



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. 0 1 2 3 4 5
 - 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. 0 1 2 3 4 5
 - 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 0 1 2 3 4 5
 - 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 0 1 2 3 4 5
 - 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. 0 1 2 3 4 5
 - 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. 0 1 2 3 4 5
 - 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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. 0 1 2 3 4 5
- 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 0 1 2 3 4 5
- 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 0 1 2 3 4 5
- 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 0 1 2 3 4 5
- 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.