



## Annual Fund Checklist

- Set annual fund goal
- Develop and update database
  - Track gifts – name, date, amount
- Identify Top 25 prospects: engage advancement committee and board
- State the case in terms of mission, needs & benefits
- Educate constituents
  - Parents, Board, Faculty, Parishioners, Grandparents, Vendors
- Hold a Lead gift event - see event checklist
- Choose dates for mailings to drop and start process six weeks prior
  - Segment mailing list and adapt message to target each constituency
  - Draft letters- personalized address block and greeting line
  - Finalize - with Principal, Advancement committee, Advancement Consultant
  - Send materials and mailing list to printer
  - Mail
- Draft and finalize Thank you letters
  - Mail within 3 days after gift
  - Major gifts receive phone call right away
- Annual report/Report of Giving