

Fundraising Campaign Planning Worksheet

Workshop: How to Build a Fundraising Campaign

Instructions: Use this worksheet to brainstorm and outline key steps in planning a successful fundraising campaign. Consider each section carefully and jot down your initial thoughts.

1. Define Your Campaign Purpose & Goals

- What is the specific purpose of your campaign?
- What is your fundraising goal (financial target)?
- What impact will these funds have on your organization or community?

Notes: _____

2. Identify Your Target Audience

- Who are your potential donors (individuals, businesses, foundations, etc.)?
- What motivates them to give?
- How will you reach them?

Notes: _____

3. Develop Your Fundraising Strategy

- What methods will you use (e.g., online giving, peer-to-peer fundraising, events, grants)?
- Will you offer donor incentives or recognition?
- What partnerships could help amplify your campaign?
- Identify and assign tasks (who will do what) - if working with a team.

Notes: _____

4. Craft Your Messaging & Storytelling

- Name your Campaign – Something that uniquely and immediately identifies your cause.
- What compelling story will you share to inspire donations?
- How will you communicate urgency and impact?
- What channels will you use (social media, email, website, print, etc.)?

Notes: _____

5. Set a Campaign Timeline & Milestones

- What is your campaign's start and end date?
- What key milestones will you track (e.g., 25% funded, halfway mark, last push)?
- How often will you update supporters on progress?

Notes: _____

6. Establish Your Budget & Resources

- What are the estimated costs of running the campaign (marketing, staff time, materials, event expenses, etc.)?
- What resources do you already have, and what do you need to secure?
- Will you need volunteers or ambassadors to help spread the word?

Notes: _____

7. Plan for Donor Stewardship & Follow-Up

- How will you thank and recognize donors?
- What follow-up communications will you send after the campaign?
- How will you keep donors engaged for future giving opportunities?
- Include the impact that the donor's contribution had on your mission/success.

Notes: _____

8. Evaluate & Reflect on Success

- What metrics will you use to measure success (funds raised, donor engagement, new donors, etc.)?
- What lessons will you take into future campaigns?
- How will you celebrate and acknowledge the campaign's achievements?

Notes: _____

Next Steps: Based on your responses, list three key action items you can take immediately to begin planning your fundraising campaign.

1. _____
2. _____
3. _____

Final Thought: What excites you most about launching this campaign?
