



Before You Send the First Annual Appeal

If you are getting ready to add an annual appeal to your advancement plan for next year, congratulations! This appeal is the centerpiece of a good advancement effort, one that should eventually be relied upon for the bulk of advancement income in your community. The appeal is going to be the mark of a new way of raising funds for your school.

Stop and consider, therefore, the importance of doing it right the first time. While you will make this appeal every year (this is one reason they call it annual) you have only one opportunity to make a good first impression; to take the stage and say, "Now for something *really* different!"

Let's be sure to launch it in a way that clearly marks that difference. We are not fundraising anymore: we are inviting philanthropy.

The appeal itself should telegraph the difference but just to be sure, take advantage of the time leading up to the appeal to explain what it is you're going to do and why.

Some months before you will send out the first solicitation of the appeal, let your community know that what's coming. If you are going to send the appeal in the fall, start to prepare your stakeholders in late spring or early summer. Build a communication calendar that shares information strategically. Tell them why we are doing this; tell them how this project fits into the vision for the future of the school; tell them how the boys and girls are going to benefit from this program. This is your case statement; your argument for your mission.

You will want to use all the communication vehicles that you have (email, website, parish bulletin, Friday Folders) but remember, this is a new initiative at your school, this is a change in strategy, and this is "big picture." Nothing says big picture like print.

A print newsletter – at least one a year – should be part of every school's advancement program. This is a great time to use it. Print is for the information that has the longest shelf-life and that will have the greatest impact on your ministry: the big picture, the strategic plan for stability, growth, etc. If you can, use print to begin the buzz about what is coming next. Be sure that this first announcement is branded, that your case is clearly stated and that when your people next hear about it (not too long from now) they recognize it as "that new program."

Think of your appeal as a campaign—one that will run all year long. (This is the other reason it is called annual.) Treat it as a campaign. Name it. Use compelling language. Anticipate your audience's questions. Have small stories ready for the parish bulletin and for your email marketing newsletters for use in the coming months. Use the brand logo, use the appeal name, use the same font but don't tell exactly the same story every time.

Tell them when you are going to ask them. Really. Don't ask them straight out of the gate if this is new for you; tell them you're going to write them soon to invite them to "Invest in," "share the work of,"

“join the team that will build the,” etc. Tell them if this is going to be an ongoing opportunity; tell them if you have a specific goal; tell them if the appeal for this fund is going to include a special event; tell them if it has a time limit. Tell them, over the course of time (using your carefully crafted solicitation timeline) everything they will want to know about this project.

How many times are you actively contacting them? Maybe three: postcard, newsletter, e-news. And passively maybe two or three more in a parish bulletin. What is the timeline for this communication? Maybe three months.

Don't apologize for raising money. Feature the leaders in your community and their enthusiasm for this work. This enforces the concept of shared vision – and evidence of vision always encourages engagement. (I want to be part of that!) Describe where your school should be in five years and explain how this new initiative is going to get you there.

If you tend it carefully, the appeal will someday be the prize of your advancement garden. If you do not tend it, you will start over every year, annoying your constituents each time they hear from you. Which is not a great way to encourage engagement!

*Lynn Fredrick
Advancement Consultant
Office of Catholic Schools*

revised June 2015