



ASSESSMENT OF CAMPAIGN TIMING

The **ASSESSMENT OF CAMPAIGN TIMING** is an instrument which measures twenty-one independent criteria of campaign readiness. Separately, each is of consequence. But together, at the right levels and in the proper combination, they assure the success of a capital program.

ACT is most effective when completed individually by board members and then discussed in a group session. It is the candid and thorough examination of each item publicly that helps strengthen complete understanding and initiates appropriate action.

The first column of **ACT** calls for your subjective rating. **10** is the highest possible score, **1** the lowest.

Where you feel your organization deserves a top rating, give the item a **10**. Where you feel there is room for improvement, make an assessment of how serious the deficiency is and determine the rating.

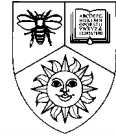
| | |
|--------------------|---|
| 10 | Best possible rating |
| 9 | At an excellent level, but not perfect |
| 8 | Very good—but requires some attention |
| 7 | Good—but needs improvement |
| 6 | Satisfactory—needs serious work |
| 4 and below | Unacceptable—immediate correction is called for |

Each item in **ACT** is given a weight—the higher the weight, the greater the consequence of the criterion for the success of the campaign. Each has been measured carefully for its significance.

Multiply your rating in the first column times the weight in the second column—and indicate the total in the third column.

When you are finished, total the third column on each page, and add together. Your total score is: _____

| | |
|----------------------|---|
| 925 - 1000 | You're ready. What are you waiting for! |
| 840 - 924 | You will almost certainly have a successful campaign. Take time to correct the few deficiencies you have. |
| 715 - 839 | You're close. You still have some work to do before you can be assured of success. Begin now to make the necessary changes. |
| 714 and under | You're not ready, not nearly. You need to spend time improving the critical areas which will determine your ability to reach the goal. |



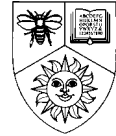
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| ACT FACTOR | YOUR RATING | ACT WEIGHT | TOTAL |
|---|-------------|------------|-------|
| <p>1. EXECUTIVE DIRECTOR HAS BEEN ON THE STAFF FOR A MINIMUM OF 24 MONTHS <i>Grade this a '10' if the Executive has been with you for at least 24 months. Deduct a point for every three months less than 24 months.</i></p> | | 1 | |
| <p>2. YOUR BOARD IS UP TO THE FULL COMPLEMENT OF MEMBERSHIP WHICH IS ALLOWABLE IN YOUR BYLAWS <i>Grade this a '10' if you have no vacancies. For each vacancy, give yourself '1' less in rating—for instance, if you have 2 vacancies, give yourself an '8'.</i></p> | | 1 | |
| <p>3. BOARD ATTENDANCE DURING THE PAST 18 MONTHS HAS AVERAGED 80% OR MORE <i>Total all of the board meetings you have had during the past 18 months and compute your attendance. If it is 80% or more, give yourself a '10'. For every 5% less than 80% deduct '1' point in rating. For instance, if you had an average of 63% attendance, you should receive a '6'. If, by the way, your attendance averages less than 50% for regularly scheduled meetings—you are in serious trouble as far as the vitality and commitment of the board is concerned. You should probably not even be thinking about a campaign.</i></p> | | 3 | |
| <p>4. THERE IS WHOLE-HEARTED AGREEMENT BETWEEN THE STAFF AND BOARD REGARDING THE WORTHWHILENESS OF THE PROJECT, AND THEY ARE WILLING TO WORK TOGETHER TO BRING THE PROJECT TO FRUITION <i>It is not uncommon for staff to initiate ideas and often to be the inspiration behind a campaign project. You hope to have a staff that provides leadership and motivation. It is unacceptable, however, to have a capital program that is entirely staff-driven. There must be a sharing of vision and dreams. The board must accept the project as their own. They must have a sense of excitement and high expectations. If this doesn't exist, or if some of the board members are not enthusiastic advocates of the project, give yourself less than a '10'. The situation needs to be either corrected or the apathetic (or negative) directors need to determine whether they can continue to stay on the board and remain effective.</i></p> | | 8 | |
| <p>5. THE PROJECT MEETS A VALID NEED <i>The completed project fills a justifiable and urgent valid need, and has been tested in such a way that there is some substantiation. Further, the project helps fulfill your mission and is in keeping with your philosophy of operation. Give yourself a full '10' if it meets all of these criteria.</i></p> | | 8 | |



