



DEVELOPMENT PLAN

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## Overall Financial Goals:

Direct Mail	\$788,300
Online Giving	\$345,750
Planned Giving	\$350,000
Americas Charities	\$202,000
Major Gifts	\$2,715,000
Foundations	\$3,115,000
Corporations	\$141,000
Organizations	\$150,000

## INDIVIDUALS

### Board of Directors

#### *Financial Goals*

1. **To raise \$1,637,500 in annual gifts from the board**
2. **To raise an additional \$1,241,000 in 75th anniversary gifts**

#### *Strategic Goals*

1. **Achieve 100% participation in board giving (give/get)**

During FY2015, 13 of 23 board members, or 57% of board members achieved their give/get goals for the fiscal year. (as of May 27, 2015). See Addendum A. The Board-adopted “give or get” policy is \$25,000 for members who were elected before January 1, 2012, and \$50,000 for members who were elected after that date.

2. **Achieve 100% voting board participation in 75th Anniversary fundraising**

All board members will be asked to set a fundraising goal of \$75,000 towards 75th Anniversary fundraising, which they can raise over 1 or 2 years. Board members can either raise this amount or give this amount over two years.

3. **Achieve 100% senior and emeritus participation in annual giving.**

Identify one Senior Director and one Director Emeritus who will write to members of their respective boards asking them to make an annual gift by November 7, 2015.

4. **Institute new ways for board members to connect to mission on a more personal level**
5. **Increase board's involvement in soliciting their networks**

### *Operational Goals*

1. **Ensure that all board members are familiar with fundraising give/get goals for each member and board as a whole. Share progress towards those goals at each board meeting (Chief Development Officer)**

This would be done to increase transparency of board contributions towards fundraising.

2. **Secure board gift pledges for the fiscal year - by November 7 (Chief Development Officer)**

Board members will pledge how much they will give in total, broken down by kinds of giving and when gift payments will be made. Securing this commitment early allows to trumpet the Board's 100% giving and leadership; clarifies financial position in a significant giving category; and allows the Board and staff to spend the rest of the year focusing on external givers. It also means that Board members are not being asked repeatedly year-round for different kinds of giving. And, it allows Board members to strategize with staff professionals about cultivating and securing support from their connections with a longer time frame in mind.

3. **Provide more group and one-on-one fundraising support to board members (Chief Development Officer)**

- Hold meetings/one on one conversations with each board members about potential major donor prospects they can introduce to
- Create and share talking points/elevator speech.
- Create and share document with opportunities for board members to invite contacts to learn more about ; work.
- Hold workshop on fundraising/role of board in fundraising at an upcoming board meeting.
- Share monthly list of donors/donations, and encourage board members to thank those people they know.
- Each quarter share donor prospect lists to uncover existing board relationships.

**4. Document and recognize board members' fundraising contributions.  
(President [REDACTED] and Chief Development Officer)**

- At every board meeting, at least one board member's fundraising contributions will be acknowledged and celebrated.
- At the beginning of each fiscal year, each board member will receive a letter with information on the gifts they made and the gifts they secured during the previous fiscal year.

**5. Formalize and expand role of [REDACTED] Development Committee (Chief Development Officer)**

- Appoint/confirm 5 board members to this committee. Include members willing to oversee in planning of [REDACTED] and encourage board involvement in event.
- Develop Roles and Responsibilities for this Committee
- Chair of development committee will serve in this role for 2 years
- Committee to meet quarterly between December and June, monthly between July and November.

**6. Encourage board exposure to [REDACTED] mission  
(President [REDACTED] and Chief Development Officer)**

- Do more to encourage board attendance at [REDACTED] events. Notify board members of all events within 2 weeks of event dates being set. At the [REDACTED] board meeting [REDACTED] asked that board be informed about event as early as possible.
- At least two board meetings per year will feature a guest or speaker who is directly affected by the issues [REDACTED] works on.

**7. Work with 3 – 5 board members to (a) host a cocktail party at their home or (b) invite 4-5 couples with major giving capacity for a dinner with President & Director Counsel and other staff (Manager of Major Gifts)**

[REDACTED], among others, will be asked to host cocktail party at his home in California.

