

# FUNDRAISING READINESS ASSESSMENT

*ARE YOU READY FOR SUCCESSFUL FUNDRAISING?*

## OVERVIEW

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Preparing an organization for a successful fundraising campaign is like preparing a child for college. A child cannot start in kindergarten and advance to a university – he or she must build their foundational base of knowledge, maturity, and resilience. Similarly, it is imperative that an organization's infrastructure is built over time and a focus on learning the foundational basis that the organization can grow and thrive. The best way to ensure a successful fundraising campaign is to build the organization's capacity by methodically and thoughtfully working through 10 key areas of preparation.

Assessing readiness in these crucial areas helps your staff and volunteer leadership identify which areas need strengthening and which strengthening strategies to implement prior to launching a fundraising campaign project.

The primary purpose of the assessment is to define, at a high level, areas that your organization may need to strengthen before proceeding with a fundraising campaign. This assessment gives your board and leadership staff a preliminary reading on your association leaders' perceptions of readiness.

## READINESS ASSESSMENT INSTRUMENT

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The Readiness Assessment is a tool that evaluates your staff and volunteer leadership's perception of your organization's capacity in ten key areas. The tool is not a test, it is an instrument to reflect on the organization's strengths and weakness and build strategies for strengthening the organization's capacity to raise the necessary funds to deliver your mission. Therefore, the more honest and candid you are about your current situation, the more you are able to identify key areas to strengthen and increase your organization's readiness for successful fundraising.

# FUNDRAISING READINESS ASSESSMENT

## ARE YOU READY FOR SUCCESSFUL FUNDRAISING?

Please indicate your sense of whether or not your organization engages in the described behaviors and activities, using these responses:

**4—Strongly Agree**

**3—Agree**

**2—Disagree**

**1—Strongly Disagree**

If you don't know the answer, leave that section blank.

Assess each statement within the category, using the above rating scale. Then average the scores to determine the category rating. When you complete the survey, add up your score in the Category Rating column. Use the comment section to further clarify your thoughts or concerns, if necessary. A general explanation of the results follows:

**Score of 3.0-4.0:** Your general perception is one of high confidence for fundraising readiness, although low scores in any particular area indicate opportunities for strengthening.

**Score of 2.0-2.9:** Your organization has several strengths, but may not be quite ready for a major fundraising campaign or commitment to a capital project. Focusing on these few areas where you scored a 3 or lower can put you in a position for success.

**Score below 2.0:** Your organization is probably not ready to embark on a public fundraising campaign and would benefit from strengthening endeavors in multiple areas.

STATEMENTS	RESPONSE	CATEGORY RATING
<b>1. Influential and Committed Board</b>		
The board includes influential community and business leaders who have a passion for the organization.		
The board is composed of peers of potential major donors or has access to those who can contribute a lead gift to the campaign.		
Board members are connected to leaders from key community partners.		
Comments:		

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2. Experienced and Respected CEO or Executive Director		
Your organization has an experienced and respected CEO or Executive Director who is willing to devote 50 percent or more of his/her time to a fundraising campaign. (Think about how long the CEO has been on the job and how successful he/she has been in developing solid relationships with community leaders.)		
The CEO or Executive Director has a reliable and stable staff team in place to operate the organization while he/she devotes at least 50 percent of his/her time to the fundraising campaign.		
Comments:		
3. Positive Community Image		
Your organization has a positive community image and top-quality services and programs upon which to build its case for support.		
Your organization demonstrates the impact its programs are making in solving critical community issues related to your mission.		
Comments:		
4. Loyal and Committed Constituents		
Your organization has a multiyear track record showing growth, delivery of high-quality programs and/or services.		
Your organization's programs and/or services and its community engagement strategies are designed to promote relationships among staff, program participants, and the community		
Your organization's programs are designed to address identifiable needs in the community.		
Comments:		

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5. Ongoing Strategic Planning		
You can easily describe how the fundraising campaign will support the organization's strategic plan and its long-term objectives for community impact.		
Your organization has investigated options for providing expanded programs through collaborative opportunities with other organizations to achieve higher quality community service.		
Key community leaders and representative stakeholders have played a part in your organization's planning process.		
Comments:		
6. Stable Financial Position		
Your organization has been generating surplus funds for several years. (The ability to cover all operating expenses and still put some funds in reserve for future replacement and maintenance of facilities and equipment is a critical indicator of good financial stewardship.)		
Your organization has a plan for financial sustainability over at least the next decade. Your organization is aware and has a plan to combat the external threats that challenge the financial sustainability of the organization (minimum wage increases, change in demographics, loss of a grant funding source, etc).		
Your organization leaders are familiar with your organization's debt structure and understand the potential impact of acquiring any new debt.		
Comments:		

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7. Successful Previous Fundraising Campaigns	
Your organization has had a successful campaign in the last 3-5 years. The fundraising goal was met.	
Your organization meets recommended practices for annual fundraising such as the following: at least 50 percent of your annual donors comes from major gifts; a high percentage of donors increase their contribution level annually; donor retention is at a high level; and the number of campaign volunteers grows each year.	
The board views philanthropy as one of its top priorities and leads by example. For instance, the board is formally solicited for personal gifts, 100 percent of board members make meaningful gifts annually, and board members are involved annually in two or more of the following activities: identifying prospects, cultivating prospects, asking for donations, thanking contributors, or reporting back on how donated funds made an impact.	
Comments:	
8. Compelling Case for Support	
Your fundraising case is so compelling that it will move your campaign to the top of prospective donors' list of philanthropic interests.	
You can easily explain why this fundraising effort is important to the community, how it meets identified critical needs, and why it is vital at this time.	
Comments:	
9. Adequate Fundraising Infrastructure	
Your organization has adequate staff, up-to-date fundraising policies and procedures, and sufficient technology to support conducting a fundraising campaign.	
Comments:	

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10. Leadership Passion for the Cause		
You believe this fundraising campaign will support critical community needs.		
You are willing to make a stretch gift according to your personal means.		
You are willing to work on the fundraising campaign in some capacity.		
Comments:		

Total score	
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