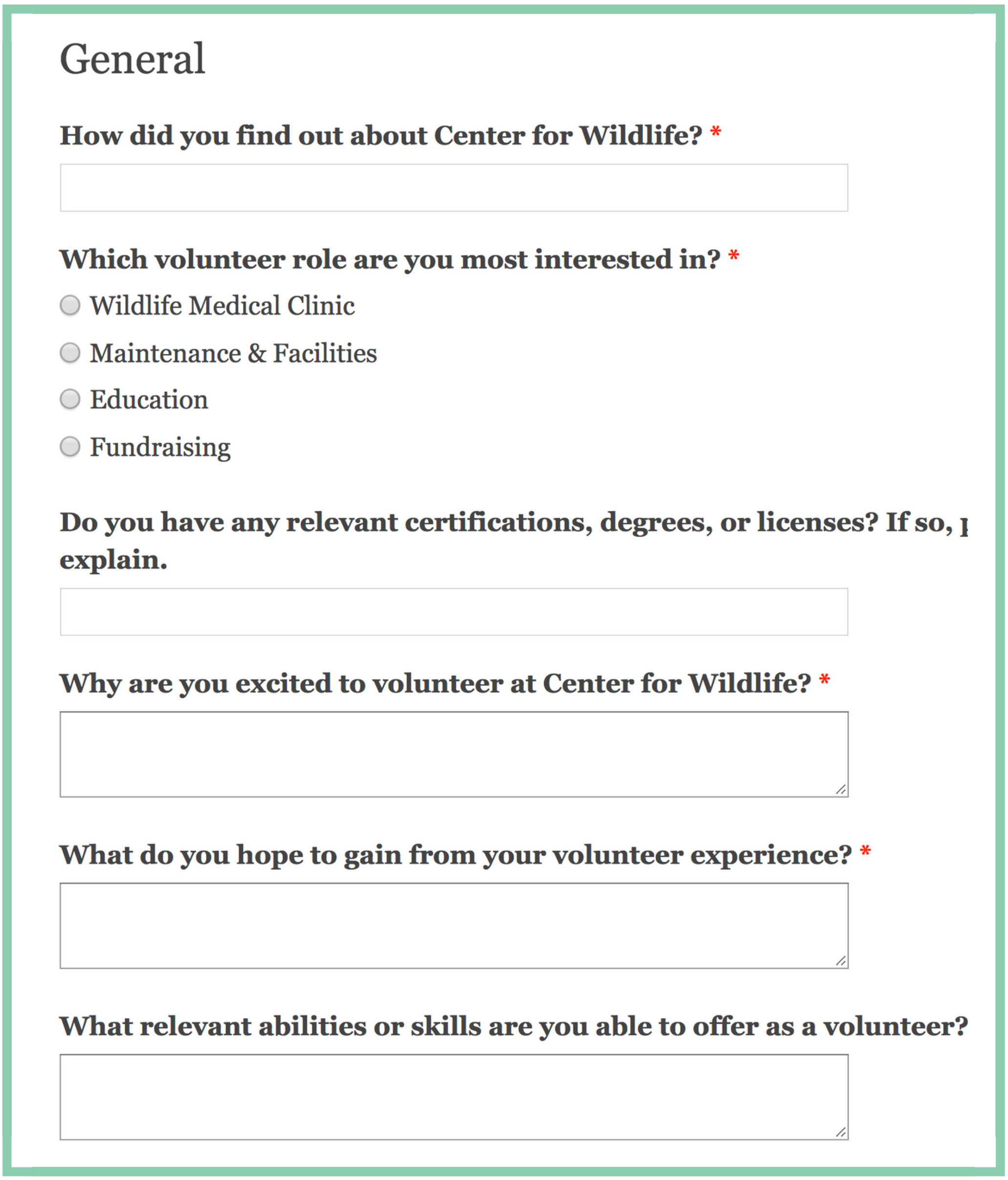
There's a variety of data that you may want to capture about volunteers, including their skills and interests, their availability, as well as the hours they've served.

