Campaign Readiness Evaluation

Instructions: Circle a number from 0 to 5 for each statement: 0=serious problem exists, 5=goal completed

1. The organization has met all legal requirements to engage in fundraising activities.
   - Do you have charitable designation?
   - Are you registered with your provincial regulatory authority, if required?
   - Have you met requirements or have approval from United Way, local Capital Campaign Review Board, your National Office, or other funding or regulatory agencies?

2. The organization has a solid infrastructure.
   - Do you have written Mission/Vision statements?
   - Do you have anti-discrimination policies in place?
   - Do you have gift acceptance policies in place?
   - Do you have data entry procedures in place?
   - Do you have an adequate and up to date donor software system?

3. The organization is financially stable
   - Do you have a qualified, experienced financial officer on your staff?
   - Does your board financial committee understand your fiscal status?
   - Have you increased revenues or decreased deficits in the past two years?
   - Have you had a balanced budget for at least two years?
   - Do you have a line of credit or availability of a bridge loan during construction?

4. The Board President is recognized as a strong, able community leader
   - Has the president been on the board of directors at least two years?
   - Has the president been on the board less than six years?
   - Is the person known and respected in the community and shows good judgment?

5. The Board of Directors has at least 7 members who have affluence and influence.
   - Do you have representatives from the business community on the board?
   - Are they the decision makers for their companies?
   - Do you have people of wealth who are well respected in the community and who have worked on other campaigns?
   - Do you have a board that reflects the diversity of the population in the community and the clients served?

6. The Board has a consensus on campaign plan and goal.
   - Has the board participated in the feasibility/planning study?
   - Does 100% of the board approve of this project?
   - Does at least 80% of the board feel the goal is possible to reach?
7. The Board is willing to work on the campaign.
   ▪ Do you have influential community leaders who will work on the campaign?
   ▪ Will at least three members of the Board serve on the campaign cabinet?
   ▪ Will 100% of the Board play some role—solicitors, public relations, phonathon, special events, etc.?

8. The CEO has been with the organization at least two years.
   ▪ Does the CEO have at least 10 years experience in the field?
   ▪ Is the CEO well known and respected within the field?
   ▪ How much turnover of CEOs, in last 10 years?

9. The CEO is experienced and respected in the community.
   ▪ Is the CEO active in Chamber of Commerce, civic or professional organizations?
   ▪ Is the CEO asked to serve as a spokesperson for issues relating to the field?
   ▪ Is the CEO known as a community leader?

10. The staff has enough experience and knowledge in the field of fundraising.
    ▪ Do you have a full-time director of development?
    ▪ Are the development staff members of AFP, CASE, AHP or other professional association?
    ▪ Is the chief development officer a CFRE or ACFRE?

11. The staff has enough time to work on the campaign.
    ▪ Is the staff free from over-involvement in special events?
    ▪ Do you have adequate clerical support?
    ▪ Is the staff free from over-involvement in other non-development related tasks?

12. The long-range plan with written goals is in place.
    ▪ Have the board and administration developed or updated your strategic plan within the last three years?
    ▪ Is the plan reviewed at least quarterly?
    ▪ Are objectives specific and measurable?

13. The annual giving program is in place.
    ▪ Have you done an annual campaign in the past two years?
    ▪ Has annual giving increased over the past two years?
    ▪ Do you have an integrated development program (special events, phone, direct mail, foundation grants, corporate appeal, etc.)?

14. The marketing and publicity plan is in place.
    ▪ Do you have a marketing staff, board members or consultants to develop your plan?
    ▪ Do you have a marketing plan developed or updated in the past three years?
    ▪ Is your marketing plan evaluated regularly?
    ▪ Do your public relations efforts result in increased donations, volunteers, and clients?
15. The organization serves a real need in the community.  
- Have you recently done a market study to evaluate community needs?  
- Is your organization in existence for two years or more?  
- Do you have a limited amount of competition for your programs?

16. The consumers of your organization think highly of your programs.  
- Have you done client satisfaction studies?  
- Do your consumers support you financially?  
- Do your consumers volunteer for your organization?

17. The organization has a high public image.  
- Do you have an easily identifiable logo?  
- Do you have an organizational video and/or brochures?  
- Do you regularly publish an annual report, newsletter and press releases?

18. There are individuals who could give 10% of the goal if they desire to do so  
- Do you have at least one Board member capable of giving 10% of goal?  
- Do you have a list of major donors capable of making a gift of this size?  
- Do you have the giving histories of your top donors?

19. Top 100 donors have been identified and cultivated  
- Can your staff pull a list of the top 20% of your donors with ease?  
- Do you have a donor recognition program in place?  
- Do you have a donor cultivation program in place?

20. Your campaign initiative is innovative, exciting, ambitious, and worthy of support  
- Have you done a feasibility study to determine community support?  
- Have you done a market study to determine the need for this project?  
- Have you done an architectural study to determine feasibility and costs of project?  
- Have you considered and evaluated endowment needs?
Campaign Readiness Evaluation

Tallying your score:

0 x___ = ________
1 x___ = ________
2 x___ = ________
3 x___ = ________
4 x___ = ________
5 x___ = ________
Total ________

Interpreting your score:

85-100 Your campaign is ready to launch immediately!
70-84 Some improvements are necessary.
55-69 Extensive preparation is essential to the success of your campaign.
0-54 Your agency is in serious need of re-organization before beginning a capital campaign.