

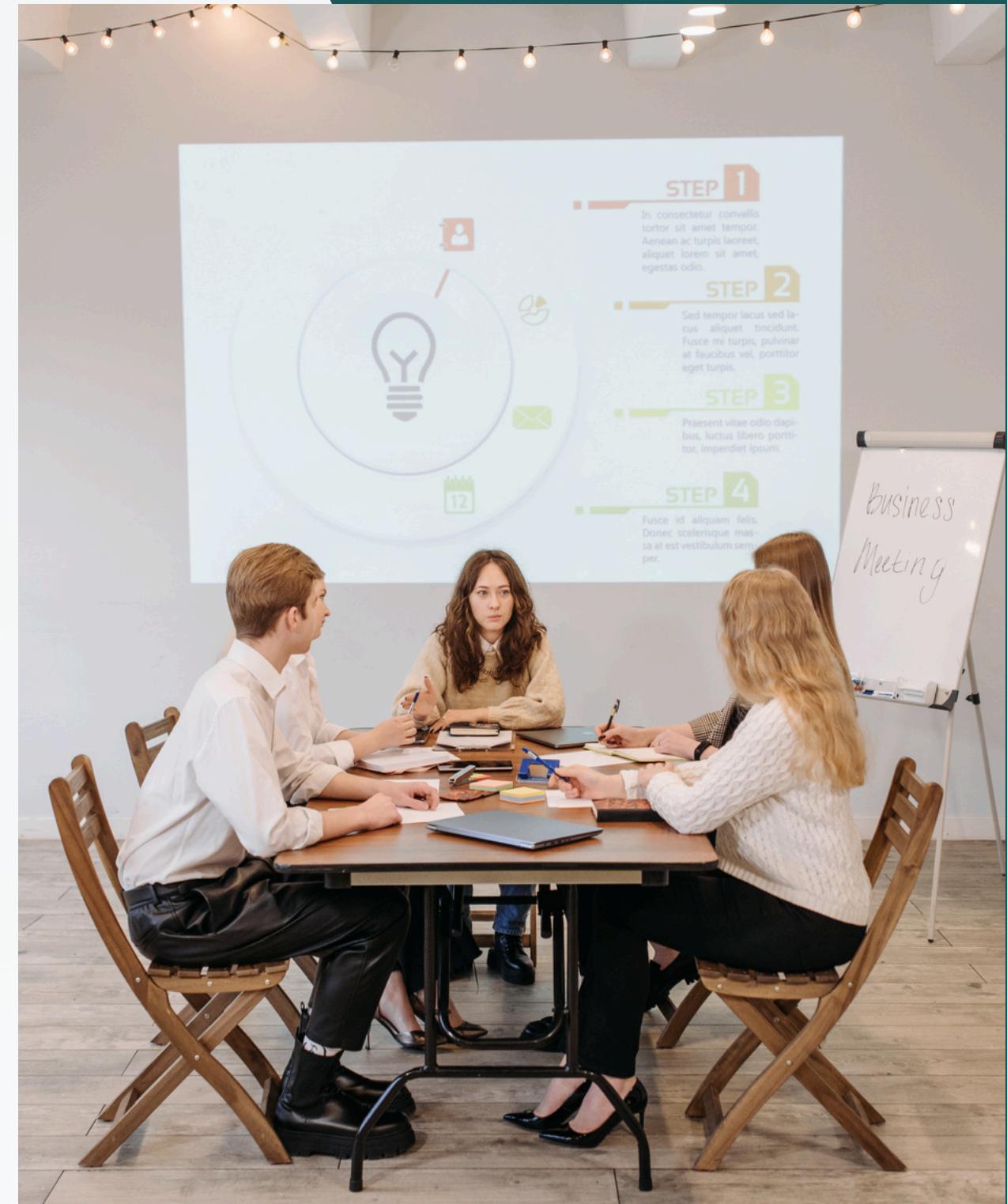
SPONSOR PRESENTATION

ASVPM Fundraising Project

Presented by Team 1
Seattle & San Jose
TEAM MEMBER: Swapna Benjamin, Hue Dang, Bhoomika Gururaja, Xiaoyu
Mu, Gan Song

