



Donation Conversion Audit Worksheet: spot what's costing you donations, step by step

A plain-language audit, with technical notes for web teams, showing where visitors drop out before giving and what to fix first.

Built for: Board members, fundraising and web teams

- ✓ Clarity & trust
- ✓ Donation form
- ✓ Mobile & speed
- ✓ Tracking & follow-up

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1

The challenge

Visitors arrive, read and even click Donate, yet most leave without giving.

2

What it covers

9 audit areas, a funnel worksheet, a scorecard and a 30-day plan.

3

How to use it

Plain checks for the board, grey notes for the web team. Fix empty "High" boxes first.

4

The result

A clear list of where donations leak, and a plan to recover them.

THE DONATION FUNNEL

Six steps from visitor to loyal donor



1 · VISITOR

Arrives from search, email or social



2 · ENGAGEMENT

Reads, watches, explores



3 · TRUST

Checks who you are



4 · DECISION

Clicks Donate, picks an amount



5 · DONATION

Pays and sees a thank-you



6 · RETENTION

Gives again or monthly

What your donation conversion rate tells you

Conversion rate is the share of visits that end in a gift. Three versions point to three different problems.

Site-wide rate

Donations ÷ all visits

GA4: donation key events ÷ sessions

Example: $180 \div 20,000 = 0.9\%$

If it's low: visitors aren't persuaded, or can't see how to give.

Donation-page rate

Donations ÷ donation-page visits

Key events ÷ sessions on the donation page

Example: $180 \div 1,200 = 15\%$

If it's low: the page loses people through doubt, delay or effort.

Form completion

Donations ÷ form starts

Key events ÷ form_start events

Example: $180 \div 300 = 60\%$

If it's low: the form or payment is too hard, or failing.

It's a traffic problem if...

- Few people ever reach the donation page
- Visitors come for jobs, definitions or unrelated topics
- Campaign clicks come from the wrong audience

It's a conversion problem if...

- Many people reach the donation page, but few give
- People start the form, then leave
- Phones bring most visits but few gifts

Rule of thumb: fix a leaking donation page before buying more traffic, or you pay twice for the same lost donors.

COMMON REASONS

Why visitors don't give

1 Not ready yet

They need a smaller first step, such as an email signup.

2 Unclear ask

They can't see what to do, or what a gift achieves.

3 Not enough trust

No registration, real people or proof of impact.

4 Too much effort

Long forms, forced accounts, missing payment methods.

5 Something breaks

Slow pages, payment errors, forms failing on phones.

6 No reason to act now

"Later" rarely becomes a gift.

HOW TO READ THE AUDIT

Tick what's true, then fix by priority

☐ A plain statement anyone can check, board members included

Grey line: the technical detail for your web or digital team

High Loses gifts now: fix this week **Medium** Reduces trust or giving: within 30 days **Low** Improvement: next quarter

1 Website clarity

Score / 5

Why it matters: visitors decide in seconds whether your cause is worth their time.

- ☐ The homepage says in one plain sentence who you help and how **High**
H1 states the mission; passes a 5-second test
- ☐ A real, dated result of your work is visible near the top **High**
Impact figure with year, linked to the impact page
- ☐ One Donate button stands out on the first screen of a phone **High**
Primary CTA above the fold at 360 px
- ☐ A real photo or short story connects visitors to a person **Medium**
Original, consented imagery; no stock hero
- ☐ People not ready to give can join your email list **Medium**
Micro-conversion: newsletter signup

How to check: Show your homepage to a friend for five seconds. Can they say what you do?

2 Buttons & journey

Score / 5

Why it matters: people give when the ask is clear and appears at the right moment.

- ☐ A Donate button is on every page, including on phones **High**
Persistent header CTA on all templates
- ☐ Buttons say what happens ("Donate now"), not "Support us" **High**
Action-specific CTA copy
- ☐ Every story and impact figure is followed by a way to give **Medium**
In-content CTAs after proof points
- ☐ Each screen has one main action, not five competing buttons **Medium**
One primary and one secondary CTA per view
- ☐ Real reasons to give now are used, never fake ones **Medium**
Match deadlines and appeals; no fake countdowns

How to check: Read your best story to the end. Is there a way to give right there?