See some examples of how these types of data were collected via online forms:

Volunteer application and skills:

Use a form to collect information from your prospective volunteers about the skills they bring and why they want to volunteer.

LGL Tip: If you plan to store this data in your donor database, consider time-stamping these submissions so you know when the data is getting stale and is due for a renewal.



Volunteer interests:

If you're looking for examples of the types of things volunteers can do to assist your nonprofit organization, here's a nice list from a Little Green Light customer that they included in their online form:

Volunteer Interests

Volunteer Interests *

How can you help? Check all that are applicable.

- [ ] Welcome Committee - Help with events
- [ ] Food - Bring food for events
- [ ] Telephone - Call members or nonprofits as needed
- [ ] Miscellaneous
- [ ] Accounting & Finance Expertise
- [ ] Commercial Construction Expertise
- [ ] Legal Expertise
- [ ] Technology - website design and hosting, content updates
- [ ] Technology - software systems and data integration
- [ ] Graphic Design
- [ ] Photography
- [ ] Public Relations, Writing, Publicity/Communications
- [ ] Social Media

Comments

Please provide additional information on how you would like to be involved

Volunteer availability:

You can use a form to collect not only what types of work your volunteers are willing and able to do, but when they are available to do it.

Note: Little Green Light doesn't offer volunteer scheduling per se, but you can use an appeal with custom fields to track a volunteer's preferred days or times of day.

VOLUNTEER AVAILABILITY

We will try our best to accommodate your date and time frame requests; scheduling is done on a first come, first serve basis, and is subject to inclement weather and work need.

First Choice Date

Please fill in your first choice for a volunteer date

Second Choice Date

In the event that we cannot accommodate your first choice, please provide a back up date.

No Specific Date

- [ ] We're Flexible!

Time Frame

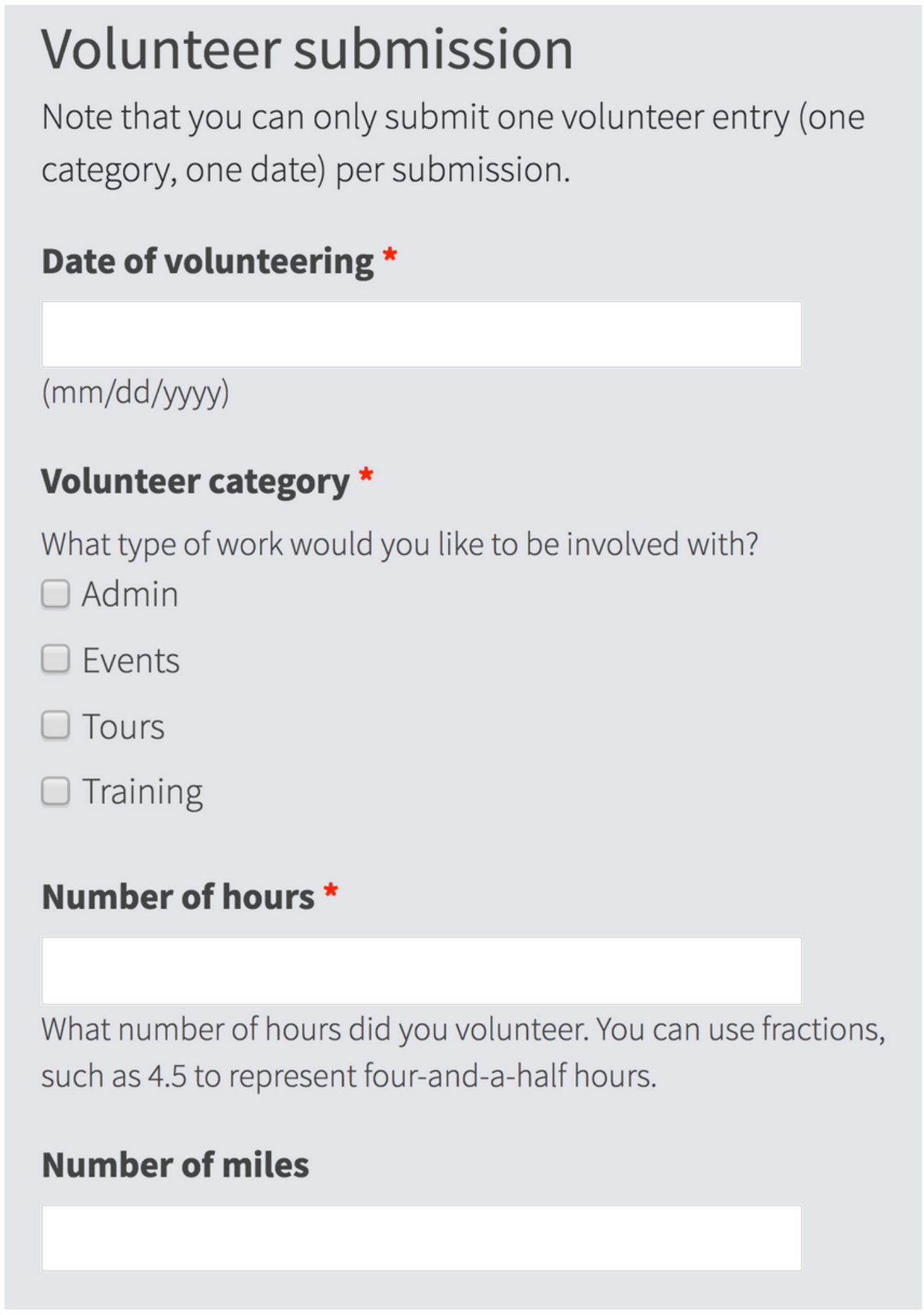
Please select the time frame you would prefer for your day of service. Please note that we only work from 9-noon on SATURDAYS.