PROJECT PURPOSE AND OVERVIEW

- 17-week project to build a sustainable fundraising system
- Strengthen ASVPM's long-term fundraising capabilities
- Build a sustainable system for grants, donors, and outreach
- Develop standardized tools, templates, and CRM processes
- Support organizational growth and financial stability
- Provide a complete Integrated Project Plan (IPP)





PROJECT SCOPE OVERVIEW

INCLUSIONS:

- Fundraising campaign planning and execution
- Grant proposal development
- Donor engagement and tracking through CRM
- Reporting, evaluation, and closure deliverables

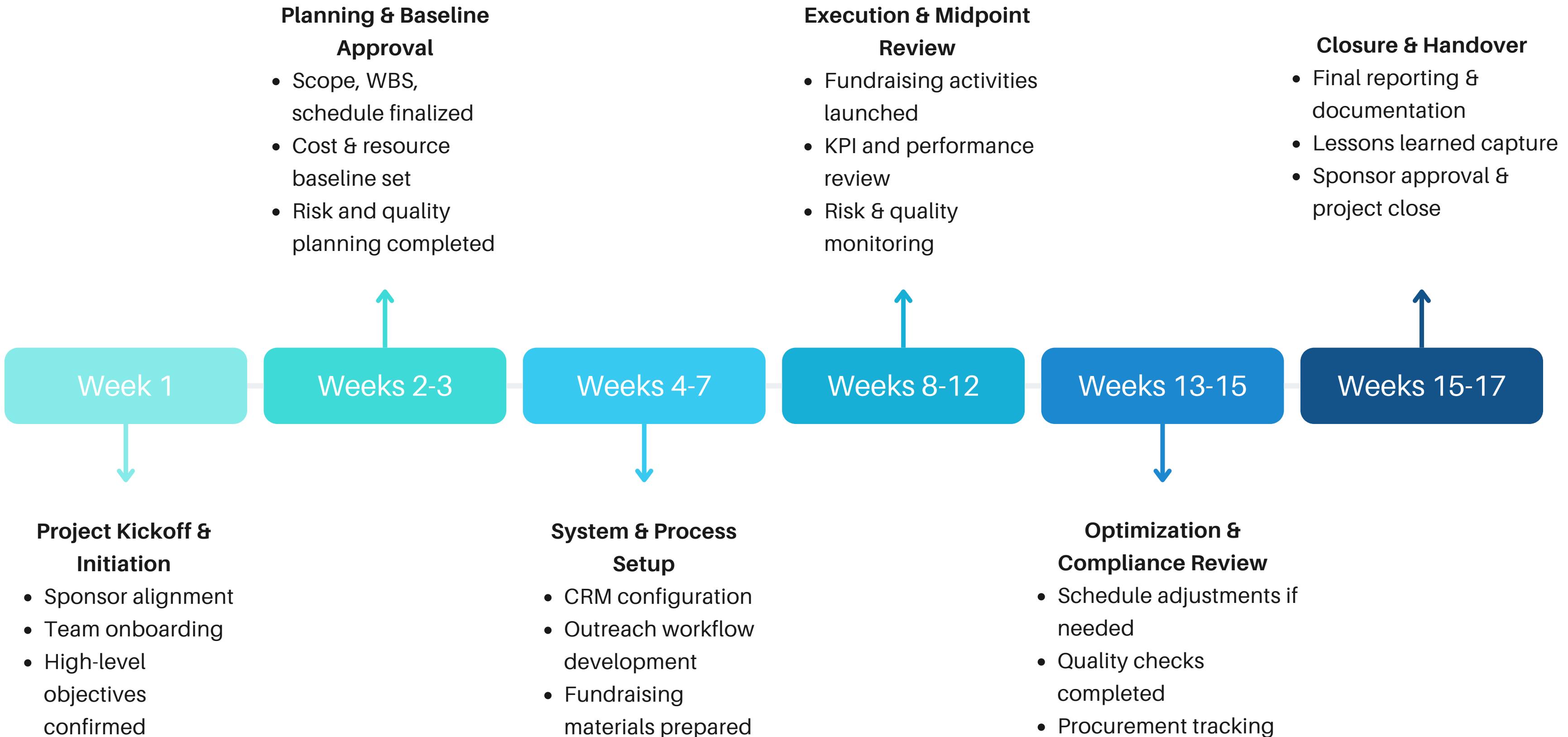
EXCLUSIONS:

