

**Integrated Development Plan Outline**

1. **The Case Statement: Your Role as an Essential Community Resource**

The case statement is a tool you can use to articulate why the mission of your organization is worth ensuring for future generations. Rather than a static document, it should be a set of key messages that can be used in marketing materials and can inform conversations with donors. It should articulate your impact and core values and convey the emotional connections individuals have to your organization.

* Describe what connects you to the organization. Why is it meaningful in your life?
* Describe the impact your organization has on the community.
* Why should the mission of your organization be preserved for future generations?
* What are your organization’s core values?
* Make the case for how an endowment will strengthen your organization and ensure it can remain an essential community resource now and into the future.
* Who could provide a powerful testimonial that describes the impact of your work? What would he/she say?
1. **Management Plan**
* Who is responsible for the plan? (person in charge should be a staff member)
* Who does the staff member report to?
* Who will track, document and record gifts?
* Who is your champion board member or volunteer leader who will make solicitations along with staff?
* Who will be responsible for stewardship and relationship-building with your new endowment donors?
* Who will report to the board about your organization’s progress on a quarterly basis?
* Who will be in charge of implementing the marketing plan?
1. **Identify and Describe Prospects**
* Individuals/Families with a close connection with your organization.

*(including board members, both current and past, and dedicated volunteers)*

* Individuals who love the mission of your organization.
* Individuals/Families demonstrating certain giving patterns and history.

*(Look for consistent donors no matter how small the gift)*

* Individuals who may not be able to donate dollars outright at this time but would appreciate the opportunity to support the organization in a meaningful way.
* Individuals/Families who have used your services or been helped by your organization.
1. **Marketing Plan**
* Identify target market/audience.
* Identify best communications vehicles

*(newsletters, e news, annual reports, mailings, emails, and social media)*

* Determine your messages.
* Highlight a testimonial from one or more of your legacy and/or endowment donors.
* Integrate your message throughout your regular channels of communication.
* Create a marketing calendar integrating your endowment sustainability message.
1. **Recognition and Stewardship**
* Develop gift acknowledgement procedures.
* How can you integrate stewardship of legacy donors into your general stewardship activities?
* How are you going to publicly recognize donors/gifts?
* How will you communicate regularly and be inclusive?
* What are your plans for special recognition at annual events?
* Plan a unique event to thank your endowment donors.
* Include personal touches from CEO or Chair for each endowment donor.
1. **Goal-setting**
* Set monthly goals for solicitations, marketing, and stewardship
* Make goals challenging, yet achievable
* These goals will inform your implementation checklist
1. **Implementation Checklist**
* Acts as your to-do list
* What steps will you take to implement your Integrated Development Plan?
* Calendar out all of your activities from the sections above.
* Be specific –this should serve as a checklist of tasks to be accomplished annually.
* To assure greater accountability, list the individual responsible for accomplishing the task.
* This level of planning will ensure you stay on track.