**8. Elect 3 new board members with capacity to give and willingness to introduce [REDACTED] to major donor prospects and new networks.  
(President [REDACTED] and Chief Development Officer)**

(NAMES OF BOARD CANDIDATES REMOVED)

9. **Identify and coach at least 2 additional board members who can personally solicit other board members.**  
(**\_\_\_\_\_ & Director Counsel and Chief Development Officer**)
10. **Secure legacy gift commitments from at least 1/3 of board members.**  
(**Chief Development Officer**)
  - Identify one board member willing to sign letter asking other board members to make a legacy gift commitment.
  - Publically thank those board members who have made legacy gift commitments
11. **Senior staff to connect with board members via LinkedIn to learn more about board members' networks.**

## Major Gifts

### \_\_\_\_\_ Donors (Calendar Year)

Donor Category	Level	Number of Donors	Total
\$10,000 plus	\$10,000.00	32	\$2,144,576
\$5,000 to \$9,999	\$5,000.00	33	\$178,812
\$2,500 to \$4,999	\$2,500.00	35	\$103,476
\$1,000 to \$2,499	\$1,000.00	163	\$199,272
\$500 to \$999	\$500.00	305	\$170,723
\$100 to \$499	\$100.00	2,680	\$437,356
\$1 to \$99	\$1.00	5,279	\$189,982
		<b>8,527</b>	<b>\$3,424,200.7</b>

## Financial Goals

1. **To raise \$2,715,000 in major gifts. This goal includes raising \$300,000 for \_\_\_\_\_ (required for \_\_\_\_\_ match) and board gifts.**
2. **To increase number of major donors (\$10,000 and above) by 20% (from 32 to 38)**

### *Strategic Goals*

1. Increase solicitations made in person
2. Increase personal attention and “high touch” cultivation/stewardship of major donors and prospects
3. Make strategic use of [REDACTED], Police Reform Initiative, and Rapid Response Fund as opportunities for major gift investments.
4. Cultivate potential new donors outside of New York City.
5. Expose major donors to senior management team and attorneys in order to build ties that extend beyond President [REDACTED]
6. Facilitate and support staff as they engage members of their personal networks who are potential [REDACTED] supporters.

### *Operational Goals*

1. To solicit 60 major donors in person or over the phone (senior staff and board)
2. To hold 100 one-on-one meetings with major donors (senior staff and board)
3. To assign major donors and prospects to senior staff (Chief Development Officer)  
  
Chief Development Officer: 35 major donors and prospects  
[REDACTED]/COO: 20 major donors and prospects (not including institutions) (completed)  
Associate Director [REDACTED]: 15 major donors and prospects (in process)  
Director of [REDACTED]: 5 major donors and prospects  
  
See Addendum B for cultivation and stewardship activities of senior staff.
4. Hold 4-5 donor cultivation dinner/small events outside of New York (Manager of Major Gifts).

NAMES OF POTENTIAL HOSTS IS 5 CITIES WERE REMOVED



5. **Create “pitch book” or dynamic/highly visual power point presentation for [redacted], Rapid Response Fund, and Police Reform Initiative (Manager of Major Gifts).**
6. **Carry out an annual, specialized mailing to pro bono attorneys, family foundations, fraternities and sororities, and [redacted] alumni. (Manager of Major Gifts)**
7. **Record all major communications with major donors, including meetings, in Raisers Edge (Database Information Coordinator).**
8. **Cultivation and solicitation of pro bono attorneys (Manager of Major Gifts)**
  - Compile contact information for all attorneys who volunteered during the past 2 years (completed May 2015).
  - Carry out special end of year mailing for pro bono attorneys with personalized note from staff member who manages relationship.
  - Ensure that all pro bono attorneys receive regular communications (newsletter, etc).
  - Send at least one email communications thanking pro bono attorneys.
  - Hold reception for pro bono attorneys at a law firm and recognize 1-2 volunteer attorneys with an award.
9. **Record major donors’ interests in particular programmatic or practice areas, when known. (Director of Data and Donor Services)**

Segmenting donors will allow for more targeted and strategic donor communications and solicitations. To this end, Database Information Coordinator will create Raisers Edge code for tracking donor interests in one or more programmatic areas. [redacted] will also create an online donor survey for donors to option to complete after they make an online gift.
10. **Make operational changes needed to receive highest rating from Charity Navigator and Better Business Bureau. (Director of Data and Donor Services)**

Better Business Bureau: [redacted] failed to meet BBB standards for not supplying (1) policy on organization effectiveness; (2) written report to board on results of performance assessment; (3) annual report; (4) evidence of strong board oversight

(more info in BBB guidelines); and (4) evidence of accurate informational and solicitation materials

Charity Navigator: [REDACTED] rating dropped to 3 stars because of financial considerations and lack of a privacy statement on the website.

