

CATHOLIC DEVELOPMENT + QUARTERLY +

An informational DIGEST to guide development personnel in the emerging field of development.

Volume XIII, Edition 2

NO-NONSENSE PHONATHONS

Most Catholic institutions have, as their entry point in development any one of three specific development initiatives:

- Annual Fund.
- Capital Campaign.
- Stewardship Program.

The Annual Fund is probably the most common and within the Annual Fund are a number of key components. The Annual Fund can be ambitious or simple in scope. Listed below would be components representing an "ideal" Annual Fund.

- Appealing case for support.
- Lay Leadership (chairpersons).
- Timeline.
- Staffing.
- Glossy Annual Report for initial direct mail.
- Major Gifts/Personal Calls.
- Kick Off.
- Gift Options
- "**Phonathon.**"

A sample Annual Fund Timeline is this **+QUARTERLY+ CHECKLIST**. The Timeline provides a calendarized overview of a typical annual fund -- including the phonathon component.

PHONATHON: COMPONENT OF THE ANNUAL FUND

The goal of The Annual Fund is to attract as many "repeatable gifts" to support the annual goals of the institution. Most Annual Funds support the operational aspects of the institution: ministries, professional staff and support staff salaries, utilities, etc. Some institutions will use their Annual Fund gifts for other purposes (endowment, capital). Note that capital and endowment gifts, however, should be larger, more significant types of gifts.

In the Annual Fund, as with all aspects of the development program, personal calls for major gifts are essential for success. The second component for a strong Annual Fund is a phonathon whereby the institution's "publics" are invited to make an annual gift. These "publics" include:

- alumni/alumnae.
- parents.
- parents of graduates.
- grandparents.
- friends and parishioners.
- business, industry and corporations.

Most phonathons are fairly elaborate, well organized, highly concentrated activities focused on alumni, parents, parishioners, etc. inviting them to invest in this year's Annual Fund.

The "phonathon" segment of the Annual Fund should chronologically follow a direct mail or personalized letter which makes another annual invitation to give.

ORGANIZING THE PHONATHON

Organization and preparation for an upcoming phonathon is critical to the success of any phonathon. Leadership, recruiting, checklisting, anticipating problems are all key components to being successful. Think of a stage play.

+*QUARTERLY*+ CHECKLIST

This edition's +*QUARTERLY*+ **CHECKLIST** is a sample timeline for an Annual Fund which includes the phonathon. The "timeline" represents an ideal Annual Fund. Your Annual Fund and phonathon may or may not resemble this particular timeline.

ANNUAL FUND TIMELINE

- JULY 1 - Recruit Leadership (Annual Fund Chair, Special Gifts Chair, Phonathon Chair, etc); Begin Compiling Financial Information for Annual Report.
- JULY 31 - Prepare for Bi-Annual Annual Fund Kick-Off; Prepare Draft of Annual Report (year in review).
- AUG. 15 - Database and Software provide previous gift history for Donor Section of Annual Report and personalized solicitation letters with Annual Report.
- AUG. 31 - Chairperson and Special Gifts Chair identify 15 major gift prospects for personal calls.
- SEPT. 30 - Kick-Off/Social; Distribute "Glossy Final Annual Report"; 15 Major Gift Prospects also in attendance.
- OCT. 7 - Personalized Solicitation Letter with Annual Report to last year's donors; 3rd Class/ Bulk Mailing to balance of donor list.
- OCT 1-31 - Special Gift Person to Person Calls.

- OCT 20-29 - First Phonathon (In-Town Alumni).
- NOV 27 - Year End Mailing; Begin Year End Gift Reminder/Thank You Phone Calls.
- JAN 15 - Development/Alumni Newsletter "Annual Fund Update."
- FEB 15-20 - 2nd Phonathon (Out of Town Alumni).
- MAR 15 - Parents, Past Parents, Grandparents/Friends Phonathon.
- APR 15 - To Date Donor Mailing; List All Donors Year to Date; Invite Non-Donors to make gift by June 30.
- JUNE 30 - All Gifts Received by This Date recognized in next Annual Report.

The phonathon helps to support the Annual Fund through direct contact. Donors are thanked, reported to, recognized and asked to give again and to give even more.

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