I | Determine the Campaign

Who's involved in *leading* this phase:
- Executive Director
- Fundraising lead
- Organizing lead
- Communications lead
- Board member or member leader (or Fundraising committee)

Planning steps:

As *specifically* as possible figure out:
- ☐ What are the goals? How much do you want to raise? Do you have goals other than raising money?

- ☐ How does the campaign tie into your long-term fundraising plan and to your organizing activities?

- ☐ What's the timeframe? What other activities do you have planned for that timeframe?

- ☐ What are your assets? What can you build on that will help you with the campaign?

- ☐ What's your organizational capacity? Be realistic!

- ☐ What's your budget? Remember, it often takes money to make money.

- ☐ How do you get staff, board, and member buy-in?

Without worrying too much about the details:
- ☐ Identify your target donor base
- ☐ Develop ideas of how you want to reach them

POWERBASE and/or data-related activities:

- There may not be any during this phase; the specifics will come during the planning phase

II | Develop the Plan

Who's involved in *leading* this phase:
- Fundraising lead
- Organizing lead
- Communications lead
- Fundraising Committee to approve the plan and promote it to the Board

Planning steps:

☐ Figure out *how to build* the fundraising campaign team

☐ Determine specifically who's going to be involved in the campaign – who's on the fundraising team

☐ Develop a plan for *training the team*

☐ Determine the campaign process and identify roles and responsibilities

☐ Using your database, undertake a thorough and detailed analysis of your potential donors and categorize (segment) them (low dollar, mid-range, major donor

☐ Develop key stories/messages/refrains for the campaign

☐ By category, determine the best way to reach potential donors – modes of contact/communication channels

☐ Identify materials you'll need and figure out how to develop them

☐ Identify what you need from Powerbase and/or the PowerBase team

☐ Identify any other tools you plan to use and what you need to be able to use them

☐ Develop a detailed workplan and timeline

POWERBASE and/or data-related activities:

☐ Segment the donor list
☐ Check for contact information and collect additional information as needed
☐ Identify any PowerBase related skills building that will be needed
☐ Determine who can do the skills-related training – is it in-house or do you need help from the PB team?
☐ Contact the PB team with detailed information about the campaign and discuss any help/involvement you'll need
☐ Create a workplan and timeline with the PB team for anything you'll need from them

III | Implement the Campaign

Who's involved in *leading* this phase:
- Fundraising lead
- Organizing lead
- Communications lead
- Techie
- ED (probably in a limited way)
- Board or member representative

Implementation steps:
- ☐ Build the fundraising team

- ☐ Train the team

- ☐ Develop the materials/shareables

- ☐ Do any necessary skills-building

- ☐ Test your tools; do any tweaks and refinements that are needed

- ☐ Get individualized donor information, shareables, tools to fundraising team

- ☐ Create auto-responses, if needed

- ☐ Put it all in motion:
    - ☐ Send email
    - ☐ Make calls
    - ☐ Send direct mail
    - ☐ Meet with potential donors
    - ☐ Record donations
    - ☐ Record pledges
    - ☐ Repeat as needed

- ☐ **SEND PERSONAL RESPONSES TO DONORS!!!**

POWERBASE and/or data-related activities:
- ☐ Track the team
- ☐ Possibly a PB role in materials/shareables development
- ☐ Possibly a PB role in training and skills-building
- ☐ Create individual donor lists
- ☐ Create personal campaign pages if needed

ptp
PROGRESSIVE TECHNOLOGY PROJECT

IV | Manage the Campaign

Who's involved in *leading* this phase:
- Fundraising lead
- Communications lead
- Techie
- ED (probably in a limited way)
- Board or member representative

Management steps:
- ☐ Generate appropriate reports

- ☐ Report out regularly to fundraising team on how the campaign is doing overall and how each individual is doing

- ☐ Support and motivate the team

- ☐ Assess the campaign results and make adjustments as needed

- ☐ Wrap up the campaign – both with donors and with the fundraising team

POWERBASE and/or data-related activities:
- ☐ Generate reports

V | Evaluate the Campaign

Who's involved in _leading_ this phase:

- Fundraising lead
- Communications lead
- ED (probably in a limited way)

Evaluation steps:

- ☐ Generate appropriate reports

- ☐ Debrief with the entire fundraising team

- ☐ Assess the campaign
    - Did you reach your goals?
    - Were there unanticipated challenges?
    - Were there unexpected benefits?
    - What can you build on for next time?

- ☐ Determine what worked and what you might change for the next fundraising campaign

POWERBASE and/or data-related activities:

- ☐ Generate reports