

Annual Fund Timeline

To be customized based on each school's needs and calendar

Summer

- . Form alumni committee to plan fall event
- . Create case for support and write annual fund letter #1



- . PR – Present case for support
- . Kickoff participation goals
- . Send lead gift invitations
- . Two personal visits



- . Fall alumni event
- . Volunteer phone calls
- . PR – participation goals, successes
- . Two personal visits

Winter



- . Follow up with LYBUNTS, board, parents, grandparents
- . PR – Annual Fund (newsletter story)
- . Two personal visits



- . Surpass goal! Share the good news!
- . Create new year goals
- . Draft plan
- . Determine mailing strategy and format
- . Plan volunteer programs



JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MARCH	APRIL	MAY	JUNE
<ul style="list-style-type: none"> . Create goals . Draft plan . Determine mailing strategy and format . Plan volunteer programs 	<ul style="list-style-type: none"> . Plan lead gift event . Create annual report on giving . Finalize plan and goal buy-in . Create and update database (include online giving) 	 <ul style="list-style-type: none"> . Schedule all key events on calendar . Finalize top 50/100 prospects . Mail annual report 		 <ul style="list-style-type: none"> . Lead gift event . AF solicitation #1 (targeted and personalized) . Lead gift event follow-up . Two personal visits 	<ul style="list-style-type: none"> . AF solicitation #2 (targeted & personalized) . Year-end Christmas wish and solicitation (electronic) . Stewardship (Christmas show invite) . Two personal visits 	 <ul style="list-style-type: none"> . Follow up with LYBUNTS*, board, faculty . PR – Annual Fund (state of school event) . Personal visits 	<ul style="list-style-type: none"> . AF solicitation #3 . Parent, board, alumni follow-up phone calls . Lead gift event #2 . Two personal visits 	<ul style="list-style-type: none"> . LYBUNT, parent, board, alumni follow-up phone calls . Seasonal wish and solicitation (electronic) . Two personal visits 	 <ul style="list-style-type: none"> . Challenge or crowd funding event . Final push LYBUNT, parent, board, alumni follow-up phone calls . Stewardship event . Two personal visits 			