MARKETING PLANNING PRO WITH AI

FOR NONPROFITS

Increase Donations, Build Lasting Relationships with Supporters and Volunteers With Easy-to-Use Online Marketing Planning Tools

MARKETING CONVERGENCE SOLUTIONS

MARKETING PLANNING PRO FOR NONPROFITS

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Instructions on How to Build Your Strategic Marketing Plan Using AI Powered Online Forms

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INTRODUCTION

Use These Instructions for Answering Questions in Online Forms to Create Your Measurable Marketing Plan

Can You Explain How Your Marketing Performs?

Throughout my career leading marketing teams across both business and nonprofit sectors, one question came up time and again:

“How do we know if our marketing is actually working?”

Senior leaders wanted measurable answers — not just activity reports, but real results: *What return can we expect from this campaign? How will this plan impact revenue, participation, or community outcomes?*

These questions taught me a vital truth: marketing must be more than creative ideas or good intentions — it must drive measurable impact. That’s why my teams and I always began with clearly defined **goals** and **Key Performance Indicators (KPIs)** before launching any initiative. We didn’t just “do marketing”; we set expectations for success and tracked them relentlessly.

Tracking performance during and after execution became our compass. It revealed what worked, what didn’t, and where we could optimize for stronger results. Over time, this discipline transformed how we planned, executed, and justified every marketing effort.

The same principle applies, perhaps even more critically, to nonprofit organizations.

Without a structured marketing plan grounded in analysis, clear goals, and measurable outcomes, efforts become guesswork. A strong plan helps nonprofits focus limited resources, expand programs and services to beneficiaries and users, increase donations and volunteer engagement, strengthen grant writing, and build lasting relationships.

That's why I created the Marketing Planning Guide for Nonprofits. It's a step-by-step framework filled with real-world examples, clear instructions, and AI-powered planning templates. It simplifies the process of building a strategic, results-driven marketing plan that connects your mission to measurable outcomes and helps you tell your story with clarity, confidence, and purpose.

Step 1 | Getting Started

Start your planning by reviewing this Marketing Planning Pro planning guide and the online forms and instructions for nonprofits in detail.

It's organized in logical sections that help you define your purpose, analyze your strengths, define your donor base, set measurable objectives, and outline actionable tactics. Fill in each part as you go, using the examples provided as inspiration. Don't worry about being perfect, what matters is clarity and commitment to follow-through.

Think of this as both a **workbook and a playbook**. As you complete each section, you're not just writing a plan, you're building a focused, data-driven strategy that helps you make smarter marketing decisions, connect better with supporters, and ultimately grow your organization.

Use it, revisit it often, and adjust your tactics based on what works. This is your roadmap to more consistent and effective marketing.

Additional resources about planning can be found at our website, www.marketingconvergencesolutions.com.

Step 2 | Select the Planning Team

Start your planning by assembling a small, cross-functional planning team that may include:

- Development Director
- Program Manager
- Communications Lead
- Volunteer Coordinator
- Finance/Grants Officer

Use this team to brainstorm, complete each section collaboratively, and bring real-world insights into the planning process.

Step 3 | Planning Meeting Preparation

Once your team is in place:

- Distribute Materials: Share this planning outline, definitions, and examples with all team members in advance. Allow time for review and preparation.
- Schedule the Planning Session: Choose a date and ensure the team is available for a focused, uninterrupted session.

Step 4 | Facilitate an Effective Planning Session

Create a productive, engaging atmosphere:

- Use flip charts and whiteboards to capture input and visualize ideas.
- Ask questions and prompt discussion for each section of the plan.
- Ensure the environment is comfortable: provide good seating, regular breaks, coffee, drinks, and snacks to maintain focus and energy.
- Make sure that someone is appointed to take detailed notes of the discussions.

Step 5 | Write the Marketing Plan

Using input from your planning team, insights from the planning meeting, and your own expertise, complete the strategic marketing plan by filling in the questions found in the Marketing Planning Pro Online Forms for Nonprofits.
You may find it helpful to assign specific sections or questions to different team members based on their roles or areas of expertise.

Use the AI Assistant with help in formulating and editing your answers.

Sections of the marketing plan that are covered in this guide.

Section I Questions | Organization Description, Branding, Supporters, Beneficiaries, Services, and Programs

Section II Questions | Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics

Section III Questions | Develop a Marketing Budget Summary and ROME

Section IV Questions | Executive Summary

Section V | Appendix to the Marketing Plan

Lean on AI for Help in Developing Marketing Tactics

The built-in Marketing Planning Pro AI Assist and others such as ChatGPT, CoPilot, Gemini, and Claude, can be used to develop marketing tactics by translating tactics for marketing objectives and strategies into specific, actionable plans, such as campaigns, messaging, content calendars, targeting, and platform recommendations.

AI tools can analyze market trends, supporter behavior, and performance data to recommend and even generate creative assets tailored to your strategic goals.

How AI Helps Map Strategy to Tactics:

Step	AI Contribution
Define objectives	Helps refine goals using SMART criteria and industry benchmarks
Align with strategy	Ensures tactics align with positioning, supporter targeting, and core messaging
Suggest tactics	Generates campaign ideas, channel plans, content formats, and timing suggestions
Automate content creation	Creates social posts, ad copy, images, and hashtags based on tone and supporter
Personalize messaging	Segments supporters and tailors content for each persona
Optimize performance	Analyzes engagement metrics and suggests adjustments for better results

ONLINE FORMS INSTRUCTIONS AND QUESTIONS

Section I Questions | Organization Description, Branding, Supporters, Beneficiaries, Services, and Programs

Question 1 | Organization Description and Branding

Provide an overview of your organization, including its legal name, founding year, leadership, and core mission focus. Describe your brand identity and what values define your organization, how you wish to be perceived, and the tone or imagery that represents your mission.

Describe your branding strategy

- What does your brand stand for?
- What is your value proposition?
- What visual elements (logo, colors, style) represent the brand?
- What tone of voice do you use in communication?

Question 2 | Organization History

Summarize key milestones: founding story, growth of programs, partnerships, and community impact over time.

