

CAMPAIGN PITCH TEMPLATE

PREPARE FOR FUNDRAISING:

Your plan should include the following:

Elevator Pitch	
Simple message on how their contribution will support the campaign	
Simple message on the campaign's path to victory	
Simple message on why this policy and why now	

SET FUNDRAISING GOALS BY PHASE:

Set target goals for money you need to raise. Break those goals out by phase to be realistic to what the campaign will need at that time and what sources could potentially be available. Every dollar raised early in your efforts will multiply later as your relationships grow and you get closer to key moments in the campaign.

GOALS:

While total revenue is the ultimate goal, there are other metrics worth tracking for the long-term health of your fundraising program.

Some other goals could be:

- Number of donors
- Number of gifts
- Average gift
- Gifts per donor
- Supporter count within key audience groups (i.e. small-dollar donors, recurring donors, major donors, prospects, etc.)
- New donors
- Number of consecutive donors (i.e. donors who have made 2+ gifts, 5+, etc.)
- Diversity of donors



Primary Goal #1	Primary Goal #2
Secondary Goals	

TIMELINE:

Time Period (Monthly or Quarterly)	Action

SET FUNDRAISING GOALS BY PHASE:

- If working with a team, workshop a system to ensure that everyone has a clear role with identified responsibilities and time commitments.
- Consider any potential barriers to success (like funding, time, staffing capacity, knowledge, technology, etc.) and what can be done to overcome them.
- Consider any processes or systems that can be applied to fundraising. The most important two of these will be (1) a system to track and maintain followup and (2) a system for collecting contact information and moving prospects through your pipeline. Systems could include email marketing, fundraising platforms and more



PLANNING AND EXECUTION:

Target Audience:

When thinking about who makes up your target audience, consider:

- People who have already made donations to support your campaign and/or organization
- People who are likely to become donors in the future

Current Donors:	Future Donors:

DONOR COMMUNICATION STRATEGY:

This should include:

- Story of the campaign
- How to get people emotionally bought in and willing to donate to help you/campaign succeed
- Why your campaign is the solution voters and community members are looking for

Communication Strategy:

TOPLINE CAMPAIGN MESSAGING:

What are the top talking points that should be used over and over again?

It should answer the question: *Why should I donate to you instead of another campaign/organization?*

Talking Point #1	
Talking Point #2	
Talking Point #3	

CHANNELS:

- **Website** - where on site people can donate
 - » Pop up on homepage and subpages
 - » Donate button in navigation bar
 - » Donate button on “about page” or other content pages
- **Email and Texts** - what emails and texts would go out to list during timeline
 - » How many messages you will send
 - » What will cadence be
 - » Message concepts
 - » Targeting (existing donors, prospects, volunteers, full list)
- **Social media** - what kinds of content, and differences in platforms
 - » How frequently you will post fundraising content
 - » Target ratio between fundraising and other content on each channel
 - » Which platform (Facebook Instagram, Twitter, Tik Tok)
- **Canvassing and Events** - offline activities
 - » Upcoming events that could support fundraising
 - » House parties hosted by supporters to educate and fundraise
- **Paid advertising** - If including in your plan, types of ads you recommend and purpose
 - » Ads don’t need to ask for donations directly
 - » Could bring in more prospects to your email list
 - » Could bring awareness of campaign to new target audiences

EXAMPLE BUDGET:

Type of ad	Purpose	Budget range
Facebook video ads	Content optimization	\$500–\$1,000
Facebook Post boost	Increase reach of organic launch post	\$500
Display ads	Reach readers of target outlets	\$2,000–\$3,000
Full-page print ad	Reach readers of target outlets	\$15,000
Radio ads	Reach people in target states	\$3,000
Remarketing ads	Reach new signups with advocacy follow-up asks	\$2,000–\$5,000

CHANNEL PLAN:

Channel Used	Specifics	Timeline

EVALUATION:

Reporting

- Based on the primary and secondary goals determined above
- Make sure that you have the data points to allow you to track progress
- Create a report form (google sheet, excel, etc.) and give access to all stakeholders
- Determine how often the team will report on progress (daily, weekly, monthly, etc.) as well as the method (meeting, email, etc.)
- Determine what a final report/debrief should look like and what it should include
 - » Compare to previous efforts
 - » Compare to other campaigns
 - » Think about overall process
 - Information/Lessons learned
 - Techniques that worked better than other
 - What would you keep the same
 - What would you do differently

