

EMERGING CHANGEMAKERS Example WORK PLAN

GOAL: <i>the brief, compelling, realistic end result you seek</i>	Raise market rate salary funds to hire first paid staff member by end of year		
STRATEGY: <i>the approach you will take to achieve your goal</i>	Cultivate private donor relationships		
OBJECTIVES: <i>accountability markers you will use to track progress</i>	*Board will host a summer fundraiser event with a target of net \$20,000 raised *Each Board Member will get (from donors) or give (themselves) an additional \$5,000 by October 31st		
TACTICS: <i>the tools or techniques to achieve the strategies</i>	*Reach out to Board Networks *Donor cultivation meetings with engaged constituents *Research donors who give to like-minded causes		
BUDGET TOTAL: <i>(List details on Budget tab)</i>	\$4,500		
RESOURCES NEEDED: Expertise, tools, etc	Expertise of involved philanthropist in the field		
START DATE:	1/1/2023	END DATE:	12/31/2023

TEAM MEMBER	ROLE	RESPONSIBILITIES
Taysia	Event Lead	Event planning timeline management, lead weekly team planning meetings, primary contact, procures event speakers, venue, food
Steven	Communications Lead	Directs marketing strategy, design, and output to community, updates website
Mia	Donor Tracking	Researches donor prospects, creates donor management constituent database, follows up on pledges, updates team on progress, sends tax receipts to donors
Board Members	Donor Relationship Building	Research target Reach out to personal network, hold donor prospect relationship building meetings

KEY ACTIVITIES			
Tasks:	Assigned to:	Timeline:	Deliverables:
Board discussion of prospects	Mia	February	Board Network Map
Book venue for summer event	Taysia	February	
Build donor management database	Mia	March	
Put out "Save the Date"	Steven	March	
Research donors, meet with involved philanthropist	Mia	March	Donor Prospect List
Hold "About EC" coffee dates with prospects	Board	March, April, May	
Create marketing materials for event	Steven	April	
Get dessert donations for event	Taysia	April	
Book caterer for event	Taysia	April	
Invite prospects to hosted event table	Board	May	
MC event	Taysia & Board	July	
Process pledges and donations	Mia	July	
Conduct post-event eval with attendees, staff & board	Taysia	August	Event Evaluation
Submit give or get results	Board	October	
Report out on donor engagement & org successes for year	Taysia	November	Annual Report
End of year giving campaign	Steven	November	
Annual Giving receipts sent out	Mia	December	