3 Donation form

Score / 5

Why it matters: every extra field or step is a chance for a donor to give up.

- ☐ The form asks only what payment and the receipt need **High**
No phone, title or date of birth on small gifts
- ☐ Donors can give without creating an account **High**
Guest checkout; account offered after the gift
- ☐ Monthly giving is a clear choice, never ticked for the donor **High**
Explicit frequency toggle; no pre-selection
- ☐ Apple Pay, Google Pay or PayPal sit alongside cards **High**
Wallets verified on the live domain
- ☐ 3–4 suggested amounts, based on what donors really give **Medium**
Anchored on the median gift; one highlighted

How to check: Time yourself giving a small amount on your phone. Aim for under 90 seconds.

4 Trust

Score / 5

Why it matters: most hesitation is a trust question the website didn't answer.

- ☐ Your legal name and registration number are easy to find **High**
Key-facts block linked to the regulator record
- ☐ Impact numbers show a date and a source **High**
Dated, sourced metrics; method linked
- ☐ Beside the form: a secure-payment note and the processor's name **High**
Trust bar at the point of payment
- ☐ Leaders are named, with real photos **Medium**
Leadership page with short bios
- ☐ Ratings, reports and partners link to the real source **Medium**
Verifiable badges; current annual report

How to check: Can a stranger confirm you are a registered charity in under a minute?

5

Mobile giving

Score / 5

Why it matters: most visitors use phones, but many donation forms are built for desktops.

- ☐ The donation page is usable within about 3 seconds on mobile data **High**
Mid-range Android with 4G throttling
- ☐ The Donate button is visible without opening the menu **High**
CTA outside the hamburger menu
- ☐ Fields are large, and amounts open a number keyboard **High**
inputmode="decimal", autocomplete, one column
- ☐ No pop-up, chat bubble or cookie banner covers the form **Medium**
Pop-ups and chat suppressed on donation URLs
- ☐ Giving works inside Facebook's and Instagram's own browsers **Medium**
In-app browser test, incl. wallets and 3D Secure

How to check: Tap a link to your donation page from Instagram and make a real small gift.

6

Speed & technical

Score / 5

Why it matters: technical faults lose gifts silently; nobody reports a form that didn't load.

- ☐ The donation form loads for everyone, even with ad blockers **High**
Embeds tested with blockers and consent tools
- ☐ Failed payments are reviewed every week **High**
Processor logs, decline codes, fraud rules
- ☐ The donation page is never stored in a cache **High**
Excluded from page and CDN caching
- ☐ Google PageSpeed Insights shows "good" results on mobile **Medium**
LCP ≤ 2.5 s, INP ≤ 200 ms, CLS ≤ 0.1
- ☐ A real gift works in Chrome, Safari, Firefox and Samsung Internet **Medium**
Cross-browser payment test

How to check: Open your payment dashboard. How many payments failed last month, and why?

7

SEO & traffic quality

Score / 5

Why it matters: more visitors only mean more gifts when they come ready to give.

- ☐ Your donation page shows in Google for "donate to [your cause]" **Medium**
Indexable page; donor-intent title and FAQ
- ☐ Your most-visited articles link to programs and giving **Medium**
CTAs on top organic landing pages
- ☐ Searching "[your name] legit" shows your own clear pages **Medium**
Brand trust queries: About, financials, FAQ
- ☐ Campaign pages keep the same web address every year **Low**
Evergreen campaign URLs keep their links
- ☐ Google Business Profile is correct and links to the donation page **Low**
NAP consistency; profile website link

How to check: In Google Search Console, which searches bring people to your donation page?

8

Analytics & tracking

Score / 5

Why it matters: you can't fix a leak you can't see.

- ☐ Each gift is recorded once, with its amount and source **High**
GA4 key event: transaction ID, value, currency
- ☐ You can see where people leave between arriving and giving **Medium**
GA4 funnel exploration; form_start events
- ☐ Email and social links are tagged, so campaigns can be compared **Medium**
One UTM naming convention
- ☐ Analytics figures are checked against payments every month **Medium**
GA4, processor and CRM reconciled
- ☐ Session recordings show how people use the form, with data hidden **Low**
Clarity or Hotjar with all inputs masked

How to check: Make a test gift. Does it appear once, with the right source, in analytics?

