



# STEP-BY-STEP GUIDE TO **FUNDRAISING CAMPAIGNS**

Raise more money with a targeted,  
planned campaign that wows donors

# What's Inside this Guide

If you Google "campaign" you'll get many results and definitions. But here's the definition we are using in this resource:

A campaign is a series of operations undertaken to achieve a set goal(s), and it operates within a particular time period with defined start and end dates.

Essentially: It's a set of actions you need people (yourself and your team in addition to the audience you reaching out to) to take in order to reach a goal or goals.

In this guide, we are focusing on how to create a fundraising campaign. We'll cover the steps you need to complete in the planning phase and the assets you need to create in order to bring your campaign to life.

Inside you'll find tips to help you write your fundraising appeal, create a great donation page, and make sure your donors feel thanked for their support while setting stage for long-term donor retention.

*Throughout this guide we will give a few examples of how a factious nonprofit, Paws for the Cause, could plan a fundraising campaign to boost monthly giving.*

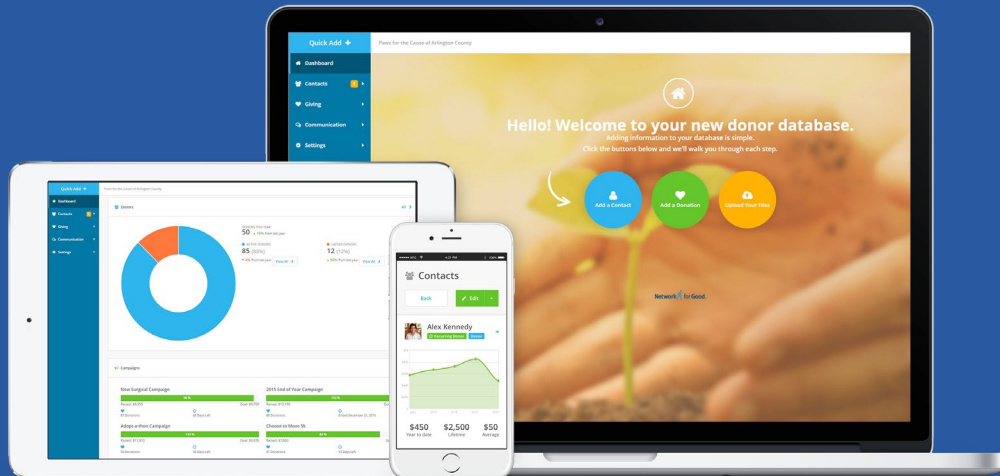
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Network for Good combines fundraising expertise with simple-to-use technology to provide [smarter fundraising software](#), tools, and coaching that are easy to use and raise more money. Since 2001, we've processed over \$1.4 billion in online donations for more than 125,000 nonprofits. We're here to help you connect with donors and create more successful fundraising campaigns.

# READY TO PUT THESE TIPS IN ACTION?



We love small nonprofits. We also believe small organizations deserve great technology, too. We're helping 6,000 emerging nonprofits create more successful fundraising campaigns, and we want to help you, too.

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**DONATION PAGES**



**DONOR MANAGEMENT**



**PEER-TO-PEER**

Our suite of tools includes everything you need to grow results, not expenses. Schedule a time to talk with a fundraising consultant today!

**SCHEDULE A DEMO NOW**

# Set a Clear Target

Is your fundraising campaign focused on getting results?

It may sound like a silly question but many organizations don't approach fundraising campaigns with clear, concrete goals. And without clearly-defined goals, it's pretty tough to know if you're actually succeeding.

Setting a fundraising goal helps to ensure that you and your colleagues are on the same page with the desired results of a fundraising campaign. Keeping track of where you are in terms of meeting your goal can give you the information you need to adjust your fundraising strategy or improve your outreach.

Now is the time to define what results you and your organization want to achieve. Keep these key pointers in mind:

**Set a specific goal for your fundraising campaign.**

Know whether your overall goal is to add a specific number of new donors or to reach a certain donation level. Have a clear and measurable end result in mind. Decide how you will define success, such as "Raise \$20,000" or "Add 200 new members."

