STRATEGY FOR A SUCCESSFUL ANNUAL FUND

1. **Audit / Review Existing and Previous Annual Fund Effectiveness**
   - Five Year History of Dollars Raised
   - Gift Totals Charted by Gift Level

Sample Only

	Year #4 Goal	Year #3 Actual	Year #2 Actual	Year #1 Actual
$10,000 +	1	1	1	0
$5,000 to $9,999	2	1	1	0
$2,500 to $4,999	4	1	1	0
$1,000 to $2,499	20	14	7	1
$500 to $999	40	25	19	0
$250 to $499	40	26	19	0
$100 to $249	100	72	49	6
$50 to $99	100	56	36	9
$5 to $49	100	56	51	29
Total	406	252	195	45
Total Raised	**$100,000**	**$74,034**	**$54,134**	**$4,867**

   - Review of All Prior Annual Fund Materials Used
   - Examine Scope of Existing Constituency
   - Review Past Solicitation Calendar
   - Evaluate Climate/Culture for Understanding Need for Support

2. **Examine "All Fundraising" Activities within the School**
   - Who gets solicited?
   - How often are they solicited?
   - By Whom are they solicited?
   - For What purpose are they solicited?
   - When are they solicited?

3. **Develop Comprehensive School-Wide "Solicitation Calendar"**
   - Establish guidelines for "fundraising" from various groups, individuals, and departments with an eye toward streamlining multiple asks
   - Develop culture and understanding for support through education, programs, and information at various times during the year

4. **Establish Constituencies and Database Credibility**
   - Define Multiple Potential Constituencies
     1. Alumni
     2. Parents
     3. Parents of Alumni
     4. Grandparents
     5. Faculty/Staff

6. Business Community
　　　　7. Vendors
　　　　8. Feeder Parishes
　　　　9. Senior Class Gift Program
　　　　10. Foundation / Corporation

- Examine Database Credibility
　　　　1. Name
　　　　2. Constituent Code
　　　　3. Address
　　　　4. Home and/or Business Phone
　　　　5. Salutation
　　　　6. Greeting
　　　　7. Participation / Involvement History
　　　　8. Giving History

- Develop Strategies to Improve Database
　　　　1. Shared Resources with School Departments
　　　　2. Parent Update Forms
　　　　3. Application Content
　　　　4. Alumni Survey / Directory
　　　　5. Reunion Update Forms
　　　　6. Vendor Lists
　　　　7. Admissions Information
　　　　8. Yearbooks
　　　　9. Faculty Input
　　　　10. Screening / Review Sessions

5. Set Dollar Value and Participation Goals
- Establish Dollar and Donor Goals for Each Constituency
- Further Define Goals by Giving Levels
- Chart Past Gift History by Constituency

6. Review and Revise Gift Society Structure
- Establish Gift Societies that connect, inspire, and raise donor sights
- Establish a Leadership Gift Society ($500+ or $1,000+)
　　- Develop "Sense of Belonging" with leadership

7. Conduct Prospect Rating and Screening Session
- Recruit Committee of 10 to Assist in Rating and Screening
- Gather Multiple Constituent / Prospect Lists
- Rate Prospects on Capacity, Inclination, and Relationship
- Develop Communication, Cultivation, and Solicitation Strategies for Top 50

8. Recruit Annual Fund Leadership
- Define Various Volunteer Roles in the Annual Fund
　　　　1. Honorary Chairperson
　　　　2. National Chairperson
　　　　3. Vice-Chairperson

4. Leadership Society Chairperson
5. Leadership Society Committee
6. Advisory Board Liaison
7. Alumni Class Agents
8. Parent Class Captains
9. Parent of Alumni Leaders
10. Grandparent Leaders
11. Faculty / Staff Chairperson
12. Business Community Chairperson

- Schedule and Host Multiple Annual Fund Committee Meetings
  - Defined Goals by Constituency
  - Public Review of Goals
  - Information and Education
  - Coordinated Effort and Leadership Empowerment

9. Define Solicitation Strategies and Goals
- Establish Segmentation Strategies
  - Code Constituency by Targeted Result
  - Top Prospect vs. Alumni Non-Donor vs. Alumni Prior Donor
  - Monitor Segment Results
  - Target Appeals based upon Segment Code

- Personal Solicitation
  - Establish Monthly Goals for President and Director of Development to visit, (3-5) per month should be the target
  - Ask existing $10,000 donor to target gift as a "Challenge Gift" to encourage first time and increased donations
  - Identify Best Solicitor for Each Top Prospect
  - Prepare Donor-Centered Solicitation Packet for each Prospect

- Direct Mail
  - Design Annual Fund Identity Pieces:
    - Letterhead
    - Commitment Card
    - Enrollment / Renewal Form
    - Guide to Giving (Installment Option)
    - Frequently Asked Questions
    - "Challenge Gift Program"
    - # 9 Reply Envelope
    - #10 Envelope

  - Establish Comprehensive Direct Mail Strategy / Calendar
    - September
    - October
    - November
    - December
    - January

- February
- March
- April
- May
- June
- July
- August

- Phonathon
  - Establish Phonathon Timeline, Constituency and Schedule
  - Secure Site and Availability
  - Prepare Phonathon Materials
  - Recruit and Train Volunteers
  - Motivate, Acknowledge, Appreciate Volunteers

10. Establish Recognition and Reporting Standards
- President's Letter to Top Prospects
- Annual Fund Update to Leadership Committee
- Dollar to Donor Comparisons
- Leadership Gift Society Reception and Program
- Annual Report of Gifts
- "Challenge Gift Program" Updates
- On Campus Visibility
- Newsletters
- Press Releases