



# Capital Campaign Checklist

*A checklist for pre, during and post-campaign success*

**crowdrise**  
by gofundme

## Pre-Campaign

### 6-12 Months Prior to Campaign Launch

- Choose a budget and a goal
  - How much money do you need to raise? Start with a goal that captures everything you want and adjust as needed throughout the campaign
  - What is the minimum amount needed to raise to cover your investment?
- Pick a date for any potential physical events associated with the campaign
  - What time frame best fits into your fundraising calendar?
  - Are there any other events or initiatives that conflict with this date?
- Create a committee of campaign volunteers and fundraisers
  - Who are your supporters who will be willing to champion your campaign?
  - Does your committee represent a diverse segment of your supporters?
  - Can you involve your board members on the committee?
  - What can you do to support your committee?

### 3-6 months Prior to Campaign Launch

- Develop a small number of campaign priorities and associated talking points
- Build your campaign landing page
  - Customize and brand your campaign to focus on your mission and goals
- Acquire sponsorships or corporate matches and begin to promote their involvement
  - How much time do you need to have conversations with potential sponsors?
  - Who is negotiating sponsor terms?

### 1-3 months Prior to Campaign Launch

- Create Communication Plans
  - Fundraising tips and toolkits
  - Contests/Sweepstakes and/or incentives
  - Messaging Plans and calendars
- Purchase Campaign Merchandise (if applicable)
  - Order incentive and prize materials e.g t-shirts, stickers, placards, etc.

## Pre-Campaign Continued

### 1 Week Prior to Campaign Launch

- ❑ Consider starting a “soft launch” with inner circle of employees, board members and volunteers.
  - ❑ Ask sponsors to consider donating to your campaign now so you have money raised when you launch to the public
- ❑ Prep and organize campaign merchandise and prizes
- ❑ Get the word out!
  - ❑ Spread your campaign and advertise your campaign via email, social media and your nonprofit’s website
  - ❑ Consider any local outlets that are available to you like radio or community websites

### Campaign Launch Day

- ❑ Send out a message blast to your supporters to kick start fundraising
- ❑ Encourage employees, volunteers and long-time supporters to promote the campaign on their personal social media channels

### Throughout Campaign

- ❑ Monitor incoming donations to quickly follow up with donors
- ❑ Post a Campaign Update that includes total amount raised, goal progress and other encouraging stats like top fundraisers, teams and participants

### Post-Campaign\*

- ❑ Post a Campaign Update that includes: announcement of goal, total amount raised, and other encouraging stats
  - ❑ Make sure to include the tangible impact of the donations and how your nonprofit will use the fundraised money to further your mission
- ❑ Thank all supporters
  - ❑ Send thank you messages via email and on social media
- ❑ Send post-campaign survey (if applicable)
  - ❑ Did supporters have a good giving experience?
  - ❑ Are supporters interested in giving or volunteering in the future?
  - ❑ Would your supporters like to become more involved with your organization?

## Post-Campaign Continued

- Send any other campaign-related news and/or photos
  - Bonus: Include future VIP events, volunteer opportunities, important campaigns or organizational updates
- Personalize messaging to VIPs such as big donors, big fundraisers, sponsors, repeat supporters etc.
  - Make personal phone call
  - Mail a thank you note
- Award prizes (if applicable)

\*For more on how to maximize your success after your event, check out our [Post-Event Engagement Guide](#)

## Post-Campaign Evaluation

- Goals and Budgets
  - Did you reach your goal? If so, how long did it take to reach it?
  - Were there any unforeseen issues or roadblocks?
  - Did you adhere to your budget?
- Participation
  - How many people made a donation?
  - Did participants find and access your campaign page easily?
  - Was the campaign committee successful and supported throughout?
  - What were the most influential tactics for receiving donations?
- Resources
  - Was there sufficient time to build and execute the campaign?
  - Were there sufficient employees to run the campaign?
- Problems/ Improvements
  - Did anything go wrong? If so, can this be fixed in the future?
  - How can you scale fundraising in the future?
  - Could you use additional functionality eg. fundraising minimums or text-to-donate to your next capital campaign?