

Capital Campaign Readiness Assessment

The Telluride Foundation staff will meet with organizations early in their capital campaign process to review the criteria, discuss timing and potential for a Foundation Capital Grant and provide advice as to the readiness of the organization.

Please complete this form prior to meeting with Foundation staff, and your answers will serve as the basis for our conversation. The Telluride Foundation considers the following criteria to be critical for launching a successful capital campaign:

1) Has your organization completed a needs assessment or other means for demonstrating linkage between the capital project and expanded programming?

Please provide a 4-year forecast (once project is completed) compared to past 2 years of the following metrics:

- a) Number of unique clients served
- b) Number of unique programs hosted

2) Does your organization have a strong balance sheet, a financial reserve, and history of annual net revenues? Please discuss.

Please complete the following chart:

Previous 4 Year	Total Assets	Amount of Reserve	Annual Net Revenue
Year 1:			
Year 2:			
Year 3:			
Year 4:			

3) Please discuss your current board and staff management and experience raising individual donations and grants.

a) If you are a nonprofit, please complete the following chart:

Previous 4 Year	Total Individual Contributions Amount	Number of Unique Donors	Grant Funding Received
Year 1:			

Year 2:			
Year 3:			
Year 4:			

b) If you are a taxing entity, please discuss your previous four years of income from tax income, grants, and individual donations.

Previous 4 Year	Tax Income	Grant Funding Received	Total Individual Contributions Amount	Number of Unique Donors
Year 1:				
Year 2:				
Year 3:				
Year 4:				

4) Does your organization have stable and experienced staff and board management?

- a) Names and number of years with the organization of top two senior staff members:
- b) Provide a list of board members and years served.
- c) How do you anticipate management, staff, and the Board taking on the new role of fundraising for a capital campaign?
- d) Is your board willing to contribute a considerable percentage towards the initiation of the capital project?

5) Please briefly summarize your campaign fundraising strategy.

Organizations that can demonstrate their readiness based on these criteria should share this fact with potential funders. Please indicate if you are unwilling to share this information if requested by Telluride Foundation donors.