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| <p>6. THE CASE FOR THE PROGRAM HAS EMOTIONAL AND DRAMATIC APPEAL <i>In order to raise important funds, a project must be compelling and have sizzle! Otherwise, no matter how valid the need, you will not raise funds. If you feel the case can be dramatized in such a way that it tugs at both the heart and the purse strings, give yourself a '10'. Evaluate whether there is a sense of urgency and excitement and, if this is lacking, lower your score accordingly.</i></p> | | 7 | |
| <p>7. THE ORGANIZATION HAS SUCCESSFULLY RAISED ITS OBJECTIVE IN ITS ANNUAL SUPPORT CAMPAIGN IN THE PAST TWO YEARS <i>A group that cannot raise annual support will not be able to mount a major capital campaign. If you have gone over goal in the campaign, give yourself a '10'. If you have just met goal, a '9'. Anything less than that, begin decreasing accordingly. If you do not have an annual campaign for sustaining funds, give yourself a '1'.</i></p> | | 5 | |
| <p>8. THE ORGANIZATION HAS A CHALLENGING ANNUAL DOLLAR OBJECTIVE IN ITS ANNUAL CAMPAIGN WHICH FORCES IT TO STAND ON TIPTOES TO ACHIEVE ITS OBJECTIVES <i>It is not enough to merely reach your annual campaign goal, it has to be an objective that pushes you.</i></p> | | 3 | |
| <p>9. A GENERAL RULE OF THUMB IS THAT YOU WILL BE ABLE TO RAISE TEN TO FIFTEEN TIMES THE FUNDS IN A CAPITAL CAMPAIGN THAT YOU HAVE BEEN RAISING ANNUALLY <i>Take the more liberal figure, fifteen, for instance. If your project needs to amount to more than fifteen times what you have been raising annually, you will find it difficult to meet your objective. You're going to have to do better on your annual campaign. If the total capital project equals fifteen (or less) of your annual giving, give yourself a '10'. The higher the numerical ratio between your capital needs and your annual giving, the lower your rating.</i></p> | | 5 | |
| <p>10. THE ORGANIZATION MUST HAVE THE ABILITY TO MANAGE DONOR INFORMATION <i>It is essential that your donor base is in good order and your records are current, detailed, and complete. Your software can be used effectively and with ease—and provide the necessary information with speed and accuracy.</i></p> | | 1 | |



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| <p>11. IN THE PAST TWO YEARS, YOU HAVE OPERATED WITHIN A BALANCED BUDGET <i>People give to organizations that are fiscally responsible and demonstrate proper financial stewardship. A balanced budget provides evidence of sound management and board accountability. Give yourself a '10' for a surplus and grade lower for an operating deficit.</i></p> | | 5 | |
| <p>12. YOU HAVE PREPARED A CAREFULLY DEVELOPED PROFORMA BUDGET AND HAVE PROJECTED THAT WHEN THE FACILITY IS COMPLETED, THE PROJECT WILL GENERATE SUFFICIENT INCOME TO MAKE IT SELF-SUPPORTING <i>Funds for the operation become increasingly more difficult and income has to be won. Major credit goes to the operation that has a significant percentage of its budget that is self-supporting. If the project demonstrates that it will generate significant income over expense, give yourself a '10'. And congratulations! If the campaign includes funds for endowment, increase your rating.</i></p> | | 4 | |
| <p>13. THE BOARD AND STAFF HAVE INDIVIDUALLY COMMITTED IN AN OPEN MEETING, WITH FULL DISCUSSION AND VERBAL VOTING, THEIR DEDICATION TO GIVE AND WORK SACRIFICALLY <i>It starts with the board and staff. If the organization's family doesn't care, why should anyone else?</i></p> | | 8 | |
| <p>14. THE BOARD IS ABLE TO GIVE INDIVIDUALLY (AND CORPORATELY IF IT IS A PERSONAL OR FAMILY-HELD COMPANY) 10% OF THE CAMPAIGN OBJECTIVE <i>Not every board is able to give as much as 10% and there have been many successful campaigns where this has been the case. But if the board is able to give 10% or better, it helps assure a victory for the project. If you believe that board members will be able to give 15% of the campaign objective, give yourself a rating of '10'. 10% of the giving should be a '9'. Anything lower than 10% should be evaluated accordingly.</i></p> | | 7 | |
| <p>15. YOU ARE ABLE TO DETERMINE OR IDENTIFY THE 20 MAJOR GIFTS THAT WILL PRODUCE 40% OF YOUR OBJECTIVE <i>The campaign cannot be successful without major gifts. If within your giving constituency, there is not the potential for receiving 40% of your objective from your top 20 gifts, your campaign is very likely moribund. And if you cannot identify these sources, you haven't started the campaign process. Give yourself a '10' if you have isolated these 20 sources. If, by the way, you are able to generate 40% of your objective with fewer than 20 sources—all the better!</i></p> | | 5 | |



