

CAMPAIGN STRATEGY GUIDE

Fundraising Campaign Planner

A Comprehensive Guide to Planning, Budgeting, and Executing Successful Fundraising Campaigns for NZ/AU Not-for-Profits

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Strategic Planning

Multi-Channel

Goal Setting

ROI Tracking

Events

Digital & Email

Major Donors

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Executive Summary

Why strategic campaign planning drives better fundraising results

Successful fundraising campaigns don't happen by accident. They require strategic planning, clear goal setting, targeted messaging, and disciplined execution. Many NZ and Australian not-for-profits struggle with inconsistent results, poor ROI, and donor fatigue.

Common Campaign Challenges

Inconsistent Results

Campaigns lack strategic focus, resulting in unpredictable income and over-reliance on year-end appeals.

Poor ROI

Ineffective channel selection and generic messaging waste budget and fail to connect with donors.

Donor Fatigue

Poorly timed or irrelevant appeals lead to declining response rates and increased unsubscribes.

Missed Opportunities

Failure to leverage seasonal peaks, matching gifts, and multi-channel integration.

What This Planner Delivers

20+

READY-TO-USE
TEMPLATES

7

CAMPAIGN TYPE
GUIDES

50+

BENCHMARKS &
METRICS

12-mo

PLANNING CALENDAR

Campaign Types Overview

Understanding the fundraising campaign landscape

Campaign Type Comparison

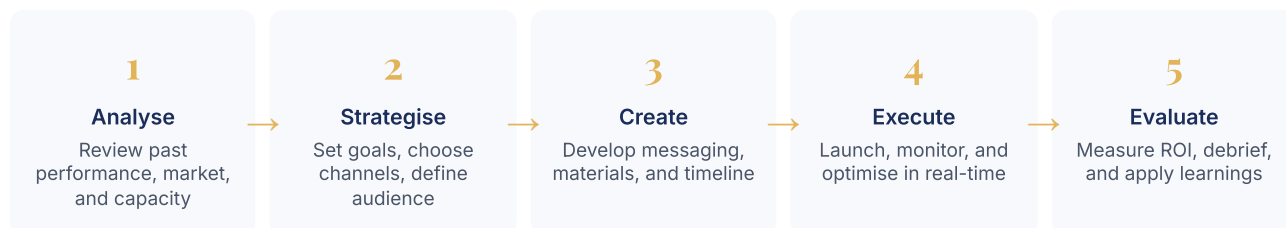
CAMPAIGN TYPE	TYPICAL ROI	LEAD TIME	BEST FOR	BUDGET
Direct Mail	2:1 – 4:1	8–12 weeks	Established donors, older demographics	\$2,000+
Email Campaign	5:1 – 15:1	2–4 weeks	Existing supporters, urgency appeals	\$200+
Social Media	2:1 – 6:1	2–6 weeks	Awareness, younger donors, P2P	\$500+
Events	2:1 – 5:1	12–24 weeks	Engagement, mid-level donors, community	\$5,000+
Regular Giving	1:1 (yr 1), 3:1 (yr 2+)	Ongoing	Sustainable income, committed donors	\$1,000+
Major Gifts	10:1 – 50:1	6–18 months	High-value donors, transformative gifts	Staff time
Peer-to-Peer	3:1 – 8:1	8–16 weeks	New donor acquisition, community events	\$2,000+

Strategic Planning Framework

Building a solid foundation for campaign success



Campaign Planning Process



Situation Analysis

Strengths

- What campaigns worked well last year?
- What is your strongest channel?
- What unique assets do you have (stories, data)?
- Where is your team most skilled?

Weaknesses

- Where did past campaigns underperform?
- What capacity constraints exist?
- What technology gaps do you have?
- Where is your data quality poor?

Opportunities

- New channels or platforms to try?
- Seasonal or topical hooks available?
- Matching gift or partnership options?
- Untapped donor segments?

Threats

- Economic conditions affecting giving?
- Competition for donor attention?
- Regulatory changes (privacy, tax)?
- Donor fatigue risk?

Goal Setting & Budgeting

SMART goals and campaign budget planning

SMART Goal Framework

Revenue Goals

Example: "Raise \$85,000 from our Christmas appeal by 31 December 2025, a 15% increase over 2024."

Donor Goals

Example: "Acquire 200 new donors through the campaign and convert 30% to repeat giving within 12 months."

Engagement Goals

Example: "Achieve 25% email open rate, 5% click rate, and 100 social shares during the campaign period."

