Organize Your Calendar!

THANK YOU!

Questions?
From Nuts and Bolts to a Well Oiled Machine:
Building Your Annual Fund Calendar for Success

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School of the Holy Child
Director of Institutional Giving
The Big Picture:

**Goals:**
*Design a program that*

- Instills a culture of philanthropy
- Identifies new major gift prospects
- Builds relationships through the engagement, cultivation and stewardship of all constituents
- And of course, reaches the financial goal by June 30!

**Challenges:**
- Balancing time and responsibilities
- Managing volunteers and staff
- Interruptions

**Purpose: What are we going to do today?**
*Breakdown our Annual Fund calendar piece by piece - that means (IPO):*
  - *Identify* all the elements
  - *Prioritize* needs vs. wants
  - Organize a month by month calendar to help us reach each of our goals and minimize the challenges we will face
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*Design a program that...

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Identify:

The Toolbox:
- Communications
- Donor Management
- Data
- Exclus

The Nuts & Bolts:
Hold everything together
The Donor Engagement Cycle
- Identification
- Information
- Analysis
- Evaluation
- Action

=>
The Toolbox:

**Communications**
- Direct mail, web-based & publications

**Events**
- Fundraising & Engagement

**Donor Management**
- Identify prospects, research & assemble personalized solicitation plans

**Data**
- Analysis & Tracking
Communications

Direct mail, web-based & publications
Events

Fundraising & Engagement
Donor Management

Identify prospects, research & assemble personalized solicitation plans
Data

Analysis & Tracking
The Nuts & Bolts: Hold everything together
The Donor Engagement Cycle

Identification:
- Prospect research and identification
  - Who do you need to be targeting?
  - What is their financial background?
- Based on findings, determine an engagement action plan

Cultivation:
- Use what you learned in the identification process to guide your approach
  - How will you make contact?
    - Direct mail, email, phone?
    - How will you share new fundraising initiatives with them?
  - Who is your main contact for that person?

Solicitation:
- Making the ask:
  - What’s your strategy/what are you asking for?
  - What’s your response?
    - Yes - Gift agreements
    - What’s your plan for “no”
  - How do you make it a “maybe” or “not yet”?

Stewardship:
- Developing a long-term relationship
  - Thank you’s
  - Make a donor know the value of their support/how it is being put to use
- Recognition
- Non-financial related touch points between solicitations
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- Non-financial related touch points between solicitations
Prioritize:
Base on time of year, urgency & importance.

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<thead>
<tr>
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<th>URGENT</th>
<th>NOT URGENT</th>
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<tbody>
<tr>
<td>IMPORTANT</td>
<td><strong>Quadrant I:</strong> Urgent &amp; Important</td>
<td><strong>Quadrant II:</strong> Not Urgent &amp; Important</td>
</tr>
<tr>
<td>NOT IMPORTANT</td>
<td><strong>Quadrant III:</strong> Urgent &amp; Not Important</td>
<td><strong>Quadrant IV:</strong> Not Urgent &amp; Not Important</td>
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</tbody>
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*source: Stephen Covey, *Habits of Highly Effective People*
Quadrant I

- Most development focused events
- Communications deadlines
- Major donor meetings
- Personal emergencies
Quadrant II

- Strategic planning
- Lybunt/sybunt calls
- Database cleanup
- Professional development
- Health/wellness
Quadrant III

- Interruptions
- Unproductive emails & phone calls
- Unexpected non-development crises
Quadrant IV

- Push notifications
- Personal social media
- Stuffing envelopes/printing letters that volunteers could help with
Organize Your Calendar!
**July:**
- **Communications:** Map out Annual Report week by week
  - Include time for reporting, designing, proofing, and printing previous to target mail date
  - Begin screening new parents
- **Engagement:**
  - Finalize Annual Fund calendar
  - Identify your Annual Fund volunteers
- **Data:**
  - Begin monthly reports
    - new/increased/decreased/lost
  - Year over year reporting

**August:**
- **Communications:** Map out first Annual Fund Appeal timeline week by week
  - Assign target dollar amounts for existing donor base
  - Segment and ask volunteers to sign letters - signatures (even e-signatures make a BIG difference)
- **Engagement:**
  - Segment and target donor base
    - Identify leadership donors
    - Screen/research new parents
    - Complete portfolios
- **Events:** Plan Annual Fund launch events
  - ex: welcome cocktails, new parent receptions, etc.
- **Data:**
  - August 1 reporting
July:

- **Communications:** Map out Annual Report week by week
  - Include time for reporting, designing, proofing, and printing previous to target mail date
  - *Begin screening new parents*

- **Engagement:**
  - Finalize Annual Fund calendar
  - Identify your Annual Fund volunteers

- **Data:**
  - Begin monthly reports
    - new/increased/decreased/lost
  - Year over year reporting
Communications: Map out first Annual Fund Appeal timeline week by week
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  - Segment and target donor base
    - Identify leadership donors
    - Screen/research new parents
    - Complete portfolios
  - Events: Plan Annual Fund launch events
    - ex: welcome cocktails, new parent receptions, etc.

