

Sample Background Information List

The following is a list of materials that are part of a typical request for background information when working with a new client or organization.

- ✓ Organization mission and vision
- ✓ Contact information for all team members, including e-mail addresses
- ✓ Organization collateral, such as brochures, annual report, marketing materials
- ✓ Organization strategic plan
- ✓ Marketing plan, or an overview of the marketing strategy
- ✓ Any marketing research done by the organization within the past five years
- ✓ Any demographic or psychographic profile of the organization's constituents, including donors
- ✓ An overview of the organization's programs and services
- ✓ For projects within the development department, an overview of donor support, including total number of annual donors, average gift size, total dollars raised per year, total number of major gifts and major gift levels.