**SCHOOL ANNUAL FUND**

*Getting Started*

**Brand the Annual Fund**

* Brand your annual fund such as “The Shanahan Fund”. Name recognition is important.
* Establish giving levels based on school history (see example)
* Determine avenues of giving – online giving and return mail envelope/tear-off form
  + Be sure to collect email addresses as part of your solicitation

**Donor List / Database**

* Collect donor information to create a mailing list
* It is recommended that donor data be tracked using a donor management platform
* Segment the donor list to personalize the letters as much as possible. In the first year you may only have two segments, previous givers (renewals), and prospective givers
* Possible segmentation categories are as follows:
  + Donors who gave previously (renewals)
  + Donors who are parishioners but have not given
  + Parishioners
  + Grandparents of students
  + Alumni
  + Parents of alumni
  + Board members (if applicable)
* In the database, generate a column for previous gift amount and add a column for ask. Each previous donor should have an ask amount based on a small increase from the previous year. See sample letter for new donor ask amount.

**Writing the Letter**

* Write the letter based on the segments you created
* Make the letter highly personalized using greeting “Dear Matthew and Sarah”
* Include personal ask based on donor segment
* Letters should be signed by the school leader and pastor(s)
* Work with mail house for printing
* Consider sending donor letters to higher level givers regular mail vs. bulk rate with personal note from the principal
* Mail out early October

**Follow-up**

* Send follow-up letter sometime between Dec-Feb to those who have not given yet
* Send *last call* proof sheet or donor list proof sheet in May

**Thank You**

* Thank you letter should be sent out within a week of receiving the gift
* Signed by the principal with personal note at the bottom (blue ink)
* Consider several touch points to thank donors (i.e. Christmas card)
* Send annual report in the early fall prior to next ask

**Grow Your Annual Fund: 3 Year Plan**

***How to get Started***

**Year 1**

*The campaign runs year round - July 1 - June 30.*

|  |  |
| --- | --- |
| **Summer** | **January/February/March** |
| * Establish giving levels * Review donor information/database - or - purchase donor database subscription * Consult with pastor about contacting parishioners * Craft letter * Consult with printer/mail house to print and send annual fund letter and response envelope * Where possible customize the greeting and letter based on donor segments. Plan for future segmentation by recording donor information in the donor database. | * Conduct annual day of giving campaign on social media * Begin to prep the annual report proof sheet (Donor lists by giving level. Never publish actual gift amounts!) * Track incoming donations in database * Send donor thank you tax letters |
| **October** | **April** |
| * Send your letter to the mail house * If doing two fall mailings, send first letter in October | * Send annual report proof sheet for all givers and likely givers to check their names * Have call to action with message that it’s not too late to give * Track incoming donations in database * Send donor thank you tax letters |
| **November** | **May/June** |
| * If doing one fall mailing, letter is mailed in early November * Track incoming donations in database | * Continue preparing annual report * Track incoming donations in database * Send donor thank you tax letters |
| **December** | **July / August** |
| * Send follow-up Christmas card or email blast to donors/donor prospects with call to action * Track incoming donations in database * Send donor thank you tax letters | * Continue preparing annual report/close out giving year July 1 * Track incoming donations in database * Send donor thank you tax letters * Plan donor kick off event |

**Annual Fund - Year 2**

|  |  |
| --- | --- |
| **September** | **March** |
| * Finalize annual report * Send back to school e-mail message to donors | * Send donor thank you’s * Possible day of online giving * Prep annual report proof sheet |
| **October** | **April** |
| * Launch the year with a leadership event in early October | * Send proof sheet * Send donor thank you’s |
| **November** | **May** |
| * Send mailing * Parochial school leadership speak at all contributing parishes - you can also include tax credit opportunities | * Prep annual report * Send donor thank you’s |
| **December** | **June** |
| * Send Christmas message with end of tax year reminder email * Send donor thank you’s | * Prep annual report * Send donor thank you’s * Close out year |
| **January** | **Summer** |
| * Secure donor for challenge match for day of giving * Send donor thank you’s | * Send donor thank you’s * Analyze giving patterns * Prep annual report * Clean-up database * Begin building donor profiles for givers who have larger capacity |
| **February** |
| * Send donor thank you’s * Possible day of online giving |

**Year 3**

*What to do differently in year 3:*

**Continue to expand segments and customize your letters by constituent groups:**

* Donors who gave previously (renewals)
* Renewals of various levels
* Donors who are parishioners but have not given
* Grandparents of students
* Alumni
* Parents of alumni
* Board members (if applicable)
* Current parents
* Other Friends of your school

**Expand your annual report to an annual/semi-annual magazine**

* Include letter from principal, pastor or head of school
* Have 2-3 articles about school programs (academic, music, athletics)
* Feature alumni engagements, marriages, new babies, career successes
* Donor lists by giving level (never publish actual gift amounts!)