**Check that your goals pass the SMART test.**

Your goals should be specific, measurable, achievable, realistic, and time-bound. If you can get super specific about the program that needs funding or initiative that will benefit from this campaign, even better. In addition to helping you set a focused goal, this will help when you think about writing your appeal.

**Segmentation is the key to engagement.**

Some audiences are likely more important than others within the context of your campaign. Do you need your current supporters to mobilize and become fundraisers for you? Do you need to reengage with lapsed donors? Do you need to connect with major donors? Think about your goals and who holds the key to your success. Segment your lists appropriately before you start sending emails and planning other outreach efforts.

If you're having trouble clearly defining your goal, ask yourself these four questions:

- What are you trying to accomplish? Picture what your ideal end result will be.
- Who are you trying to reach? Decide on your key audiences before planning your campaign.
- What do I want them to do? Have a clear call to action for your supporters. Will they be asked to donate a specific amount or pledge a recurring gift? Make sure this is baked into your planning and communications.
- What is the best way to reach my audience? Once you've identified your audience and calls to action, think about the best way to reach and activate your supporters.

What type of campaign will help you hit your goals?

Based on your goals and donor segments, would a specific type of fundraising campaign help you raise more or bring in more donors? Or perhaps a combination of campaign types will help you achieve your fundraising target:

- **If your goal is to bring in new donors:** try a peer-to-peer fundraising campaign.

*If you want a specific road map for a [peer-to-peer campaign](#), download [our eGuide](#) on peer fundraising after you review this resource.*

- **If your goal is to grow your recurring giving program or bring in more dollars on a consistent cadence:** focus on a monthly giving campaign. Be sure that your donor management system can properly segment your list so you don't reach out to current monthly donors.
- **If your goal is to reengage donors who didn't give last year:** a campaign reaching out to lapsed donors is your best bet. Although nonprofits track donors and the timing of their gifts, many lapsed donors don't realize they have "lapsed" so be careful on the language you use in your appeal (don't give these donors a guilt trip).

## Budget

As ideas emerge and evolve, you will need to establish a budget for your campaign. If you already have funds for a campaign written into your budget, great! But, realistically, do you need more resources to create the kind of campaign you have in mind? Are those funds available? Can your board members, gift-in-kind donations, an individual donor or corporate sponsor help close the gap?

### Here's the target for our campaign for the fictional nonprofit, Paws for the Cause:

- Increase our monthly giving program by 30% by the end of Q2 so we can continue to grow our foster program.
- The best audience for a monthly giving ask would be donors who have given at least two donations to Paws for the Cause but have yet to upgrade to a monthly gift. Furthermore, we will also include website visitors who might be looking for a giving opportunity in our audience.
- We want these potential monthly donors to commit to a monthly giving cadence. We will segment our list and determine our specific dollar amount ask depending on their giving history.
- The best way to reach our audience will be a combination of online and offline communications.
- Budget: \$3,000

# Plan Your Campaign Activities

Now that you have defined the audience(s) you want to touch and the actions you want them to take, how will you reach them and spur action?

## Choose Activities that Reach Your Audience

In the goal setting step, we decided Paws for the Cause should focus on recruiting monthly donors in order to raise more money for the foster dog program. The primary audience we want to reach are potential monthly donors we identified in our donor database as well as website visitors. Here are those ideas translated into activities and the method of delivery (channel):

Audience	Activity	Channel
Potential monthly donors who give offline	appeal	direct mail
Potential monthly donors who give online	appeal	email
Potential monthly donors	online ad	Facebook
Potential monthly donors	phone calling campaign	phone-a-thon
Potential monthly donors	online ad	monthly newsletter
Website visitors	online ad	lightbox on our website

Your campaign activities and channels will vary depending on the audience(s) you want to reach and the budget you set:

- If your goal is to bring in new donors or build your email list, you should consider planning or participating in a community event to boost your presence.
- If your campaign is focused on bringing in new major donors, face-to-face meetings with prospects is a must.
- If you hope to reactivate lapsed donors, you'll want to use all your resources to reach that specific segment of your database.
- What other campaign activities could you include in your plan? Take a look at the campaign assets listed on the next page to get more ideas on ways you can reach specific audiences.