**11. Enter all contact information for [REDACTED] Conference attendees into Raisers Edge – By November 15, 2015. (Database Information Coordinator)**

**12. Every other month collect business cards from staff and enter information in Raisers Edge. (Development Assistant, Database Information Coordinator)**

## Planned Giving

### *Financial Goal*

**1. Secure 20 bequest commitments**

### *Strategic Goals*

**1. Create and implement planned giving marketing campaign targeting most promising prospects. Integrate planned giving messages into all donor communications.**

### *Operational Goals*

1. Create Bequest Confirmation form – by July 1, 2015  
(Director of Data and Donor Services )
2. Work with Senior Director [REDACTED] to write all Senior Directors to ask that they include [REDACTED] in their will – by July 1, 2015  
(President & [REDACTED] and Chief Development Officer)
3. Identify top planned giving prospects (those who have given at least 20 gifts to [REDACTED], 5 gifts in the past 7 years, 7 gifts in the past 10 years, all current and past board members, donors without children, donors between 40 and 60 years of age, and previous [REDACTED] donors) – by August 1, 2015  
(Director of Data and Donor Services)

4. Identify charitable gift annuity prospects – donors over the age of 60. – by August 1, 2015 (Director of Data and Donor Services)
5. Tag all bequest donor and CGA prospects in Raisers Edge – by August 15, 2015 (Database Information Coordinator)
6. Feature planned giving in all four quarterly newsletters (Director of Data and Donor Services)
7. Update 2011 2-pager on bequests – by September 1, 2015  
Include importance information on importance of maintaining a will.  
(Director of Data and Donor Services)
8. Create 2-page Charitable Gift Annuity fact sheet – by December 1, 2015 (Director of Data and Donor Services)
9. Begin enclosing 2-pager on bequests with acknowledgement letters for all bequest prospects – By October 1, 2015 (Director of Data and Donor Services) |
10. Incorporate bequests into one-on-one conversations with donors, particularly high priority bequest prospects – by September 1, 2015 (Chief Development Officer)
11. Mail Charitable Gift Annuity appeal – by October 15, 2015 (Director of Data and Donor Services)
12. On website and other communications replace formal works like planned giving, bequests, and legacy gifts with simpler language such as “Remember I \_\_\_\_\_ in your will – by November 15, 2015 (Chief Development Officer).
13. Recognize legacy donors by including \_\_\_\_\_ members in fall 2015 newsletter – By December 1, 2015 (Director of Data and Donor Services).
14. Review and update, if necessary, guidelines for membership to Defenders Circle – by February 15, 2015 (Director of Data and Donor Services).
15. Identify donor willing to match bequest, estate, or charitable gift annuity at a rate of 10% of gift for immediate cash support. Carry out mail campaign. – By June 1, 2006 (Director of Data and Donor Services).
16. Hold special luncheon for Defenders Circle members – by November 15, 2016 (Director of Data and Donor Services).
17. Mail 1 page update letter from President \_\_\_\_\_ to all members. (Director of Data and Donor Services)

## Direct Mail / Online

### *Financial Goals*

1. \$788,300 (Direct mail)    \$345,750 (Online)

### *Strategic Goals*

1. Identify direct mail/online donors who are potential major gift donors
2. Use stories and photos to convey impact and urgency of mission, and to evoke emotional (and less cerebral) response from donors.
3. Increase donor engagement through social media (specifically through promoted Facebook posts and ads.)
4. Continue use of infographics to convey urgency of mission and provide background information of issues.
5. Grow monthly giving program from 200 to 275 donors.

### *Operational Goals*

1. Develop procedures for direct mail/online donors to feed major gifts prospect pipeline. Develop workable cultivation plan for high potential direct mail donors (Director of Data and Donor Services)
2. To further humanize mission, secure (1) 15 photos that convey impact of or effects of racial disparities on people; and (2) Secure 7 stories of individuals affected by issues that work on. (Chief Development Officer)
3. Secure donor who can provide a match for year-end appeal. Particularly effective for online appeals (Chief Development Officer)
4. Further refine reconciliation procedures so revenue recorded by matches that of Sanky (Director of Data and Donor Services)

5. Learn about and incorporate best practices on monthly giving programs, doing more to recognize and thank these donors, and encouraging new donors to become monthly donors. Consider branding program in a way that will make these donors feel that special and valued. (Director of Data and Donor Services)
6. Learn more about donors' interest and reasons for supporting by creating an online donor survey that online donors would have option to complete (Director of Donor Services).

