**Chapter Financial Sustainability Plan**

**A Financial Sustainability Plan, often also called a Fund Development Plan, frequently appears as a key part of an organization’s Strategic Plan.**

**PURPOSE: To assist the Board and Staff of a Chapter in proactively addressing the need for adequate and diversified funding sources to (1) Ensure the availability of adequate resources to support capacity needed to deliver core services, meet current obligations and achieve strategic goals of the organization; and (2) Minimize the risk and vulnerability associated with single or minimal funding sources.**

**ADDITIONAL INFORMATION THAT MIGHT BE INCLUDED:**

* **What, if any, % of annual revenues id dedicated to building an operational reserve? In the current budget? In future budgets?**
* **What are the unrestricted funding needs of the organization? Currently? In the future?**

**CHAPTER FINANCIAL SUSTAINABILITY PLAN – TEMPLATE**

**(Chapter Operational Budget exclusive of Pass-Through or Sub-Award Funds)**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Funding Source** | **Current Budget Revenues**  **Dollar Amts.** | | **Current Budget Revenues**  **% of Total Revenues** | | **Budget Revenue Goals**  **(Short-Term: 1-3 Years)**  **% of Total Revenues** | | **Budget Revenue Goals**  **(Long-Term:3-5 Years)**  **% of Total Revenues** | |
| **Category** | **Unrestricted** | **Restricted** | **Unrestricted** | **Restricted** | **Unrestricted** | **Restricted** | **Unrestricted** | **Restricted** |
| NCA Chapter Support Grant |  |  |  |  |  |  |  |  |
| RCAC Grant |  |  |  |  |  |  |  |  |
| State Appropriation |  |  |  |  |  |  |  |  |
| Other Fed. Grants/Earmarks |  |  |  |  |  |  |  |  |
| Other State Grant |  |  |  |  |  |  |  |  |
| Other State Grant |  |  |  |  |  |  |  |  |
| Foundation Gifts/Grants |  |  |  |  |  |  |  |  |
| Corporate Gifts/Grants |  |  |  |  |  |  |  |  |
| Membership Dues |  |  |  |  |  |  |  |  |
| Individual Donations |  |  |  |  |  |  |  |  |
| Training Registrations Fees |  |  |  |  |  |  |  |  |
| Training/Conference Sponsorships |  |  |  |  |  |  |  |  |
| Special Event Proceeds |  |  |  |  |  |  |  |  |
| Other (specify |  |  |  |  |  |  |  |  |
| Other (specify) |  |  |  |  |  |  |  |  |

**Fund Development Strategies**

|  |  |  |
| --- | --- | --- |
| **Fund Development Goals, Strategies, Initiatives (from Strategic Plan)**  **for development, cultivation, growing and sustaining funding sources, revenues** | **Timeline** | **Assignments**  **(Staff, Board, Board Committees, etc)** |
| 1. |  |  |
| 2. |  |  |
| 3. |  |  |
| 4. |  |  |
| 5. |  |  |
| 6. |  |  |
| 7. |  |  |
| 8. |  |  |