- Direct fundraising transaction processing
- Long-term donor management post-project

MAJOR DELIVERABLES:

- Integrated Project Plan (IPP)
- Stakeholder and Communication Plan
- Grant proposals and outreach materials
- Final project report and handover

PROJECT TIMELINE REQUIREMENTS



WORK BREAKDOWN STRUCTURE SUMMARY



PRIMARY DELIVERABLES, KEY MILESTONES & SCHEDULE CONTROL

Primary Deliverables Tracked

- CRM setup
- Fundraising outreach templates
- Grant submissions
- Performance tracking & reporting

Key Milestones

- Project Kickoff & Sponsor Approval (W1)
- Planning Baseline Approved (W3)
- CRM & Outreach Ready (W4)
- Fundraising Campaign Launch (W5)
- Midpoint KPI Review (W6-7)
- Quality & Compliance Review (W8-9)
- Training & Documentation Complete (W10)
- Final Review & Closure (W11-12)

Schedule Control

- Weekly PM-led schedule reviews
- Critical path monitoring
- Variance tracked using baseline comparisons
- Schedule changes handled via Change Control Process

1.0 PROJECT INITIATION



Grant Proposal Development							
↳ 1 Project Initiation (Funding-Seeking Context)	15 days?	Mon 1/5/26	Fri 1/23/26		\$7,382.00		As Soon As Possible
↳ 1.1 Kickoff Meeting with Sponsor	6 days	Mon 1/5/26	Mon 1/12/26		\$2,250.00		As Soon As Possible
↳ 1.2 Confirm Project Objectives and Scope	4 days?	Tue 1/13/26	Fri 1/16/26	11	\$2,120.00		As Soon As Possible
↳ 1.3 Develop Communication Plan	4 days?	Tue 1/13/26	Fri 1/16/26	11	\$1,012.00		As Soon As Possible
↳ 1.4 Create RASCI Matrix	3 days?	Mon 1/19/26	Wed 1/21/26	26,19	\$1,280.00		As Soon As Possible
↳ 1.5 Obtain Sponsor Approval for Project Charter	2 days?	Thu 1/22/26	Fri 1/23/26	32	\$720.00		As Soon As Possible
1.6 Project Initiation Completed	2 days	Thu 1/22/26	Fri 1/23/26		\$0.00		As Soon As Possible

- Established project purpose and alignment
- Identified stakeholders and responsibilities
- Defined communication structure
- Conducted kickoff to authorize work

FUNDRAISING COMPANY

- James Irvine Foundation

Location: San Francisco, CA

Phone: 415-777-2244

Address: One Bush Street, Suite 800, San Francisco, CA 94104

- Silicon Valley Community Foundation (SVCF)

Location: Mountain View, CA

Phone: 650-450-5400 | **Fax:** 650-450-5401

Address: 444 Castro St, Suite 140, Mountain View, CA 94041

- California Wellness Foundation

Location: Oakland, CA

Phone: 415-908-3000

Address: 499 14th Street, Suite 300, Oakland, CA 94612

- David and Lucile Packard Foundation

Location: Los Altos, CA

Phone: 650-948-7658

Address: 343 Second Street, Los Altos, CA 94022

FUNDRAISING COMPANY

- The Boston Foundation (TBF)

Location: Boston, MA

Phone: 617-338-1700 | **Fax:** 617-338-1604

Address: 75 Arlington Street, 3rd Floor, Boston, MA 02116

Website: tbf.org

- Barr Foundation

Location: Boston, MA

Phone: 617-854-3500 | **Fax:** 617-854-3501

Address: 2 Atlantic Avenue, Boston, MA 02110

Website: causeiq.com

- Berkshire Taconic Community Foundation (BTCF)

