

Rescigno's

Fundraising Professionals

Sample Annual Fund Marketing Plan

This is an example of a typical plan the Rescigno's team puts together for our non-profit clients! When following our proven process, success is imminent!

- 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** • Thank you phonathon to all donors
- July** • Quarterly newsletter mailed and emailed
 - Develop volunteer committee of folks 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 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

