EMPOWERED FUNDRAISER

CAMPAIGN COUNSEL FOR THIRD SPACES

Fundraising Campaign Planning Worksheet

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Start Here

Use this worksheet to organize what your team has already decided and the questions that still need discussion. Pay particular attention to the questions your team cannot answer yet.

> **Never write donor names on this worksheet. Get in the habit of using initials or made-up names only.**

How to Use It

Print the worksheet or save it as a PDF and use the spaces provided for your notes. It is a printable discussion worksheet. The page does not save your answers.

1

What will your fundraising campaign make possible, and who will benefit?

2

What is the status of your donor data and database?

How many records do you have? Are they current and accurate? Do you have donor privacy, confidentiality, and data security policies and practices in place? Have these been updated to address current AI risks and benefits?

3

What have you and your colleagues already established about a campaign?

Write down three questions this raises for you.

1.
2.
3.

4

How much do you need to raise, and what gives you confidence that your community can support that goal?

What have you heard directly from people who could make significant gifts? Use initials or made-up names only.

5

What do you know about your prospective donors? What do you need to learn through research or conversation?

6

Do you have leadership-level volunteers who will make lead gifts in the campaign, guide the strategy, and make connections? Who would you consider?

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7

Which fundraising tasks are already documented? Which instructions would help your team know what to do, who is responsible and when to act?

Who will lead this work day to day, and what needs to change in their workload for it to receive consistent attention?

8

Whose perspectives need to inform your campaign plan? How will your team address donor conduct and fundraisers' rights?

9

Where is your team stuck, and what help would allow you to move forward?

Look back at the questions you could not answer. Which one needs attention first?

Questions About the Campaign Planning Worksheet

What does the fundraising campaign planning worksheet cover?

The worksheet organizes your campaign's purpose and decisions, prospective-donor knowledge, and staff and volunteer responsibilities. It also asks which perspectives should inform the plan and how the team will address donor conduct.

How do we complete the campaign planning worksheet?

Print the worksheet or save it as a PDF and use the spaces provided for your notes. It is a printable discussion worksheet. The page does not save your answers.

What information belongs in our campaign planning notes?

Use general descriptions to document decisions and questions for the team. Keep identifiable donor information in your organization's approved systems, and assign next steps to the people responsible.

About the Builder

Anne Murphy

CEO and Lead Fundraiser and Campaign Counsel

Anne Murphy is CEO of Empowered Fundraiser Consulting, with 35 years leading advancement strategy across higher education and the social impact sector, fundraising for over $10 billion in successful campaigns.

As Lead Fundraiser and Campaign Counsel, Anne guides organizations from feasibility study through campaign celebration, preparing and conducting donor conversations alongside leadership or independently.

Anne is a fundraising educator and professional keynote speaker whose talks cover campaigns, ethics in fundraising, and Responsible AI for Fundraising, Advocacy, and Democracy. She is co-author of the Framework for Responsible AI in Fundraising and co-host of The Daily AI Show.

She lives in Corvallis, Oregon with her family and three doggos.

Further Reading

Campaign Planning Resources

Use these resources together to document campaign decisions, organize volunteers, and establish campaign guidelines.

Complete the Campaign Planning Worksheet

Record decisions, responsibilities, and unanswered questions.

Define Volunteer Roles

Review the responsibilities of the campaign cabinet and other volunteers.

Review Campaign Guidelines

Prepare governance, gift acceptance, confidentiality, and campaign records decisions.

Bring your unanswered questions to a Fundraising Strategy Session

From feasibility through the final gift, we help lead the campaign, develop donor strategy, and participate directly in gift conversations and solicitations with your team.

Book a Fundraising Strategy Session

The Campaign Launch Lab, Spring 2027 Cohort

Work on your organization's campaign plan through a guided cohort. Review the complete plan with Anne in a private capstone and finalize your implementation roadmap. Your team implements the plan.

Complete the Campaign Launch Lab Application

Join Fundraising NOW

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