



# **The Discovery Group**

## **Capital Campaign Diagnostic Tool**

## PRE-CONDITIONS FOR CAMPAIGN SUCCESS

### The 5 R's

- Readiness (culture of trust, staffing, systems)
- Relationships (early donor cultivation + positive philanthropic culture)
- Resonance (case aligned to mission + audience values)
- Role clarity (especially important on Board of Directors, Campaign Cabinet, Ambassadors)
- Rigour (track, steward, follow through)

## CAMPAIGN DIAGNOSTIC TOOL

Criteria	Indicators of Readiness
Leadership & Board Readiness	CEO/Executive Director and Board Chair are united in their understanding of the campaign vision, need, and timing. <i>Is there stability at the top? Are external demands (e.g., accreditation, crisis) drawing attention?</i>
Board Participation	Board members are ready to give, advocate, and speak publicly about the project and campaign. <i>Does the Board have the capacity to dedicate extra time to the school re: campaign?</i>
Early Donor / Community Engagement	Top prospective donors are aware, emotionally invested, and have been asked for input before being asked for gifts. <i>Is previous stewardship in good shape, pledges done, asks diverse?</i>
Case Clarity & Resonance	The case for support connects the capital project to mission, community experience, and long-term impact. <i>Could your community explain why this project matters now? Are there other pressing concerns?</i>
Internal Capacity	There is staff, time, and infrastructure (e.g., database, stewardship plan) to support a multi-year effort. <i>Are internal systems at risk from turnover or overstretch? Are the staff and faculty bought in? Do they understand what's in it for them?</i>
Internal Capacity	Philanthropy is normalized and celebrated across the school community. There is a clear understanding of the role it plays beyond tuition. <i>Are there past campaign perception challenges to overcome (fatigue/failure)?</i>

## SCORING

4 - Ready Now	3 - Moderately Ready	2 - Somewhat Ready	1 - Not Ready
<p>The organization is fully prepared.</p> <p>All indicators of readiness are met, and external factors strongly support implementation.</p> <p>● ● ● ●</p>	<p>The organization has most indicators in place, but some areas require minor improvements or attention to external factors.</p> <p>● ● ●</p>	<p>There are significant gaps in readiness, and/or external factors pose moderate challenges to implementing change.</p> <p>● ●</p>	<p>The organization is not prepared in this area, and/or external factors create substantial barriers to implementing change.</p> <p>●</p>

## Application

For each Key Area, your team will **collaboratively analyze and assess** your organizations campaign readiness and assign a score between 1 and 4.

Criteria	Indicators of Readiness	Scoring /24	Weighting
<b>Leadership Readiness &amp; Board</b>	CEO/Executive Director and Board Chair are united in their understanding of the campaign vision, need, and timing.	1-4	High
<b>Board Participation</b>	Board members are ready to give, advocate, and speak publicly about the project and campaign.	1-4	High
<b>Early Donor / Community Engagement</b>	Top prospects are aware, emotionally invested, and have been asked for input before being asked for gifts.	1-4	High
<b>Case Clarity &amp; Resonance</b>	The case for support connects the capital project to mission, student experience, and long-term impact.	1-4	Medium-High
<b>Internal Capacity</b>	There is staff, time, and infrastructure (e.g., database, stewardship plan) to support a multi-year effort.	1-4	Medium
<b>Culture of Philanthropy</b>	Philanthropy is normalized and celebrated across the community. There is a clear understanding of its role beyond tuition	1-4	Low-Medium

Adapted from RTI Press: Policy Brief, Pub# PB-0020-1903, 2019

## THRESHOLD FOR READINESS

The minimum score to proceed with campaign planning is [16/24](#).

A score of 16 should reflect that the three most critical areas are adequately ready, even if less critical areas still need work.

1. Leadership & Board Alignment, drives change
2. Board Giving, precipitates further giving
3. Early Donor Engagement, provides the fuel for progress

## READINESS REFLECTION

Where could this have helped with a decision to make or not make a change?

Can you identify an instance when lack of readiness could explain something that didn't go well in the past?

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## ABOUT US

The [Discovery Group](#) (TDG) is a boutique consulting firm dedicated to the social profit sector. We believe that social profit organizations can change the world. Our mission is to help our clients envision change, determine how to make it happen, and put the necessary tools and skills in place for success. We work with leaders who understand that enhancing the alignment between their purpose, their Board of directors, and their essential partners will increase their organization's ability to succeed.

[TDG provides services to support our clients in three integrated areas of the social profit sector:](#)



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