

CAMPAIGN PLAN AND PROJECT STRATEGY TEMPLATE

1. Executive summary

Provide a clear and brief overview of the document and a summary of the main points.

2. Introduction

- Scope – describe the project and the scope of the plan, e.g. ‘This is a five year plan for the major donor fundraising program in ABC charity. It does not consider other potential income sources (e.g. government, trusts & foundations, bequests, regular appeals).’
- Assumptions – describe any important assumptions, e.g. ‘It is assumed that the database contains enough quality data to allow wealth screening to be completed.’
- Constraints and challenges - this should describe the major issues which may impact on the success of the activity, e.g. ‘The appointment of a Manager, Major Donors will need to be made and there may be delays in finding a suitably qualified candidate given this is a scarce resource.’

3. Situation analysis

- SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)
- Market profile/audience
- Potential partners/allies and competitors
- Environment (Political, Economic, Social/Cultural, Technological).

4. Objectives

- Describe the goals of the campaign/project (Use SMART objectives, i.e. specific, measurable, achievable, realistic and with specific deadlines).

5. Strategies

- Outline the broad approaches you are going to take in order to achieve the campaign objectives, e.g. ‘Cultivate potential major donors by leveraging the existing relationships of staff and volunteers’.

6. Tactics

- The specific activities to be undertaken to achieve the campaign objectives as linked to defined strategies, e.g. ‘Major Donor Manager to complete tender process and commission wealth screening of the donor database by May 2013.’

7. Implementation

- Include an outline of the campaign timeframe and responsibilities.

8. Control and evaluation

- Performance measures
- Control/monitoring
- Reviewing.

9. Risks and contingency plans

10. Budget

ATTACHMENTS (e.g. Tactical Plan, Communication Plan, etc)