Question 3 | Core Values and Culture

List 3–6 guiding principles that shape your organization's behavior and decision-making. Explain how these values influence staff, volunteers, and supporters, and how they support your mission.

Question 4 | Mission Statement

State your core purpose: What do you do, for whom, and why? Keep it concise, compelling, and aligned with your impact goals.

American Red Cross Mission Example

“The American Red Cross prevents and alleviates human suffering in the face of emergencies by mobilizing the power of volunteers and the generosity of donors.”

World Wildlife Fund (WWF) Mission Example
“To conserve nature and reduce the most pressing threats to the diversity of life on Earth.”

Question 5 | Vision Statement

Describe what your organization aspires to become or achieve in the long term. It should inspire your staff, donors, and community partners.

American Red Cross Vision Example
“The American Red Cross, through its strong network of volunteers, donors and partners, is always there in times of need.”

World Wildlife Fund (WWF) Vision Example
“To build a future in which people live in harmony with nature.”

Question 6 | Programs and Services

List and describe your primary programs, initiatives, or services you offer beneficiaries. For each, identify the target beneficiaries, the needs addressed, and measurable outcomes.

Question 7 | Community Position

Explain how your organization is positioned within your cause and mission area. Highlight your distinct approach, trusted reputation, or innovative service model.

Question 8 | Primary Supporter Segments

Define your primary supporter groups: individual donors, foundations, corporate sponsors, or volunteers. Include motivations and engagement behaviors that drive their involvement.

Question 9 | Beneficiary Segments

Identify your main beneficiaries, their challenges, and how your services address their needs.

Question 10 | Geographic Reach

Describe your current and planned service areas: local, regional, national, or international and delivery channels to beneficiaries (in-person, virtual, hybrid).

Question 11 | Future Organizational Goals

List 3–5 measurable goals over the next 1–5 years related to mission impact, program expansion, funding diversification, and community engagement.

Key Characteristics of Strong Nonprofit Goals

- Mission-aligned: Directly support the organization’s core purpose
- SMART: Specific, Measurable, Achievable, Relevant, Time-bound
- Balanced: Include both *programmatic* and *operational* objectives
- Outcome-driven: Focus on measurable change, not just activity

Examples

- Mission and Program Impact Goals: Expanding or deepening the Nonprofit’s core services or advocacy work
- Fundraising and Financial Sustainability Goals: Strengthening grant writing processes and results, funding diversity, and long-term stability
- Volunteer and Community Engagement Goals: Growing participation and strengthening relationships
- Awareness, Branding, and Advocacy Goals: Expanding public awareness and influence
- Organizational Development and Capacity Goals: Strengthening infrastructure and team effectiveness
- Evaluation and Accountability Goals: Demonstrating transparency and continuous improvement

Question 12 | Organizations Similar to Your's

Describe

- Their strengths and weaknesses
- How they are positioned in their community
- What makes your organization different or more effective in reaching supporters
- What makes your organization different or more effective in reaching beneficiaries

Question 13 | Summary of the Services and Programs You Offer Beneficiaries

When writing a summary of the services and programs you offer beneficiaries, consider both the functional details and the strategic positioning of each service. Highlight *why it matters* to the beneficiary.

Here's what to include and consider

Service and Program Categories

- Organize services and programs into logical categories.
- Group similar services and programs.

Features and Benefits

- Clearly describe key features of each service and program.
- More importantly, emphasize the beneficiary benefits such as what problems the service and program solves or value they delivers.

Target Beneficiary for Each Service and Program

- Note which segments each service and program are designed for.
- Include how the service and program aligns with that beneficiary's needs.

Differentiators

- Explain what makes each service and program unique.
- Consider how it compares to services and programs similar Nonprofits offer.

Channels

- Indicate where the service and program is available (e.g., regions, specific communities).
- Highlight if a service and program is exclusive to a certain channel.

Conduct a SWOT Analysis

A SWOT analysis identifies your organization's Strengths, Weaknesses, Opportunities, and Threats. It helps align your strategies with internal capabilities and external conditions.

Instructions for Strengths

Ask: What does the organization do well, and what gives it an advantage in attracting donors.
Examples
Strong reputation, loyal donor base, experienced staff, or impactful partnerships.
Tip: Focus on what sets the organization apart and supports growth.

Instructions for Weaknesses
Weaknesses: May include limited funding diversity, inconsistent messaging, or capacity constraints.

Ask: Where is the organization vulnerable or underperforming?
Examples
Limited funding diversity, inconsistent messaging, or capacity constraints.
Tip: Be honest. Identifying weaknesses is critical for planning improvements.
Instructions for Opportunities

Ask: What trends, gaps, or changes in the can the organization leverage?
Examples
New grant opportunities, shifting public interest, or potential collaborations.
Tip: Look at both macro trends and category-specific opportunities.

Instructions for Threats
Ask: What external forces could negatively impact the organization in each of these areas?

Examples
Policy changes, funding volatility, or other Nonprofits in the same field.
Tip: Monitor your environment regularly to identify early warning signs.

Answer Questions 14, 15, 16, and 17 to Complete a SWOT Analysis (Strengths, Weaknesses, Opportunities and Threats) for **Donor and Public Awareness, Programs and Services, Contribution Levels, Program Delivery Channels**

Question 14 | SWOT for DONOR AND PUBLIC AWARENESS (Supporters and Volunteers) Strengths, Weaknesses, Opportunities, and Threats

Question 15 | SWOT for CONTRIBUTION LEVELS (Supporters and Volunteers) Strengths, Weaknesses, Opportunities, and Threats

Question 16 | SWOT for PROGRAMS AND SERVICES (Beneficiaries, Users of Programs) Strengths, Weaknesses, Opportunities, and Threats

Question 17 | SWOT for PROGRAM DELIVERY CHANNELS (Beneficiaries, Users of the Programs) Strengths, Weaknesses, Opportunities, and Threats

Question 18 | Set Your Contribution and Grant Goals by Program and Service for Current Year, Year 1, Year 2, and Year 3

Set measurable contribution and grant goals based on:

- Past performance

- Trends
- Giving environment

Coordinate with key departments or people with your organization to validate projections for the next one, two, and three years.

