



Annual Fund Timeline

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

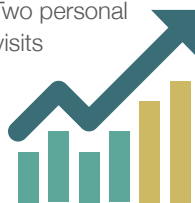
Summer

- . 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) | <div></div> <ul style="list-style-type: none">. Schedule all key events on calendar. Finalize top 50/100 prospects. Mail annual report | | <div></div> <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 | <div></div> <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 <div></div> | <ul style="list-style-type: none">. LYBUNT, parent, board, alumni follow-up phone calls. Seasonal wish and solicitation (electronic). Two personal visits | <div></div> <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 | | |