

CAUSE CONNECT

READINESS ASSESSMENT



CANVASS READINESS SELF-ASSESSMENT

The below tool is designed to assess the readiness of your agency to implement a face-to-face fundraising program. The primary purpose of this self-evaluation is to identify the elements of a large-scale sustainer acquisition program and critically look at your agency's operational foundations, resources, and fundraising treatments as a support in achieving a successful implementation and ROI in the short and long term.

RATINGS

For each of the following 5 areas, please rate the current state of your department/agency. At the end you will add up the numbers to serve as a guide for readiness. Use the following definitions and descriptions to guide your ratings.

1 JUST GETTING STARTED	2 NEWLY ESTABLISHED	3 PRACTICED	4 ROBUST
• Is not present • In development/planning stage • None of the boxes or maybe only 1 box checked	• Some Evidence • Just getting started • More than one but not all the boxes are checked	• Strong Evidence Established • The majority of the boxes	• Expert and in place for some time • Ready to take to the next level • All or almost all of the boxes are checked and/or you might have • All or almost all of the boxes are checked and/or you might have something to add!

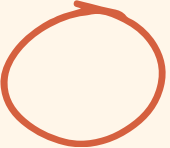
DATABASE / SYSTEMS

- ☐ Regular data hygiene checks of the donor database are in place and successfully being competed
- ☐ Program identifiers built into the database which are used to pull data for different treatments
- ☐ Staff expertise to regularly create and evaluate data queries in the database
- ☐ Staff expertise in excel and similar programs


YOUR RATING

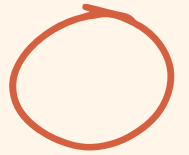
STAFF RESOURCES (does not have to be a full-time roll)

- ☐ Dedicated resource for sustainer program donor support
- ☐ Staff are practiced at processing monthly gifts and resolving processing errors
- ☐ Staff capacity to implement the systems necessary for launch (setting up reporting
- ☐ Your staff has the capacity to support implementation of the canvassing program along with regular data sharing and check-ins
- ☐ Staff expertise in excel and similar programs


YOUR RATING

STEWARDSHIP

- A sustained giving program that is named and branded
- Established and functioning calendarization of sustainer stewardship and solicitation efforts
- Mid-level or other donor segments with established treatment which monthly givers could be included at the outset of the program
- Staff expertise in excel and similar programs



YOUR RATING

BUDGET

- Dedicated budget for an acquisition program
- Ability to budget across 2 fiscal years (if a July 1st FY start)
- Willingness to finance and budget against expense rather than on revenue alone
- Tolerance for a 24-36 month full return on investment



YOUR RATING

LEADERSHIP SUPPORT & COLLABORATION

- Decision makers willing to invest in grassroots donor acquisition and pipeline building
- Support from CEO and other affiliate leadership
- Board and other stakeholders invested in community based fundraising efforts
- Collaboration from internal community facing teams (public affairs, comms, education)



YOUR RATING

RESULTS

Add up your scores for each category!

If you scored...

0-9

Likely need another 12 months or more to prepare department/agency foundations for a successful canvass launch and sustainer program development

10-14

On the way to readiness, key foundations should be underway 4-6 months before commencement of the canvass

15+

Let's go!