

# ARE YOU READY FOR CAMPAIGN COUNSEL?



## **A strategic self-check to help you know when you're ready—and how to get there.**

Engaging fundraising counsel is more than hiring a guide—it's a commitment to bold vision, deep partnership, and shared success.

At FBC, we believe the best consulting relationships are built on clarity, trust, and mutual readiness. This self-assessment is designed to help you explore whether your organization is positioned to get the most from a consulting partnership—or if there's foundational work to strengthen first.

# ARE YOU READY FOR CAMPAIGN COUNSEL?

Check all boxes that apply.

## 1. Clarity of Needs and Goals

- Are your fundraising goals clearly defined—and connected to your mission? (e.g., growing your annual fund, launching a capital campaign, expanding major gifts)
- Can you articulate the specific challenges or opportunities you hope counsel will help you address?
- Is there alignment across staff and Board around why external support is needed—and what success looks like?
- Are you clear on the role you would like your counsel to play in supporting you?

Clarity builds trust. The more focused your vision, the more strategic your counsel can be.

## 2. Leadership Commitment and Engagement

- Are staff and Board leaders willing to actively participate in the process (meetings, decisions, strategy sessions)?
- Do you have a point person who will manage the consultant relationship and help move things forward?
- Is leadership prepared to invest the time, attention, and energy needed to implement recommendations—not just receive them?
- Are the Board and Staff Leadership clear on the roles of each party and the expectations for how your counsel will be a partner in the process?

A consultant can guide the way—but your leadership still has to walk the path.

## 3. Fundraising History and Infrastructure

- Do you have a functioning fundraising program in place (e.g., annual campaigns, donor management systems)?
- Are your donor records up to date, organized, and accessible?
- Do you have ways to track fundraising activities and report on results?

Strong infrastructure earns donor confidence—and gives your consultant a platform to help you build upon.

## 4. Organizational Capacity and Culture

- Is your organization financially stable and transparent in its practices?
- Is there a culture of collaboration, communication, and shared ownership with clear accountability for fundraising?
- Is your team open to new ideas—and willing to act on bold recommendations?
- Do you intentionally cultivate a healthy culture of philanthropy across staff, Board, and volunteers?
- Is the definition of a thriving and healthy culture of philanthropy understood by all?

Campaigns succeed in environments where trust, curiosity, collaboration and generosity thrive.

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### 5. The Right Donors + Case for Support

- Have you identified qualified prospects who are excited by your vision and ready to engage?** Campaigns don't start with the crowd. They start with the core—your champions who believe deeply and are ready to lead.
- Have you been stewarding these qualified prospects along the way as stakeholders who matter?** Campaigns start with stakeholders you have “cherished” through stewardship even when there is no campaign in process.

### 6. The Time and Will to Succeed

- Are you ready to dedicate the time, focus, and organizational energy needed to carry this campaign through to success?** Campaigns are transformational only when your whole organization commits to the journey—treating it as a critical, relationship-driven priority rather than a transactional effort.
- Do you have a plan and process for how you will maintain a steadfast dual communication channel with your donors and stakeholders throughout the campaign?** Beyond the immediate thank you and acknowledgement for investing in the campaign, a meaningful stewardship strategy will be the differentiator for a sustainable long-term relationship.

## What's Next?

Count how many boxes you checked \_\_\_\_\_

**9–13: You're well-positioned—let's talk about your discovery phase.**

**5–8: You're gaining momentum—FBC can help close the gaps.**

**0–4: You're early in your journey—let's build a roadmap together.**

**Ready to talk? Visit [generosityexperts.com](https://generosityexperts.com) or contact us directly at [info@generosityexperts.com](mailto:info@generosityexperts.com) to schedule a complimentary Campaign Readiness Conversation.**