## FOUNDATIONS, CORPORATIONS, AND ORGANIZATIONS

### *Financial Goals*

#### 1. Raise \$3,115,000 from past foundation supporters

Confirmed FY16 Funding		
Foundation	Program	Amount
OSF		\$ 103,500
Atlantic Philanthropies		\$ 1,498,250
Atlantic Philanthropies		\$ 110,000
Ford		\$ 300,000
Ford		\$ 250,000
Ford		\$ 205,000
W. K. Kellogg Foundation		\$ 50,000
<i>Atlantic Philanthropies</i>		<i>\$ 1,500,000</i>
<i>Atlantic Philanthropies</i>		<i>\$ 1,500,000</i>
	TOTAL	\$ 5,516,750
	TOTAL Less TMI (\$3 M)	\$ 2,516,750
Projected FY16 Funding		
Foundation	Program	Amount
OSF		\$ 500,000
OSF		\$ 350,000
OSFF		\$ 100,000
Ford		\$ 500,000
Ford		\$ 100,000

W. K. Kellogg Foundation	GOS	\$ 50,000
MALDEF	PPG	\$ 100,000
David and Katherine Moore Foundation	GOS	\$ 25,000
Crankstart Foundation	GOS	\$ 25,000
Herb Block Foundation	GOS	\$ 5,000
Miscellaneous*		\$ 100,000
	TOTAL	\$ 1,855,000
	TOTAL Less (\$200K)	\$ 1,655,000

2. To raise \$100,000 from new foundation supporters
3. To raise \$141,000 from corporations
4. To raise \$150,000 from organizations

#### *Strategic Goals*

1. Further develop relationship with Ford and OSF with the goal of becoming an anchor grantee organization
2. Secure support from 2-3 new foundation donors
3. Increase research of foundation donor prospects
4. Secure law firm support for Conference.
5. Tap into networks of supporters who are prominent law firm partners

#### *Operational Goals*

1. Maintain communications with and engagement of Ford and OSF (President and Director Counsel)

NAMES OF FOUNDATION STAFF MEMBERS WERE REMOVED

2. Train Research Assistant to research foundations. Allocate at least 4 hours of staff time per week to foundation research – By July 1 (Chief Development Officer)

- Standardize foundation research procedures and document key information on each foundation to avoid duplication of effort and researching the same foundations in the future

Capture this information: Grant budget: (rounded to \$100,000); Grant size range for most grants; List funding priorities; Do they fund national organizations? (If so, list 3 examples); Grantee organizations with a focus on civil rights and/or issues facing African-Americans; (List 3 examples); Accept applications?; Names of trustees; Reviewed website, 990, Foundation Center directory.

**3. Research giving history of foundations below and possible fit with \_\_\_\_\_ (Foundation Relations Consultant)**

Akanadi, Blaustein Foundation, Booth Ferris Foundation (for development capacity building) George Lucas Educational Foundation, Give Well Foundation, Haas Family, Harry Frank Guggenheim Foundation, Huber Foundation, Jeffrey M. and Barbara Picower Foundation, Jenkins Family Foundation, MacArthur Foundation, Norflet Progress Fund, Peierls Family Foundation, Philanthropic Initiative for Racial Equality, Robert and Colleen Haas, Walter and Elise Haas Fund, William and Flora Hewlett Foundation

**4. Identify 5 to 10 new foundation prospects by researching funders of comparable organizations, including: (Development Research Assistant)**

ResearchACLU, Advancement Project, African American Policy Forum, Brennan Center, Center for the Study of Race and Equity in Education and Equal Measure, Color of Change, Justice Policy Center at Urban Institute, Lawyers Committee for Civil Rights, NAACP, Opportunity Agenda, The Center for Social Inclusion, UNC Center for Civil Rights, US Human Rights Network

**5. Submit concept papers or proposals to the following foundations**

Rockefeller Brothers Fund (Political participation) – by June 15, 2015, Foundations Consultant with support from \_\_\_\_\_

Mellon Foundation (Affirmative Action) - by July 1, 2015, Foundations Consultant with support from \_\_\_\_\_

Silicon Valley Foundation (Education) – by June 15, 2015, Foundations Consultant

Morgan Stanley Foundation (Black Girls Leadership) – by June 15, 2015, Foundations Consultant with support from \_\_\_\_\_

**6. Secure meetings with these foundations**

Annie E. Casey Foundation  
Patrick McCarthy, President and Chief Executive Officer

Bloomberg Philanthropies  
Erana Stennet, estennett@bloomberg.net

NoVo Foundation  
Pamela Shifman, executive director

The Proteus Fund Initiative  
Shireen Zaman, Program Director, Security & Rights Collaborative ,  
[szaman@proteusfund.org](mailto:szaman@proteusfund.org), [413-461-3443](tel:413-461-3443)

Robert Wood Johnson Foundation  
Dwayne Proctor, Director  
John Grovea, Senior Program Officer

Hewlett Foundation  
Larry Kramer

**7. Ask \_\_\_\_\_ to Co-Chair a \_\_\_\_\_ / Law Firm Appeal by writing to colleagues at other law firms.**

Currently law firms contribute only between \$5,000 to \$15,000 in non-event gifts each year. This is a big opportunity for growth if \_\_\_\_\_ can identify the right people to “make the ask.”