Location: Sheffield, MA

Phone: 413-229-0370 | **Fax:** 413-229-0329

Address: 800 North Main Street, Sheffield, MA 01257-9503

Website: berkshiretaconic.org

PROJECT PLANNING

► 2 Planning Phase	19 days?	Mon 1/26/26	Thu 2/19/26	37,36	\$8,440.00		As Soon As Possible	NA
► 2.1 Conduct Donor and Grant Research	5 days	Mon 1/26/26	Fri 1/30/26	36	\$2,440.00		As Soon As Possible	NA
► 2.2 Define Fundraising KPIs	3 days	Mon 2/2/26	Wed 2/4/26	45	\$1,200.00		As Soon As Possible	NA
► 2.3 Develop Integrated Project Plan (IPP)	6 days	Thu 2/5/26	Thu 2/12/26	51	\$2,400.00		As Soon As Possible	NA
► 2.4 Assign Roles and Responsibilities	3 days?	Fri 2/6/26	Tue 2/10/26	53	\$920.00		As Soon As Possible	NA
► 2.5 Review and Approve Planning Deliverables	3 days?	Wed 2/11/26	Fri 2/13/26	61	\$1,480.00		As Soon As Possible	NA
2.6 Planning Phase Completed	3 days	Wed 2/11/26	Fri 2/13/26		\$0.00		As Soon As Possible	NA
► 2.7 Risk Response Planning	3.5 days	Mon 2/16/26	Thu 2/19/26	66	\$0.00		As Soon As Possible	NA

- Conducted grant and donor research
- Selected CRM platform
- Built schedule, cost baseline, and scope details
- Developed risk and quality management plans
- Drafted Integrated Project Plan



PROJECT EXECUTION

4.3 Execution Phase	37 days?	Mon 2/16/26	Tue 4/7/26	64	\$12,395.00		As Soon As Possible	NA
▶ 3.1 Develop Outreach Tools (Zero-cost setup)	5 days?	Mon 2/16/26	Fri 2/20/26	64	\$1,575.00		As Soon As Possible	NA
▶ 3.2 Launch Fundraising Outreach	15 days?	Mon 2/23/26	Fri 3/13/26	81	\$5,040.00		As Soon As Possible	NA
▶ 3.3 Donor Engagement & Follow-up	5 days	Mon 3/16/26	Fri 3/20/26	84	\$1,100.00		As Soon As Possible	NA
▶ 3.4 Track Funding Progress & Adjust Strategy	9 days?	Mon 3/16/26	Thu 3/26/26	84	\$4,680.00		As Soon As Possible	NA
3.5 Funding Threshold Achieved (Milestone)	0 days	Fri 3/27/26	Fri 3/27/26		\$0.00		Must Finish On	Fri 3/27/26
3.6 Execution Review & Sponsor Approval	6 days	Fri 3/27/26	Fri 4/3/26	89	\$0.00		As Soon As Possible	NA
3.7 Execution Phase Completed	3 days	Wed 4/1/26	Fri 4/3/26		\$0.00		As Soon As Possible	NA
▶ 3.8 Implement Risk Mitigation	5 days	Mon 2/23/26	Fri 2/27/26	78	\$0.00		As Soon As Possible	NA
▶ 3.9 Quality Assurance	2 days	Wed 2/18/26	Thu 2/19/26	78	\$0.00		As Soon As Possible	NA
▶ 3.10 Internal Team Communications	3 days	Fri 2/20/26	Tue 2/24/26	97	\$0.00		As Soon As Possible	NA

- Configured CRM system and donor workflows
- Built donor & grant databases
- Created grant proposal and outreach templates
- Produced communication and branding materials
- Refined deliverables through internal reviews