Campaign Budget Template

BUDGET ITEM	DIRECT MAIL	EMAIL/DIGITAL	EVENTS
Creative/design	\$500–2,000	\$300–1,000	\$500–2,000
Production/printing	\$1,000–5,000	\$0	\$500–3,000
Postage/distribution	\$1,000–4,000	\$50–200	\$0
Data/list costs	\$200–500	\$0–200	\$100–300
Advertising/promotion	\$0	\$500–3,000	\$500–2,000
Venue/catering	\$0	\$0	\$2,000–15,000
Staff time (valued)	40–80 hrs	20–40 hrs	80–200 hrs
Typical total	\$3,000–12,000	\$1,000–4,000	\$5,000–25,000

BUDGET RULE OF THUMB

Target ROI by campaign type: Direct mail 3:1 | Email 8:1 | Events 3:1 | Regular giving 1:1 (year 1) | Major gifts 10:1+

If your projected ROI is below these thresholds, reconsider the campaign scope or channel mix.

Audience Segmentation

Getting the right donors with the right message



Segmentation Framework

RFM Segmentation

Recency: When was their last gift?

Frequency: How often do they give?

Monetary: How much do they give?

Score each 1–5 and combine for priority ranking.

Lifecycle Segmentation

- **Prospects:** Never given
- **New donors:** First gift <12 months
- **Active:** Giving regularly
- **Lapsed:** No gift >12 months
- **Major:** \$1,000+ capacity

Segment-Specific Messaging

SEGMENT	MESSAGE FOCUS	ASK AMOUNT	CHANNEL PRIORITY
New donors	Welcome, impact of first gift, community	Same as first gift	Email, digital
Active repeaters	Deepening impact, upgrade opportunity	10–20% increase	Direct mail, email
Regular givers	Exclusive updates, appreciation	Gentle upgrade	Email, phone
Lapsed donors	What's changed, we miss you	Match last gift	Direct mail, email
Major donors	Personalised impact, partnership	Research-based	Face-to-face, phone
Prospects	Cause introduction, emotional story	Low entry point	Digital, social, events

Multi-Channel Campaign Planning

Integrating channels for maximum campaign impact

Channel Integration Timeline

EXAMPLE: CHRISTMAS APPEAL MULTI-CHANNEL TIMELINE

Week 1: Social media teaser campaign begins — story-driven content building awareness

Week 2: Direct mail pieces arrive — compelling letter with impact story and response device

Week 3: Email campaign launches — 3-email series reinforcing the mail message

Week 4: Social media intensifies — video content, countdown, matching gift reveal

Week 5: Phone calls to mid/major donors — personal thank you and renewal ask

Week 6: Final push across all channels — urgency messaging, deadline reminders

Channel Strengths

Direct Mail

Best for: Older donors, higher gift values, tangible impact

Strengths: Physical presence, response devices, proven for appeals

Email

Best for: Quick turnaround, urgency, segmented messaging

Strengths: Low cost, testable, trackable, automatable

Social Media

Best for: Awareness, younger donors, P2P, viral potential

Strengths: Reach, shareability, visual storytelling

Phone

Best for: Major donors, upgrades, lapsed re-engagement

Strengths: Personal connection, immediate response, relationship

Events

Best for: Community building, mid-level, cultivation

Strengths: Emotional engagement, networking, experience

SMS

Best for: Urgent appeals, event reminders, quick actions

Strengths: High open rate (98%), immediate, personal

Direct Mail Campaigns

Planning and executing effective direct mail appeals



Direct Mail Package Components

01

Outer Envelope

Teaser copy, hand-addressed look, avoid "junk mail" appearance. Consider window envelope or hand-stamp for higher open rates.

02

Letter

Personal salutation, compelling opening story, clear problem/solution, specific ask amounts, PS with urgency. 2-4 pages for appeals.

03

Response Device

Pre-filled donor details, suggested gift amounts, payment options, mission reminder. Include online giving URL and QR code.

04

Reply Envelope

Pre-addressed, ideally freepost. Makes response easy and removes barriers to giving.

Direct Mail Benchmarks (NZ/AU)

METRIC	ACQUISITION	WARM APPEAL	LAPSED
Response rate	0.5-2%	5-15%	2-5%
Average gift	\$35-60	\$50-100	\$40-70
Cost per piece	\$1.50-3.00	\$1.00-2.00	\$1.50-2.50
Target ROI	0.5:1 - 1:1	3:1 - 5:1	1:1 - 2:1

Digital & Email Campaigns

ail, social media, and online fundraising strategies

Email Campaign Best Practices

Subject Lines

- Keep under 50 characters
- Use personalisation (first name)
- Create urgency or curiosity
- A/B test two options
- Avoid spam trigger words