Data:
  - August 1 reporting
Fall: The Launch

September:
- Communications:
  - Mail first appeal
  - Design and print volunteer handbook
  - Plan senior class gift approach
- Events:
  - Prep for Annual Fund launch events
  - Set date & prep for volunteer training
- Engagement:
  - Solicit 100% participation
    - Trustees, Faculty, and Annual Fund volunteers
- Data:
  - Run volunteer solicitation lists
  - Track response from Annual Fund Appeal
  - September 1 reporting

October:
- Communications:
  - Electronic follow up to first appeal
- Events:
  - Schedule phonathons
  - Welcome/launch events (continued)
- Engagement:
  - Begin scheduling/visiting leadership donors
  - Begin Lybunt calls
  - Organize/begin first volunteer reach out
- Data:
  - Lybunt lists
  - October 1 reporting

November:
- Communications:
  - Giving Tuesday prep
  - Map out end-of-tax-year solicitation (#2)
- Events:
  - Giving Tuesday
  - Plan stewardship events
    - ex: Former Trustee cocktail
- Engagement:
  - Continue scheduling/visiting
  - Continue Lybunt calls
  - Next round of volunteer reach out
- Data:
  - Lybunt lists
  - November 1 reporting
**September:**

- **Communications:**
  - Mail first appeal
  - Design and print volunteer handbook
  - Plan senior class gift approach
- **Events:**
  - Prep for Annual Fund launch events
  - Set date & prep for volunteer training
- **Engagement:**
  - Solicit 100% participation
    - Trustees, Faculty, and Annual Fund volunteers
- **Data:**
  - Run volunteer solicitation lists
  - Track response from Annual Fund Appeal
  - September 1 reporting

**October:**

- **Communications:**
  - Electronic follow-up on first appeal
- **Events:**
  - Schedule phonathon
  - Welcome/launch (continued)
- **Engagement:**
  - Begin scheduling visits with visiting leadership donors
  - Begin Lybunt calls
  - Organize/begin fall volunteer reach out
- **Data:**
  - Lybunt lists
  - October 1 reporting
October:

- **Communications:**
  - Electronic follow up to first appeal

- **Events:**
  - Schedule phonathons
  - Welcome/launch events (continued)

- **Engagement:**
  - Begin scheduling/visiting leadership donors
  - Begin Lybunt calls
  - Organize/begin first volunteer reach out

- **Data:**
  - Lybunt lists
  - October 1 reporting

November:

- **Communications:**
  - Giving Tuesday
  - Map out end of year solicitation

- **Events:**
  - Giving Tuesday events
  - Plan steward events
    - ex: Former cocktail

- **Engagement:**
  - Continue scheduling/visiting
  - Continue Lybunt
  - Next round volunteer reach out

- **Data:**
  - Lybunt lists
  - November 1 reporting
October:

Communications:
- Electronic follow-up to list appeal
- Schedule phonathons (welcome/launch events continued)

Engagement:
- Begin scheduling/visiting leadership donors
- Begin Lybunt calls
- Organize/begin first volunteer reach out
- Lybunt lists
- October 1 reporting

November:

Communications:
- Giving Tuesday prep
- Map out end-of-tax-year solicitation (#2)

Events:
- Giving Tuesday
- Plan stewardship events
  - ex: Former Trustee cocktail

Engagement:
- Continue scheduling/visiting
- Continue Lybunt calls
- Next round of volunteer reach out

Data:
- Lybunt lists
- November 1 reporting
**Winter: The Next Wave**

**December:**
- **Communications:**
  - Send out end-of-tax-year appeal (#2)
  - Map out third Annual Fund appeal
- **Events:**
  - Holiday parties
- **Engagement:**
  - Continue scheduling/visiting
  - Continue Lybunt calls
- **Data:**
  - December 1 reporting
  - Outlook report
  - Lybunt lists

**January:**
- **Communications:**
  - Donor thank you
  - Tax receipt
- **Engagement:**
  - Continue scheduling/visiting
  - Volunteer thank you
  - Continue Lybunt calls
- **Data:**
  - Lybunt lists
  - January 1 reporting
  - Outlook report
  - Track end-of-tax-year appeal

**February:**
- **Communications:**
  - Mail third Annual Fund appeal
  - Plan online follow up to appeal
- **Events:**
  - Stewardship events
    - ex: past parents
- **Engagement:**
  - Continue scheduling/visits
  - Prep next round of volunteer reach out
  - Continue Lybunt calls
- **Data:**
  - Lybunt lists
  - February 1 reporting
  - Outlook report
• Communications:
  • Send out end-of-tax-year appeal (#2)
  • Map out third Annual Fund appeal
• Events:
  • Holiday parties
• Engagement:
  • Continue scheduling/visiting
  • Continue Lybunt calls
• Data:
  • December 1 reporting
  • Outlook report
  • Lybunt lists