# Build Campaign Assets and Set Deadlines

Here's a general list of assets you might need to in order to get your campaign launched. Your audience needs to hear your message more than once before they will respond to your call to action. This surround sound method may seem like it's too much, but the more your audience hears your message, the more likely they are to respond.

All fundraising campaigns have different goals, audiences and channels. You won't need to create every asset on this list. Only use the assets that will help you reach your intended audience with the right message. Don't waste time on creating assets that won't get you closer to your goal.

- **Your appeal.** Appeals can be sent via email or direct mail. Once you have your appeal drafted for the right channel(s), this is the base material for all your other campaign assets. With direct mail appeals, it's common to send a reply device so donors can easily send a gift. Don't forget to include a way for donors to respond to your appeal.
- **Photos.** Images of faces are best. You will use these images to compliment your other assets. Choose photos that enhance the story you are telling your donors.
- **A tagline.** Taglines are not a must, but, if you plan on doing this campaign year after year, a tagline is a nice reminder/alert to donors.
- **A short campaign video.** If you have the capacity, a short, well-done fundraising campaign video has the potential to bring your campaign to life.
- **A branded donation page.** This is where donors will land when they click on the donate button on any of your online campaign messages.
- **Social media updates.** If you decide to use social as one of your campaign channels, have a series of posts ready to go for each social channel you plan on using. Don't forget to include a link to your donation page in every update.



- **Facebook Ads.** Because of Facebook's custom audience feature, you can upload a list of you donors' email addresses and serve an ad to that audience only. This is an extremely targeted (and cost effective) way to reinforce your campaign message.
- **A press release.** Only write and distribute a press release if there is a newsworthy element to your campaign.
- **Talking points.** Share these talking points with your staff and board so they know the details of the campaign and can answer questions from donors.
- **Call scripts for a a phone-a-thon.** Volunteers will feel more comfortable calling donors if they have a script to speak from. The script doesn't need to be long but should include an introduction from the volunteer, your campaign's story, and a strong call to action. Board member or staff make great phone-a-thon volunteers.
- **Website updates.** Adding a lightbox or a banner to your website's homepage will drive more people to your donation page. Depending on the format of your campaign, it can be worthwhile to create a "home base" for your campaign on your website. This webpage includes your appeal, your campaign video, a link to your donation page, and any updates that need to be shared.
- **Newsletter blurbs.** How can you leverage existing communication channels to promote your campaign? During your campaign, use your weekly or monthly newsletter as a vehicle to drive donors to your donation page.
- **Your donor thank you (which is separate from the donation receipt).** Have this thank you ready to go before your campaign launches. As gifts come in, be prompt (2-5 days) in sending these out via email to online donors and snail mail for gifts that come in from your direct mail appeal.
- **Peer-to-peer fundraising toolkit.** If your campaign contains a peer-to-peer element, you'll need to create assets to reach out to potential fundraisers. You should also help our fundraisers create compelling stories to share with their social networks. For more on peer-to-peer fundraising, [download our eGuide](#).

## Set Deadlines

To keep you and your team on track, attach deadlines to each task associated with campaign assets and assign an owner. Check out the sample deadlines for the Paws for the Cause monthly giving campaign:

<b>Paws for the Cause Monthly Giving Campaign Deadlines</b>		
Campaign asset	Task	Deadline
Direct mail appeal	decide on story/message for appeal	April 3
	draft appeal + choose visuals	April 5
	edit appeal	April 10
	format /design (don't forget reply device)	April 12
	segment donor list	April 17
	print + package	April 20
	drop date	April 28
Email appeal	draft email appeal using direct mail appeal as base content	April 12
	edit appeal	April 24
	format/design + build donation page to match	May 1
	send	May 8
Donation page	create donation page using images/ language from email appeal	April 10
	Edit follow up/ auto receipt to fit campaign message	April 12
	test donation page + launch	April 20
Direct Mail Thank You	draft thank you	April 11
	edit thank you	April 15
	format/design	April 20
	print + package	as gifts come in
Email Thank You	draft thank you using direct mail thank you as base material	April 18
	edit thank you	April 25
	format/design	April 27
	send	weekly after online donations come in