MONITORING & CONTROLLING

4 Monitoring & Control Phase	17 days?	Mon 4/6/26	Tue 4/28/26	91	\$4,787.00		As Soon As Possible	NA
4.1 Assess Fundraising Data and Compliance	5 days?	Mon 4/6/26	Fri 4/10/26	91	\$1,400.00		As Soon As Possible	NA
4.2 Evaluate KPI performance vs. targets	5 days?	Mon 4/13/26	Fri 4/17/26	112	\$1,532.00		As Soon As Possible	NA
4.3 Implement Corrective Actions	4 days?	Mon 4/20/26	Thu 4/23/26	115	\$1,855.00		As Soon As Possible	NA
4.4 Monitoring & Control Review Completed (Milestone)	2 days	Thu 4/23/26	Fri 4/24/26		\$0.00	Finish No Earlier Than	Fri 4/24/26	
4.5 Quality Control	2 days	Mon 4/13/26	Tue 4/14/26	112	\$0.00		As Soon As Possible	NA
4.6 Stakeholder Communication	1 day	Mon 4/13/26	Mon 4/13/26	110	\$0.00		As Soon As Possible	NA
4.7 Schedule Reserve Before Final Sponsor Sign-Off	2 days	Mon 4/27/26	Tue 4/28/26	122	\$0.00		As Soon As Possible	NA

- Tracked schedule and cost performance
 - Issued weekly status updates
 - Reviewed risks and quality
 - Performed compliance checks
- Incorporated sponsor/instructor feedback

PROJECT CLOSURE

- Finalized all deliverables
- Delivered SOPs and training materials
- Handed off CRM and documentation
- Completed lessons learned
- Prepared final report and gained sign-off

↳ 5 Project Closure & Handover	11 days?	Fri 4/24/26	Fri 5/8/26	120	\$8,952.00		As Soon As Possible NA
↳ 5.1 Prepare Final Project Report	5 days	Fri 4/24/26	Thu 4/30/26	120	\$3,040.00		As Soon As Possible NA
↳ 5.2 Conduct Sponsor Review & Handover Meeting	4 days	Fri 5/1/26	Wed 5/6/26	133	\$1,740.00		As Soon As Possible NA
↳ 5.3 Archive Project Documentation & Close Contracts	2 days?	Thu 5/7/26	Fri 5/8/26	136	\$4,172.00		As Soon As Possible NA
↳ 5.4 Final Sponsor Sign-off & Project Completed (Milestone)	3 days	Wed 5/6/26	Fri 5/8/26		\$0.00		Finish No Earlier Than Fri 5/8/26

PROJECT COST OVERVIEW

Total Estimated Project Cost (4-Month Project Duration):
\$41,956

01

The majority of project costs are driven by human resources

02

Execution and fundraising activities represent the largest cost phase

03

Operational and tool costs are intentionally minimized

Cost control is supported through phased spending, milestone-based reviews, and minimal fixed overhead.



