

SAMPLE 12 MONTH ACTION PLAN

(Your committee develops your plan with input from church staff and lay leadership and in coordination with the church calendar)

**Endowment Fund Promotion – Timeline for Strategies and Tactics
September 2005 – August 2006**

GOAL <i>(What result do we seek?)</i>	STRATEGY <i>(What will we do?)</i>	TACTIC <i>(How will we do it?)</i>	LEAD PERSON	PLANNING COMPLETED BY	IMPLEMENTATION TIME FRAME
Build a strong endowment committee	<ul style="list-style-type: none"> Determine the desired size and composition of committee Identify additional people with needed skills, capabilities and interests to add to committee Target 4-8 people 	<ul style="list-style-type: none"> Make a list of lawyers, financial advisors, CPAs, good communicators, opinion leaders, leaders of constituent groups (<i>see grid</i>) Create task list/job descriptions Discuss list Invite selected individuals to serve Create training manual Conduct training 			
Build a strong volunteer group	<ul style="list-style-type: none"> Identify people with special skills, capabilities and interests who can support committee's work Target 10-20 	<ul style="list-style-type: none"> Recruit lead volunteers from active membership Determine expectations Discuss list of possibilities Invite selected individuals to serve Create training manual Conduct training 			
Communicate mission & vision of fund to prospective donors clearly and persuasively so as to encourage gifts	Create and implement verbal communications plan	<ul style="list-style-type: none"> Develop clear, consistent expression of vision & mission Develop and implement plan for workshop/seminars Present temple talk Organize <i>Endowment Fund Sunday</i> 			
Communicate mission & vision of fund to prospective donors clearly and persuasively so as to encourage gifts	Create and implement written communications plan	<ul style="list-style-type: none"> Create a constant visual reminder of the fund's mission using posters, a standing reference in the bulletin, on going feature articles in newsletter Create brochure and distribution plan Develop bookmark & distribution plan Maintain information table or rack Add Planned Giving component to church's website 			

Maximize potential of major donors	Create plan to solicit major donors	<ul style="list-style-type: none"> Identify persons with strong connection to fund mission, with largest resources, who are in older segment, who are strong supporters of the endowment Screen list Assign and train solicitors from committee and volunteer group Prepare and implement plan for visits, follow up 			
Maximize deferred gifts	Create plan to encourage bequests	<ul style="list-style-type: none"> Plan estate planning seminars Identify and target age groups 			
Maximize deferred gifts	Consider use of fee-based professional consultants for leadership training and/or strategic planning	<ul style="list-style-type: none"> Determine cost/benefits 			
Document success	Create collection of inspirational stories	<ul style="list-style-type: none"> Collect/share testimonials from donors Collect/share testimonials of results of grants from fund Raise up the donor stories and grant results on bulletin board, newsletter articles, website 			
Celebrate success	Develop recognition program for donors	<ul style="list-style-type: none"> Thank donors quickly and effectively Plan event to thank and honor donors and raise the work of the fund before the congregation 			
Celebrate success	Develop recognition program for good work of the fund	<ul style="list-style-type: none"> Plan event to raise the work of the fund before the congregation 			
Ensure that plan is working	Determine what worked and should be repeated	<ul style="list-style-type: none"> Create evaluation process for each step of plan, setting realistic expectations Repeat efforts, enhancing or abandoning specific actions as appropriate 			