- [ ] 9-12
- [ ] 1-4
- [ ] Other

Submit volunteer hours worked:

It's important to make it really simple for volunteers to submit their time entries. You can set up an online form on your organization's website that's easy to find, and then your volunteers can submit the hours they've worked from there.

LGL Tip: If you wish, you can send an email to your volunteers each month and include the link to your volunteer hour form's URL in the email. Little Green Light offers the ability for some fields in the form to be pre-populated (i.e., with the volunteer's name and email, for instance) so all they'd need to complete is the hours they worked.



Volunteer submission

Note that you can only submit one volunteer entry (one category, one date) per submission.

Date of volunteering *

(mm/dd/yyyy)

Volunteer category *

What type of work would you like to be involved with?

- Admin
- Events
- Tours
- Training

Number of hours *

What number of hours did you volunteer. You can use fractions, such as 4.5 to represent four-and-a-half hours.

Number of miles

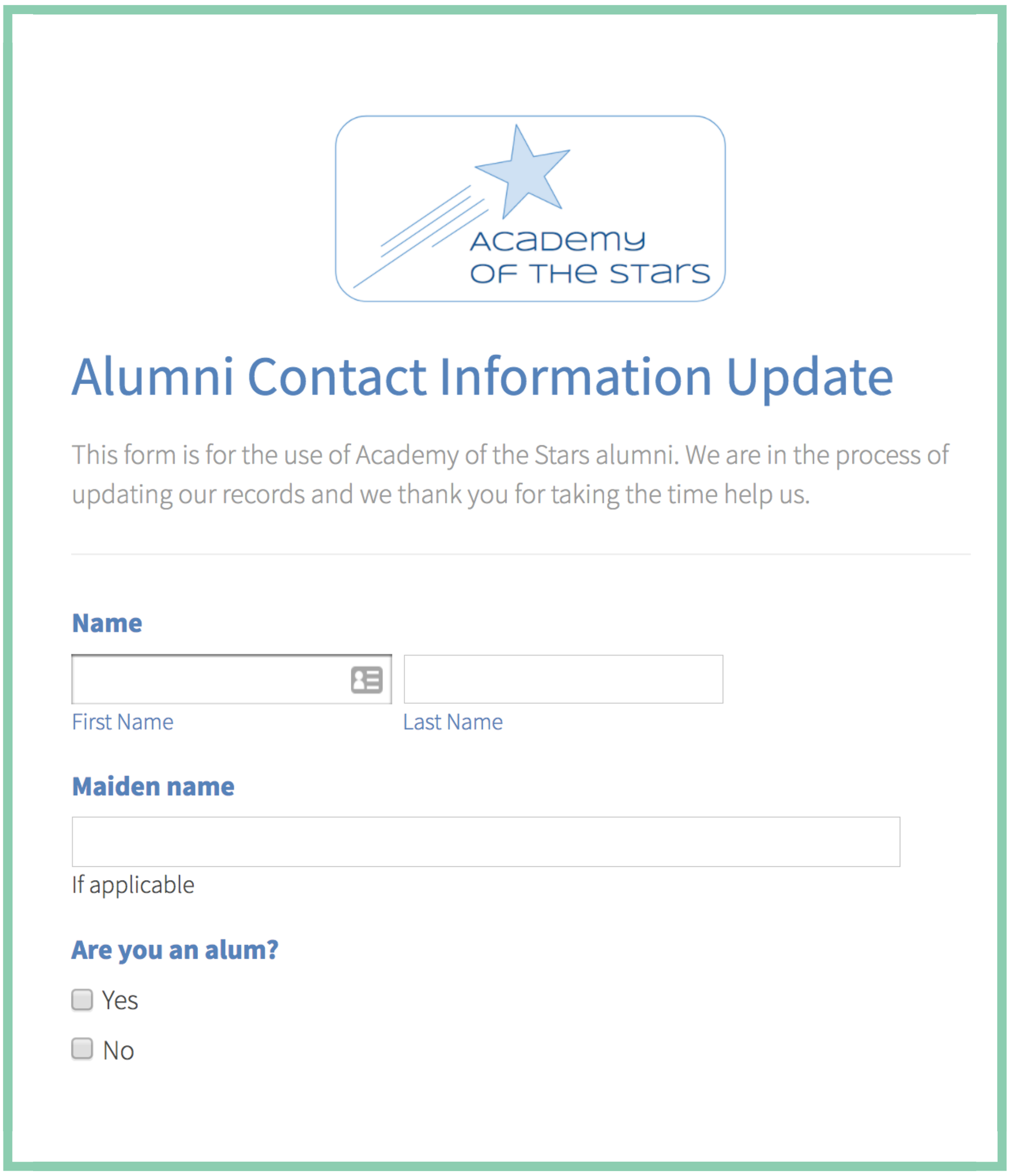
When you're ready to tally the number of hours served, you can either pull these entries into your donor management database (Note: this functionality is included with all forms you create in Little Green Light) or you can export the data into a spreadsheet and calculate totals by time period or category.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email	Vol. date	Category	Hours	Miles
2	Ichiro	Suzuki	ichiro@gmail.com	3/1/18	Training	6.5	10
3	Félix	Hernandez	felix@hotmail.com	3/2/18	Events	3	
4	Robinson	Canó	cano@aol.com	3/2/18	Tours	5	32
5	Dee	Gordon	dg@mail.com	3/5/18	Admin	2.5	
6	Nelson	Cruz	cruz@mariners.com	3/6/18	Events	8	
7	Kyle	Seager	kyle@seager.com	3/6/18	Events	4.5	26.2

Alumni updates forms

Use an online form to fill in missing contact information. In this example, a school is asking alumni to provide their most recent name information.

Be sure to ask for maiden name to help with matching to your school records.



Program-related forms

You can use online forms to streamline the work your organization is doing on the program side as well as on the fundraising side, because online forms aren't just for the fundraising team!