**8. Research fraternities and sonorities, begin developing relationship with 5, and secure gift from 2.**

**9. Draft or improve boilerplate descriptions of standard proposal components, among them program evaluation procedures, history, and recent accomplishments. Create template for operating grant reports. (Foundation Relations Consultant).**



## AWARD DINNER

### Financial Goal

**1. To raise \$1,750,000**

FY15: \$1,403,502

FY14: \$1,678,263

FY13: \$1,776,500

FY12: \$2,100,000

## Strategic Goals

1. Increase board's involvement in soliciting their networks
2. Reengage past honorees
3. Begin cultivation of future honorees
4. Do more targeted, strategic follow up with attendees
5. Obtain contact information for at least 1/3 of attendees

### Operational Goals

- 1. To identify 7-10 potential corporate honorees for future cultivation strategy for each (Chief Development Officer) and develop**
  - Secure corporate honorees at least 6 months before . Cultivate relationships with potential candidates so they are more likely to accept our invitation to serve as honoree.
  - Candidates: (NAMES REMOVED)
  - Review corporate sponsors of other national .
- 2. Increase board's involvement and support of (Chief Development Officer)**
  - Securing the assistance of all three boards in identifying potential corporate honorees
  - Share list of corporations with all three board to determine who has relationships with executives who can open doors

- COO, \_\_\_\_\_, and \_\_\_\_\_ will connect with board members via LinkedIn to identify potentially useful corporate relationships
- Asking board members to cover event expenses so that other donors can be enticed to give with the promise that all gifts will directly support the mission of \_\_\_\_\_ and none will go towards event expenses
- Ask all board members to supply list and write to at least 10-25 potential donors.
- Provide each board member and senior staff ambassador with a 3 x 5 card with 3-6 individuals you want them to meet and cultivate during the event as well as brief research on each individual. Note these assignments in your individual. Note these assignments in your database.
- Provide each board member and senior staff ambassador with a brief script of the kinds of information you want them to gather: what the guest's role (beyond the title) is in their organization, what he or she knows about \_\_\_\_\_ how he or she came to attend your event, other philanthropic interests.
- Ask each board member and senior staff to write personal notes (preferably on their own stationery) to all the guests they cultivated, inviting them to tour \_\_\_\_\_ with them.

**3. Transition \_\_\_\_\_ donors into ongoing supporters of \_\_\_\_\_ shifting their affinity from the event to the organization. (Chief Development Officer)**

- Send 2 communications to \_\_\_\_\_ participants connecting \_\_\_\_\_ to mission of \_\_\_\_\_, and containing quantitative and qualitative information about the impact of event on organization.
- \_\_\_\_\_ online giving form will include a drop-down field at the end of the transaction process where the donor can answer "Please tell us why you support \_\_\_\_\_."

Introduced by a friend or colleague  
Believe very strongly about the mission of \_\_\_\_\_

- Segment event donors into prospects for annual fund, major gifts, and planned giving.
- First-time attendees will receive donor communications for six months before they are solicited for annual fund

**4. Solicit all \_\_\_\_\_ vendors for a \_\_\_\_\_ gift (Events consultant)**

**5. Reengage past \_\_\_\_\_ honorees (Events Consultant)**

- \_\_\_\_\_ is to create a publication with testimonials from each one of these individuals. We would ask each to share their thoughts on one or more of these questions: (1) As you reflect on what you have done to advance diversity and

inclusion, what are you most proud of? (2) what advice would you give the next generation of leaders working to advance diversity and inclusion in their workplaces and communities? (3) What gives you hope that our country will someday fulfill the promise of equality for all Americans? (4) Whom would you like to thank and recognize for mentoring you or inspiring you to act on the values that you hold dear in the area of diversity and inclusion?

- Enlist \_\_\_\_\_ in extending special invitation to all past honorees to attend and contribute \$75,000, recognizing their involvement via an honorary committee.

6. **Contact 5 nonprofits with successful galas to learn how they obtain contact information for attendees. (Events Consultant)** Incorporate most promising procedures in development operations.

## Other Events

### *Financial Goals*

1. **To raise \$100,000 through 1-2 other events**

### *Operational Goals*

1. **For each event create strategic plan outlining (Events Consultant)**
  - Primary purpose of event
  - Secondary goals
  - Social media plan
  - Key attendees and their background (to be circulated 48 hours in advance)
  - Plan to collect contact information
  - Follow up plan

Create form that will document each of the strategy components noted above.