When setting contribution and grant goals, planners must balance ambition with realism and ensure that goals are aligned with broader strategies. Below are the key considerations to guide the goal-setting process:

Align with the Organization's Objectives

- Ensure goals support overall organization objectives (e.g., revenue growth, community expansion, program and service launch success).
- Coordinate with finance and executive teams for consistency.

Use Historical Data

- Analyze past performance by service and program, by region, channel, or other segment.
- Identify seasonality, trends, and patterns to create realistic baselines.

Make Goals SMART

- Specific – Clearly define what you want to achieve
- Measurable – Use concrete metrics
- Achievable – Stretch, but within reach given your resources
- Relevant – Tied directly to your organization's priorities
- Time-based – Set deadlines (e.g., monthly, quarterly, annually)

Account for Market Conditions

- Consider economic trends, consumer confidence, and other external factor.

Plan for Monitoring and Adjustment

- Set checkpoints (e.g., monthly reviews) to monitor progress.

- Be ready to refine strategies or reallocate resources if you're off-track.

Tip: Tie contribution and grant goals to incentives if you're managing internal teams or partners. Motivation and accountability improve goal achievement.

Section II Questions | Developing Your Marketing Plan Deliverables – Marketing Objectives, Strategies, and Tactics

Develop your marketing plan deliverables which are the objectives, strategies, and tactics for each of these areas of engagement:

Focus on Supporters and Volunteers
- Donor and Public Awareness
- Contribution Levels

Focus on Beneficiaries, Users of Programs
- Programs and Services
- Program Delivery Channels

Engagement Area	Objective	Strategy	Tactics Examples
Donor & Public Awareness (Supporters and Volunteers)	Strengthen brand trust and donor engagement	Influence and motivate our supporters with engaging messaging	Campaigns, storytelling, influencer partnerships
Contribution Levels (Supporters and Volunteers)	Increase giving frequency and average gift size	Develop and implement tactical initiatives to increase contribution levels from all constituents	Monthly giving, grants, matching gifts, donor recognition, legacy programs

Engagement Area	Objective	Strategy	Tactics Examples
Programs & Services (Beneficiaries and Users)	Demonstrate measurable impact and service reach	Improve our mission effectiveness by expanding on the programs and services we deliver	Blood drives, training programs, military support, volunteer mobilization
Program Delivery Channels (Beneficiaries and Users)	Expand access and service efficiency	Enlarge our program reach footprint through new technologies and territories	Mobile units, digital apps, local chapters, online training

Definitions for each deliverable

Objectives

Objectives should align with the overall marketing plan goals and serve as benchmarks for performance.

Ensure objectives are SMART

- Specific
- Measurable (KPIs, Key Performance Indicators)
- Achievable
- Relevant
- Time-Based

Key Performance Indicators (KPI)

KPIs provide valuable insights into how well the marketing strategies and tactics are progressing toward achieving the objectives. In marketing convergence,

Examples of KPIs can include

- Increase in engagement with beneficiaries and program users
- Increase in donations
- Donor leads generated
- Increase in volunteers
- Return on Mission Engagement(ROME)
- Supporter acquisition cost

Strategies

Strategies should align with the strengths, weaknesses, opportunities and threats your planning team believes are important to address.

- Strategies: Outline how you will achieve each objective.
- Tactics: Provide specific actions, each with:
  - Implementation details
  - Assigned responsibilities
  - Timing and budget allocation

Target Audiences

- Beneficiaries and program users
- Current donors (renewals and lapsed supporters)
- Prospective donors acquired through events, social media, or peer referrals
- Public and private entities for grants
- Volunteers

Tactics

Marketing tactics must deliver the results for the marketing objectives and strategies and should include:

Performance Measurement
Each tactic should have performance measurement (KPI) to track its level of success (or failure). Measurements can include boost in donations, increased number of supporters, and new supporter leads.

Budget, Responsibilities, Timing
Budgets must be allocated for executing each tactic. Budgets must align with the expected Return on Mission Engagement (ROME). Assign specific timing and the teams responsible for implementing each task within the tactic.

Timing
In what time frame will the objective be accomplished?
Example
Develop in Q1. Implement in Q2.

What Incentive Offer(s) Will Motivate the Target Supporter
These can include recognition, rewards, awards, mission-linked gifts, and exclusive access. All must align with target supporters' interests and provide genuine value.

Examples of Measurable Tactics
- Host four quarterly community events or open houses to increase visibility and partnerships
- Launch a major gifts or planned giving program to strengthen long-term funding
- Build partnerships with three civic or educational organizations to amplify advocacy efforts
- Recruit and train 100 new volunteers to support ongoing programs by year-end

Create the Message
Preferably the "One Thing" That will Convey the Offer to Motivate the Supporter to Donate

The message must be clear and concise and communicate benefits and value. Highlight unique selling points and create a sense of urgency or exclusivity to encourage action. Tailor the messaging to different communications channels and target segments if applicable.

Message Example
"Your Gift Turns Hope Into Action"

"You're the reason change happens. Every day, lives are being changed because of people like you. When you contribute to **[Your Organization Name]**, you help provide support, food, shelter, and opportunities for those in need."

"Give Now. Thank you for believing in our mission and for being the heart of the change we're building together."

Refer to the ADDENDUM for extensive examples of Objectives, Strategies, and Tactics

Create Your Objectives, Strategies, and Tactics To Address DONOR AND PUBLIC AWARENESS (Supporters and Volunteers)

Question 19 | Donor and Public Awareness Objective

Question 20 | Donor and Public Awareness Strategy and Target Audience

Question 21 | Donor and Public Awareness KPIs

Question 22 | Donor and Public Awareness Measurement Plan

Question 23 | Donor and Public Awareness Tactics with Responsibilities, Timing and Budgets

Question 24 | Total Budget, All Donor and Public Awareness Tactics

Question 25 | ROME All Donor and Public Awareness Tactics: [Return on Mission Engagement (ROME) for Donor and Public Awareness) = Gain – Budget / Budget X 100]

Create Your Objectives, Strategies, and Tactics To Address CONTRIBUTION LEVELS (Supporters and Volunteers)