Facebook ad	create visuals/ text for Facebook Ads	April 26
	edit/proof	May 1
	build ads in Facebook	May 3
	Upload custom audience list	May 6
	schedule and launch	May 8
Talking points	draft talking points on campaign details for staff and board	April 12
	share for feedback	April 14
	update and create final draft	April 18
	distribute	April 20
Phone-a-thon	recruit volunteers	Apri
	draft script	May 15
	test script	May 22
	make edits + segment list	May 29
	phone-a-thon takes place	June 1-16
Monthly newsletter(s)	place campaign details in newsletter	May/June newsletter deadlines
Website updates	create lightbox/banner announcing campaign	April 10
	launch lighbox/banner on website	April 28

As you start setting deadlines and tasks you might discover a need for special tools to create and manage your campaign. Here are some suggestions for a few web-based tools that are either free or low cost:

#### **Project management tools:**

[Basecamp](#)  
[Gantt chart](#)  
[Trello](#)

#### **Asset creation tools:**

[Canva](#)  
[PicMonkey](#)  
[Headline Analyzer](#)  
[Subject Line Checker](#)  
[Hemingway](#)

#### **Fundraising tools from Network for Good:**

[Donation Pages](#)  
[Donor Management](#) (built in email marketing, text messaging and direct mail tools)  
[Peer-to-Peer Fundraising](#)

**Now that you have your campaign plan in place, start creating your core campaign assets: your appeal, your donation page, and your thank you message.**

# Craft a Strong Appeal

Your appeal will be the base material and over arching message that you will leverage in all your other campaign assets.

## Appeal Writing Best Practices

An effective appeal is equal parts emotion and urgency. You want to pull people into your message with a compelling story, and then push them to act with a specific, clear, and urgent call to action. Here are some things to keep in mind as you craft your year-end ask:

**Show how donations will be used.** If your audience has given before, tell them all the great things they've done, and all the wonderful things that more support will bring.

**Be specific.** Don't assume your donors know what you want them to do. Ask for one concrete action. Asking people to click on a button to donate now is better than asking them to support your campaign. Specific actions are easier to do and harder to decline.

**Keep it simple.** Don't be long winded or beat around the bush. Make an incredibly compelling yet concise case for why people should give.

**It's not all about you.** Instead of talking only about how great \*you\* are, share amazing stories about your donors, volunteers, and beneficiaries. Inspire your supporters to want to be a part of the action.

**Share a photo.** One powerful photo can go a long way in stirring emotion. Pick a clear photo of one person or animal looking straight at the camera.

**Make it personal.** People give more when they feel they're helping another person to whom they can relate. Don't talk about the masses who need help. Focus on one person's story.

## Answer These Key Questions

Along with a compelling story, it's critical that you take the guesswork out of giving for your donors. That begins with understanding the questions your donors are asking themselves before they give.

### **"Why me?"**

Your donors need to know why your cause is relevant to them and why they should care. They need to connect with you on a human level. Use pictures, tell stories, and do anything that can help your audience relate to your organization and its mission.

### **"Why now?"**

Is there urgency in your appeal? Create a sense of immediacy. Explain why a donation is needed right now. Is there a matching gift? Are you up against a seasonal deadline?

### **"What for?"**

Describe what their gift can accomplish and the impact it will have. Share how other donors have helped individuals in need. Important: Avoid talking about massive numbers, mind-numbing statistics, or intangible outcomes. This makes it harder for donors to relate to your cause!

### **"Who says?"**

People are increasingly skeptical and will trust what their friends, family, and even acquaintances say over all of your marketing efforts. Ask existing supporters to share why they give to you and what it means to them. Use these testimonials in your outreach. Also consider who signs your appeal. It may be more effective for your message to come from a volunteer, beneficiary, or a front-line staff member instead of your executive director.

## A Few Words on Framing Restricted vs. Unrestricted Gifts

If you're not raising money for a specific project or fund (restricted giving), it can be tricky for fundraisers to grapple with writing appeal for unrestricted giving. How can we tell an individual's story and connect our donors to that individual while still raising money for a larger cause?

This isn't easy, but organizations must work hard to transform their fundraising model to meet donors' emotional needs.