COST BREAKDOWN BY RESOURCE CATEGORY

Detailed cost allocation based on Microsoft Project resource assignments

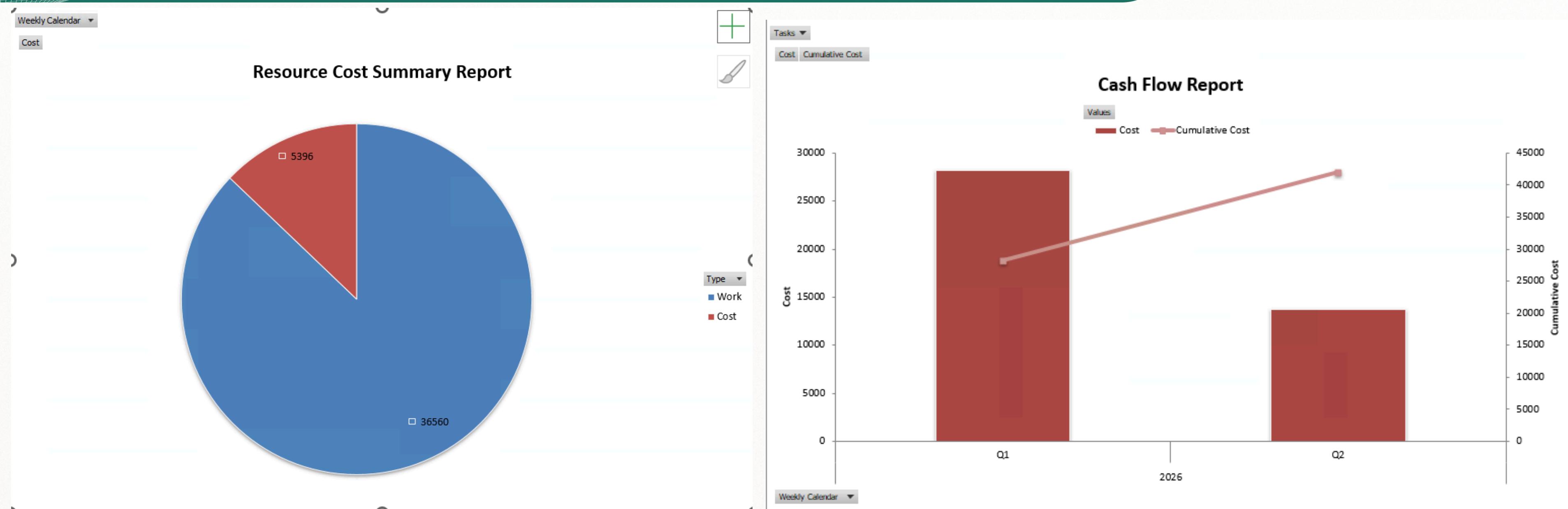
CATEGORY	ESTIMATED COST
Project Manager	\$13,680
QA/Compliance Analyst	\$11,480
CRM Technical Support	\$8,320
Training Facilitator	\$3,080
Administrative & Operational Costs (Travel, Lodging, Meals, Tools)	\$5,396
Total Project Cost	\$41,956

PROJECT RESOURCING & COST SUMMARY



Resource	Cost	Allocation
Project Manager	\$45/hr	100%
Fundraising Consultant	\$50/hr	100%
CRM Technical Support	\$50/hr	100%
Communication and Documentation Specialist	\$30/hr	100%
QA Analyst	\$35/hr	100%
Training Facilitator	\$35/hr	100%

COST DISTRIBUTION AND CASH FLOW



Resource Cost Summary

Proof: The bulk of the money is spent on people.

Cash Flow Report

Proof: Money is spent "in a rhythmic and logical manner."

Source: Microsoft Project – Visual Reports

TOP 5 RISKS

Team Miscommunication & Version Control

- Standardized documentation templates and file-naming conventions.
- Enforced single source of truth for drafts and approvals.

Outreach Emails Flagged as Spam

- Implemented email deliverability monitoring (bounce rates, spam warnings).
- Reviewed messaging structure and sender settings to improve inbox placement.