Question 26 | Contribution Levels Objective

Question 27 | Contribution Levels Strategy and Target Audience

Question 28 | Contribution Levels KPIs

Question 29 | Contribution Levels Measurement Plan

Question 30 | Contribution Levels Tactics with Responsibilities, Timing and Budgets

Question 31 | Total Budget, All Contribution Levels Tactics

Question 32 | ROME for All Contribution Levels Tactics: [Return on Mission Engagement (ROME) for Contribution Levels) = Gain – Budget / Budget X 100]

Create Your Objectives, Strategies, and Tactics To Address PROGRAMS AND SERVICES (Beneficiaries and Users)

Question 33 | Programs and Services Objective

Question 34 | Programs and Services Strategy and Target Audience

Question 35 | Programs and Services KPIs

Question 36 | Programs and Services Measurement Plan

Question 37 | Programs and Services Tactics with Responsibilities, Timing and Budgets

Question 38 | Total Budget, All Programs and Services Tactics

Question 39 | ROME for All Programs and Services Tactics: [Return on Mission Engagement (ROME) for Programs and Services) = Gain – Budget / Budget X 100]

Create Your Objectives, Strategies, and Tactics To Address **PROGRAM DELIVERY CHANNELS (Beneficiaries and Users)**

Question 40 | Program Delivery Channels Objective

Question 41 | Program Delivery Channels Strategy and Target Audience

Question 42 | Program Delivery Channels KPIs

Question 43 | Program Delivery Channels Measurement Plan

Question 44 | Program Delivery Channels with Responsibilities, Timing and Budgets

Question 45 | Total Budget, All Program Delivery Channels Tactics

Question 46 | ROME for Program Delivery Tactics: [Return on Mission Engagement (ROME) for Program Delivery Channels) = Gain – Budget / Budget X 100]

Section III Questions | Develop a Marketing Budget Summary and ROME

Instructions for Marketing Budget Summary

Summarize the budgets to complete each mission objective. Be sure to include the KPIs for each objective and the ROME (Return on Mission Engagement).

ROME formula

ROME = (Gain from Tactics – Tactics Investment) / (Tactics Investment) X 100

Example

If you spent $50,000 on a campaign and generated $200,000 in incremental donations:

ROME = (200,000−50,000 / 50,000) X 100 = 300%

This means you earned $3 in revenue for every $1 spent on marketing.

Question 47 | Summarize for Each Objective: KPIs, Budget, and ROME%

Objectives	KPI	Total Budget	ROME %

TOTAL			

Section IV Questions | Executive Summary

Executive Summary Background

An executive summary is important in a marketing plan because it provides a concise, high-level overview of the plan's most critical elements: objectives, strategies, tactics, target market, and expected results (KPIs).

It helps executives and stakeholders quickly understand the plan's purpose, priorities, and impact without reading the full document.

In short, it answers

What are we doing, why, for whom, and what results do we expect?

- This makes it a vital tool for gaining alignment, approval, and support.

Question 48 | Summary of Key Takeaways

- Recap the main objectives of the marketing plan
- Reiterate the marketing strategy and how it aligns with the organization's goals
- Highlight core target supporters, positioning, and key tactics

Question 49 | Strategic Focus Areas

- Briefly outline the primary strategic priorities (e.g., brand awareness, grants improvement, supporter acquisition, program launch, volunteer retention).
- Emphasize how these focus areas will drive growth or improvement.

Question 50 | Expected Outcomes

- Summarize anticipated results from the plan (e.g., donation growth, number of new donor leads, increase in volunteers, increased grants).
- Reference any success metrics or KPIs introduced earlier in the plan.

Question 51 | Budget Summary and ROME

- Recap the budgets by objective and the expected ROME for each objective.

Question 52 | Plan for Execution and Review

- Mention who is responsible for implementing the plan.
- Identify timelines, checkpoints, or review processes to track progress.
- Include how adjustments will be made if goals are not met.

Question 53 | Closing Statement or Call to Action

- End with a motivating statement that reinforces the organization's commitment to execution.
- If the plan is being presented for approval, include a statement requesting feedback, endorsement, or resources needed.

Example of Closing Statement

"With a clear strategy, measurable goals, and a focused execution plan, this marketing roadmap empowers us to amplify our impact by increasing donations, strengthening our brand, and building lasting relationships with supporters and volunteers. Backed by collaboration across teams and a commitment to adapt as we grow, we're not just planning for success, we're ready to make it happen."

Section V | Appendix to the Marketing Plan

Additional comments, acknowledgments or names of contributors to the plan, references for budgets, detailed calendars, or research.

ADDENDUM

Examples of Objectives, Strategies, and Tactics

The American Red Cross Objectives, Strategies, and Tactics

Donor & Public Awareness (Supporters and Volunteers)

Objective: Build trust, visibility, and engagement to strengthen public understanding and inspire giving.
Strategy: Develop initiatives to strengthen brand trust, create emotional engagement, and keep the Red Cross top-of-mind during crises and giving seasons.
Target Audience: TBD
Measurement KPIs: TBD
Tactics:

- **Disaster Response Storytelling:** Share real-time stories, photos, and videos from disaster sites to show how donations help people immediately.
- **National Campaigns:** Launch awareness drives like "*Sound the Alarm*" (home fire safety) and "*Missing Types*" (blood donation awareness by removing A, B, and O from brand logos).
- **Public Service Announcements (PSAs):** Partner with media outlets and influencers to deliver emergency-preparedness messages nationwide.
- **Cause-Marketing Partnerships:** Collaborate with major brands (e.g., Amazon, Anheuser-Busch, Delta) for co-branded donation and awareness campaigns.
- **Social Media Engagement:** Use Twitter/X, Instagram, and TikTok to humanize stories of volunteers, blood donors, and disaster survivors.
- **Seasonal Campaigns:** Drive donations through key times (e.g., year-end "Give Something That Means Something" campaign).
- **Community Events & Fundraisers:** Sponsor blood drives, safety fairs, and local fundraising walks to keep the brand visible in neighborhoods.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Contribution Levels (Supporters and Volunteers)