Pet adoption form

Matching the Right Pet

I am interested in adopting the following species... *

- [ ] Dog
- [ ] Cat
- [ ] Other

I am interested in the following ages... *

- [ ] Young (<1 year)
- [ ] Adult (1-8 years)
- [ ] Senior (8+ years)

Where will this animal primarily be kept? *

- ( ) Inside
- ( ) Outside
- ( ) Garage
- ( ) Barn

I want a pet with the following activity level(s): *

- [ ] Couch Potato
- [ ] Moderately Active
- [ ] Exercise Buddy (very active)

Are you willing to care for an animal requiring a specialized diet (ex. for diabetes, weight loss, etc.)?

*

- [ ] Yes
- [ ] No

Business directory forms

Using a structured list of options makes it much easier to later sum up useful totals by type. Try to avoid using too many open-ended fields.

Business Directory Information

This information is for members only and intended to help producers navigate the restaurant / chef market. It is optional, but much appreciated.

Categories of Local Food You Sell

Check all that apply - note this does not have to be what you currently purchase, it's what you *want* to purchase

- [ ] Produce (includes beans & grains)
- [ ] Meat & Poultry
- [ ] Dairy
- [ ] Fish
- [ ] Eggs
- [ ] Maple & Honey Products
- [ ] Herbs
- [ ] Alcoholic Beverages
- [ ] Other Specialty Foods (includes non-alcoholic beverages, flours, alternative proteins)

Product Details

Check all that apply

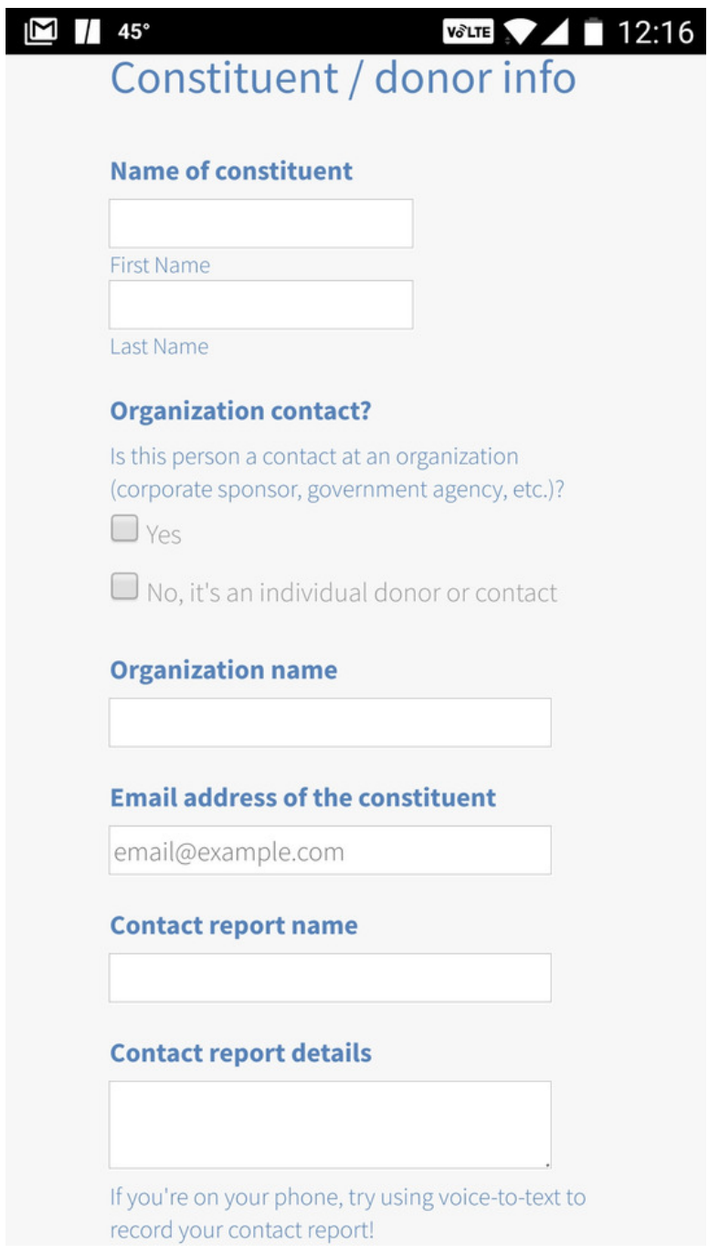
- [ ] Grassfed
- [ ] Free Range
- [ ] Certified Organic
- [ ] Certified Humane
- [ ] GMO Free

