

Are You Ready for a Capital Campaign?

A capital campaign can be one of the most ambitious fundraising undertakings a nonprofit will ever experience. The rewards can be the answer to a large financial challenge such as financing a new building, program or insuring the sustainability of your organization. But it requires a tremendous amount of preparation, dedication, and hard work.

Is your organization ready for a capital campaign? Take this quiz and find out.

Instructions: Select the answer for each question that is most true. The number beside that answer will be used to tally your final score.

Image, Reputation, And Competition

How many people in your community recognize the name of your nonprofit? Do they have a clear understanding of what you do? Do they have a positive image of your organization?

Almost no one	1
Some know our name and have a fuzzy, slightly positive image of what we do	2
Many know our name. Many know what we do and many have a positive image of our work	3
Almost everyone knows us, knows what we do and has a positive image of our work	4

Are there other capital campaigns going on in your community and/or are there others planned for the near future? Can your community support all these campaigns?

We have no idea of what others are doing	1
We've heard rumors about other organizations	2
We've checked with a handful of other organizations to learn their plans	3
We have conducted a thorough investigation of other nonprofits' activities and plans in our community and feel our community can support our plans	4



Planning and Case for Support

Does your nonprofit have a strategic plan with a well-articulated assessment of where you are and a clear vision of where you're going the next 5 or so years? Is a capital campaign a logical extension of the strategic plan?

We have no plan and have not discussed it	1
Leaders have talked about the future, but no written plan exists	2
We have an outdated plan that needs refreshing	3
The board has worked hard to write a clear, 5-year strategic plan and the capital campaign is integral to the plan	4

Can you explain in a clear and compelling way how the community will benefit from the campaign? Do you have an emotional hook to make your appeal?

Benefit is not at all clear. No emotional hook	1
Benefit has been determined, but no emotional hook	2
Community benefit is clearly stated, but limited emotional appeal	3
Benefit is clear and benefit and emotional hook have been tested with potential donors	4

Campaign Leadership

Has the Board of Directors engaged in an in-depth and realistic discussion of what it will take to conduct a capital campaign? Have they acknowledged the deep commitment of time and money needed from both the organization and from individual board members? Do they really understand and agree to what it will take to make this happen?

The board has not discussed the campaign	1
The board has had preliminary discussions about the campaign	2
The board spent time learning what is involved with a capital campaign	3
The board has had a deep and lengthy discussion on this topic and each member has personally committed to the project and has voted to proceed	4

Are there several good prospects for leadership to the campaign? Are there respected community leaders with experience who will lend their reputation and talent to this effort and open doors?



No prospects	1
A few good prospects, but they are not necessarily tied to the organization	2
There are several good prospects with ties to the organization, but they have not been asked, and we don't know if they'll serve	3
Several key leaders have been identified and have agreed to assist with the campaign	4

Donor Support

Can you identify a stable pool of donors who have given to your organization before and are likely to make major gifts to the campaign, comprising at least 50% of your goal?

No pool of existing donors	1
A small group of consistent donors	2
A substantial group of steady donors, some with a history of making significant gifts	3
A good core group of donors likely to support us at the needed levels	4

Have you made a list of each donor constituency (board, staff, previous donors, businesses, foundations, etc.) and identified target amounts to reach 100% of your goal?

No, not sure where to begin	1
We have started a list of constituencies	2
We have created a list but no goals yet	3
We have created a carefully thought-out, realistic list of goals for each of our constituencies	4

Infrastructure And Expertise

Do you have staff to manage the campaign, the software to track donations and thank donors, and the policies and procedures to manage gifts as they come in? Do you have funds needed to support the upfront costs of running the campaign?

None of these	1
Some of these	2
Many of these	3



All of these	4
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Do you have qualified expertise and guidance to create, conduct and manage the campaign?

We have no one with capital campaign experience in our organization and no plans to hire a consultant	1
We have some board and staff experienced with capital campaigns	2
We have identified several consultants and board members who could provide the guidance needed to run the campaign	3
We have the experience that we need to guide the campaign in the form of a hired consultant and/or board or staff member highly experienced in conducting a capital campaign	4

Tally Your Results for All Questions. _____

28 and above	Your nonprofit is well prepared to undertake a Capital Campaign.
20 to 28	Nearly ready. More preparation needed.
12 to 20	A lot of work ahead of you to be ready.
Below 12	Not ready at this time. Use your responses from this quiz to identify next steps.