Objective: Motivate donors to give more frequently, at higher levels, and across diverse giving channels.
Strategy: Develop tactics that help the Red Cross maintain steady year-round donations, drive large-scale emergency response funding, and sustain major-gift relationships.
Target Audience: TBD
Measurement KPIs: TBD
Tactics:

- **Monthly Giving Programs:** "The Red Cross Champions" recurring donor club with special recognition and impact updates.
- **Tiered Giving Campaigns:** Define impact per donation tier (e.g., "$25 provides blankets and food for a family after a fire").
- **Matching Gift Programs:** Partner with corporations during key campaigns (e.g., "Your gift doubles thanks to XYZ Company").
- **Major & Legacy Giving:** Offer planned giving opportunities — wills, bequests, endowments — promoted through donor relationship managers.
- **Peer-to-Peer Fundraising:** Empower supporters to create personal fundraising pages during disasters or blood drives.
- **Donor Recognition & Appreciation:** Feature major donors in newsletters, events, and annual reports; provide exclusive updates on impact.
- **Emergency Appeals:** Send targeted email and SMS appeals within hours of a major disaster — capitalizing on emotional urgency.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Programs & Services (Beneficiaries and Users)

Objective: Deliver essential services that demonstrate measurable community impact and reinforce donor confidence.
Strategy: Create programs that reinforce the organization's credibility, showcasing how donations and partnerships translate into tangible humanitarian outcomes.
Target Audience: TBD
Measurement KPIs: TBD
Tactics:

- **Disaster Relief Operations:** Rapidly deploy trained volunteers, food, and shelter to communities impacted by natural disasters.
- **Blood Services Program:** Operate mobile and fixed blood donation centers; leverage online scheduling and donor-tracking tools.
- ~~**Training & Certification:**~~ Offer paid and volunteer-led classes in CPR, First Aid, and lifeguarding, which also support revenue generation.
- **Health & Safety Education:** Create online and in-person training programs focused on preparedness, first aid, and mental health.
- **Military & Veteran Services:** Provide emergency communications, support groups, and transition assistance for service members and families.
- **International Humanitarian Services:** Partner with global Red Cross and Red Crescent organizations for disaster relief and refugee support.
- **Volunteer Empowerment Programs:** Use the "Volunteer Connection" platform to recruit, train, and recognize volunteers nationwide.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Program Delivery Channels (Beneficiaries and Users)

Objective: Expand reach and accessibility through diverse, efficient, and innovative delivery methods.
Strategy: Develop diverse delivery channels to ensure the Red Cross can meet people where they are: in-person, online, and on the ground, while maximizing operational efficiency and donor confidence.

Target Audience: TBD
Measurement KPIs: TBD
Tactics:

- **Mobile Response Units:** Deploy emergency response vehicles and mobile blood donation buses to reach affected areas and rural communities.
- **Digital Engagement & Apps:** Operate apps such as the Blood Donor App, Emergency App, and Hero Care App for direct service delivery and donor engagement.
- **Regional Field Offices:** Maintain a nationwide network of local chapters to tailor delivery to community needs.
- **Online Training & Certification:** Offer e-learning platforms for CPR, disaster preparedness, and volunteer training.
- **Partnership Distribution:** Collaborate with local shelters, food banks, and public agencies to deliver aid and services.
- **Volunteer Delivery Network:** Mobilize 20,000+ trained volunteers who act as first responders and local service ambassadors.
- **International Coordination:** Coordinate through the global Red Cross and Red Crescent network for supply chain and logistics support.
- **Community Pop-Ups:** Temporary on-site assistance during disasters, health fairs, or vaccination drives, branded and staffed by local volunteers.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Other Examples of Objectives, Strategies and Tactics

Donor & Public Awareness (Supporters and Volunteers)

Objective: Improve contribution levels (average gift size and total giving volume) by enhancing awareness, emotional connection, and perceived value through multi-channel donor engagement and storytelling campaigns.
Strategy: Develop initiatives to strengthen brand trust, create emotional engagement, and keep the Red Cross top-of-mind during crises and giving seasons.
Target Audience: TBD
KPI Examples:
+20% average donation increase after campaign
+25% social media engagement rate on impact posts
+15% donor retention rate
+10% repeat donations from featured donors

Tactics for Donar and Public Awareness

1. **Storytelling**

- Create short video testimonials from beneficiaries, staff, and volunteers showing transformation stories.
- Launch a “Your Gift in Action” campaign showing the direct link between contribution levels and tangible impact (e.g., “$50 feeds a family of four for a week”).
- Use photo essays or digital storytelling to show progress made possible by donors.
- Develop a “Before & After” impact series to demonstrate measurable change.
- Share monthly “Impact Updates” via email and social media to reinforce ongoing need and donor importance.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

2. Donor Recognition & Gratitude Visibility

- Feature top donors (with permission) in social media "Donor Spotlights."
- Create a digital wall of gratitude on your website showing names or impact stories of supporters.
- Send personalized thank-you videos from leadership or program beneficiaries.
- Highlight cumulative donor milestones ("You've helped 10 families this year!").
- Host annual donor appreciation events and livestream portions online to reach broader audiences.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

3. Multi-Channel Giving Awareness Campaigns

- Run coordinated awareness drives across email, social media, website, and local media focused on "Ways to Give."
- Develop a "30 Days of Giving" challenge featuring daily stories and suggested donation levels.
- Use geo-targeted digital ads promoting local giving opportunities.
- Add donation links or QR codes to all content: print, events, social posts, and newsletters.
- Utilize seasonal awareness events like Giving Tuesday or year-end campaigns with a matching gift incentive.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

4. Transparency & Impact Reporting

- Publish quarterly "Impact by the Numbers" infographics showing outcomes per dollar donated.
- Share interactive dashboards online tracking donations vs. goals.
- Host live virtual briefings or webinars where leadership reports on results and upcoming needs.
- Create annual "Impact Reports" (print or digital) that visually connect giving tiers to measurable outcomes.

- Send personalized “Impact Statements” showing each donor’s cumulative effect (“Your $500 this year provided 200 meals”).