- Tell stories that exemplify the work of your organization, without using statistics.
- Incorporate these stories into your campaign assets.
- Be clear that these stories are emblematic of your work, but don't create the impression that a donor's contribution is specifically earmarked for an individual (unless it is).



- For more tips on how to write a fundraising appeal, check out our [eGuide: How to Write Amazing Fundraising Appeals](#).
- Want some examples of stellar appeals? Check out these [twelve appeals](#) from nonprofits big and small.

# Make it Easy to Give

Your donation page is where your donors complete their online gift. Don't put roadblocks in a donor's way by creating a confusing or complex donation experience.

There are three basic requirements any online donation experience should satisfy:

## 1. It should make giving easy.

This can't be stressed enough, so we'll say it again and again: Don't make your donors think too hard about giving to your organization. This includes enabling your supporters to quickly interact via mobile and social: can your donors easily give and share on the go?

## 2. It should keep donors in the moment of giving.

When a prospective donor lands on your donation page, each component should reinforce their decision to give while making it quick and easy to complete their donation. This means it should closely match your nonprofit's branding, campaign materials, and message. Make your donation page an extension of the conversation you're having with your potential donors so there's no disconnect.

## 3. It should help start your donor relationship off right.

Donor retention really begins before a donation is made. If it's confusing, difficult, or frustrating to give to your cause, you're not starting your donor's experience with your organization on a positive note. Your donation page should also help you quickly thank donors with a powerful post-donation experience and email acknowledgement, plus give you the information you need to cultivate these supporters over time.

## Optimizing Your Donation Page

To make the most of your fundraising campaign efforts, you absolutely must have an easy, intuitive way for donors to give online.

E-commerce or shopping cart-style experiences aren't optimized for charitable giving, so to raise more money online, you need a donation page that allows donors to give quickly and offers essential tools for fundraisers, like the ability to track gifts and send thank you messages.

Think of it this way: You're going to be putting a lot of time, effort, and money into communicating to potential donors. Don't lose them in the final stretch to a confusing or inefficient donation experience.

### Your online donation page should:

- Be as short as possible. Ideally your form should be one page and include a minimum number of fields.
- Be branded to match your campaign. Your page will perform better if it carries your nonprofit's design; worse if it does not.
- Have one clear call to action: Donate!
- Be concise. If you have copy on why to give/where the money goes, keep it very short.
- Be easy to read. Go easy on the eyes and avoid offbeat fonts, clashing colors or unconventional design choices.
- Offer well-positioned recurring gifts (especially if your focus for this campaign is boosting monthly giving).
- Be easy to share. Empower your supporters to easily tell someone else about your organization after they donate.

Looking for a tool to help you build a great donation page?  
Talk to one of our reps!

**SCHEDULE A DEMO NOW**



# Focus on the Follow Up

According to the Association of Fundraising Professionals' [Fundraising Effectiveness Survey Report](#), 103% of donors gained by nonprofits were offset by lapsed donors.

Let that sink in for a minute: for every 100 new donors that came through the door, 103 walked out.

Not exactly the growth most nonprofits are looking for.

Now is your opportunity to begin turning year-end donors into your long-term partners in good. To do so, you need a solid plan to welcome these donors, keep them informed, and build relationships with them throughout the year. The first step is to keep the magic alive with a well-planned donor gratitude strategy. Here are some things to keep in mind:

**Thank your donors as soon as possible.** Ideally, your online donors have already received an automatic thank you and receipt, and offline donors are receiving their thank yous in the mail shortly. Thanking donors promptly is not just common courtesy, it's positive reinforcement of their decision to support your campaign and trust your organization.

**One thank you is not enough.** One great thank you is a good start, but don't forgo regularly thanking donors to keep them up to date on the impact of their gifts. Don't leave donors wondering, "Whatever happened to that person/animal/cause in need?"

**Make sure your thank you is sincere and memorable.** You may have a template for your donor thank yous, but if your thank you feels like a form letter, or doesn't tie in to your campaign theme, it needs more work. Express authentic gratitude for your donors' generosity and put them in the middle of the work you do. Use photos, quotes, and even video to help bring these stories to life for your supporters. Give donors a thank you so amazing that they can't wait to show it off to their friends and family.