January:

• Communications:
  • Donor thank you
  • Tax receipt
• Engagement:
  • Continue scheduling/visiting
  • Volunteer thank you
  • Continue Lybunt calls
• Data:
  • Lybunt lists
  • January 1 reporting
  • Outlook report
  • Track end-of-tax-year appeal
January:

- Plan communications appeal
- Events:
  - Stewardship events
  - etc.
- Engagement:
  - Continue scheduling/visiting
  - Volunteer thank you
  - Continue Lybunt calls
- Data:
  - Lybunt lists
  - January 1 reporting
  - Outlook report
  - Track end-of-tax-year appeal
January:

**Communications:**
- Mail third Annual Fund appeal
- Plan online follow up to appeal

**Events:**
- Stewardship events
  - ex: past parents

**Engagement:**
- Continue scheduling/visits
- Prep next round of volunteer reach out
- Continue Lybunt calls

**Data:**
- Lybunt lists
- February 1 reporting
- Outlook report
Spring: The Final Push and Wrap Up

March:
- Communications:
  - Send out follow up to third appeal
- Map out fourth appeal
- Lybunt & sybunt
- Engagement:
  - Focus visits on any remaining major Lybunts
  - Next round of volunteer reach out (phonathon)
- Data:
  - Lybunt/sybunt lists
  - March 1 reporting
  - Track third appeal

April:
- Communications:
  - Mail Lybunt & sybunt Appeal (#4)
- Events:
  - Reunion planning
  - Plan donor recognition and thank you events
- Engagement:
  - Work with volunteers to strategize approach with the remaining few
  - Continue visits and calls with major lybunts
  - Reunion gift solicitation planning
- Data:
  - Lybunt/sybunt lists
  - April 1 reporting
  - Track fourth appeal

May:
- Communications:
  - Mail pledge reminders
  - Begin pre-annual report
- Events:
  - Reunion
  - Donor recognition events
  - Next round of volunteer reach out (phonathon)
- Engagement:
  - Continue work with volunteers to strategize approach with the remaining few
  - Continue visits and calls with major lybunts/sybunt
  - Reunion gift solicitation
- Data:
  - Lybunt/Sybunt lists
  - May 1 reporting

June:
- Communications
  - End-of-year reminders
  - Pre-annual report release
- Events:
  - Volunteer thank you event
- Engagement:
  - Squeeze in last visits before end of year
  - Complete Lybunt/Sybunt calling
  - Begin calls for pledge reminders
  - Call as many others ranked by affinity as possible
  - Volunteer thank you
- Data:
  - June 1
  - End-of-year reporting
  - Lybunt/Sybunt lists
• **Communications:**
  • Send out follow up to third appeal
  • Map out fourth appeal
  • Lybunt & sybunt

• **Engagement:**
  • Focus visits on any remaining major Lybunts
  • Next round of volunteer reach out (phonathon)

• **Data:**
  • Lybunt/sybunt lists
  • March 1 reporting
  • Track third appeal

• **Communications:**
  • Mail Lybunt/sybunt Appeals

• **Events**
  • Reunion
  • Plan day
  • Plan thank

• **Engagement**
  • Work with strategies for the remainder
  • Continue with major Lybunts
  • Reunion planning

• **Data:**
  • Lybunt
  • April 1
Communications:
- Follow up to Appeal
- Fourth appeal

Events:
- Reunion planning
- Plan donor recognition and thank you events

Engagement:
- Work with volunteers to strategize approach with the remaining few
- Continue visits and calls with major lybunts
- Reunion gift solicitation planning

Data:
- Lybunt/sybunt lists
- April 1 reporting
- Track fourth appeal
April:

- Communications:
  - Lybunt & sybunt appeal (#4)

- Engagement:
  - Work with volunteers to strategize approach with remaining few major lybunts
  - Reunion gift solicitation

- Data:
  - Lybunt/Sybunt lists
  - May 1 reporting

May:

- Communications:
  - Mail pledge reminders
  - Begin pre-annual report

- Events:
  - Reunion
  - Donor recognition events
  - Next round of volunteer reach out (phonathon)

- Engagement:
  - Continue work with volunteers to strategize approach with the remaining few
  - Continue visits and calls with major lybunts/sybunt
  - Reunion gift solicitation

- Data:
  - Lybunt/Sybunt lists
  - May 1 reporting

June:

- Communications
  - End-of-year reminders
  - Pre-annual report

- Events:
  - Volunteer thank you

- Engagement:
  - Squeeze in last visits to end of year
  - Complete Lybunt/Sybunt calling
  - Begin calls for pledge reminders
  - Call as many others by affinity as possible

- Volunteer thank you

- Data:
  - June 1
  - End-of-year reporting
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- Data:
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  - End-of-year reporting
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