

Fundkit

Capital Campaign Readiness

It is often said that a capital campaign is 90% planning and 10% execution... or 90% perspiration and 10% inspiration. For a campaign to be successful, proper planning is crucial. Is your organization ready to launch a campaign? This checklist can be used to spark the discussion with the organization's CEO and volunteers. Few organizations can answer yes to every question, but these questions can help identify the tasks necessary to ensure a successful campaign.

Scoring the Checklist

Rate your organization as objectively and thoughtfully as possible on each item using the following guidelines:

- Score 2 points for each "Yes" answer
- Score 1 point for each "Uncertain" answer
- Score 0 points for each "No" answer

Weighted Scores

Multiply your score for each item by the allotted weight for that question. Add the weighted scores and compare the total to the Scoring Summary at the end of the survey to determine your preparedness to launch a campaign.

- 3 - Crucial:* Absolutely necessary before beginning any fund-raising campaign.
- 2 - Necessary:* Necessary, but not as crucial to have in place before launching a campaign. However, these areas must be addressed/developed in the early stages of the campaign.
- 1 - Important:* Important, but can be continually developed during the quiet campaign and, to a lesser degree, the public campaign.

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A. Clearly Defined Project

Are all the elements determined and defined? Does the project have a construction estimate, programming component cost completed, endowment portion and what it will be used for, and measurable outcomes well thought out?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 3 = _____

Comments: _____

B. Budget

Has the budget been developed to include all aspects of the campaign? Does it include pre-campaign planning costs, construction, renovation and contingency costs? Does it also include campaign costs of approximately 6% to 12% of the goal, that take into account the cost of staff, outside counsel, training materials, travel, phone bills, office supplies, publications and promotions, donor acknowledgement, meeting expenses and events?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 2 = _____

Comments: _____

C. Case for Support

Is your case for support clear, urgent, and compelling? Can you convincingly answer the question, "What will happen to our community if our doors closed tomorrow OR if we do not seize the moment with a campaign?" Do you know specifically what you need and why?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 3 = _____

Comments: _____

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D. Leadership

Does your organizational leadership, the Board, CEO, and top management, agree with and accept the need for additional campaign/project resources? Is the leadership prepared for the intensive involvement that is necessary for campaign success? Are they personally motivated to meet the goal, support the volunteers, and keep focused on the most important part of a campaign: asking for gifts?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 3 = _____

Comments: _____

E. Prospective Donors

Has your organization identified and cultivated major gift prospects? Are these gifts of a size to make the goal attainable? Is there one gift available that will give us 10-20% of our goal? Is it likely the top fifteen gifts will generate 50-70% of our goal?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 2 = _____

Comments: _____

F. Volunteers

Are there sufficient volunteers available to seat an effective campaign cabinet? Have campaign co-chairs been identified? Are there enough volunteers willing to solicit four to five major gifts from the prospect pool? Are the volunteers capable of making significant personal gifts? Is the staff prepared to support the volunteer structure?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 1 = _____

Comments: _____

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G. A History of Support

Has the organization's development program been in existence for several years? Does it have a history of fundraising success? Has it developed the internal procedures to solicit gifts and steward them well? Are the results on the upswing?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 1 = _____

Comments: _____

H. Timetable

Is there a realistic timetable for fundraising based on organizational readiness, which aligns with the needs for the project? Has enough time been allotted, prior to any construction, for all the necessary steps of the campaign to be in place?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 3 = _____

Comments: _____

I. Staffing

Are there staff members and outside consultants who are knowledgeable and experienced about campaign management and major gift fund raising? Does the Staff have the commitment, leadership, time, and skills to run a successful capital campaign?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____ x 2 = _____

Comments: _____

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J. Records and Research

Does the organization have an appropriate donor management system? Are the prospect, donor and membership records clean, up-to-date, and easy to use? Is there accurate information about prospective donors and the research capability to prepare solid briefing materials about these prospective donors? Is there a workable system for volunteer assignments, pledge payments, gift acknowledgments, and reporting?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____x 2 = _____

Comments: _____

K. Motivation

Are the CEO/President/Executive Director and Director of Development prepared to devote the required energy to this campaign? Are they personally motivated to meet the goal, support the volunteers, and keep focused on the most important part of a campaign: asking for gifts?

Yes (2 points) – Uncertain (1 point) – No (0 points) -- Score: _____x 3 = _____

Comments: _____

TOTAL SCORE: _____

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Did You Hit the Campaign Mark?

After completing the checklist, compare your Total Score to the Scoring Summary shown below to determine your preparedness to launch a campaign.

Scoring Summary

Score of 36: A perfect score. If you answered “Yes!” to all of these questions and scored a perfect 36, then you are ready to launch your campaign.

Score of 21 or higher: If you scored 21 or higher, you could be ready to launch.

Score of 20 or lower: If you scored 20 or lower, your organization most likely needs some additional work on the project and/or organizational readiness before launching a capital campaign.