

Are You Ready for a Campaign?



The Essential Checklist

This is your go-to checklist of actions that lead to the successful completion of a campaign! Of course, due to the unique nature of each and every campaign—and the organizations running them—no checklist could ever truly be comprehensive. There are often nuances and “audibles” required which may supersede any formal checklist. However, the items below are generally a part of every solid campaign undertaking. Overlaying these points on a defined campaign timeline will provide a workable roadmap for your next major campaign effort.

Remember that this is a guide, and each organization may place different emphasis on each one of these items. For instance, some organizations spend months or years defining their fundraising priorities; others will have a goal of building a certain building on a certain location and therefore have a ready-made fundraising priority. The goal is to apply these milestones and measures of success to your specific effort and use the checklist to help keep progress on track.

Begin Strategic Planning Process

Define Fundraising Priorities

Develop Campaign Budget

Create Plan to Build Professional Staff

Screen Prospect Database

Research/Rate Top 100 Prospects

Create a Table of Gifts

Conduct Planning / Feasibility Study

Begin Weekly / Bi-Weekly Updates to Campaign and Organization Leadership

Present Findings to Organization Leadership

Develop Roles & Responsibilities for Campaign Leadership

- Campaign Executive Cabinet
- Board Gifts
- Leadership Gifts
- Major Gifts
- Planned Giving
- Special Gifts
- Corporations and Foundation
- Alumni Gifts (if applicable)
- Medical Staff Gifts (if Applicable)
- Community Phase

Recruit Campaign Leadership

Solicit Lead Gifts / Build Nucleus Fund

Hold Strategy Session(s) to Discuss Top 25 Gift Requests

Begin Quiet/Lead Gift Phase by Soliciting Top 25 Prospective Investors

Develop Named Gift Opportunities with Descriptions of Each Space or Service

Hold Bi-Weekly Major Gift Meetings with Staff / Volunteers

Create Campaign Public Phase Timeline

Design & Implement Campaign Management Tools

- Gift Acceptance Policy
- Crediting and Counting Policies
- Systems Record Keeping
- Administrative & Volunteer Acknowledgement of Gifts

Design and Write Campaign Communications Tools

- Case Statement or Mini-Case Statements
- Electronic and Print Updates
- Campaign Newsletters
- Webpage or Microsite
- Video
- Press Releases

Increase Involvement

- Insider's Tours
- Small Dinners
- VIP Receptions / Vision Briefings
- Large Events

Confirm Campaign Goal(s)

Hold Campaign Kick-off Event

Begin Major and Special Gift Phases

Implement Stewardship Plan

Develop Post-Campaign Plan

Develop Community Phase Tri-Fold Brochure

Initiate Broad Based Clean-up – Community Mailing

Publish Campaign Report

Hold Campaign Wrap-Up Event