

CAMPAIGN READINESS SELF-ASSESSMENT | CHECKLIST

ORGANIZATION INFORMATION

Gather and review existing documents:

- ☐ Most recent Form 990 Tax Filing
- ☐ Most recent completed Audit report or reviewed financial statements
- ☐ Your current strategic plan
- ☐ Last three years' organization financial documents
- ☐ Your reserve fund and endowment policies, if any

Review, discuss, and assess key organization capacities:

- ☐ Fundraising
- ☐ Programming
- ☐ Communications
- ☐ Administration and Operations

PERSONNEL INFORMATION

- ☐ Board Leadership – Review board member list
- ☐ Staff Leadership
- ☐ Campaign Committee
- ☐ Consultant (if applicable)

PROJECT INFORMATION

For capital projects, compile information on:

- ☐ Scope of work – new build, purchase, renovation
- ☐ Square footage, and how much additional space will be gained, if any
- ☐ Status of architectural plans, building contracts, any environmental testing/clean-up needed on new or existing site
- ☐ Timeline – when will the project begin, and be completed?

Build the financial components to the project.

- ☐ Develop a detailed line-item budget for the project.
- ☐ Develop projections of organizational revenues and expenses for the next three years once the project is complete.

CAMPAIGN INFORMATION

Lay out your approach for the campaign.

- ☐ Develop a campaign timeline
- ☐ Develop a fundraising pyramid
- ☐ Develop a budget for the campaign

CAMPAIGN READINESS SELF-ASSESSMENT

This tool is designed to walk you through the information needed for a project and campaign to help you determine your organization's readiness. The information gathered will be useful when meeting with a volunteer QCCC member and completing the QCCC application.

ORGANIZATION INFORMATION

Gather and review existing documents:

- ☐ Most recent Form 990 Tax Filing
- ☐ Most recent completed Audit report (if relevant) or reviewed financial statements
- ☐ Your current strategic plan (is the project need demonstrated in this plan?)
- ☐ Last three years' organization financial documents
- ☐ Your reserve fund and endowment policies, if any

QUESTIONS TO ANSWER:

What story do these financial documents tell about your organization? About the need for or benefits of your proposed project?

Are there major variances, or challenges, that a narrative would help you explain to potential donors?

Is your organization carrying any debt? If so, for what reason, and how is it being paid back?

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If your organization is not required to complete an audit, have your financial documents been reviewed by a Certified Public Accountant to make sure they comply with applicable accounting standards?

Do you currently have a reserve fund? An endowment? What are the balances of those funds?

Is reserve or endowment building a component of this project and campaign?

Review, discuss, and assess key organization capacities:

FUNDRAISING | QUESTIONS TO ANSWER:

Does your organization have a strong donor base? An annual campaign? A major gifts program? How will you maintain your annual fundraising goals while engaging in this campaign?

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What are the technical capabilities of your development database? What data can you use to plan and carry out your campaign?

Has your organization – or its current team – ever undertaken a major strategic campaign? What was the purpose? Who was involved?

What were the results? Were there aspects that worked well? That you would change going forward?

Who are the major contributors to your organization over the last three years? What do they support at your organization?

PROGRAMMING | QUESTIONS TO ANSWER:

What are the outcomes of your programs?

What are some of the major successes of your organization over the last 3-5 years? Some of the major challenges?

How do your organization's programs fit into the network of services available to your clients and the Quad Cities? How do you and other organizations coordinate and complement each other's work?

COMMUNICATIONS | QUESTIONS TO ANSWER:

What is the perception of your organization by your clients? Your partners? Your donors and close constituents? The public?

What are your communications capabilities? Do you have regular print or electronic communications? A strong web and social media presence?

ADMINISTRATION AND OPERATIONS | QUESTIONS TO ANSWER:

What administrative and operational support is available for the campaign? The project?

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PERSONNEL INFORMATION

Review, discuss, and assess key organization talent skill sets:

BOARD LEADERSHIP | QUESTIONS TO ANSWER:

What experience does your board have in fundraising or major campaigns?

What willingness has your board demonstrated to lead and participate in the work of this campaign?

STAFF LEADERSHIP | QUESTIONS TO ANSWER:

Who are the members of your leadership team, and what are their roles?

What is the tenure of the members of your leadership team?

What experience does your staff leadership team have in fundraising or major campaigns? What role will each have? Is the CEO available for involvement in meetings for cultivation and solicitation?

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CAMPAIGN COMMITTEE | QUESTIONS TO ANSWER:

What volunteer leadership will drive the campaign? Have you formed a campaign committee? Identified chairs or co-chairs?

CONSULTANT | QUESTIONS TO ANSWER:

Are you using/will you use a campaign consultant or other outside fundraising professionals? If so, who? What role will they fill?

PROJECT INFORMATION

Develop the narrative that explains your proposed project.

QUESTIONS TO ANSWER:

What is the project you are proposing? What will the future state of your organization and services be when it is complete?

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How will the project help your organization better meet its mission and goals? What needs will it meet for your clients? Your organization? The Quad Cities?

How did you identify the need? Have you involved your clients in defining the need and how to meet it?

How does your existing programming, your organization's recent successes or challenges, or your strategic plan, help make the case for this project?

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What similar facilities or projects exist in the Quad Cities, and how does this project fit in the network of resources available?

What alternatives did you consider, and why did you instead choose this project?

How many years into the future will this project meet your organization's needs?

What will be the outcome for your mission and clients if this project does not take place?

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- ☐ Timeline – when will the project begin, and be completed?

Financial components

- ☐ Develop a detailed **line**-item budget for the project.
- ☐ Develop projections of organizational revenues and expenses for the next three years once the project is complete.

QUESTIONS TO ANSWER:

How will the project affect your ongoing program and operating expenses, like staffing, maintenance, utilities? If they will increase, how do you plan to meet those ongoing increased expenses?

Will interim financing be needed? What sources exist to secure this financing, and what are the terms available?

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CAMPAIGN INFORMATION

Lay out your approach for the campaign.

- ☐ Develop a campaign timeline
- ☐ Develop a fundraising pyramid
- ☐ Develop a campaign budget

QUESTIONS TO ANSWER:

When will the campaign begin? When will the private and public phases begin and end?

How many gifts of each size will you seek to met your goal?

What major donors, foundations, or companies will you approach? What do they fund and what do they prioritize? How much will you request from each?

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How much of the campaign goal will be raised in the Quad Cities?

What type of funding will be sought outside the QC area? Can local funds help to leverage outside funds, or vice versa?

What percentage of the fundraising goal will you secure before beginning the project?

What level of investment is your organization making towards this campaign?