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

5. Personalized Donor Journeys

- Segment donors by giving level, frequency, and interests (e.g., “education donors,” “health donors”).
- Send personalized communications with suggested next-level giving (“You’re just $50 away from helping another student succeed!”).
- Automate thank-you and follow-up emails that reflect each donor’s specific impact area.
- Invite mid-level donors to join exclusive giving circles with added recognition and insider updates.
- Use AI-assisted donor analytics to identify high-potential upgrade opportunities.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

6. Donor Testimonial & Ambassador Programs

- Feature peer donor stories about why they give and how they increased their commitment.
- Train “Donor Ambassadors” to share personal experiences in events and social media videos.
- Encourage supporters to record short “Why I Give” clips and tag your nonprofit.
- Use social challenges (e.g., “Nominate a Friend to Give”) to expand reach organically.
- Collaborate with influencers or local figures aligned with your mission.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

7. Thematic and Time-Limited Appeals

- Develop campaigns centered on impact milestones (e.g., "Help Us Serve 1,000 Families by Year-End").
- Use countdown clocks or progress bars on your website to show goal progress.
- Tie campaigns to awareness months (e.g., Mental Health Month, Earth Day) with clear giving goals.
- Offer matching gift challenges during critical fundraising windows.
- Use email drip campaigns with storytelling arcs that build emotional investment over several weeks.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

8. Website Optimization for Giving

- Add impact-oriented messaging and suggested donation levels on your homepage.
- Use pop-up prompts or banners during key campaigns ("Your $25 gift today doubles with our match!").
- Incorporate video storytelling and testimonials on donation pages.
- Simplify checkout to one-click giving and mobile optimization.
- Include monthly giving as a default option at checkout.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

9. Community & Corporate Partnerships

- Collaborate with business partners for cause-marketing campaigns ("$1 per sale donated").
- Feature donor appreciation signage at partner locations.
- Partner with media outlets or local influencers to co-host awareness events.
- Launch community challenges ("Help our city raise $100,000 for kids this month").
- Create employee giving toolkits for companies interested in workplace giving.

Responsibilities: TBD
Timing: TBD
Budget: TBD

ROME: TBD

Contribution Levels (Supporters and Volunteers)

Objective: optimize contribution levels, payment options, and giving experience so supporters feel empowered (and inspired) to give more, more often, and at higher levels.
Strategy: Develop and adopt donor initiatives that encourages higher and more frequent giving.
Target Audience: TBD
KPI Examples:
+25% increase in donations
+50% increase in donations from grants

Tactics for Grant Writing:

1. Build Internal Grant Writing Capacity

- Invest in professional development: Enroll staff in grant writing courses, webinars, or certificate programs (e.g., Grant Professionals Association, Candid, or Nonprofit Ready).
- Create a grant writing team: Include development staff, program leaders, and finance representatives to ensure accuracy and alignment.
- Develop a "grant style guide" for your organization to maintain consistent tone, language, and formatting.
- Cross-train staff: Ensure multiple team members understand proposal structure, budgeting, and compliance so knowledge isn't siloed.
- Hire or retain a professional grant writer or consultant for complex, high-value proposals.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

2. Develop a Centralized Grant Resource Library

- Compile a repository of past successful proposals, letters of inquiry, and award notifications.
- Maintain updated organizational data — mission statement, key metrics, annual reports, program descriptions, and testimonials.
- Keep current grant boilerplate language for mission, vision, community needs, and impact outcomes.
- Store supporting documents (IRS 501(c)(3) letter, board list, budget, audits) in one shared folder.
- Develop pre-approved program narratives that can be easily adapted for different funders.
- **Responsibilities:** TBD
- **Timing:** TBD
- **Budget:** TBD
- **ROME:** TBD

3. Research and Target the Right Funders

- Use grant databases (Candid/Foundation Directory Online, Grants.gov, GrantStation) to identify well-matched opportunities.
- Develop a Funder Alignment Matrix comparing your programs to each funder's interests, eligibility, and past giving.
- Track deadlines, average award size, and reporting requirements in a grant calendar.
- Prioritize funders with a history of multi-year or renewable grants.
- Build relationships early and reach out to program officers to discuss alignment before applying.
- **Responsibilities:** TBD
- **Timing:** TBD
- **Budget:** TBD
- **ROME:** TBD

4. Strengthen Proposal Content and Storytelling

- Start with a clear problem statement supported by credible data.
- Use concise, human-centered storytelling to bring data to life with real beneficiary stories.

- Focus on measurable outcomes, not activities (e.g., “90% of participants achieved stable housing” vs. “We provided workshops”).
- Align every section with funder priorities and language.
- Emphasize collaboration and community partnerships to show credibility.
- Use visuals such as infographics, photos, charts when allowed.
- Have proposals peer-reviewed internally before submission.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

5. Strengthen Relationships and Stewardship

- Attend funder briefings, conferences, and webinars to build familiarity.
- Send periodic impact updates even outside grant cycles.
- Invite funders to visit program sites or attend events.
- Send thank-you letters and reports promptly after awards are received.
- Continue communication with funders even if a proposal is declined — ask for feedback and stay on their radar for future opportunities.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

6. Align Grant Strategy with Organizational Data and KPIs

- Maintain a performance dashboard tracking program outputs and outcomes.
- Tie every funding request to specific, quantifiable goals (e.g., “Expand after-school program to reach 200 more youth”).
- Include ROI or cost-benefit analyses when possible (“Every $1 invested yields $4 in community value”).
- Share third-party evaluations or case studies to validate effectiveness.

- Incorporate participant testimonials or success metrics directly into proposals.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

7. Improve Financial Transparency and Grant Budgeting

- Align proposal budgets directly with program objectives and measurable outcomes.
- Clearly separate administrative vs. program costs to demonstrate efficiency.
- Include indirect cost justifications when appropriate.
- Maintain audited financial statements and consistent reporting templates.
- Collaborate with the finance team to ensure accuracy and readiness for compliance reviews.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

8. Track and Evaluate Grant Performance

- Maintain a grant management database to track submissions, approvals, reporting, and renewals.
- Record feedback from reviewers and incorporate lessons learned.
- Conduct quarterly reviews of grant activity and outcomes.
- Evaluate ROI: cost of grant writing vs. funds awarded.
- Adjust future strategy based on what worked (funders, programs, timing).

