



Campaign Checklist – A test for preparedness

Before embarking on a major fundraising campaign, you should be able to answer “yes” or be able to supply the information for each of the following questions:

1. Identify Needs

- Is there agreement on campaign objectives and needs among board, administration, donors and friends?
- Has an organizational long-range plan been conducted? Has an outside evaluation of your plans been conducted?
- Do you have realistic project and program budgets, architectural plans, or endowment requirements?

2. Perform study / Campaign Planning

- Is your annual fund fully developed? Gift Clubs? How many \$1,000 or more donors? Percentages of giving?
- Are you raising funds from corporations, foundations, government agencies, and individuals for specific projects and proposals?
- Do you have a planned gifts program?
- Have you budgeted your campaign costs? Do you know staffing requirements for your campaign?
- Can your development and public relations offices provide support for campaign accounting, gift acknowledgements, materials production, scheduling, special events, and public relations? What is the status of your database?
- Does your staff have capital campaign experience? Is more staff required for a campaign? Is the proposed campaign timetable realistic?

3. Identify Prospects

- Can you identify a lead gift equal to 10 to 15 percent of your campaign goal?
- What are the likely ranges of gifts at different levels required to meet your campaign goal? Do these fit your pattern of current support?

4. Recruit Leadership

- Can your board give 10 to 30 percent of your goal? Will they all participate?
- Is leadership available and ready to lead, give time and money, and give priority to your campaign? Are they experienced in fundraising?

5. Prepare Materials

- Have you developed a persuasive campaign description or case statement?

6. Recruit Volunteers

- Do you have a sufficient number of volunteers and a tradition of volunteerism to support a personal contact fundraising appeal?

7. Inform Prospects

- Are supporters, friends, and the giving community well acquainted with your mission, your needs and your plans?

8. Solicit Prospects

- How do your volunteers feel about making personal visits with peers?