

MGI Capital Campaign Readiness Quiz (Printable) — Version 2.1

Thank you for taking the MGI Capital Campaign Readiness Quiz.

Answer each question as honestly as possible. Your selections will help generate a readiness snapshot and practical next-step recommendations.

Estimated time: 7–10 minutes

Instructions: For each question, enter **one letter only: A, B, or C.**

SCORING (for your internal use)

Total score: _____ / 20

Readiness label (circle one based on your total score):

- **Requires Further Work:** 0–9
- **Worth Exploring:** 10–14
- **Ready to Explore:** 15–20

SECTION I — QUIZ (Enter A, B, or C)

1) Leadership alignment: _____

- A. Our leadership/board is actively engaged and aligned on the goals, timeline, and need.
- B. Leadership support exists, but alignment on key details and priority actions isn't fully formed.
- C. Alignment is limited; major decisions and responsibilities are not yet clearly defined.

2) Board engagement capacity: _____

- A. We have board members who are prepared and able to open doors to major donors (relationships + willingness).
- B. Some board capacity exists, but it may not be consistently mobilized for major gift conversations.
- C. Board members are not prepared or relationships are not clearly identified for major gifts.

3) Case for support is defined: _____

- A. The capital need, intended outcomes, and a compelling case narrative are clearly drafted and ready to refine.
- B. The need is identified, but outcomes, messaging, or key assumptions still need development.
- C. The capital need and outcomes are not yet clearly defined.

4) Major gift strategy readiness: _____

- A. We have a major gifts approach in place (or a clear plan), including early donor targets and engagement process.

- B. We have some ideas about major gifts, but strategy, targeting, or sequencing is still informal.
- C. We do not currently have a major gift strategy to guide early fundraising work.

5) Donor/prospect research foundations: _____

- A. We have (or can access) a meaningful list of prospects with recent engagement history and plausible connection paths.
- B. Some donor/potential prospect information exists, but research would be incomplete or outdated.
- C. We lack a credible prospect base and engagement history is not well documented.

6) Early fundraising momentum (proof of demand): _____

- A. Leadership conversations and early interest indicate a strong likelihood of early traction (or comparable evidence).
- B. There is some interest, but early fundraising traction is uncertain.
- C. We have not established credible early demand or have no evidence of likely momentum.

7) Resource capacity to execute: _____

- A. We have an internal campaign lead (or capacity plan) and the time to execute core work consistently.
- B. Capacity exists but is stretched; support may be needed to meet timelines and campaign requirements.
- C. Internal capacity is limited and execution would rely heavily on external support without a clear plan.

8) Planning discipline: _____

- A. We are ready to run a disciplined planning process (roles, timeline, feasibility thinking).
- B. We have partial planning in place but may need structure to keep efforts focused and measurable.
- C. Planning is not established; roles, timeline, and decision-making are unclear.

9) Communication and storytelling readiness: _____

- A. We have a credible communications foundation (impact story, draft materials, spokesperson plan).
- B. We have some story elements, but communications would require substantial development.
- C. Messaging and storytelling are not yet developed.

10) Risk awareness & realistic expectations: _____

- A. Leadership understands the investment required, timelines, and fundraising realities—decision-making is pragmatic.
- B. Expectations are generally reasonable, but risk factors and resource requirements haven't been fully discussed.

C. The organization is underestimating required effort and may not be prepared to address risk.

SECTION II — ANSWER KEY / POINTS (for internal scoring)

Scoring guide: A = 2 points | B = 1 point | C = 0 points

- 1) Letter: _____ Points: _____
- 2) Letter: _____ Points: _____
- 3) Letter: _____ Points: _____
- 4) Letter: _____ Points: _____
- 5) Letter: _____ Points: _____
- 6) Letter: _____ Points: _____
- 7) Letter: _____ Points: _____
- 8) Letter: _____ Points: _____
- 9) Letter: _____ Points: _____
- 10) Letter: _____ Points: _____

TOTAL: _____ / 20

SECTION III — RESULTS GUIDANCE (use with your total)

If **15–20 points** (Ready to Explore)

Recommended next step (summary):

Move into a structured campaign planning process (typically including feasibility confirmation, refinement of the case for support, and a major-donor engagement roadmap).

Top priorities: press clarity; finalize prospect strategy & sequencing; confirm internal execution plan.

If **10–14 points** (Worth Exploring)

Recommended next step (summary):

Address the highest-priority readiness gaps before (or while) moving into formal planning.

Top priorities: strengthen case/messaging cohesion; improve prospect research readiness; assign clear early-work roles and capacity.

If **0–9 points** (Requires Further Work)

Recommended next step (summary):

Address fundamentals first—leadership alignment, capacity planning, and donor/prospect foundations—to create realistic momentum.

Top priorities: clarify case outcomes; align leadership/board expectations and roles; build major donor research base & engagement plan.

MGI Minimum Viable Pre-Work Checklist (Version 2.1)

Choose your readiness group (circle one):

Ready to Explore / Worth Exploring / Requires Further Work

A) READY TO EXPLORE — Do these 4 items first

- ☐ Confirm campaign goal/outcomes + “why now” narrative direction
- ☐ Validate major gift strategy basics (early targets + engagement steps)
- ☐ Check prospect readiness (availability of prospects + engagement history)
- ☐ Lock roles/capacity for campaign work (who leads what, by when)

B) WORTH EXPLORING — Do these 4 items first

- ☐ Identify top 2–3 readiness gaps and assign owners
- ☐ Strengthen case for support (outcomes + assumptions + messaging cohesion)
- ☐ Improve prospect research coverage (what’s missing + how to fill it)
- ☐ Define execution capacity (internal lead + what support is needed)

C) REQUIRES FURTHER WORK — Do these 4 items first

- ☐ Re-align leadership/board expectations (decision rights + responsibilities)
- ☐ Define the capital need and intended outcomes (make the case coherent)
- ☐ Build foundational major gift/prospect readiness (pipeline basics)
- ☐ Establish planning discipline (timeline, feasibility thinking, tracking)

Notes (optional)

What is the single biggest gating item for readiness right now?
