

# Annual Fund Direct Marketing Plan

## January

- Quarterly newsletter (mail and e-mail)

## February

- Thank you card to all donors

## April

- Quarterly newsletter (mail and e-mail)
- Spring donor appeal and prospect mailing; personalized and segmented
- Phone-a-thon follow-up

## May

- End of fiscal year reminder letter

## June

- Year-end e-mail reminder to those who have not yet given
- Thank you phonathon to all donors

## July

- Quarterly newsletter mailed and emailed newsletter (yes, both)
- Develop volunteer committee. Volunteers must be those who have contacts and will participate in asks and phone-a-thons; they are not envelope stuffers
- Develop leadership circle group schedule for participation in special events with dates in the coming year

## August

- Identify leadership-gift prospects based on existing or found relationships
  - Begin developing those who haven't given previously
  - Volunteers and staff solicit top prospects who have given previously
- Philanthropy report with annual fund results

## September

- Direct mail
  - Personalized and segmented direct mail package to all donors and prospects (members, alumni, visitors, patients, etc.), inviting them to give, renew, or become members
- E-mail follow-up, notifying that package should have arrived and asking to give online or to return pledge card
- Phone-a-thon follow-up to all previous donors within one to two weeks of direct mail

## October

- Quarterly newsletter (mail and e-mail)

## November

- Special thank you to all current and previous donors or members about how gifts were used: accomplishments, who was helped, and how the mission was delivered

## December

- Second letter, mailed first week of December to everyone... even if they already gave
- Volunteer call to those who have not responded
- Reminder e-mail last week of December to those who haven't yet given

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