## Beyond the Thank You Letter

Crafting an amazing donor acknowledgement to thank a donor for their support of your fundraising campaign is critical, but it's just the beginning. Consider how you will build the relationship with your supporters for years to come.

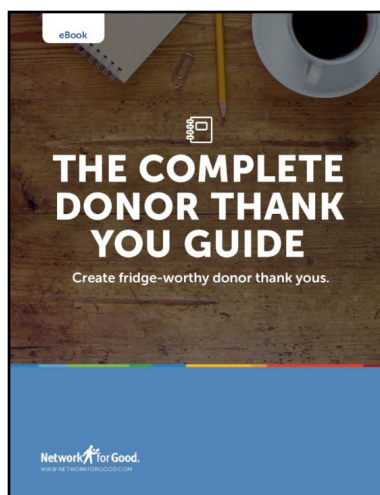
**Celebrate Your Donors.** Find ways to recognize and celebrate your donors on your website, in your newsletter, and in your future outreach.

**Extend an Invitation.** Keep the door open for your donors to do more—such as volunteer, attend an event, or help you spread the word about your cause. Make them feel like they're part of the team.

**Make them Feel Special.** Personalize your acknowledgements to include relevant details to each donor, like additional information on the specific programs they support.

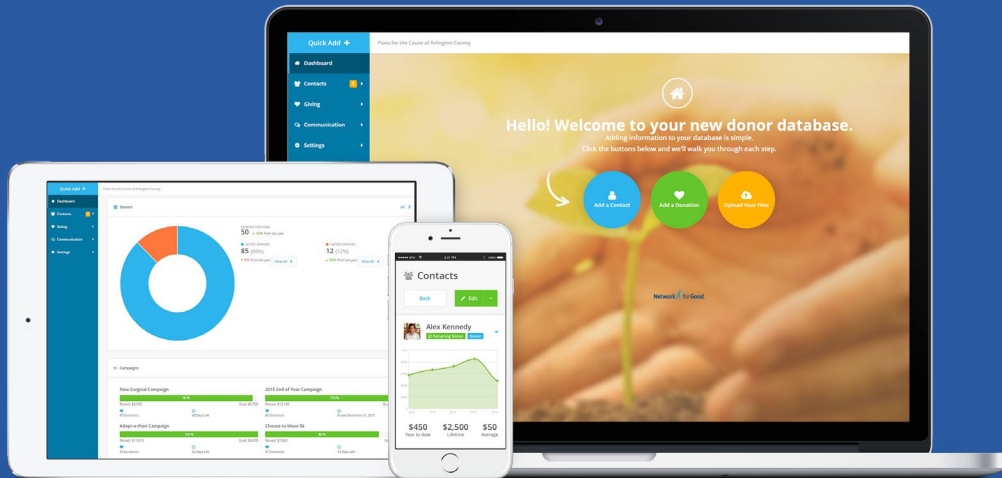
**Keep in Touch.** Reach out regularly to update your donors on your progress and how their donations are making a difference.

**Ask for Feedback.** Your donors are a valuable source of insight and inspiration. Make it easy for them to share their comments and suggestions, and take note of indirect feedback, such as unsubscribe requests. Track your results. After you have created and shared a few videos, start tracking audience interaction. What do people like to watch? What are they sharing often? These metrics will give you indicators about what is resonating with your audience.



- For more tips on how to write a stellar thank you message, check out our [eGuide: The Complete Donor Thank You Guide](#).

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# Additional Resources

## Campaign Examples

[Infant Crisis Services \\$10 in 10 Days Campaign](#)

[West End Residencies People Like Us Campaign](#)

[East Oakland Youth Development Center #ClosetheGap Campaign](#)

## eGuides

[The Complete Donor Thank You Guide](#)

[How to Write Amazing Fundraising Appeals](#)

[Peer-to-Peer Fundraising Campaign Planner](#)

[Recurring Giving Quick Start Guide for Nonprofits](#)

**Schedule a Demo to Learn More About  
Network for Good's Software**

**[SCHEDULE A DEMO NOW](#)**