

The Annual Fund

Advances your mission, fulfills your school's needs and invites your community to make it possible.



MISSION IS THE MESSAGE

- Know your story: Your mission, what uniquely defines you
- Know your needs: provide opportunities, deliver benefits
- Believe in your story and share it: educate constituents
- Connect others' interests to your story: cultivate
- Ask constituents to support your story: solicit
- Thank for support: steward

GET PERSONAL

- Build your team: board, principal, advancement director, faculty, parent association, etc.
- Engage and involve volunteers and donors
- Develop and update database: segment, target, personalize

CREATE THE PLAN

- The "Ten Simple Rules" are your guide
- Deadline driven: July 1 to June 30
- Solicitations are purposefully planned throughout the year
- Write the letters
- Plan the event(s)
- Visit and ask
- Are you using your Annual Fund Checklist?

DEVELOP GOALS

- Use data to set dollar goal and participation goal
- Attract new donors, keep existing donors
- Move donors to higher giving levels

IMPLEMENT MAJOR GIFT PROGRAM

- Pursue gifts at the top of the pyramid
- What's your "80/20" rule?
- Establish a lead gift society
- Be specific with the gift level and ask
- Steward major gift donors in a special way

Helping schools help themselves