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| <p>16. YOU HAVE IDENTIFIED AND LISTED THE 200 SOURCES THAT ARE MOST LIKELY TO PROVIDE THE LARGEST GIFTS FOR YOUR PROGRAM <i>It is quite likely that 80% to 90% of your funds will come from your top 200 sources. You need to determine now who these sources are. In addition and of importance, your top leadership should be developed from these sources. This truly becomes the heart and spirit of your successful campaign.</i></p> | | 4 | |
| <p>17. DURING THE PAST 12 MONTHS, YOU HAVE MAINTAINED A WRITTEN PLAN TO ACTIVELY CULTIVATE YOUR TOP 200 SOURCES AND YOU HAVE MADE SIGNIFICANT CONTACT WITH EACH AT LEAST TWICE DURING THE YEAR <i>It's not good enough to just have the list—you need to be in contact with these sources, romancing your cause and your case. Give yourself a '10' if you have an active and effective program of prospect management and cultivation.</i></p> | | 9 | |
| <p>18. ON YOUR BOARD, YOU HAVE A PERSON OF SUFFICIENT STRENGTH, STATURE, INFLUENCE, AND AFFLUENCE THAT HE OR SHE WILL BE A DESIRABLE CANDIDATE TO HEAD YOUR CAMPAIGN <i>It is not, however, necessary that you choose your chair from the board roster, but this often makes the selection easier and certainly more natural. If you do have this caliber of person on your board, it also says something about the power of the group.</i></p> | | 6 | |
| <p>19. YOU ARE ABLE TO IDENTIFY SOMEONE OF SUFFICIENT STRENGTH, STATURE, INFLUENCE, AND AFFLUENCE WHO YOU FEEL WILL ACCEPT THE CHAIRMANSHIP OF YOUR CAMPAIGN PROGRAM <i>If you have been able to identify a person with the level of regard and esteem described, and they have already accepted the responsibility—you get roaring applause, and a '10'. Even if you haven't posed the question but you feel fairly certain that the man or woman of the caliber described will accept, give yourself a '10', and cross your fingers.</i></p> | | 5 | |
| <p>20. YOU WILL BE ABLE TO RECRUIT SUFFICIENT VOLUNTEERS TO MOUNT A SUCCESSFUL CAMPAIGN EFFORT <i>While it is quite clear that your largest gifts will determine the level of your success, you will still require a broad base of giving to assure a victory. You will need a well trained, enthusiastic, and happy worker for every 5 to 8 prospects. Give yourself a full '10' if you feel you will be able to recruit the workers you need.</i></p> | | 3 | |



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| <p>21. THERE SHOULD BE NO CAMPAIGNS IN YOUR SERVICE AREA BEING PLANNED FOR THE SAME PERIOD WHICH WILL CAUSE A SERIOUS CONFLICT <i>For your effort, you will require all of the dedication possible of volunteers, donors, and media coverage in order to win your effort. There are some campaigns, even of a major size, that will not interfere with yours—but if there are other organizations similar to yours in character and nature, this could cause a problem. If you do not anticipate a conflict, give yourself a ‘10’.</i></p> | | 2 | |