2018 SBDC Fundraising Tracking

UPDATED: TEMPLATE

To Do/Follow-up	Deadline	Funding Organization	Funds Apply	20xx Requested Amount	Request Notes	Invoice Period	Meeting or Present-ation Date	Packet-Annual Report, Invoice & W9 - Date Sent	Invoice Amount	Invoice No. and Date Sent	Check Amount Received	Date check rcvd	Email Conf. of Check	Date Written Thank you Sent	July Semi-Annual Report Sent	Biz Beat Article	Date to Contact Again	Historical Tracking of Activities
SAMPLE - set web call to go over budget for 2021	Aug	City of XYZ	Program/location	$ 5,000.00	Local Impact data	Jan-Dec	15-Nov	sent 11/14/20	5000	20-1001 / 11/18/20	$ 5,000.00	12/1/20	yes	yes/ 12/2/20	n/a	yes	1Q21	City Council presentation, webinar on PPP for city and chamber, sit on small biz committee, etc.

SUBTOTAL

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