Team Availability & Schedule Risk

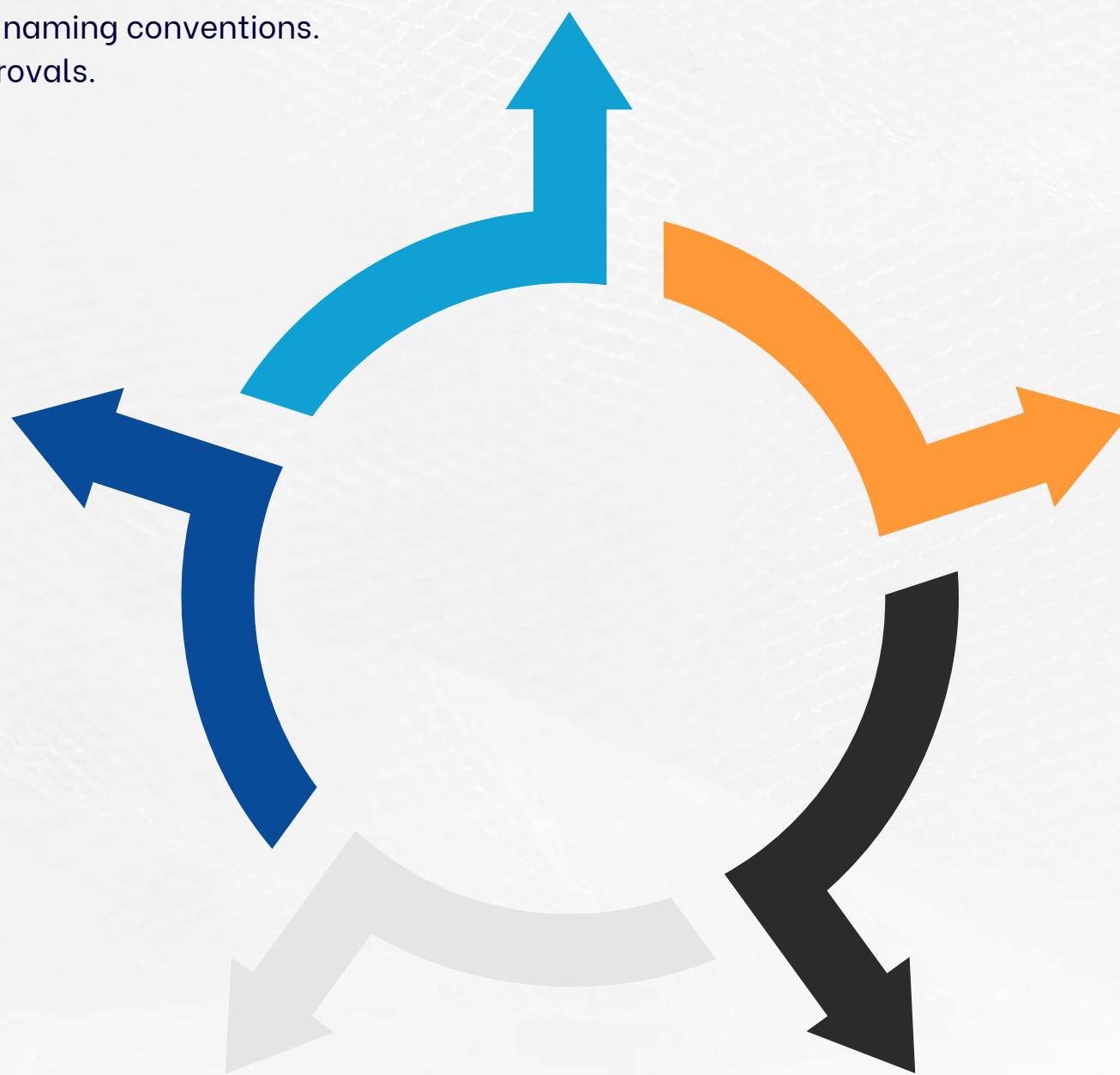
- Established weekly attendance and progress tracking to identify availability gaps early.
- Assigned a dedicated PM escalation mechanism for missed milestones.