**SAMPLE LETTER**

*Prospective (New) Giver – Friend of School*

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

I write to you with gratitude to God for the many blessings He has bestowed on Trinity Catholic School since our founding in 1910. Our mission is to provide students with a challenging academic environment that instills Catholic values and fosters a life of faith and servant leadership.

After parish investment to the school, the Trinity Fund is the way we bridge the gap between tuition and the cost to educate each student. By supporting the Trinity Fund, you help us keep Catholic Education affordable and accessible for all families. The Trinity Fund supports our overall strategic goals: to provide a rigorous and engaging curriculum, to attract and maintain quality faculty and staff, and to keep tuition affordable for our families. No matter the amount, each gift helps to ensure the future of Trinity Catholic School.

***Would you prayerfully consider a gift of $25, $50, or $100 this year?*** You can donate online at [www.trinity.org/give](http://www.trinity.org/give) or mail your gift in the enclosed envelope.

Trinity Catholic School continues to <insert school tagline>. We are incredibly thankful for your support and partnership. May God continue to bless all of us as we do His work of forming and educating our children in faith, knowledge and service.

***Signatures: principal/head of school or principal and pastor.***

**SAMPLE LETTER**

*Prospective (New) Giver – Parishioner*

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

I write to you with gratitude to God for the many blessings He has bestowed on Trinity Catholic School since our founding in 1910. Our mission is to provide students with a challenging academic environment that instills Catholic values and fosters a life of faith and servant leadership.

After parish investment to the school, the Trinity Fund is the way we bridge the gap between tuition and the cost to educate each student. By supporting the Trinity Fund, you help us keep Catholic Education affordable and accessible for all families. The Trinity Fund supports our overall strategic goals: to provide a rigorous and engaging curriculum, to attract and maintain quality faculty and staff, and to keep tuition affordable for our families. No matter the amount, each gift helps to ensure the future of Trinity Catholic School.

As a parishioner, I know you are committed to the faith formation of our Catholic children as well as supporting the opportunity to evangelize. ***Would you prayerfully consider a gift of $25, $50, or $100 this year?*** You can donate online at [www.trinity.org/give](http://www.trinity.org/give) or mail your gift in the enclosed envelope.

Trinity Catholic School continues to <insert school tagline>. We are incredibly thankful for your support and partnership. May God continue to bless all of us as we do His work of forming and educating our children in faith, knowledge and service.

***Signatures: principal/head of school or principal and pastor.***

**SAMPLE LETTER**

*Previous Giver*

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

I write to you with gratitude to God for the many blessings He has bestowed on Trinity Catholic School since our founding in 1910. Our mission is to provide students with a challenging academic environment that instills Catholic values and fosters a life of faith and servant leadership.

After parish investment to the school, the Trinity Fund is the way we bridge the gap between tuition and the cost to educate each student. By supporting the Trinity Fund, you help us keep Catholic Education affordable and accessible for all families. The Trinity Fund supports our overall strategic goals: to provide a rigorous and engaging curriculum, to attract and maintain quality faculty and staff, and to keep tuition affordable for our families. No matter the amount, each gift helps to ensure the future of Trinity Catholic School.

John and Mary, thank you for supporting Catholic education and giving all Trinity students and opportunity to learn and grown both academically and in their faith. Thank you, also, for your last gift of $150.00 to the Trinity Fund. ***Would you prayerfully consider a gift of $175.00 this year?*** You can donate online at [www.trinity.org/give](http://www.trinity.org/give) or mail your gift in the enclosed envelope.

Trinity Catholic School continues to <insert school tagline>. We are incredibly thankful for your support and partnership. May God continue to bless all of us as we do His work of forming and educating our children in faith, knowledge and service.

***Signatures: principal/head of school or principal and pastor.***

**SAMPLE LETTER**

*Parent of Alumni*

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

I write to you with gratitude to God for the many blessings He has bestowed on Trinity Catholic School since our founding in 1910. In speaking with a recent graduate of Trinity, the student shared he was so grateful for the lasting friendships and faculty mentors he encountered during his time at Trinity. Our parents often say they greatly value the Trinity school culture that emphasizes academic formation, but more importantly strengthens their child’s faith formation.