9 Follow-up & retention Score / 5

Why it matters: the first gift should start a relationship, not end a transaction.

- ☐ A thank-you email with receipt arrives within a minute, not in spam High
Transactional sender; SPF, DKIM, DMARC
- ☐ The thank-you is warm and signed by a real person High
Thank-you page with one next step
- ☐ New donors hear about impact before the next request High
2-3 email welcome series
- ☐ One-time donors are invited to give monthly Medium
Monthly upgrade journey
- ☐ You know how many first-time donors give again Medium
First-year retention tracked in the CRM

How to check: Give a small gift yourself. How long until you hear something that isn't an ask?

+ Button words that raise more

Why it matters: clear words, concrete impact and real urgency remove hesitation.

WEAK

STRONG

Support us → Donate now

Learn more → Give \$35 for a school kit

Submit → Donate \$50 monthly

Click here → Become a monthly supporter

Help → Give today: gifts matched until Friday

Tip: make the final button show the amount and frequency, such as "Donate \$50 monthly".

WORKSHEET

Find your biggest drop-off

Fill in last month's numbers. Divide each stage by the one above to get the share who continue.

STAGE	LAST MONTH	CONTINUE RATE
1. Visitors How many arrive, and from where? GA4 › Acquisition › Traffic acquisition (sessions)		Starting point
2. Donation-page visits How many continue to the donation page? GA4 › Pages and screens, filtered to /donate		%
3. Form starts How many begin the form? form_start event (GTM or the platform's analytics)		%
4. Completed gifts What stops people finishing? Donation key event, checked against the processor		%
Biggest drop is between stages		
Biggest drop at 1 → 2: look at areas 1, 2 and 4. At 2 → 3: areas 4, 5 and 6. At 3 → 4: areas 3, 5 and 6. Split every stage by phone and desktop if you can.		

Your donation conversion scorecard

Copy each area's score (ticked boxes out of 5), set the priority, and write one concrete action.

CATEGORY	SCORE / 5	PRIORITY	ACTION REQUIRED
Website clarity Area 1	☐	☐	
User experience Area 2	☐	☐	
Donation page Area 3	☐	☐	
Trust Area 4	☐	☐	
Mobile experience Area 5	☐	☐	
Speed Area 6	☐	☐	
SEO Area 7	☐	☐	
Analytics Area 8	☐	☐	
Follow-up Area 9	☐	☐	

Your total

Add up the nine scores.

/ 45

Priority from score: 0–2 High, 3 Medium, 4–5 Low.

38–45

Converting well

Keep testing amounts, monthly wording and impact examples.

27–37

Leaking donations

Fix every High-priority gap within 30 days.

0–26

Major leaks

Fix the form, mobile giving and tracking before spending on traffic.

30-day donation conversion plan

WEEK 1

Find the problems

- ☐ Record today's numbers (table below)
- ☐ Check tracking with a real test gift
- ☐ Fill in the funnel worksheet
- ☐ Give on a phone; note every problem

WEEK 2

Fix the donation experience

- ☐ Cut the form to essential fields; allow guest giving
- ☐ Add Apple Pay and Google Pay
- ☐ Set amounts from your median gift; add monthly
- ☐ Show Donate everywhere; speed up the page

WEEK 3

Strengthen trust & content

- ☐ Add a trust bar beside the form
- ☐ Add a short story and impact examples
- ☐ Rewrite the homepage first screen
- ☐ Fix the thank-you email; start a welcome series

WEEK 4

Measure and improve

- ☐ Compare numbers with week 1
- ☐ Re-score this worksheet
- ☐ Choose one test for next month
- ☐ Report results to leadership

Track these five numbers

KPI AND HOW TO CALCULATE IT

DAY 1

DAY 30

Donation conversion rate

Gifts ÷ donation-page visits

GA4 key events ÷ donation-page sessions

Form completion rate

Gifts ÷ form starts

Key events ÷ form_start events

Average donation value

One-time revenue ÷ one-time gifts

Processor or CRM, excluding recurring

Monthly donors

New recurring donors in the period

Donation platform or CRM subscriptions

Donation abandonment rate

(Form starts - gifts) ÷ form starts

GA4 funnel exploration

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