## STEWARDSHIP/ACKNOWLEDGMENT/RECOGNITION

1. Identify the 25-35 individuals most important to        who will receive personal, periodic email updates from President  
(Chief Development Officer).
2. Chief Development Officer will phone all donors who give \$1,000 or more. President and        to phone all donors who give \$10,000 or more.
3. Acknowledgment letters over \$1,000 to be hand signed by Chief Development Officer (Begun March 2015); over \$5,000 by President and
4. All acknowledgment letters to be mailed within 48 hours of gift receipt. Begun April 2015 (Director of Donor Data & Services )
5. Special language to be used for first-time donors, lapsed donors who give again, regular donors, and donors who increase gifts by more than \$100. (Begun May 2015)  
(Director of Donor Data & Services)
6. Acknowledgment letters to be updated every other month to reflect        most pressing priorities (Chief Development Officer).
7. Public annual Report (tentative) demonstrating organizational and include donor honor roll (Director of Communications).
8. Organizational-wide Thank-a-Thon month (October 2015) where every        staff member will call and thank 2 donors. (Chief Development Officer)
9. Hold 3 conference calls with President        | for top donors. (Manager of Major Gifts)
10. Hold 4 Breakfasts with an        (Manager of Major Gifts)
11. Hold 2 conference calls geared towards major donors outside of New York.  
(Manager of Major Gifts)
12. Work with 2-3 board members to host a cocktail party at their home, or invite 4-5 couples with major giving capacity for a dinner with President        and

other staff

13. Provide quarterly written updates to donors of Police Reform Initiative. (Manager of Major Gifts)

## Addendum A – FY2015 Board Goals & Results

[illegible]

## Addendum B - Cultivation and Stewardship Activities of Senior Staff

- Call and introduce themselves. Find out why they support \_\_\_\_\_ and what issues (practice areas) they are most interested in. Take notes and share with your assigned Development Resource staff member.
- If they live in New York, consider meeting them for coffee or inviting them to the offices
- Email them with a brief update at least once every 45-60 days. (send them publication, link to op ed piece by President & Director Counsel, update on a case, etc)
- Call them at least once a year, ideally within 3 weeks of letter solicitation to update them on \_\_\_\_\_, make the case for larger gift, and alert them that letter is coming.
- Email personal note inviting them to any \_\_\_\_\_ events. For very special \_\_\_\_\_ event, call them.
- Write note on all letter solicitations.
- Call them or send handwritten after they make a gift
- If they attend \_\_\_\_\_, make special effort to speak with them and introduce them to key people at \_\_\_\_\_

## Addendum C - Weekly Staff Hours for Key Functions

	<b>FY2016</b>	<b>NOW</b>
<b>Foundation Prospect Research</b>	<b>5</b>	<b>1</b>
<b>Individual Prospect Research (reactive/proactive)</b>	<b>15</b>	<b>7</b>
<b>Approach, develop relationships with new foundations</b>	<b>6</b>	<b>0</b>
<b>Grant writing/grant reporting/letters of inquiry</b>	<b>20</b>	<b>15</b>
<b>Manage events, including [redacted]; Event Strategy Development</b>	<b>20</b>	<b>25</b>
<b>Database maintenance/routine</b>	<b>15</b>	<b>25</b>
<b>Acknowledgment and processing of gifts</b>	<b>25</b>	<b>40</b>
<b>Administrative support</b>	<b>30</b>	<b>40</b>
<b>Direct mail/online giving management</b>	<b>20</b>	<b>20</b>
<b>Manage [redacted] portfolio/Drafting Correspondence</b>	<b>10</b>	<b>5</b>
<b>Manage 3K to 25K gifts/relationship building/Stewardship/In person meetings</b>	<b>20</b>	<b>5</b>
<b>Board management/engagement/development</b>	<b>7</b>	<b>3</b>
<b>Donor communications (targeted, personalized, tailored)</b>	<b>6</b>	<b>2</b>
<b>Managing/supporting other senior staff with portfolios</b>	<b>10</b>	<b>0</b>
<b>Post event follow up</b>	<b>6</b>	<b>1</b>
<b>Management: staff, org strategy, operations, development planning</b>	<b>10</b>	<b>3</b>
<b>TMI campaign</b>	<b>12</b>	<b>1</b>
<b>Law firm engagement</b>	<b>5</b>	<b>1</b>
<b>Alumni engagement</b>	<b>3</b>	<b>1</b>
	<b>245</b>	<b>195</b>



