



The Discovery Group

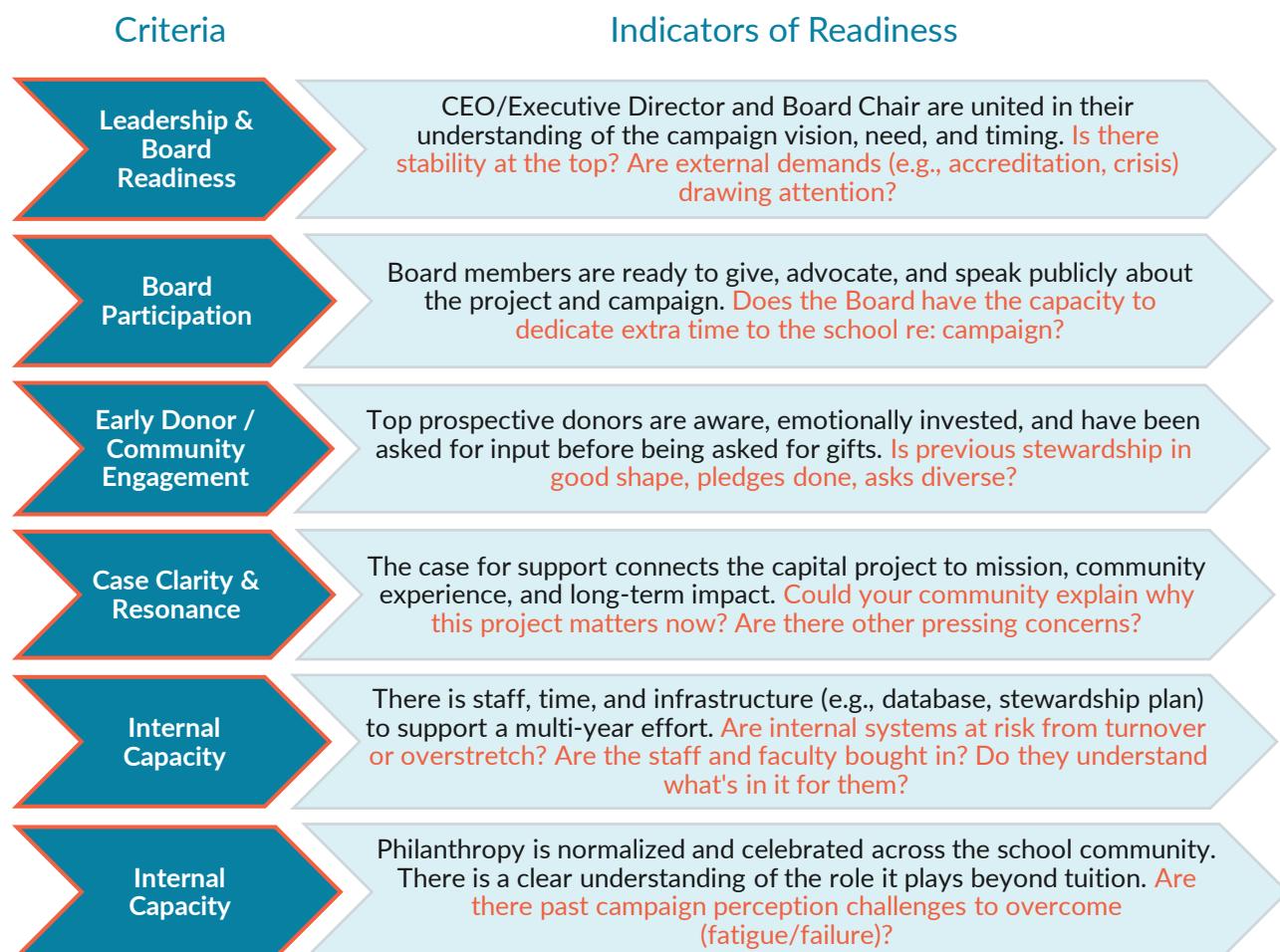
Capital Campaign Diagnostic Tool

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



SCORING



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

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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