CRM Tier Limitations

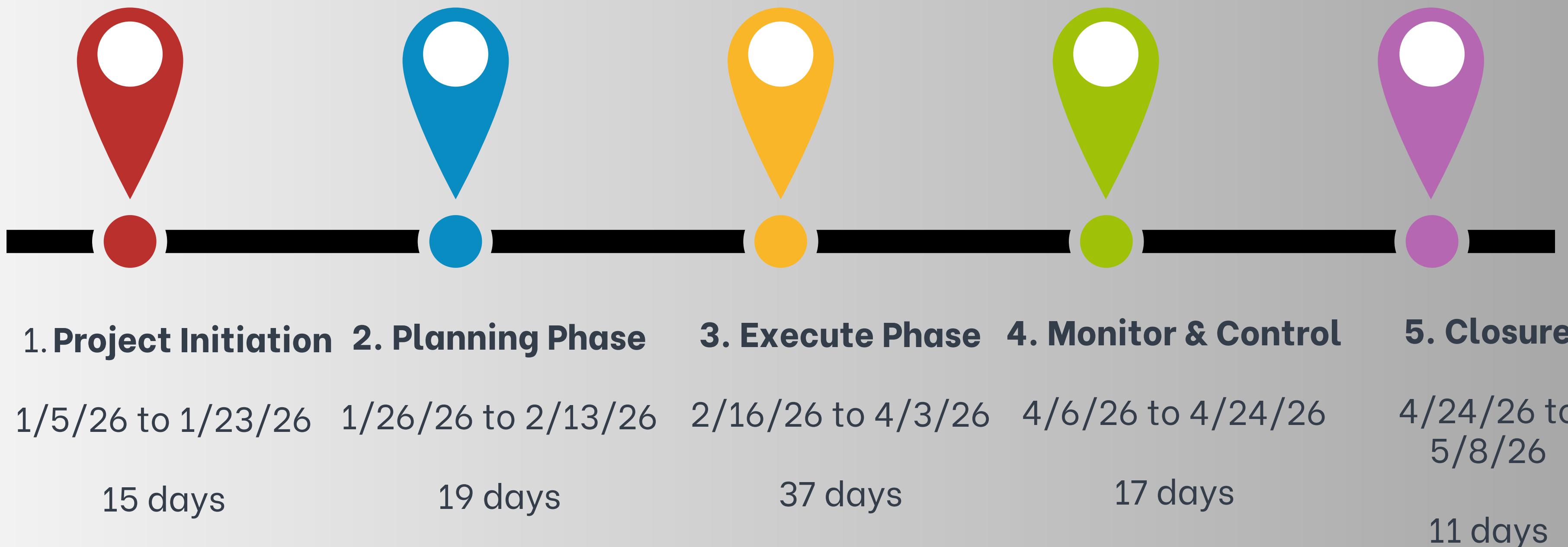
- Performed upfront CRM capacity and feature analysis to identify free-tier constraints.
- Defined data validation checks and backup tracking processes to prevent donor data loss.

GDPR Compliance Gaps

- Engaged a QA/Compliance role to review data handling, permissions, and documentation.



PROJECT ROADMAP



RECOMMENDATIONS

Use Performance Thresholds for Corrective Actions

Trigger adjustments when SPI or CPI fall below 0.9; review progress weekly.



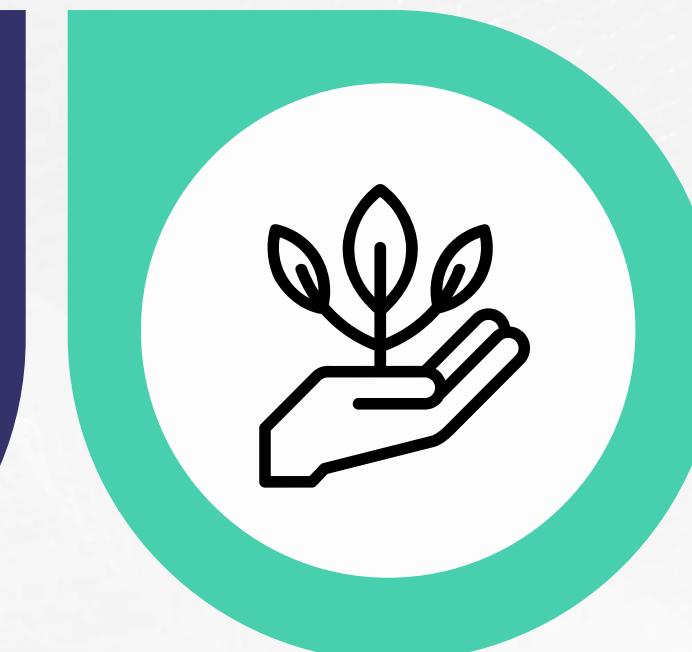
Apply Root Cause Analysis Before Solutions

Investigate the “why” behind delays or overruns to avoid repeating issues.



Follow a Formal Change Control Process

Approve scope, resource, or baseline changes through a structured review with the sponsor.



Adapt Strategy Through Prioritization & Buffering

Reprioritize WBS tasks, adjust communication or research plans, and use time/cost buffers to stay on track.

THANK YOU