As you might remember, after parish investment to the school, the Trinity Fund is the way we bridge the gap between tuition and the cost to educate each student. By supporting the Trinity Fund, you help us keep Catholic Education affordable and accessible for all families. The Trinity Fund supports our overall strategic goals: to provide a rigorous and engaging curriculum, to attract and maintain quality faculty and staff, and to keep tuition affordable for our families. No matter the amount, each gift helps to ensure the future of Trinity Catholic School.

***Would you prayerfully consider a gift of $25, $50, or $100 this year?*** You can donate online at [www.trinity.org/give](http://www.trinity.org/give) or mail your gift in the enclosed envelope.

Trinity Catholic School continues to <insert school tagline>. We are incredibly thankful for your support and partnership. May God continue to bless all of us as we do His work of forming and educating our children in faith, knowledge and service.

***Signatures: principal/head of school or principal and pastor.***

**SAMPLE LETTER**

*From Alumni to Alumni*

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

When you belong to Trinity Catholic, you belong to a family.

In fact, Trinity Catholic has been a family of faith, service, excellence, and tradition for nearly sixty years. And while Trinity has been uniquely dedicated to the [name of towns] communities, the impact of a quality, Catholic academic experience travels far and wide. That’s why so many of us in [county name] County and beyond stay connected. Trinity Catholic gave us great teachers, friends, faith, and a foundation for the rest of our lives.

Today, I am very proud that I can give back to Trinity. But honestly, I don’t think of my contribution as a gift to our school. Instead, I support the Trinity Fund so that students and families can benefit from the same Trinity Catholic family that took such good care of me. Of course, I understand that Trinity Catholic cannot be the same as it was ten or twenty or fifty years ago. At the same time, the things that matter – faith, family, service, excellence, tradition – still define the Trinity experience.

As this year comes to a close, I hope you will join me in making the gift of Trinity available to students and families in [county name] County and beyond. ***Would you consider a gift of $25, $50, or $100 this year?*** You can donate online at [www.trinity.org/give](http://www.trinity.org/give) or mail your gift in the enclosed envelope.

Thank you for being a part of the Trinity Catholic family. Go Saints!

Sincerely,

Anna Jones ‘71

**SAMPLE LETTER**

*Advent Letter*

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

The season of Advent gives us the opportunity to reflect on hope and expectation. It is a time for reflection and examining of those things that we hold as important in our lives. Advent is also a time of Joy as we prepare to celebrate the birth of Christ. This joy is evident here at Trinity Catholic School as our students are preparing for the annual Christmas pageant, participating in an Advent service project, and prayerfully taking part in the many faith traditions at Trinity during this season.

John and Mary, during this holy season, ***would you prayerfully consider a gift of $25, $50, or $100 this year?*** Your year-end gift to the Trinity Fund enables us to provide an excellent Catholic education, rooted in faith, that is affordable for families. Every donation, no matter what the size, is appreciated and makes a difference. When you give, you join the many outstanding members of the Trinity community who have made a real impact on the lives of young people!

You can donate online at [www.trinity.org/give](http://www.trinity.org/give) or mail your gift in the enclosed envelope. May the blessings of Jesus Christ, and the protection of the Blessed Mother be with you and your family this holy season and throughout the New Year!

***Signatures: principal/head of school or principal and pastor.***

**SAMPLE THANK YOU LETTER**

Mr. and Mrs. John Smith

123 Sesame Street

Bethlehem, PA. 18015

Dear John and Mary,

In a time of many worthy requests for your charitable dollar, please know that your support of Trinity Catholic School truly makes a difference in the lives of our students and the quality of the education we are able to offer. You investment in the form of a $500 gift is gratefully appreciated by all who value a Trinity Catholic School education.

We at Trinity, rely heavily upon the generosity of our alumni, parents, and friends to support the mission of our school each year in the form of a Trinity Fund gift. This support affords us our school the opportunity to take a variety of initiates that directly affect our educational program each dat. Namely, your generosity will help benefit Trinity in the following ways:

* To invest in our high qualified faculty and staff
* To enhance technology and curriculum integration
* To enrich our student programs and services

As we move forward with a plan for success, we do so with the knowledge that we will continue to have a school that provides a high quality academic program and Catholic faith formation.

On behalf of our faculty, staff, and students, please accept our deepest gratitude and appreciation for your continued support. We look forward to an exiting future because of your generosity that of others who value the mission and purpose of Trinity Catholic School.

May God Bless You,

***Signatures: principal/head of school or principal and pastor.***

**We attest that no goods of services were offered in return for this gift.**

**Your gift is tax deductible to the fullest extend provided by law.**