



Roman Catholic
Diocese of Marquette

Annual Fund

Advancing Your School's Mission

Catholic School Advancement Training
Presenter: Renée Deroche
August 24, 2017



Annual Fund Seminar

Purpose:

To provide an overview of the annual fund
and

To offer direct guidance to participants in the planning of an annual fund effort as part of a comprehensive school advancement program.

Annual Fund Seminar

Objectives:

- To discuss techniques of establishing annual fund goal(s) and the preparation of an annual fund plan to achieve the stated goal(s);
- To examine the school infrastructure, committee “charges” and volunteer training;
- To review the timelines and strategies for implementation of each respective phase of the annual fund;
- To discuss direct mail and phonathon strategies;
- To examine record-keeping procedures and the preparation of status reports.



Leadership & Team Building in Fund Raising

- Team work harnesses the collective talent and energy of people
- Members feel responsible for output and act to clear difficulties standing in their way
- Team: energetic group of people committed to achieving common objectives, who work well together and enjoy doing so, and produce high-quality results.

Leaders build teams; Teamwork builds leadership

Characteristics of effective teams:

- High morale, effective task performance, clear relevance to the organization
- Have **OUTPUT** (achieve results as group that individuals could not), Goal's & Objective's (sense of shared mission & accomplishment), **ENERGY** (strength from one another; use synergy), **STRUCTURE** (use individual talents, deal with control, leadership, procedures & roles, flexible, responsive, orderly)
- Leads to empowerment, sense of ownership, improves motivation & commitment, develops sense of collective strength

Leaders build teams; Teamwork builds leadership

The Annual Fund Program: *Definition*

- The Annual Fund is more than just an appeal for money!
- It is a coordinated, concentrated effort on the part of the school to plan one major, professional effort producing better results than many small campaigns.
- The Annual Fund Drive solicits gifts each year from all school constituencies.
- The philanthropic dollars secured are typically used to fund the implementation of the strategic planning goals.



The Annual Fund Program: *Definition*

- Provides regular income to the organization's ongoing budget needs
- Reflects evolving relationship between the organization and its supporters
- Is a continuing effort to seek gift support

The Annual Fund Program: *Definition*

- Other fund raising efforts depend on and/or support the annual fund.
- Capital Campaign is most successful if build on solid base provided by the annual fund.
- Planned gift prospects identified through Annual Fund program.
- **THE Cornerstone of a philanthropic fund raising program designed for sustainability of the organization and its mission.**

Annual Fund Program:

The Foundation of Fund Raising

- **Provide repeated amount of money**
- **Establish habits and patterns of giving**
- **Established giving leads to bigger gifts**
- **Provide identification of top prospects**
- **Allow continual expression of the mission message**
- **Compels the organization to account for its stewardship**
- **Identifies leadership**



Annual Fund Program: *Success Factors*

- Clear Purpose
- Importance is Apparent
- Time Period/Timetetable
- Written Plan
- Volunteers
- Leadership
- Informed Constituency
- Range of Strategies Used
- Prospects are Challenged
- Personal Solicitation Used
- Recognition & Gift Clubs
- Markets Identified

Annual Fund Timeline – Another view: (Healey Education Foundation)



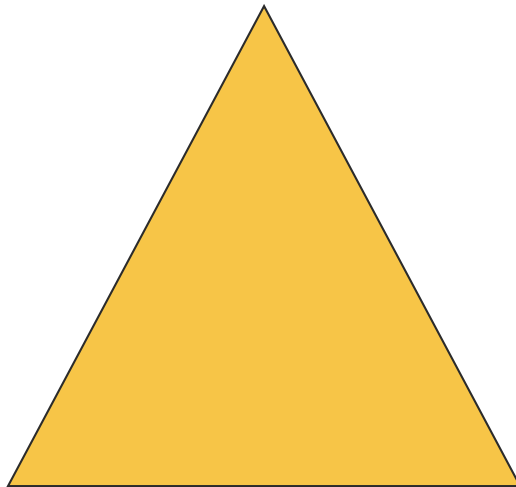
Annual Fund Timeline

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



Profile of the Annual Fund Program

- Approximately 10% of Donors give 60% of Goal
- Approximately 20% of Donors give 20% of Goal
- Approximately 70% of Donors give 20% of Goal





Annual Fund Program: *Basic Formula*

- *Get the Gift*
- *Repeat the Gift*
- *Upgrade the Gift*

FUNDRAISING IS A MANAGEMENT PROCESS

Annual Fund Program: *Basic Formula*

Levels of Operation

1. **Prospects to make initial gifts**
2. **Donors to repeat gifts**
3. **Annual donors to increase gift**

Get: Get the 1st time gift; inform prospect about opportunity, the school, why gifts are important, how gift will benefit them; ASK

Repeat: Info should be mailed to donor indicating what his gift made possible; enclose gift envelope; invite donor to participate in programs & activities; understand donor need to be recognized for continuing gift

Upgrade: Ask donor to consider upper level opportunities like recognition groups; provide status to gift clubs; acknowledge donor for minimum gift levels; arrange events or activities that enable donor to give again and again

Selecting the Right Fund Raising Vehicle: *Ladder of Effectiveness 1 - 8*

- ❖ Personal face-to-face **#1**
- ❖ Personal letter (on stationery, telephone follow-up) **#2**
- ❖ Personal telephone call (letter follow-up) **#3**
- ❖ Personalized letter
- ❖ Telephone solicitation/phone-a-thon
- ❖ Impersonal letter/direct mail 😐
- ❖ Impersonal telephone/telemarketing 😞
- ❖ Fund raising benefit/special event 😓



7 Basic Steps to the Annual Fund Program:

1. Examine/Revise/Develop Case
2. Set Goal
3. Identify Gift Sources
4. Prepare Gift Range Chart
5. Select Solicitation Strategies
6. Organize & Train Team of Volunteers
7. Develop & Implement Plan

Key Annual Fund Materials

1. Annual Report
2. Annual Fund Brochure (from case statement)
3. Solicitation letters (customize to group)
4. Commitment or Pledge Card
5. Gift Reply Envelope
6. Thank You/Acknowledgement Letters (w/tax info)
7. Annual Fund Report

Samples available at: <http://csmsamples.com/annual-fund>

Putting It All Together ...

- Purpose of fund clearly defined
- Leader selected
- Prepare plan with goals, deadlines, schedules & timetable
- Plan shared with donors, board, staff, volunteers
- Volunteers trained
- Constituents segmented
- Challenge grants
- Lapsed donors
- Appreciation
- Annual fund part of larger effort

Putting It All Together ...

- Before launching Annual Fund Program, need to be ready to receive, record, and acknowledge gifts in a timely manner.
- Need to be able to identify gifts by source & program, and evaluate if goals were achieved within time framework and approved budget.
- Need to have enough trained staff or volunteers to operate Annual Fund Program effectively. On site personnel must manage day-to-day operations of an Annual Fund.

Putting It All Together ...

- Plan should be a useable and flexible document which is evaluated annually and should be modified as needed.
- Team should refer to and adhere to plan and be involved in any major changes.
- Budget monitoring and controls are necessary to monitor expenses and revenues.
- Accountability measure should be in place for stewardship of funds entrusted to the organization.



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THANK YOU FOR ATTENDING!
Questions?

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