
Fundraising Essentials Workbook: Campaign Planning



Campaign Planning

What is campaign planning, and why is it important?



This workbook is your guide to planning and executing a successful fundraising campaign. If you're new to fundraising, this workbook will simplify the process and make it more approachable.

In this workbook, the campaign planning process is broken down into easy-to-follow steps, ultimately giving you more time during the campaign to focus on celebrating milestones, making adjustments, and having fun.

Let's get started!

Organization Name: _____



Step 1: Campaign Overview

Let's start by looking at some of the key details that you will use to build your campaign.

CAMPAIGN NAME & PURPOSE

- What is the purpose of this fundraising campaign?

MISSION ALIGNMENT

- How does this campaign help you fulfill your organization's mission?

TIMELINE

- When will your campaign launch and conclude? Are there any other major milestones?

Step 2: Goal Setting



Next, let's look at your campaign goals and measurements of success.

FUNDRAISING GOALS (\$ RAISED)

- What are your campaign's fundraising goals for money raised?

MEASUREMENTS OF SUCCESS

- Besides money raised, how else will you measure the success of your campaign?

Step 3: Supporters & Messaging



Next step is to identify your primary supporter groups for the campaign and your main messaging.

SUPPORTERS

- Who are the key people or groups you want involved in this campaign, and how can they be part of it?

MESSAGING

- What is the key message you want to communicate?
 - What people need to know.
 - What you want them to feel.
 - What you want them to do.

STEWARDSHIP

- How are you going to thank the people and organizations who support your campaign, and what will the message(s) be?

After the campaign concludes, you will want to look at what you learned while it is fresh in your mind.

LEARNING

- Take notes on what you learned during the campaign while it is fresh in your mind:
 - What worked and what didn't?
 - What would you do differently for the next campaign?
 - What did we learn about our supporters and community?

Friendly Fundraisers

Harvesting Philanthropy with Fundraising Essentials



www.friendlyfundraisersconsulting.com