Email Content

- One clear call-to-action
- Lead with story, not ask
- Mobile-responsive design
- Short paragraphs (2–3 sentences)
- Prominent donate button

Timing

- Tuesday–Thursday best open rates
- Morning (9–10am) or evening (7–8pm)
- Send series of 3–5 emails per campaign
- Space 3–5 days apart

Optimisation

- Segment by giving history
- Personalise ask amounts
- Track opens, clicks, conversions
- Test send times and days
- Clean list quarterly

Email Campaign Benchmarks (NFP Sector)

METRIC	BELOW AVERAGE	AVERAGE	GOOD	EXCELLENT
Open rate	<15%	15–22%	22–30%	>30%
Click rate	<1.5%	1.5–3%	3–5%	>5%
Conversion rate	<0.5%	0.5–1%	1–3%	>3%
Unsubscribe rate	>0.5%	0.2–0.5%	0.1–0.2%	<0.1%

Events Fundraising

Planning and executing fundraising events

Event Types & Considerations

EVENT TYPE	TYPICAL REVENUE	PLANNING TIME	BEST FOR
Gala dinner	\$20K–100K+	6–12 months	Major donors, corporates, profile
Fun run/walk	\$10K–80K	4–8 months	Community, P2P, new donors
Golf day	\$10K–50K	4–6 months	Corporate, networking
Quiz night	\$3K–15K	6–10 weeks	Community, younger donors
Morning tea	\$1K–10K	4–8 weeks	Workplace giving, awareness
Online event	\$2K–20K	4–8 weeks	Broad reach, low cost

Event Planning Checklist

Pre-Event (8+ weeks)

- Set event goals (revenue, attendance, donors)
- Establish budget with contingency
- Book venue and key suppliers
- Recruit event committee or sponsors
- Plan marketing and ticket strategy
- Develop run sheet and AV requirements

Post-Event (within 2 weeks)

- Send thank you to all attendees
- Personal follow-up with major donors
- Thank sponsors and volunteers
- Reconcile finances and report ROI
- Debrief with team and committee
- Enter new contacts into CRM

Regular Giving & Major Donors

Building sustainable monthly giving and cultivating major gifts

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Regular Giving Acquisition Channels

CHANNEL	AVG MONTHLY GIFT	COST PER SIGNUP	ATTRITION YEAR 1	BEST FOR
Face-to-face	\$25–35/mo	\$80–150	30–40%	Volume acquisition
Online (website)	\$20–30/mo	\$30–60	15–25%	Cost-effective, committed
Phone	\$20–30/mo	\$40–80	20–30%	Conversion from one-time
Direct mail	\$15–25/mo	\$50–100	15–20%	Older donors, loyalty
Events	\$25–40/mo	\$60–120	20–30%	Emotional connection

Regular Giver Retention Strategies

Strong Onboarding

Welcome call, welcome pack, 4-email series, first debit confirmation. First 90 days are critical for retention.

Ongoing Stewardship

Quarterly impact reports, exclusive content, birthday messages, anniversary recognition. Make them feel special.

Payment Management

Proactive card expiry management, immediate failed payment follow-up, easy update options. Technical lapse is preventable.

Major Donor Campaign Planning

THE MAJOR GIFTS PYRAMID

A successful major donor campaign follows the classic fundraising pyramid:

Top 1%: Transformative gifts (\$100K+) from 1–3 donors = 40% of campaign goal

Next 4%: Leadership gifts (\$10K–\$100K) from 10–20 donors = 30% of goal

Next 15%: Major gifts (\$1K–\$10K) from 50–100 donors = 20% of goal

Remaining 80%: General gifts (<\$1K) from many donors = 10% of goal

Timeline & Project Management

Campaign timelines and team coordination

Campaign Timeline by Type

Direct Mail	8–12 weeks:	Week 1–2 strategy Week 3–5 creative Week 6–7 production Week 8–9 mail Week 10–12 follow-up
Email/Digital	3–6 weeks:	Week 1 strategy & segment Week 2–3 creative & test Week 4–5 send series Week 6 analyse
Events	12–24 weeks:	Month 1–2 concept & venue Month 3–4 sponsors & marketing Month 5 execution Month 6 follow-up
Peer-to-Peer	8–16 weeks:	Week 1–4 platform & recruit Week 5–8 coaching & pre-launch Week 9–12 active campaign Week 13–16 close

