

Fund-Raising Readiness Organization Self-Assessment Inventory

Self-Assessment Overview

The purpose of this exercise is to help you focus on your organization's fund-raising achievements and challenges, as well as on your thoughts and perceptions in this regard.

This self-assessment and discussion exercise will provide insight as to what is needed for the organization to achieve its goals with the help of fund-raising.

"How can we be sure we're ready?"

It is a question TPG is often asked in early meetings with organizations considering increased charitable income, whether for capital projects, general operations, endowment, and/or special project needs and opportunities.

A complete answer requires a thorough analysis of many inter-related factors by experienced professionals via a Fund-Raising Audit, a Philanthropic Market Assessment or a Capital Campaign Feasibility Study. However, you can begin the process by investing a few minutes to complete this **self-assessment inventory**.

Instructions

Individually, rank your perception of the organization's readiness in the following areas. (Use a scale of 1 to 5 with 5 being the highest (or use a scale of 1 to 10 when indicated). Record and be prepared to compare your results.

There are no wrong answers. What is most important is thoughtful rating and open discussion. Although a consensus may result regarding points of discussion, consensus building is not the main purpose of this exercise.

Stop: Please complete the rating exercise (on page 2) before proceeding.

How did you do?

A total composite score of less than 60 indicates significant preparatory work will be required before fund-raising can be effectively expanded and sustained. In addition, if the score in any one category is below 3 for 5 points or below 6 for 10 points, a serious weakness is indicated which must be addressed if your goals are to be met.

Many organizations need to engage in readiness enhancement activities before fund-development can be expanded. Moreover, keep in mind that 90% of the organization's fund-raising success is determined by how well it prepares for fund-raising.



Fund-Raising Readiness: Organization Inventory

Score	Question
1.	We have a strong, positive image and reputation. (5 points)
2.	Our record of service to the community is above reproach. (5 points)
3.	We have a solid history of fund-raising success. (5 points)
4.	Our constituency supports us in an exemplary manner. (5 points).
5.	The need and opportunity for expanded programming, accelerated capital projects, and/or endowment ranks high among total community needs. (5 points)
6.	Our constituencies understand and support the cause. (5 points)
7.	The funds we seek are available in our community and/or from our constituents. (5 points)
8.	Our constituents have responded favorably in the past to fund-development campaigns similar in size and scope. (5 points)
9.	We have, among our “inner circle” of friends and board members, well informed, influential, and experienced leaders. (5 points)
10.	These leaders are willing to work, lead, and give in support of the project’s priorities. (10 points)
11.	Beyond this inner circle, we have available to us a substantial body of additional volunteers. (5 pts)
12.	These volunteers are willing and able to work actively in support of accelerated fund-development. (5 points)
13.	Comprehensive processes of planning have taken place, involving board and staff resulting in written up-to-date strategic plans. (5 points)
14.	The identified funding needs and case-for-support are a logical outgrowth of that process. (5 points)
15.	Credible documentation of the funding needs and opportunities have been prepared which explains the details, the project(s), describes the history; and concentrates on <u>positive outcomes, benefits, and people served</u> . (10 points)
16.	A process is in place to address significant obstacles that may be uncovered before or during the fund development campaign. (5 points)
17.	The organization is internally ready. We have in place or can recruit experienced development staff, highly accurate and retrievable donor/prospect and financial records, appropriate policies and procedures (gift processing and acceptance, donor and volunteer recognition, investment, and adequate support personnel and technology). (5 points)
18.	The organization has the financial resources necessary to plan and conduct a fund-raising campaign, and the leadership is unanimously committed to the project. (5 points)
TOTAL (100 Possible Points)	