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Tactics for Other Donations Giving:

1. Tiered Giving Levels

- Introduce tiered giving levels (e.g., "Friend – $25/month," "Advocate – $50/month," "Champion – $100/month") with specific impact descriptions ("$50/month provides tutoring for one child").
- Create branded giving societies or circles that recognize milestone giving levels (e.g., *The Visionary Circle, Founders Guild*).
- Bundle donation opportunities with recognition incentives (e.g., exclusive updates, name in annual report, early event access).
- Promote upgrade campaigns encouraging existing donors to move up one level ("Increase your monthly gift by just $10 to reach the next tier!").
- Present impact equivalencies — translating dollars into tangible outcomes (e.g., "$250 funds medical supplies for 10 patients").

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

2. Recurring Giving & Payment Flexibility

- Launch or expand a Monthly Giving Program ("Join the Sustainers Circle").
- Offer customizable payment frequency options such as monthly, quarterly, or annual giving.
- Provide "set-it-and-forget-it" auto-renewal options for recurring donors with easy cancellation.
- Promote recurring giving during campaigns ("A $20 monthly gift makes a bigger impact than a one-time $240 donation").
- Encourage donor pledges for future contributions spread over several months or years.
- Send automated reminders for pledge payments or expiring credit cards.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

3. Payment Acceptance & Technology Integration

- Accept all major payment methods: credit/debit cards, PayPal, Venmo, ACH/bank transfers, Apple Pay, Google Pay.
- Integrate digital wallets and QR code payment options for on-the-go or event donations.
- Add embedded donation forms on your website and social media (Facebook or Instagram giving tools).
- Use text-to-give or SMS donation codes at events (“Text GIVE to 41444”).
- Enable donation kiosks or tablets at physical locations.
- Optimize donation forms for mobile responsiveness and one-click checkout.
- Implement donor data encryption and security certifications to ensure safe online transactions.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

4. Matching Gifts & Corporate Contributions

- Partner with corporations to offer matching gift programs (“Your employer may double your donation!”).
- Include a “Check for Matching Gifts” tool on the donation page.
- Launch matching gift challenges during campaigns (“All gifts up to $25,000 will be matched 1:1”).
- Recognize corporate sponsors publicly on your website or annual report.
- Create custom donation tiers for business donors with branding benefits (e.g., “Community Partner” recognition).

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

5. Donor Financing & Alternative Giving Options

- Offer installment plans for large pledges (e.g., $1,000 spread over 10 months).
- Accept non-cash gifts such as stock transfers, donor-advised funds (DAFs), cryptocurrency, or in-kind contributions.
- Promote planned giving options (wills, trusts, and legacy bequests).
- Establish "gift in honor/memory" programs allowing donors to dedicate contributions.
- Create special project funds that accept large designated gifts ("Fund a classroom renovation for $5,000").

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

6. Donor Education

- Publish clear, transparent impact statements showing how funds are used.
- Create personalized donor reports illustrating individual contribution impact.
- Share stories, infographics, and visuals showing outcomes tied to giving levels.
- Use email and social media retargeting to re-engage one-time donors.
- Provide tax-deduction reminders and easy access to giving receipts.
- Educate donors through "Why Monthly Giving Matters" blog posts or webinars.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Programs and Services (Beneficiaries and Users)

Objective: Strengthen program quality and visibility to serve more beneficiaries and demonstrate measurable community outcomes.
Strategy: Enhance the reach, effectiveness, and credibility of core programs through continuous improvement, outcome measurement, and multi-channel visibility initiatives.
Target Audience: TBD
KPI Examples:
15% increase in beneficiaries served
20% improvement in participant satisfaction
Positive outcome metrics in at least three program areas

Tactics for Programs and Services

1. **Program quality & impact enhancement to improve outcomes, participant satisfaction, and service delivery consistency.**

- Implement a client feedback system (e.g., surveys, focus groups, or digital suggestion boxes) to track satisfaction and unmet needs.
- Conduct a comprehensive program evaluation to identify strengths, gaps, and opportunities for improvement.
- Create standardized training modules for staff and volunteers to ensure program delivery consistency.
- Introduce a quality assurance checklist for all service touchpoints.
- Develop or refine impact measurement frameworks: identify KPIs (e.g. # served, % improvement, success rate).
- Launch pilot program enhancements or new service delivery models (e.g., hybrid online/in-person options).
- Document success stories and testimonials illustrating measurable impact.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

2. Community Partnerships & Collaboration

- Establish formal collaboration agreements (MOUs) with community organizations serving similar populations.
- Develop joint programs or referral systems to minimize duplication and expand reach.
- Participate in coalitions or networks related to your mission area (e.g., homelessness, mental health, youth development).
- Offer co-branded outreach events or webinars with partner organizations.
- Create a community advisory board that includes beneficiaries and partners to inform programming decisions.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

3. Staff and Volunteer Capacity Building

- Conduct training workshops on trauma-informed care, cultural competency, or digital program tools.
- Introduce peer mentoring or "train-the-trainer" programs among experienced staff.
- Recognize staff and volunteers publicly for innovation and excellence in program delivery.
- Implement monthly debriefs or reflection sessions to review what's working and what can be improved.
- Use AI-assisted tools (e.g., ChatGPT or internal analytics) to streamline report generation, data analysis, and content creation.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

4. Data, Reporting, and Accountability

- Deploy a data management system or CRM (e.g., Salesforce NPSP, Bloomerang) to track program outcomes.
- Publish quarterly "Impact Dashboards" on your website.
- Create impact reports for funders highlighting outcomes vs. goals.

