

Endowment Building Game Plan: Worksheet

1. Endowment Goal:

What dollar amount would your organization like to realize from an endowment?

- 5, 10, or 25% of your budget?
- The cost of a specific program?

To determine the amount you need, multiply by 20 to set your goal.

My endowment goal is: \$ _____

This will allow or organization to: (What is your why?)

2. Identify your top 3 prospects from the list provided

If you have more than 3, who are your “super stars?” Are any on your list a current or former board member, volunteer, founder, current or former staff, has personally benefited or had a family member benefit from your organization? If so, give them a star per “Yes.”

Donor Prospect #1:

Ask Team #1: (Who will meet with them)

Donor Prospect #2:

Ask Team #2

Donor Prospect #3

Ask Team #3

3. Set your Timeline

When do you want to have these meetings completed by? Tip: The sooner the better. Don't lose the momentum from Match Madness. Try to have these meetings set up within 2-3 months of Match Madness (at the most).

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| 1. Immediate Thank You | March 16 |
| 2. Personal Thank you | _____ |
| 3. Follow up call to setup the meeting | _____ |
| 4. Meet with the donor | _____ |
| 5. Personal Thank You | _____ |