**Simple Action Plan Template Example**

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| **Project Name** |  | **Start Date** |
| Spring Donor Engagement Event |  | February 3, 2025 |
|  |  |  |
| **Project Manager** |  | **End Date** |
| Henry McNeal |  | April 5, 2025 |

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| Goal | Plan a fundraising event for May 10, 2025, to engage key donors for the new wing. |

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| Action Steps | Assigned Person / Team | Priority Level | Status | Resources | Due Date | Notes |
| Confirm event theme and location | Events Team | **High** | Complete | Venue database, event calendar | 10-Feb | Selected rooftop gallery space with panoramic views |
| Develop invitation list | Development Team | **High** | Complete | Donor CRM, board referrals | 14-Feb | Include top 50 major donors and 20 new prospects |
| Design and send invitations | Marketing Team | **Medium** | In Progress | Graphic designer, email software | 28-Feb | Invitations will include link to RSVP + donation options |
| Coordinate catering and entertainment | Events Team | **Medium** | Not Started | Preferred vendors list | 15-Mar | Considering live jazz trio and local catering partner |
| Prepare talking points for staff and board | Development Director | **Medium** | Not Started | Campaign case statement | 25-Mar | Tailor to emphasize impact of new wing |
| Confirm RSVP list and send reminders | Development Assistant | **High** | Not Started | RSVP software | 5-Apr | Use scheduled email and follow-up calls |
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| **Project Name** |  | **Start Date** |
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| **Project Manager** |  | **End Date** |
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| --- | --- |
| Goal |  |

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| --- | --- | --- | --- | --- | --- | --- |
| Action Steps | Assigned Person / Team | Priority Level | Status | Resources | Due Date | Notes |
|  |  | **High** | Complete |  |  |  |
|  |  | **Medium** | Not Started |  |  |  |
|  |  | **Low** | In Progress |  |  |  |
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