- Integrate storytelling with metrics — show human stories supported by data.
- Schedule bi-annual internal reviews to assess goal progress and refine strategy.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

4. Beneficiary Engagement and Retention

- Develop a beneficiary loyalty program to maintain relationships with past participants.
- Offer graduation ceremonies or recognition events for program completers.
- Create peer mentor opportunities — empower former participants to guide new ones.
- Use SMS/email reminders to keep participants informed about upcoming sessions or resources.
- Incorporate beneficiary feedback in annual reports to highlight authentic voices.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Program Delivery Channel (Beneficiaries and Users)

Objective: Expand community reach and program availability through new partnerships, online access points, and regional collaborations.
Strategy: Develop and implement new initiatives to extend our geographic, online and demographic reach and bring programs to underserved areas.
Target Audience: TBD
KPI Examples:
3 new community sites activated
+10% total program participation increase across all regions
20% increase in online program participation
95% participant satisfaction with online delivery

Tactics for Program Delivery Channels

1. Partnership Development

- Identify and engage 3–5 community organizations (e.g., schools, libraries, health clinics) that serve similar populations for joint programming.
- Develop Memorandums of Understanding (MOUs) defining roles, shared resources, and referral processes.
- Launch co-hosted events or workshops combining partner audiences.
- Collaborate with local businesses or civic groups for sponsorships or service-site support.
- Offer partners co-branded outreach materials to promote programs within their own networks.
- Create a partner onboarding toolkit with training, promotional templates, and reporting guidelines.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

2. Online Access & Digital Platforms

- Convert core programs into digital or hybrid formats (e.g., live webinars, online learning modules, mobile access).
- Build or upgrade a user-friendly program portal on your website with downloadable materials, registration, and progress tracking.
- Use Zoom, Google Meet, or learning platforms (e.g., Thinkific, Kajabi) to host sessions for remote participants.
- Record sessions and create an on-demand library of resources accessible 24/7.
- Launch a virtual orientation or intake process for new beneficiaries.
- Integrate multilingual access options or captioning to broaden inclusivity.
- Develop a text or WhatsApp notification system to keep participants informed of upcoming events or new resources.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

3. Regional Expansion & Satellite Outreach

- Conduct a regional needs assessment to identify high-potential new service areas.
- Pilot pop-up service events or mobile program delivery in 2–3 new communities.
- Form alliances with regional hubs (e.g., community centers or local nonprofits) to host rotating programs.
- Recruit and train regional volunteers or ambassadors to deliver core services locally.
- Explore shared-space agreements for part-time or rotating program delivery sites.
- Develop regional impact dashboards to monitor new location performance.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

4. Awareness & Enrollment Support

- Design multichannel promotional campaigns (social media, email, local radio, flyers) highlighting expanded access points.
- Create geo-targeted digital ads promoting nearby program locations.
- Develop a referral incentive program for existing participants or partners (e.g., recognition for top referrers).
- Partner with community influencers or local media to feature expansion stories.
- Translate promotional materials into multiple languages used in your service area.
- Responsibilities: TBD

Timing: TBD
Budget: TBD
ROME: TBD

5. Data, Evaluation, and Optimization

- Implement tracking dashboards for online and in-person participation by location and delivery type.
- Evaluate partner performance and participant outcomes quarterly.
- Use feedback from regional participants to refine delivery schedules or formats.
- Adjust staffing, funding, or promotional efforts based on performance trends.
- Produce quarterly "Reach & Impact" summaries for funders and stakeholders.

Responsibilities: TBD
Timing: TBD
Budget: TBD
ROME: TBD

Template for Objectives, Strategies, and Tactics

DONOR AND PUBLIC AWARENESS (Supporters and Volunteers)

Donor and Public Awareness Objective	Increase the average gift size and total giving volume across all programs.
Donor and Public Awareness Strategy	Implement supporter-focused awareness tactics that enhance loyalty, improve emotional connections, and perceived value in order to increase contribution frequency and amounts.
Target Audience	• Primary: Current donors (renewals and lapsed supporters, describe demographics TBD) • Secondary: Prospective donors acquired through events, social media, or peer referrals (describe demographics TBD)
Donor and Public Awareness Key Performance Indicators (KPIs)	• +20% average donation increase after campaign – total $210,000 • +25% social media engagement rate on impact posts
Donor and Public Awareness Measurement Plan	• Monthly reporting dashboards for loyalty metrics, donation lift, and campaign engagement • Quarterly executive reviews to refine messaging and budget allocation • ROME evaluation on each tactic with optimization based on real-time data

Donor and Public Awareness Tactic

Create impactful storytelling campaigns that inspire higher giving through emotional narratives that connect donations to visible outcomes.

- Launch a “Your Gift in Action” campaign showing the direct link between contribution levels and tangible impact (e.g., “$50 feeds a family of four for a week”).
- Create short video testimonials from beneficiaries, staff, and volunteers showing transformation stories.
- Use photo essays or digital storytelling to show progress made possible by donors.
- Develop a “Before & After” impact series to demonstrate measurable change.
- Share monthly “Impact Updates” via email and social media to reinforce ongoing need and donor importance.

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	Launch in **Q2**, optimize in **Q3–Q4**	$50,000

Donor and Public Awareness Tactic
Develop multi-channel giving awareness campaigns to make giving more visible, convenient, and top-of-mind. • Run coordinated awareness drives across email, social media, website, and local media focused on "Ways to Give." • Develop a "30 Days of Giving" challenge featuring daily stories and suggested donation levels • Use geo-targeted digital ads promoting local giving opportunities. • Add donation links or QR codes to all content — print, events, social posts, and newsletters. • Utilize seasonal awareness events like Giving Tuesday or year-end campaigns with a matching gift incentive.

Responsibilities Teams	Timing	Budget
Development Director / Program Manager / Communications Lead	Kick off in **Q2**, then monthly through **Q4**	**$30,000**

TOTAL BUDGET (MARKETING INVESTMENT)	**$80,000**
TOTAL GAIN FROM MARKETING	**$210,000**
ROME*	**$163%**

*** Return on Mission Engagement (ROME) = (Gain from Marketing – Marketing Investment) / (Marketing Investment) X 100**

BUILD YOUR MARKETING PLAN WITH EASY-TO-USE AI POWERED ONLINE FORMS AND INSTRUCTIONS

This resource provides a structured framework, promotes goal setting, encourages strategic thinking through SWOT analysis, and offers practical, fillable online templates, powered by AI, to aid in creating actionable marketing plans within budget.

This guide is more than a worksheet. It’s a roadmap that empowers your nonprofit organization to plan smarter, improve reach and services to beneficiaries, increase donations, expand your volunteer base, and grow with purpose.

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