Start Here! Quick-Hit Recommendations to Plan a Successful Fundraising Campaign

Campaign planning is like any other type of planning. The process takes focus and diligence, but if you have planned other multi-week or -month projects before, then you can plan a fundraising campaign.

Here are some quick-hit suggestions to improve your fundraising planning for both the short and longer term. **Let's go!**

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1. Components of a Fundraising Plan

A fundraising plan is a written document that gives shape to a time-bound, thematically unified plan to raise a certain amount of money in a certain time from certain sources. It is meant to put structure around the tasks you will piece together in an orderly, sequential fashion. **Your fundraising plan is at its core a project plan.**

Your fundraising plan is made up of several components.

- Goals
- Messaging
- Channels
- Roles and Responsibilities
- Dates

The work of fundraising, especially digital fundraising, is part science and part art. Your fundraising messages, whether they are sent via email, social media, postal mail or delivered by a speaker, should convey the vision and mission of your organization. You will know that behind the scenes, each word and image was chosen specifically to maximize the possibility that a potential donor will be motivated to donate.

How do we maximize that possibility? By looking at the data.

2. Data Review

If we don't know where we've been, then we won't know where we're going. Before you start writing a fundraising plan, take a moment to review data from past fundraising campaigns. You should familiarize yourself with what you tried and how it performed. Take note of any messaging or tactics that performed above or below expectations. Discuss with others at the organization why these specific attempts may have succeeded or failed, and brainstorm ideas for the next campaign.

Use this data to help you set goals for the next campaign. A good idea is to try to do a little bit better with every new campaign. Until you accumulate a good deal of data and have an idea of how your donors perform, try increasing your goal by 10% for next time.

What goals should we set?

3. Goals

Goals are important because they give us something to strive for and a way to measure our progress. In a metrics-driven activity like fundraising, goals are easy to define in a measurable way. **Some goals you can define and work toward improving are:**

- Total amount raised
- Number of one-time donations
- Number of recurring donations
- Open rate for emails
- Click-through rate for emails
- Conversion rate for emails
- Engagement rate for social media posts (likes, shares)

Goals should be SMART: Specific, Measurable, Achievable, Realistic, and Time-Bound. When starting out, **we encourage you to especially focus on Realistic**. Achieving a goal, however modest, conveys a good feeling and builds momentum for the next campaign.

The best way to figure out what goals are Realistic is to look at benchmarks. Benchmarks are standards against which we can measure ourselves. **The best benchmarks are your own.** Until you build enough history to have benchmarks, you can use industry benchmarks. The Luminate Benchmark Report from Blackbaud and the M+R Benchmark Report are good nonprofit benchmarking resources.

What helps us improve in motivating donors to give? It's all about the messaging.

4. Messaging

Donors want to solve problems. Your organization exists to address certain problems in the world. When choosing messaging for your fundraising campaign plan, make sure you choose **a message that is relevant, timely and compelling that is at the core of your mission**. Your written description of that message should relate to the problem to be solved, the people who are helped, or the progress that is made.

When defining the messaging for your campaign, it may help to think about it like this:

- What is the problem we are trying to solve?
- Who is affected by this problem?
- Why is it important?
- How does our organization help solve this problem?
- Why is it important that we raise this money now? Is there a deadline?
- What are some success stories we can share?
- What are some key phrases we want to use when talking about this problem?
- Can we summarize the problem and the solution with a tagline?
- What is the value of a donation? Will $50 pay for one scholarship?

An often-overlooked piece of fundraising campaigns is reporting results back to donors along with a thank you. You should build into your messaging an email to donors to let them know that as a result of the campaign what your organization will be able to accomplish. And **say thank you!**

Once we have our messaging planned out, how do we get it in front of people? That's where channels come in.

5. Channels

Channels refers to methods you use to get the message out about your fundraising campaign and contact donors and prospects. Channels include:

- Email
- Direct mail/US mail
- Phone
- Text message
- Social media
- Advertising, both print and digital
- Press/media
- Peer-to-peer
- Face to face fundraising (aka canvassing)
- Partnerships
- Events (galas, cocktail parties, webinars)

When writing a fundraising campaign plan, you should define the role each channel will play in the campaign. Take special note of what each channel is good at - whether it's a visual medium, a written message, or the voice of another person or organization who can validate what your organization is doing. Tailor the message to allow each channel to promote what it is good at, but make sure each channel you use reflects the messaging of the overall fundraising campaign plan.

With so many channels in play, this sounds like a lot to do. How do we make sure it's on track?

6. Roles and Responsibilities

With so many channels in play, it's important to define who is driving each section of the plan. Co-chair means no chair - specific people should own specific tasks. When many people play a part in the fundraising campaign, being very clear about who owns which piece is crucial. A RACI chart for each piece of the plan can be helpful:

> **R - Responsible.** This person gets the task done.
> **A - Accountable.** This person makes sure the task gets done, delegates responsibilities, and signs off on the message.
> **C - Consulted.** This person or people provide input and feedback.
> **I - Informed.** This person or people are told what is happening, but not every detail of the process.

Now we know who is doing what. But what if something unexpected happens?

7. Contingencies

The news cycle is fast and furious these days, and a maxim of fundraising is that you **should capitalize on opportunities when they are in the news cycle**. This might mean that you've planned out a fundraising campaign that focuses on one key issue, but another issue takes front and center in the news. It's heartbreaking to think of losing a lot of work that's gone into creating the perfect message - but it's also important to be relevant. For that reason, you should build into your plan a contingency. How will you pivot if another issue gains traction? What will you do if the message you've worked on doesn't generate results? If you've thought about these questions ahead of time, you'll be better prepared if something does crop up.

Now how do we put it all together?

8. Calendar

Once you've thought through all of these components, you should place the pieces of your plan into a calendar. A basic calendar will list the days you plan to send your email messages and social posts. As you build upon your successes, you will be able to build in more channels and test combinations of messages, channels and timing to improve results and achieve your goals.

We are big fans of a shared Google calendar as a way for multiple people to have access to the same calendar and update it in real time. You may also choose to eventually use a project planning tool with a built-in calendar function that allows you to cross tasks off your list. **Which tool you use matters less than your commitment to using it.**

Conclusion

Fundraising campaigns raise more money when they are planned out and managed according to the plan. What seems simple and seamless from the outside can be complex behind the scenes. It's hard to keep track of a complex process with multiple dependencies and decision points in your head. Planning is not simply an administrative task, either: writing down the specific steps of your fundraising campaign can lead to creative bursts and new ideas. Getting ideas down on paper relieves your brain of the need to remember them, and having a written plan helps your staff organize the tasks and time. Investing time in planning your fundraising campaign will make sure it gets done - and will make it better. **You've got this!**

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