

Grassroots Budget Scenario Builder

A Tangency Action Kit_

Snapshot

- ****Focus:**** Fundraising & Operations
- ****Format:**** Spreadsheet Template
- ****Time:**** 60 minutes
- ****Ideal team:**** Finance + program owners
- ****Great for:**** Budget approvals, board updates, campaign pivots
- ****Deliverable:**** Spreadsheet with conservative, likely, and stretch scenarios plus narrative summary
- ****Materials:**** Accounting exports, grant calendar, staffing plan

Prep checklist

1. List non-negotiable fixed costs (insurance, software, compliance).
2. Identify variable costs tied to programming (travel, stipends, venues).
3. Forecast income streams: grassroots gifts, grants, events, earned revenue.
4. Clarify program priorities to map dollars to impact.

Scenario build

1. ****Populate the base sheet.**** Enter last year's actuals to set baselines.
2. ****Create three tabs.**** Conservative, likely, and stretch projections with notes explaining assumptions.
3. ****Translate into decisions.**** For each scenario write “We can fund...”, “We delay...”, “We pause...”.
4. ****Share and refine.**** Review with staff leads and finance committee to ensure alignment.

Tips

- Color-code revenue sources to avoid overreliance on one stream.
- Include a cash-on-hand row to monitor runway.
- Publish the stretch headline to your community to inspire targeted sponsorship.

Tools & templates

- Scenario builder spreadsheet (with formulas)
- Decision memo template for boards/funders
- Finance glossary for non-finance staff