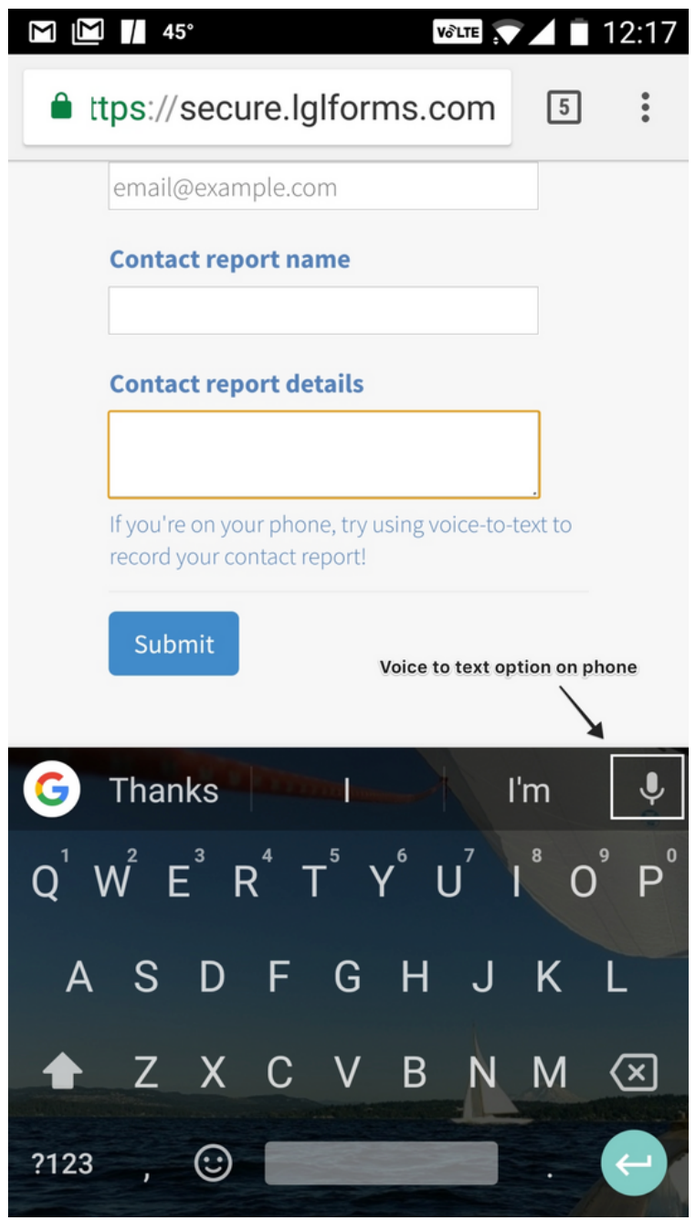
Contact management forms

You can create forms that are not open to the general public but are intended to be used only by your internal staff, volunteers, or board members.

If you use an online form service that can create mobile-friendly forms, you can create a contact form to help your team report on important meetings or calls they've had with your organization's supporters.

Here's a handy form we use that works really well on a phone screen. You can save the webpage that displays this form to the desktop of your phone (either Android or iOS).





Did you know? When you click in the text field, your phone will give you an option to speak your message instead of typing it.

Conclusion

We hope you picked up a few good ideas in this ebook about how you can use online forms that your nonprofit will love! If you'd like to learn more about Little Green Light and our online forms feature, be sure to visit us at www.littlegreenlight.com. We'd love for you to try LGL free or join us for a demo soon.

For additional free resources from Little Green Light, please visit us at:
www.littlegreenlight.com/resources-guides/