

## ***Capital Campaign Readiness Quiz***

Many ingredients combine to make a successful capital campaign. To help you determine if your organization is well positioned to move into a formal campaign planning process, we've developed the following Campaign Readiness Quiz. Answer yes or no to these questions then check your score to see how well you are positioned and what your next step may be.

### **Community Awareness**

1. Is your organization well known and well respected in the community it serves?
2. Are community leaders generally aware of the important work you do in the community?
3. Does your organization have a history of volunteer involvement?

### **Project Definition**

1. Can you clearly and succinctly demonstrate the need for the proposed capital project?
2. Are plans sufficiently far along that you can convey a reasonably accurate sense of the project scope?
3. Do you have credible cost estimates that reasonably project the funding required for the proposed project?

### **Financial Projections**

1. Do you have operational budgets that demonstrate the long-term sustainability of the project?
2. Can your organization demonstrate it has a history of sound financial management?
3. Are your fund raising and overhead expenses in line with national averages (10% to 20% is considered reasonable)?

### **Development History**

1. Does at least 15% of your annual operating revenue come from major gifts of \$5,000 or more?
2. Can you identify a pool of approximately 200 donor prospects who are capable of giving or influencing gifts of at least \$5,000 a year and who might reasonably be expected to have an interest in your organization?

## Board Participation in Fund Raising

1. Would you characterize your Board as a “fund raising Board?”
2. Are at least some members of your Board actively involved in fund raising?
3. Do you have a Development Subcommittee of the Board?
4. Do Board members make annual gifts?
5. Does your Board host an event?

## Campaign Resources

1. Does your organization have the capacity to hire or dedicate a full time person to serve as capital campaign manager as well as a half time administrative support person?
2. Do you have, or can you find the resources to develop basic campaign materials – brochure, solicitation kit, donor recognition gifts, etc.?

To grade your quiz, give yourself 5 points for every “Yes” answer. Then total your score and check it against the guidelines below.

If you scored:	Your rating is:	Suggestions:
80 to 90	<b>Excellent!</b> All of the elements are in place to begin formal campaign planning.	<b>Contact Pathway Associates</b> to discuss how we can help you plan and launch your campaign.
65 to 75	<b>Not bad.</b> But you’ve got some work to do before beginning the campaign planning process.	<b>Contact Pathway Associates</b> for free advice about what you need to do improve your state of readiness over the near term.
60 or lower	<b>Not yet.</b> Unless there are unusual circumstances, you’re probably not in a good position to conduct a capital campaign.	<b>Contact Pathway Associates</b> to discuss a longer term strategy to move into position for an eventual capital campaign.