



*Philanthropic Counsel... Making a Lasting Difference for Good*

## Are You Ready to Launch a Capital Campaign?

Find out if your organization is ready by taking this simple quiz.

### 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.

#### A. 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?" Does your case flow from a greater strategic vision for the organization? Do you know specifically what you need and how much it will cost or do you have a random shopping list?

**Yes**      **Uncertain**      **No**      **Score: x 2 =**\_\_\_\_\_

#### B. Leadership

Does your organizational leadership, the Board, CEO, and top management, agree with and accept the need for support? Is the leadership prepared for the intensive involvement that is necessary for campaign success? Are the leaders capable and willing to give maximum financial support and to ask others to do the same?

**Yes**      **Uncertain**      **No**      **Score: x 3 =**\_\_\_\_\_

#### C. Market Research

Has your organization done its homework and tested the case objectively with an appropriately dispassionate professional, your supporters and current constituents? Do your core constituencies understand the needs/opportunities to be addressed and support your capital plan?

**Yes**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

## **D. Prospective Donors**

Has your organization identified your major gift prospects and how they feel about the campaign? Are there at least three to five prospective donors identified for every major gift needed for success? Will the prospective donors make contributions at a level necessary for success?

**Yes**      **Uncertain**      **No**      **Score: x 2 =**\_\_\_\_\_

## **E. Volunteers**

Are there sufficient volunteers available to assist the staff with the campaign? Are there enough volunteers willing to solicit four to five major gifts from the prospect pool? Are the volunteers capable of making personal gifts of the same magnitude they will seek from others? Are the campaign volunteers motivated, trained and excited about the organization's future plans? Is the staff prepared to support the volunteer structure?

**Yes**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

## **F. A History of Support**

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

**Yes**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

## **G. Planning**

Is there a detailed campaign plan developed that outlines the following aspects of the campaign: the timetable; benchmarks; role of CEO/governing board/staff/ counsel; communications; involvement activities; the budget; strategies for prospect identification, cultivation, solicitation and stewardship?

**Yes**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

## **H. Timetable**

Is there a realistic timetable that incorporates intermediate benchmarks that will buoy and maintain a sense of urgency over the long haul?

**Yes**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

## **I. Staffing**

Are there staff members and/or outside consultants who are knowledgeable and experienced about campaign management and major gift fund raising?

**Yes**      **Uncertain**      **No**      **Score: x 2 =**\_\_\_\_\_

## **J. Records and Research**

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**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

## K. Budget

Has an adequate budget, approximately 6% to 12% of the goal, depending upon the type, size, and history of your organization, been specifically developed for the campaign that considers the cost of staff, outside counsel, training materials, travel, phone bills, office supplies, publications and promotions, meeting expenses, events and contingencies?

**Yes**      **Uncertain**      **No**      **Score: x 2 =**\_\_\_\_\_

## L. 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**      **Uncertain**      **No**      **Score: x 1 =**\_\_\_\_\_

**Total Weighted Score:** \_\_\_\_\_

## Did You Hit the Campaign Mark?

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

**Score of 36 - a perfect score:** If you answered "Yes!" to all of the questions and scored a perfect 36, then you are definitely ready and suitable prepared to launch your campaign.

**Score of 21 or higher:** If you scored 21 or higher, you *could* be ready to launch. For a more objective and accurate assessment, and to maximize your chances for success, consider a feasibility/planning study conducted by outside counsel. A feasibility/planning study can help you put important preparation elements into place by furthering the continuing engagement of your members, donors and prospects.

**Score of 20 or below:** There's work to be done first. Don't fret, every preparatory action now will pay dividends during a campaign. A feasibility/planning study might be further off in your strategic process than you would like. Perhaps there are internal advancement practices that need improving. Consider Demont's COPE© (Culture of Philanthropy Evaluation) to identify best practices your team might consider adopting to better prepare you for the journey ahead.