

Campaign Readiness Checklist



Long Range Plans	We have well-defined objectives for our organization over the next 3-5 years.
	We have a clear strategic plan in place that is adaptable.
	We have a clear written definition of the role we serve in the community.
	We have clear written statement of how this campaign is tied to our organization's mission and our theory of change.
Resources	We have a strong fundraising program in place, raising money from individuals, foundations, and corporations who can be cultivated and tapped for major gifts.
	We have identified likely sources for lead gifts totaling 15% of the goal.
	We have diversified revenue sources (Individuals, Foundations, Corporations, Government.)
Board Leadership	Our board understands the purpose of the campaign.
	Our board has a clear picture of the sequence and timing of the campaign.
	Our board and volunteer leaders have a clear idea of how they can contribute the campaign (non-monetary).
	We have a formalized process in place for asking board members for gifts.
	We have clearly outlined practices for stewarding board gifts.
	We have a process in place for leadership to regularly communicate with staff on the progress of campaign.
Operations & Staffing	We have an annual development/fundraising plan into which the campaign is integrated.
	We have a clear donor privacy policy in place.
	We have a gift acceptance policy in place.
	We have a clear system for tracking campaign gifts and ensuring they are appropriately designated.
	We have a clear system for tracking multi-year pledges.
	We have clear process for reconciling gifts with finance staff.
	We have a clear system for financial reporting in which reports on campaign gifts and pledges can be pulled regularly.
	We have a system for sending mass emails/online communications to donors.
	Our online communications system has the ability to build and segment mailing lists.
	We have determined how to receive and track campaign gifts made online.
	Our online donation page has the ability to designate gifts for a specific campaign.
	We have prepared a set of special acknowledgement letters for campaign gifts.
	Our campaign acknowledgement copy is varied based on gift amount.
	We have prepared a set of letter templates for acknowledging pledges, reminding donors of outstanding pledge payments and confirming final pledge payments.
	We have or will dedicate time to training staff on the processes needed to sustain ongoing gift and pledge acknowledgment and tracking.
	We have considered and planned for the ways in which this campaign may increase the current workload and responsibilities for staff.