

Are You Ready? Campaign Readiness Assessment

Source: The Miller Group, Nonprofit Sector Services

The success of your fundraising campaign is determined by the thoroughness of your planning and preparation. You probably already know if you are really ready to launch a campaign or major fundraising initiative. Use these Readiness Factors to identify how you can improve your level of readiness.

	Strongly Agree	Agree	Don't Know	Disagree	Strongly Disagree
	1	2	3	4	5
<p>1. Organizational Consensus - <i>Key Internal Constituencies (trustees, staff, volunteers and donors) share common agreement on the need for and urgency of a major fundraising initiative. No major constituency is uncertain about the need for a campaign or its priorities. There are no major uncertainties facing the organization in the areas of leadership or direction which could distract senior staff or board members.</i></p>	1	2	3	4	5
<p>2. Case for Support - <i>Your organization is highly regarded, has a strong record of achievement, and fulfills a true need in your community or in the larger society. You have written a compelling case for support which has received adequate review and input from trustees, key staff and constituents and opinion leaders.</i></p>	1	2	3	4	5
<p>3. Funding Needs Planning - <i>You have conducted a thorough and methodical planning process which has provided the Board of Trustees and Campaign Planning Committee with a ranked list of building, equipment, facilities, staffing, program and endowment needs. The relative priority and cost of each has been established.</i></p>	1	2	3	4	5
<p>4. Case for the Campaign - <i>The Campaign goals and funding needs have been translated into specific campaign elements and presented in a written campaign "prospectus." You can articulate how the campaign will enable you to better fulfill your mission. You have determined that mounting a campaign is the best way to meet your funding needs.</i></p>	1	2	3	4	5
<p>5. Campaign Administration - <i>You have adequate staff leadership and clerical support. You have a solid information management and donor tracking system installed and working properly. You have a campaign budget, a timeline, printed materials, and you have approved written policies governing donor recognition, naming opportunities, pledges, non-cash gifts, campaign accounting and endowment considerations.</i></p>	1	2	3	4	5

	Strongly Agree	Agree	Don't Know	Disagree	Strongly Disagree
	1	2	3	4	5
6. Fundraising Leadership - <i>The initiative for your campaign is coming from your key volunteer leadership: trustees and major donors. You have identified and enlisted your campaign chair and committees from your pool of top rated donor prospects. Your program directors and department heads are ready to team with campaign volunteers; key leadership is ready, able and willing to ask for the right gift from the right person at the right time. These individuals are capable of inspiring others with their enthusiasm and belief in your organization's mission and people.</i>					

7. Capable Donors - <i>You have determined that you can secure lead gifts equal to at least 50% of your total goal before publicly announcing your campaign. You have identified realistic donor prospects, evaluated their giving ability, assessed their interests and readiness to give and determined that their combined gift potential exceeds your campaign goal. You have conducted adequate pre-campaign research and maintain adequate information about your prospects in your donor tracking and information management system.</i>	1	2	3	4	5
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8. Campaign Public Relations - <i>You have a plan for informing your constituencies of the purposes and progress of the campaign through specially tailored campaign communications and publications. You have a schedule for special events, cultivation activities, involvement opportunities and committee activities which will encourage broader participation over the course of the campaign. You have a plan and timetable for announcing your campaign publicly.</i>	1	2	3	4	5
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9. Campaign Strategy - <i>You have mapped your strategy for an inside-out, top-down campaign, for securing gifts sequentially and canvassing each donor sector (individuals, foundations, corporations, alumni, members, others) according to a pre-determined plan.. The strategy and its accompanying timetable, committees, staffing and budgets have been set forth in writing and approved by the Campaign Steering Committee.</i>	1	2	3	4	5
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10. Confidence - <i>Key staff and volunteer leadership are ready. There is a strong core group with the conviction, commitment and confidence to represent the needs and vision of your organization in a sustained and energetic effort.</i>	1	2	3	4	5
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