## Addendum D- FY2016 Development Staff Performance Goals

### Chief Development Officer

1. Oversee implementation of development plan, monitoring revenue results and recommending new strategies as needed.
2. Execute and further develop major gifts campaigns for
3. Oversee and participate as needed in face to face solicitations of all major donors giving \$10,000 and above
4. Board development: In collaboration with President and develop and implement plan to increase voting board's role in introducing new donors to create individualized engagement plan for each board member; and support recruitment of 3-5 new strategically chosen board members.
5. Develop 1 year, 3 year, 5 year staffing plan for department

### Director of Data and Donor Services

1. Refine and implement planned giving plan, including marketing strategy, donor recognition, soft and direct solicitations, and prospect list development.
2. Develop, document, and implement plan for direct mail and online donors to feed major gifts pipeline, identifying those with capacity and working to increase their engagement with
3. Develop procedures to use Raisers Edge for "moves management" to document and plan "high touch" contact points with prospects leading up to an ask.
4. Further develop and implement system to reconcile gifts records of Sanky, finance department, and development department. Document procedures and ensure that all three parties adhere to such procedures.
5. Upgrade appearance, brand consistency, and effectiveness of internal (non-Sanky) "email blasts," moving away from reliance on outside consultant (MTG) to an inhouse system that allows to track which online/email donor communications are received by whom.
6. **Professional development:** Attend seminars on Charitable Lead Trusts and Charitable Remainder Trust.

### Manager of Major Gifts

1. Ensure that all donors of \$10,000 and above are in the portfolio of a member of the senior management team.

2. In collaboration with the Director of Data & Donor Services, develop procedures to ensure that all major communications with donors is recorded in Raisers Edge
3. Execute an annual, specialized mailing to pro bono attorneys, family foundations, fraternities and sororities, and alumni.
4. In collaboration with Chief Development Officer and Director of Data & Donor Services, review and improve information gathered for donor prospect profiles
5. In collaboration with the special events consultant, plan and execute 3-5 small donor cultivation dinners in New York and other cities.

#### **Database Information Coordinator**

1. Create Raisers Edge code for tracking donor interests in one or more programmatic areas. Review and streamline Raisers Edge constituency codes in consultation with Director of Data & Donor Services.
2. Identify and record in Raisers Edge the “decision-maker” and the administrative contact for all sponsors, including law firms and corporations. (Right now this distinction is not made so [redacted] runs the risk of soliciting administrative contacts rather than the decision-maker).
3. Consolidate duplicate records, of which there are approximately 3200, by August 28, 2015.
4. Devise ways to collect alumni contact information missing from Raisers Edge and enter this information
5. **Professional Development:** By July 1, 2015, learn to create standard performance reports in Raisers Edge and begin generating them as needed.

#### **Development Research Assistant**

1. In collaboration with Director of Data and Donor Services, research and document 3-5 prospect research tools as a possible replacement for Iwave, outlining, in writing, the cost, pro’s and con’s of each, and how each compares to Iwave
2. Create manual for database records entry procedures to ensure consistence and accuracy of donor records
3. In collaboration with the Chief Development Officer, research foundation donors of

4. Research African American sonories and fraternities using format to be provided by Director of Data and Donor Services
5. **Professional Development:** By October 1, 2015, learn how to research foundations via the use of 990s, online directories, funder websites, and Guidestars; By December 1, 2015, learn to use DonorSearch and use for select donor research at the Foundation Center's new location in Lower Manhattan.

### Development Assistant

1. Prepare acknowledgement letters for board, Fund donors, and "in memory of" gifts with the goal of mailing these letters within 72 hours of the gift's receipt, alerting Director of Donor Data & Services of delays with any letter and maintaining a spreadsheet to document date of gift receipt and date acknowledgment letter was mailed.
2. Maintain 10 standards packets at all times, and monitor and record inventory of publications, alerting chief development officer and director of communications when supply of any publication reaches 40.
3. Complete organization of legal file room, including designated area for planned giving donors.
4. Set up "Google Alerts" for top 100-150 organizational prospects, board candidates, and other VIPs to be determined by Chief Development Officer.
5. **Professional Development:** Upgrade technology skills. Specifically (1) obtain training in Excel with the goal of learning how to manipulate columns and cells, create professional looking spreadsheets, create simple charts, update budgets, sort fields, and format cells; (2) obtain training with her Groupwise email, and calendar and meeting scheduling with the goal of learning to search and retrieve old emails, file important emails for future reference, scheduling meetings when attendees are available, and rescheduling meetings, and using other basic calendar functions; and (3) obtain training on Raisers Edge with goal learning how to enter biographical and other background information on donors.