Campaign Coordination Roles

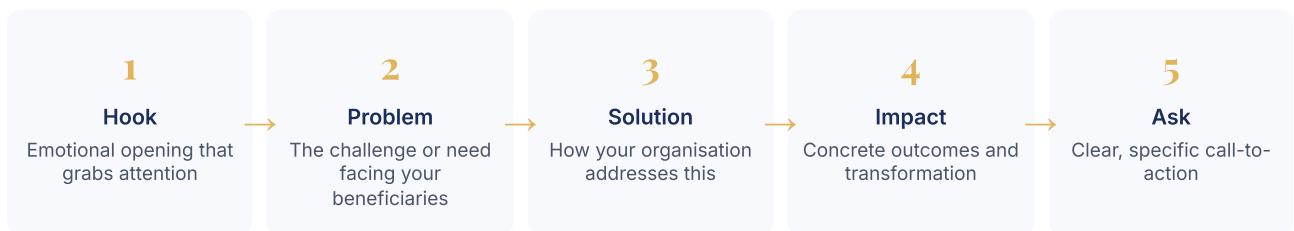
ROLE	RESPONSIBILITIES	TIME COMMITMENT
Campaign Lead	Strategy, budget, timeline, team coordination	30–50% of time during campaign
Content/Creative	Messaging, design, stories, copy	20–40% during creative phase
Digital/Tech	Email setup, website, tracking, CRM	15–25% during launch
Donor Relations	Major donor calls, thank you, stewardship	20–30% ongoing
Data/Analytics	Segmentation, reporting, optimisation	10–20% throughout

Creative Development

essaging, storytelling, and design principles

10

Storytelling Framework



Messaging Principles

Make the Donor the Hero

"Your gift" not "our programme." The donor is the one making change possible. Position them as the essential ingredient.

Be Specific About Impact

"\$50 provides 20 meals" not "your donation helps."
Concrete amounts and outcomes are more compelling than vague promises.

Create Urgency (Authentically)

Matching gift deadlines, seasonal need, specific campaign end dates. Urgency drives action but must be genuine.

One Ask, One Action

Don't ask for money, volunteering, and social shares in the same communication. Focus on one clear call-to-action.

ROI Tracking & Post-Campaign Analysis

Measuring success and learning for the future

1

Key Campaign Metrics

Revenue

- Total raised
- Vs. goal (%)
- Vs. last year
- By channel

Donors

- New donors
- Renewed donors
- Upgraded donors
- Average gift

Efficiency

- ROI (return on investment)
- Cost per dollar raised
- Cost per donor
- Staff hours invested

Engagement

- Email open/click rate
- Social reach/shares
- Website traffic
- Event attendance

ROI Calculation

CAMPAIGN ROI FORMULA

$$\text{ROI} = (\text{Gross Revenue} - \text{Total Costs}) \div \text{Total Costs}$$

Example: Campaign raised \$50,000 with \$10,000 in costs.

$$\text{ROI} = (\$50,000 - \$10,000) \div \$10,000 = \mathbf{4:1} \text{ (for every \$1 spent, \$4 returned)}$$

Post-Campaign Debrief Template

What Worked

- Which channel(s) generated the best ROI?
- What messaging resonated most?
- Which segments responded best?
- What creative elements performed?
- What operational efficiencies emerged?

What to Improve

- Where did we fall short of targets?
- What processes caused delays?
- Which segments underperformed?
- What technology gaps hindered us?
- What would we do differently?

Templates & Checklists

Ready-to-use campaign planning worksheets

Campaign Planning Worksheet

Campaign Overview

Campaign name: _____

Campaign type: _____

Revenue goal: \$ _____

Donor goal: _____ new / _____ renewed

Timeline: _____ to _____

Budget: \$ _____

Target ROI: ____:1

Target Audience

Primary segment: _____

Segment size: _____

Key message: _____

Ask amount(s): \$ _____

Primary channel: _____

Supporting channels: _____

Annual Campaign Calendar Template

QUARTER	CAMPAIGN	TYPE	GOAL	LEAD
Q1 (Jul-Sep)	New FY launch / Tax receipt follow-up	Email + phone	Renewals	_____
Q2 (Oct-Dec)	Christmas appeal / Giving Tuesday	Multi-channel	Revenue	_____
Q3 (Jan-Mar)	Regular giving drive / Impact report	Digital + mail	Regular givers	_____
Q4 (Apr-Jun)	EOFY appeal / Matching gift	Multi-channel	Revenue + new	_____

Pre-Launch Checklist

Strategy & Planning

Campaign goals finalised (SMART)

Execution Readiness

Creative materials approved

- Budget approved
- Target segments identified
- Channel mix confirmed
- Timeline and milestones set
- Team roles assigned
- Donation page tested (all devices)
- Email sequences built and tested
- CRM tracking set up
- Thank you process confirmed
- Reporting dashboard ready

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