

ARE YOU READY FOR A CAPITAL CAMPAIGN?

Questions to Help You Build Confidence & Momentum

(Based on FBC's Campaign Readiness Diagnostic Checklist)

Check all boxes that apply.

1. Compelling "Why" for the Campaign

- Can you clearly articulate why this campaign matters—and what it will make possible that isn't possible today?** Your case should light a spark. It should inspire action, attract investment, and clarify the transformation your campaign will deliver.
- Is your campaign vision directly tied to your strategic plan or a bold organizational pivot?** Campaigns that succeed are grounded in strategy—not stress. The "why now" must be both urgent and aligned.

2. The Right Leadership

- Are your staff and volunteer leaders aligned, energized, and ready to lead with confidence and their own personal commitment of time, talents and personal treasures?** Clarity, buy-in, and shared vision at the top fuel campaign momentum.
- Does your organization actively cultivate a healthy culture of philanthropy?** A culture that values generosity builds trust from the inside out—starting with staff and Board and extending to your community.
- Does your team have the stamina—and the strategy—to stay the course?** Campaigns are marathons with milestones. Sustained energy and commitment are just as important as your starting plan.

3. Internal Systems + Infrastructure

- Do your systems (CRM, reporting, processes) support the information that is necessary for a successful campaign?** You don't need perfection—you need infrastructure that gives you clarity and traction.
- Have you sought insight or counsel from trusted partners and stakeholders via an organized well-thought-out process?** External perspective unlocks clarity, consensus, and donor-aligned strategy.

4. Financial Health

- Are you prepared to invest in the people, planning, and tools needed to run a successful campaign?** Investment signals that you're serious—and gives others confidence to invest alongside you. Professional and Board leadership who understands and are committed to this need of investment are pivotal. Lead gifts, sufficient qualified staffing and infrastructure are not "nice-to-haves"—they're launch fuel.
- Does your organization have a strong track record that builds trust with donors?** Campaign momentum is fastest when donors trust you'll deliver on your promise.

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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 or contact us directly at info@generosityexperts.com to schedule a complimentary Campaign Readiness Conversation.