

The Complete Fundraising Campaign Planning Checklist

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www.causevox.com

Introduction

Launching your next fundraiser shouldn't be a headache. Whether it's an annual campaign, a giving day like Giving Tuesday, a peer-to-peer event, or something else entirely, our fundraising checklist is here to smooth out the process. We'll guide you in choosing the perfect date, creating engaging content, and reaching your goals. Each step is carefully designed to prepare you for a seamless launch, letting you focus on what truly matters - your mission. So, let's make your next big fundraiser a big success, without the stress!

About CauseVox

Transform your fundraising strategy with CauseVox. Our platform is crafted to offer your donors unforgettable experiences, ensuring your campaigns are memorable and impactful.

- **Effortless Donations:** Streamline the donation process with multiple payment options like Apple Pay, Venmo, and ACH.
- **Distinct Branding:** Showcase your mission with fully branded, customizable fundraising sites. Engage donors deeply by telling your story in a way that resonates.
- **Peer-to-Peer Empowerment:** Empower your community to become fundraising ambassadors, connecting you to new donors through the power of trust. Boost your reach with simple-to-set-up peer-to-peer fundraising pages.
- **Dynamic Engagement:** Spark competition and drive donations with live updates through fundraising thermometers, counters, and leaderboards.
- **Data-Driven Insights:** Optimize your strategies with real-time reports, automated workflows, and effective data management. Make every decision with confidence, backed by comprehensive insights.

Discover how we can help you leave a lasting impression on your donors by signing up for a demo today.

Learn more here: www.causevox.com.

How to Use This Checklist

This checklist and accompanying tips and tricks will help your nonprofit maximize the potential of your fundraising campaign by engaging supporters and boosting donations. Tailor the timeline and tasks to suit your specific campaign and organizational needs.

Pre-Campaign:

- ☐ Choose your campaign type (ex. Crowdfunding, peer-to-peer, event-based)

Tip: For more detailed information pertaining to peer-to-peer fundraisers and events, refer to our [peer-to-peer](#) or [event-specific](#) checklists.

- ☐ Choose a date(s) for your campaign

Tip: Opt for spring or fall for activities like walks and races, and winter for indoor events like galas, to take advantage of seasonal participation trends.

- ☐ Establish [fundraising goals](#)
 - ☐ Set a specific dollar amount goal for your campaign, based on data from past-campaigns and funding need
 - ☐ Consider setting additional goals, like total number of donations or number of peer-to-peer fundraisers (if applicable)
- ☐ Identify your target audience
 - ☐ Consider developing [donor personas](#) by determining the following:
 - ☐ Demographics (age, gender, income level, location, occupation, etc.)
 - ☐ Psychographics (interests, values, motivations, and challenges.)
 - ☐ Behavioral Traits (donation history, preferred communication channels, and engagement level.)
- ☐ Name your campaign
 - ☐ Select a name that is memorable and reflects your organization's mission. (ex.
 - ☐ Aim for a name that is unique and distinct from commonly used terms in your sector.
- ☐ Choose a fundraising platform
 - ☐ Select a fundraising platform that's straightforward for both your team and your donors, minimizing any technical barriers that could deter participation.

- ☐ Make sure your fundraising platform allows you to fully tailor donation forms and campaign pages to reflect your organization's branding. This helps create a seamless and cohesive experience that reinforces your identity and mission to supporters.
- ☐ Engage and motivate donors with interactive elements such as a real-time donation counter, fundraising thermometer, and a list of recent donors.
- ☐ Make sure your fundraising platform accommodates a variety of payment methods, from credit cards to digital wallets to Venmo, ensuring that every donor can contribute easily and securely.
- ☐ Choose a fundraising platform with robust reporting capabilities to monitor campaign performance in real-time.

ACTION ITEM: *With all the features above included and more, choose CauseVox as your fundraising platform for your next campaign. [Learn more here.](#)*

- ☐ Create your campaign page, including the [following elements](#):
 - ☐ Build your layout
 - ☐ Ensure the layout is user-friendly and aligns with the campaign's theme.

