

APPENDIX B: CAMPAIGN PLAN TEMPLATE

This template must be completed and approved in accordance with the Navy League of Canada Online Fundraising Policy (Draft 2026).

1. Campaign Overview

Campaign Title: _____

Branch / Division / National: _____

Campaign Owner: _____

Email & Phone: _____

Authorized Financial Authority
(Treasurer): _____

Campaign Start Date: _____

Campaign End Date: _____

Campaign Purpose (must
support charitable purposes): _____

Description of Need /
Rationale: _____

2. Platform & Technology

Selected Crowdfunding
Platform: _____

Reason for Platform
Selection: _____

Platform Configuration Notes
(tracking, privacy, security): _____

3. Budget & Financial Plan

A. Income Projections

Item	Estimated Amount
Expected Donations	
Matching Funds	
Other Revenue	

B. Expenses / Fees

Item	Estimated Cost
Platform Fees	
Processing Fees	
Advertising Costs	
Other Expenses	

Net Revenue Goal: _____

Details for Official Navy
League Bank Account Used: _____

4. Approval Requirements

Required Level of Approval
(Branch / Division / National): _____

Approvals Obtained (attach
written approvals):: _____

5. Communications & Promotion Plan

Key Messages:

Audience Identification:

Promotion Channels to be Used:

Materials Checklist (copyright, privacy):

6. Donor Stewardship Plan

Donor Acknowledgement Method:

Charitable Tax Receipt Process & Tracking *(Treasurer only):

**For campaigns on CanadaHelps receipt generation and tracking occurs at the National Office.*

7. Monitoring & Management

Donation Tracking Frequency (who/when):

Communication & Comment Monitoring on the site (who/frequency):

Confidentiality & Privacy Measures:

Monthly Reconciliation Plan:

8. Close-Out Procedures

Final Financial Reconciliation Summary (who/expected date):

Treasurer Sign-Off on plan (Name & Date):

9. Attachments (as required)

- Budget Spreadsheet
- Approval Documentation
- Promotional Materials