### Addendum E - Corporate Supporters of other national African American organizations

Corporations	NAACP	UNCF	Urban League	Thurgood Marshall College Fund	Jackie Robinson Foundation	Smithsonian National Museum of African American
3M						X > 100K
Aflac, Inc.						X > 100K
Allstate		X				
Altria Group, Inc		X > 100K		X > 100K		X > 100K
American Express						X > 100K
American Honda Motor Company, Inc	X					
American Petroleum Institute	X					
Anheuser Busch	X > 100K	X > 100K				
Astra Zeneca	X					
AT&T Corporation	X > 100K	X > 100K	X > 100K			
Bank of America	X > 100K	X > 100K				X > 100K
BBVA	X					
Bloomberg, L.P.		X > 100K			X > 100K	X > 100K
BP			X > 100K			
BTIG					X > 100K	
Camelot	X > 100K					
Capital One	X					
Caterpillar						X > 100K
CBS Corporation	X					
ChevronTexaco Corporation	X > 100K					
Citi Foundation		X > 100K				
Coca-Cola North America		X > 100K		X > 100K		X > 100K
Colgate Palmolive Company		X				
Comcast Corporation	X > 100K		X > 100K			
Continental Airlines			X > 100K			
Costco Wholesale	X			X > 100K		
Cracker Barrel	X					
CVS Pharmacy, Inc.	X	X				
Darden Restaurants, Inc. Foundation		X > 100K				
Denny's	X					
Disney Worldwide Services, Inc.	X					
Dunkin Brand	X > 100K					
Eli Lilly and Company	X > 100K					
Federal Express Corporation	X > 100K	X > 100K				
Ford Motor Company	X > 100K	X		X > 100K		X > 100K
GE Foundation		X > 100K			X > 100K	
GEICO	X					
General Mills Foundation						X > 100K
General Motors Corporation	X > 100K	X > 100K				X > 100K
Gilead Sciences, Inc	X					
GlaxoSmithKline Foundation		X				
Goldman & Sachs					X > 100K	X > 100K
Goodyear Tire & Rubber Company	X					
Hershey's				X > 100K		
Hilton Worldwide	X					
Hyundai Motor America	X > 100K					
IBM						X > 100K
Intel Corporation		X > 100K				
JCPenny		X				
Johnson & Johnson	X	X > 100K				
JPMorgan Chase Foundation						X > 100K
Lilly			X > 100K			
Lowe's Companies, Inc.	X			X > 100K		
Macy's		X				
Major League Baseball					X > 100K	
Marathon Oil Company	X					
Marriott International, Inc.	X					
MasterCard Worldwide		X				
McDonald's Corporation	X > 100K	X > 100K				X > 100K
Merck & Company, Inc		X > 100K				
Microsoft Corporation		X > 100K				
MillerCoors	X			X > 100K		
Moet Hennessy USA, Inc	X					
Monsanto Company		X > 100K				
Morgan Stanley						X > 100K

Morgan Stanley						X > 100K
Nascar				X > 100K		
Nationwide Mutual Insurance Company	X		X > 100K			
NBC Universal Media, LLC	X > 100K			X > 100K		
New Era Fits					X > 100K	
News Corporation						X > 100K
Nike					X > 100K	
Nissan	X	X > 100K				
Northrop Grumman Foundation		X			X > 100K	
Pepsi	X	X				X > 100K
Personnel Strategies Inc.	X					
PHRMA	X					
Praxair					X > 100K	
Proctor&Gamble		X > 100K				
Prudential					X > 100K	X > 100K
Rodney and Michelle Adkins						X > 100K
Scripps Networks			X > 100K			
Sodexo, Inc. & Affiliates	X					
Southwest Airlines	X > 100K					
State Farm	X > 100K					
Target	X					X > 100K
The Boeing Company						X > 100K
The Coca-Cola Company	X > 100K				X > 100K	
The Home Depot	X					
The ServiceMaster Company	X					
The UPS Foundation, Inc.		X > 100K	X > 100K			
The Walt Disney Company	X					X > 100K
Time Warner	X	X > 100K				X > 100K
Toyota						
Toyota Motor Sales, USA, Inc.	X	X > 100K				
Turner Construction Company	X					
UAW - GM Center For Human Resources	X					
UAW Chrysler	X > 100K					
Unilever					X > 100K	
United Health Care Corporation		X > 100K		X > 100K	X > 100K	
United Parcel Service of America, Inc.	X > 100K					
United Technologies Corporation						X > 100K
USA Funds				X > 100K		
Verizon	X > 100K	X				
Walgreens Company	X > 100K					
Wal-Mart Stores, Inc.	X > 100K	X > 100K	X > 100K	X > 100K		X > 100K
Wells Fargo	X > 100K	X > 100K	X > 100K	X > 100K		
Willis					X > 100K	
Windmill Foundation					X > 100K	
Xerox Foundation		X				