Tip: *Use CauseVox's templates and drag-and-drop modules to create an intuitive and visually appealing design.*

- ☐ Incorporate [branding](#)
 - ☐ Add in your organization's branding elements, such as logos, colors, and fonts.
- ☐ Write your appeal
 - ☐ Use [storytelling](#) to explain the purpose of the campaign and the impact donations can make.
 - ☐ Include relevant testimonials, stories, and clear calls to action.
- ☐ Add visuals
 - ☐ Add high-quality photos that tell your story or showcase your work.
 - ☐ Include videos to engage users more deeply.
 - ☐ Use graphics to illustrate data or achievements in a visually digestible format.
- ☐ Customize your donation form

- ☐ Include [donation tiers](#) to offer options for different levels of support.
- ☐ Enable [recurring donations](#).
- ☐ Offer [flexible payment options](#) such as credit/debit cards, PayPal, ACH, and Venmo.
- ☐ Automate receipts to send after a donation is made.
- ☐ Add options for [tribute donations](#) and [pledges](#) if applicable.
- ☐ Set up peer-to-peer fundraising pages to allow supporters to fundraise on your behalf (if applicable)
 - ☐ Provide a [peer-to-peer toolkit](#) to guide individual and team fundraisers to personalize their pages and hit the ground running.

ACTION ITEM: When approached by friends or family, 75% of donors are more inclined to contribute. [Learn more here.](#)

- ☐ Include ticketing for events (if applicable)
 - ☐ Set up ticketing or registration modules specifically tailored for your event-based campaigns.
- ☐ Consider additional campaign features to maximize donations
 - ☐ Include [matching gifts](#) to encourage donations and double your impact.
 - ☐ Create a virtual donor wall on your campaign site to publicly acknowledge your contributors.
 - ☐ Set up multiple pages on your campaign site to logically separate information (e.g. event details, sponsorship information, updates, toolkit).

During Campaign:

- ☐ Launch your campaign
 - ☐ Test your entire campaign site including the donation process and campaign page functionality before going live.

Tip: Make sure you test from various devices.

- ☐ Officially publish your campaign once everything has been reviewed.
- ☐ Marketing

- ☐ Maximize email marketing
 - ☐ Develop a series of emails to announce the campaign launch, share updates, and send reminders to donate.
 - ☐ Segment your email list to tailor messages to different target audiences.
- ☐ Capitalize on social media
 - ☐ Create and schedule regular posts across platforms to promote your campaign.
 - ☐ Use hashtags, engaging visuals, and calls to actions to increase visibility and engagement.
- ☐ Provide updates on campaign progress
 - ☐ Share regular updates about your campaign's progress toward your overall goals.
 - ☐ Include any major milestones and impact stories.

ACTION ITEM: 50% of donors say regular updates would increase their likelihood to donate. [Learn more here.](#)

- ☐ Engage peer-to-peer fundraisers, partners, and/or ambassadors
 - ☐ Supply fundraisers with a [toolkit](#) that includes shareable graphics, social media posts, and email templates.
 - ☐ Host training sessions or webinars to educate peer-to-peer fundraisers on best practices for online fundraising, storytelling, and using the campaign tools effectively.
 - ☐ Collaborate with partners and ambassadors by creating co-branded content that they can share within their networks.

Post-campaign:

- ☐ Thank your donors, participants, and volunteers
 - ☐ Send prompt, customized thank you messages to donors, volunteers, and participants.
- ☐ Make sure donors are in your CRM
 - ☐ Input or import all donor information, including names, contact details, donation amounts, and dates in your CRM.

Consideration: CauseVox comes equipped with an integrated CRM system that automatically consolidates all your fundraising campaign data in one place.

- ☐ Log each donor's communication preferences, engagement history, and any personal notes to tailor future interactions.
- ☐ Follow-up with new donors again
 - ☐ Send a welcome email immediately after their first donation to introduce your organization and acknowledge their support.

Tip: Create a series of welcome emails that introduce new donors to what your organization does, show them the impact of their donation, and suggest other ways they can get involved.

ACTION ITEM: Make sure new donors feel welcomed right away with a donor welcome email series. [Learn more here.](#)

- ☐ Share Impact
 - ☐ Keep in touch with donors by providing regular updates on projects, upcoming events, and ongoing needs.
 - ☐ Use social media and email to share what was accomplished with the funds raised from your campaign.
- ☐ Evaluate and Debrief
 - ☐ Analyze the results and compare them to your goals.
 - ☐ Calculate the return on investment (ROI) from your campaign.
 - ☐ Determine highlights and areas for improvement.
 - ☐ Gather feedback from staff, volunteers, and donors to improve future participation.
 - ☐ Document what you learn so you can use these insights when planning your next campaign.

ACTION ITEM: Start building your fundraising campaign for free on CauseVox today and make a lasting impact! [Learn more here.](#)