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LET'S BUILD HOPE
Transforming Nonprofits through Partnership

CAMPAIGN ASSESSMENT

Are You Ready for a Campaign?

To successfully conduct a multi-million campaign, internal readiness must be assessed. Through this assessment tool we will determine the strengths and challenges of your nonprofit to ensure the organization is adequately prepared to undertake this exciting endeavor.

Rate the organization on a scale of 1 to 5 with **5 denoting that the agency is "Fully Confident and Prepared"** and **1 denoting that the agency is "Unprepared at This Time."** Categories with a score of "3 or below" are areas that should be addressed before embarking on a capital or comprehensive campaign. It is not important that everything be rated "4 or 5", however It is important that you rate your organization objectively, so you can focus your efforts on areas for improvement.

ORGANIZATION STRUCTURE	1	2	3	4	5
We have a clearly stated mission and vision, and associated values.					
We have an active strategic plan that is being effectively utilized.					
We have had a balanced agency budget for at least the past two years.					
We have an organizational case for support that is compelling and urgent.					
We have a functional, updated website from which constituents can get desired information.					
Our organization is known and respected in the community for our service area.					
We have had no seriously negative press or publicity regarding our organization in the recent five years.					
ORGANIZATION LEADERSHIP	**1**	**2**	**3**	**4**	**5**
Our Board has embraced its primary roles of governance and fundraising and practices these effectively.					
We have a committed, qualified CEO in whom the key stakeholders and community have a high degree of trust.					
Our executive team spends time planning for the future.					
Our executive team has a good relationship with the board.					
Our executive team is visible and respected in the community.					
Our executive team is involved in fundraising.					
CAMPAIGN PREPAREDNESS	**1**	**2**	**3**	**4**	**5**
Our Board is educated about the campaign and prepared to lead both through giving and solicitation.					

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Both staff and board members have a high degree of commitment to the success of this campaign effort.					
We have a clear understanding of our capital needs and the associated costs for this effort, including fundraising costs.					
We have shared our campaign concepts with key stakeholders to gauge their interest.					
We have competent, qualified development staff prepared to direct the campaign and to support volunteer leadership.					
We have qualified donors and/or prospects that can give leadership gifts for this effort.					
We have board members who have been volunteers in a campaign previously.					
We have board members who have access to potential campaign donors.					
We have board members who can serve on the campaign cabinet.					
Our board members will fund 15% to 30% of the campaign goal.					
We can enlist top community leaders to help lead this campaign.					
We have influential people currently involved in our cause.					
We can identify potential volunteer leaders and create a plan to enlist them.					
We can identify a lead gift at approximately 20 to 25% of the goal.					
We have allocated funds to "staff up" for the campaign.					
DEVELOPMENT PROGRAM	**1**	**2**	**3**	**4**	**5**
We have board members who are active in fundraising now.					
We have major donors who are well cultivated and prepared to give gifts large enough to succeed.					
We have staff infrastructure in place for optimal support, both from the development and program perspectives.					
We have an experienced, capable staff.					
We have a development database which we are confident can manage donor and gift/pledge information.					
We have relationships with leaders at local companies and foundations.					
We routinely meet or exceed our goals.					
We have a sufficient expense budget for our development initiatives.					
We have a major gifts program with individual cultivation plans for our major gift prospects					

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There is someone on our staff or board who has a relationship with each of our top 25 donors.					
We have a number of qualified major gift prospects.					
Major gift prospects are cultivated and solicited.					
We have individual plans for major gift prospects.					
We have gift acceptance policies and procedures in place (receipting, recording, acknowledgement, and reporting of gifts).					
We have a system for depositing and recording gifts that is efficient, well-organized, and documented.					
We acknowledge gifts within a 48-hour period.					
We have a process for accepting securities and it is accessible to donors.					
We have an active planned giving program.					
Our development team interacts regularly with the program team.					
The development staff feels ownership of the fundraising plan.					
Job descriptions for the development staff are accurate and up to date.					

Average your answers within the 1 to 5 system.

Scoring denotes the following projected outcomes:

Score of 4 to 5 The organization is ready to undertake the campaign, understanding that some adjustments and updates may need to be made as the campaign progresses.

Score of 2.5 to 3.5 The organization may be ready but there are issues that need to be immediately addressed BEFORE the campaign can move forward effectively.

<Score of 2.5: The organization is not ready for a capital effort at this time. Significant issues need to be addressed before a successful campaign can begin.