

## Steps for a Fundraising Action Plan

- 1) Review your financial statement and your budget, and determine where the shortfalls lie for the next 3-5 years
- 2) Put together a detailed expense budget
- 3) Review your fundraising assets
  - ✓ Skills, experience, local talent
  - ✓ Established donor database
  - ✓ Access to special locations, activities, mailing lists
  - ✓ Connections to people. List people who may see themselves contributing
  - ✓ Brainstorm assets other community members can contribute
- 4) Where budget shortfalls exist, target key fundraising strategies to pursue
  - Brainstorm list of fundraising ideas
  - Compare ideas against assets
  - Decide which ideas
    - Maximize benefits in comparison to costs
    - Best accomplish goals
    - Compliment project/activities
- 5) Create an action plan for each selected strategy
  - a. Specify monetary goal
  - b. Identify steps to carry out
  - c. Assign responsible persons
  - d. Set timeline

***SAMPLE FUNDRAISING ACTION PLAN***

*Program:* Matching HUD Grant

*Cash match needed:* \$2,561

*Strategy:* Secure a local sponsor

<b>Action</b>	<b>Time frame</b>	<b>Resp. Party</b>	<b>Budget</b>	<b>Progress Measure</b>
1. Develop potential sponsor list	August 15	Roweena	0	List of 5 potential sponsors
2. Target top 2	August 21	Gerald	0	Top two targeted and studied
3. Develop a proposal and sponsorship packet	Sept. 1	Gerald	\$10	Packet ready
4. Deliver proposal	Sept. 10	Ann	0	Proposal accepted
5. Close the deal	Sept. 12	Ann	0	Check is assured
6. Pick up check and contact local paper for a “grip and grin”	Sept. 25	Roweena	0	Article in paper