

# NAME OF ORGANIZATION

## DEVELOPMENT/MARKETING PLAN FY 20XX-20XX

### **Mission:**

Include full mission statement of organization.

### **Vision:**

Include full vision statement of organization.

These services are:

- Service #1
- Service #2
- Service #3

*Based on the mission and vision of the entity, the...*

### **Marketing/Development Mission is:**

To raise funding and other related resources to provide support for “briefly describe services.”

**Name of Organization**  
**Address of Organization**

## **INDIVIDUAL DONORS**

*Goal: To establish, build & strengthen new and current donor relationships to support the mission and vision of Name of Organization.*

### **General Donor Objectives:**

1. To increase internal and external awareness of the opportunities to financially support *Name of Organization* by:
  - Objective #1
  - Objective #2
  - Objective #3
2. To increase internal and external awareness of the opportunities to provide volunteer support to *Name of Organization* by:
  - Objective #1
  - Objective #2
  - Objective #3
  - Objective #4
3. To develop outcome-based stories which highlight the need to contribute annually to:
  - Objective #1
  - Objective #2
4. To analyze data on current donors to identify opportunities to:
  - Objective #1
  - Objective #2
5. To create Annual Appeal for Name of Organization, to be mailed on Specific Date.
  - Objective #1
  - Objective #2
6. To develop plan to market Memorial Giving Opportunities by Specific Date.
  - Objective #1
  - Objective #2

### **Major Gift Objectives:**

1. To determine giving levels and names of Giving Levels (e.g. Gold, Silver, etc.) of the Name of the Organization, communicating these giving levels to donors and prospects.
2. To launch a major gift program by securing gifts of \$X or more from at least X individuals. If met, the number of major donors will increase by X%
3. To develop donor profiles, by identifying at least X prospects and researching each identified individual with regard to their interests, connections to other donors/board members/community members, birthdays, anniversaries, past/current employment, etc.
4. To develop individualized strategies for donor solicitation.
5. To keep least X major donor accounts active at all times by communicating via phone, handwritten notes, personal meetings, birthday recognitions, etc.

**Planned Giving Objectives**

1. To identify and create donor profiles for at least X prospects for a planned giving program.
2. To follow-up with at least X prospects, generating a minimum of X major/planned gift donor/prospect call per month.
3. To secure at least X planned gifts with in FY 20XX.

**INDIVIDUAL DONOR GOALS**

2008-2009 Results	2009-2010 Projections	
<b>\$X,XXX</b>	<b>\$XX,XXX</b>	<b>Charitable Gift Annuities</b>
\$ X,XXX—XYZ Grant \$ X,XXX—Annual Report \$ X,XXX—Major Donors \$ XXX—Memorial Gifts \$ X,XXX—Trust Income \$ X,XXX—Year End Appeal \$ XXX—Unsolicited <b>\$XXX,XXX—Unrestricted Subtotal</b>	<b>\$XXX,XXX (X% increase)</b>	<b>Unrestricted Contributions</b> (Includes Individual Donations and Unrestricted Grants)
\$ X,XXX—Trust Income \$ X,XXX—Grant from XYZ Foundation \$XX,XXX—Grant from XYZ Foundation <u>\$XX,XXX—Grant from XYZ Foundation</u> <b>\$XX,XXX—Temporarily Restricted Subtotal</b>	<b>\$XXX,XXX (X% Increase)</b>	<b>Temp. Restricted Contributions</b>
<b>\$XX,XXX</b>	<b>\$XX,XXX</b>	<b>Permanently Restricted Contributions</b>
<b>\$X,XXX</b>	<b>\$XX,XXX</b>	<b>Gift-in-Kind</b>
<b>\$TOTAL</b>	<b>\$TOTAL</b>	<b>X% Total Increase in Individual Gift Totals</b>

**SPECIAL EVENTS**

*Goal: To deliver one signature event that provides an environment conducive to friend and fundraising with a significant profit after expenses.*

**Special Event Objectives:**

1. To develop a volunteer-driven XYZ Event Committee, working with both to recruit members as needed.
2. To develop job descriptions for the volunteer positions on this committee.
3. To oversee activities of volunteers, ensuring that coordination of activities occurs in a timely manner.
4. To increase net proceeds for the XYZ Signature Event by X% (\$X,XXX).

**SPECIAL EVENT GOALS  
(Name of Signature Event)**

2007-2008 Net Results	2009-2010 Projections	
\$X,XXX	\$X,XXX	<b>X% Increase in Net Special Event Proceeds</b>

**GRANTS**

Goal: To identify, cultivate and strengthen relationships with current and new foundations/grantors at the local, state and federal levels.

**Grant Objectives:**

1. To assess new and existing state, federal and other grant sources that align with Name of Organization’s mission and vision.
2. To seek risk management/legal approval for grants as necessary
3. To provide periodic or culminating reports to grantors and to facilitate audits when applicable.
4. To secure at least X grants from past funding partners (i.e. X out of X or X%)
5. To identify and cultivate X new grant relationships with local, state and/or federal funders.

**GRANT GOALS**

2007-2008 Results	2009-2010 Projections	
\$XX,XXX	\$XXX,XXX	<b>Federal State and Other Grants*</b>

\*Does not include grants currently listed in Unrestricted and Temporarily Restricted Categories.

**DEVELOPMENT INITIATIVES**

**Marketing Objectives:**

1. To maintain and increase internal and external awareness of Name of Organization services, as well as volunteer and giving opportunities.
2. To develop/strengthen case for support.
3. To distribute materials to new markets by growing donor base and/or identifying and soliciting lapsed donors.
4. To publish Name of Organization’s 08-09 Annual Report, following AFP guidelines.

**Daily Operations Objectives:**

1. To provide donor with acknowledgement within 48 hours of receiving gift.
2. To keep updated donor records adhering to Name of Organization’s policies and guidelines.
3. To review monthly donor reports to ensure accurate accounting of monthly contributions.
4. To maintain current call reports in the donor database.

**TOTAL PROJECTIONS**

Category	2007-2008 Results	2009-2010 Projections
Grants	\$ XX,XXX	\$ XXX,XXX
Special Events	\$ X,XXX	\$ X,XXX
Unrestricted Contributions	\$ XXX,XXX	\$ XXX,XXX
Temp. Restricted Contributions	\$ XX,XXX	\$ XXX,XXX
Permanently Restricted Contributions	\$ XX,XXX	\$ XX,XXX
Gift-in-Kind	\$ X,XXX	\$ XX,XXX
Gift Annuities	\$ X,XXX	\$ XX,XXX
<b>Total</b>	<b>\$ XXX,XXX</b>	<b>\$X,XXX,XXX</b>

\*Total Projected Increase = X%

## **S.W.O.T. (Strengths, Weaknesses, Opportunities, Threats)**

**Strengths:** List current **INTERNAL** strengths of Organization/Development Program.

- Strength #1
- Strength #2
- Strength #3
- Strength #4
- Strength #5

**Weaknesses:** List current **INTERNAL** weaknesses of Organization/Development Program.

- Weakness #1
- Weakness #2
- Weakness #3
- Weakness #4
- Weakness #5

**Opportunities:** List current **EXTERNAL** opportunities for Organization/Development Program.

- Opportunity #1
- Opportunity #2
- Opportunity #3
- Opportunity #4
- Opportunity #5

**Threats:** List current **EXTERNAL** threats for Organization/Development Program.

- Threat #1
- Threat #2
- Threat #3
- Threat #4
- Threat #5