

## The Basics of an Annual Fund

Annual campaigns are yearly appeals that provide supplementary funds to support the efforts of your school. An annual campaign solicits contributions from new donors and appeals to previous donors to increase their contributions.

Popular types of communication methods used for annual fund drives include:

- Phone-a-thons
- Direct-mail
- Email solicitations
- Auctions
- Breakfast, luncheon, and dinner meetings
- Special group meetings with parent-teacher-student organizations
- Website solicitations

The annual fund drive solicits gifts each year from all of your school constituencies. It takes a coordinated and concentrated effort on the part of your school to plan one major effort that produces better results than several smaller campaigns. Doing so requires:

- Good organization
- Goals, objectives, strategy, and timeline
- Support from volunteers
- Qualified prospects
- Solicitation
- Cultivating existing donors
- Accurate records
- Donor recognition
- Evaluation of performance

- Planning for next year's annual fund

### **Sample Plan**

- Statement of Purpose

The purpose of the 2005-2006 Annual Fund Drive is to:

- Broaden the base of support for the efforts of our school to enrich our school community through educational, spiritual, and extracurricular programs and activities
- Provide resources in order to ensure the economic diversity of families who want a Catholic secondary education for their children
- Acquaint parents, alumni, parents of alumni, grandparents and special friends of alumni with the mission, objectives, accomplishments and needs of our school
- Invite the participation of those persons who believe in and support the vision and aims of our school
- Foster recurring annual gifts from our school supporters, including those holding leadership positions in our school governance, friends of our school, parents of current students, administration, faculty, staff and the community
- Realize sufficient restricted and non-restricted financial gifts to advance the scholastic program of our school, enhance our Catholic identity, and enable it to flourish

- Measurable Objectives

It is important that you establish measurable objectives for your campaign. It is the only true way you can determine success. Begin by reviewing what you have accomplished in previous years. Determine a percentage of how much you want to

increase your revenue. The chart below will help you get an idea of what information you should be collecting and evaluating.

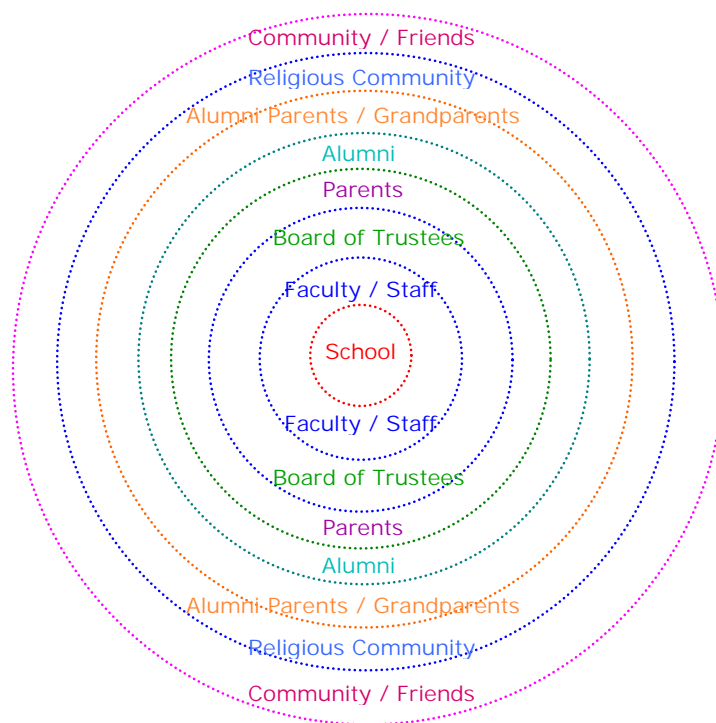
	Number of Donors 2004-2005	Participation Percentage 2004-2005	Money Raised 2004-2005	Participation % Objective 2005-2006	Number of Donor Objectives	Fund Objective 2005-2006
Parents						
Alumni						
Faculty						
Board						
Friends/Corp.						
Total						

- Organizational structure

The Annual Fund must be carefully coordinated with the other fundraising endeavors of your school.

The process of the Annual Fund consists of three principles:

1. The school community is a composite of concentric rings (see visual on next page) around the school operation, each with its own level of interest and sense of "ownership" in the "destiny of the institution."



2. The closer a particular group is to the school center, the greater the participation in the Annual Fund must be.
  3. The most effective way to approach the various school groups is by requesting the help of people who are part of that group.
- General Timetable
 

Begins - July 1, 2005  
Ends - June 30, 2006

All Annual Fund contributions must be received by June 30 to be listed in the 2005-2006 Annual Report.
  - Approval Process
    - The Board must approve all budget matters
    - All Annual Fund Drive communications, letters and invitations must be reviewed by the approved by the Principal and Director of Development

- In order to prevent over burdening of the time and talents of parents, alumni or volunteers, before asking people to serve on any committees, those
  - Names must be submitted to the Principal for approval before asking people to serve on any committees. This ensures the time and talents of volunteers are not needlessly wasted.
  - Director of Development will keep all Board members fully apprised of all annual fund drive activities and seek board approval when appropriate
- Sample Communications Calendar

<b>Board Phase</b>	<b>Objective: \$TBD</b>
	At the first meeting at the beginning of the school year, the Board will determine their goal amount. Striving for 100% participation
<b>Faculty / Staff Phase</b>	<b>Objective: \$TBD</b>
	At the first or second faculty meeting, enlist a volunteer from the staff to coordinate collections. Striving for 100% participation
<b>Parent Phase</b>	<b>Objective: \$TBD</b>
September	Back to school night - Parent will speak to other parents about Annual Fund; recruit volunteers.
October 4	1st Appeal: solicitation letter Letter: Parent donor will sign letter.
October 15	2nd Appeal: solicitation letter to non-donors Letter: Letter from director
November 4	3rd Appeal: Phonathon mailing
November 11, 12, 13, 14	Phonathon –before Thanksgiving and not during report card distribution
March 15	4th Appeal: Past Giver letter (letter to people who gave in the past but are not giving currently)
May 15	5th Appeal: Proof letter

<b>Friends Phase</b>	<b>Objective: \$TBD</b>
November	1st Appeal Letter: Thanksgiving
	2nd Appeal: Past Giver letter (letter to people who gave in the past but are not giving currently)
May 15	3rd Appeal: Proof letter
<b>Alumni Phase</b>	<b>Objective: \$TBD</b>
July 15	Non-Donors (before distribution of Annual Report
October 4	1st Appeal Donors Letter: Renew gift; not reunion year; Annual Fund brochure  Donors Reunion Year (classes ending in 3's or 8's) Letter: Solicitation to renew gift and save the date for reunion with Annual Fund brochure  Non-Donors Reunion Year (classes ending in 3's or 8's) Letter: Solicitation to renew gift and save the date for reunion with Annual Fund brochure
November 1	2nd Appeal: All alumni letter: Thanksgiving – Butterball Letter
February 15	3rd Appeal: Phonathon reminder
March (1 <sup>st</sup> week)	Phonathon
March 15	4th Appeal: Past Giver letter (letter to people who gave in the past but are not giving currently)
April 15	Mother's Day Honor/Memorial Letter
May 15	5th Appeal: (all alumni proof letter)