



Checklist

Advancement Summer Checklist

Planning is essential to reaching and surpassing your enrollment and development goals. Capitalize on the summer months to “get your house in order” before the new school year is in full swing.

- Determine fundraising needs for the upcoming school year based on the budget; meet with parent association to review fundraising events and determine which stay, go and grow.
- With principal and board, create enrollment and development goals.
- Create detailed work plans for enrollment and development for the upcoming year. Include actions, deadlines and person/committee responsible.
- With the principal and development committee of the board, create Top 50 prospect list for the Annual Fund.
- Set Lead Gift Event date(s). Be sure to check school, parish and board calendars.
- Set Annual Fund solicitation letter(s) mailing dates.
- Set fall and spring Open House dates. Be sure to check parish and community calendars for conflicts.
- Hold summer meeting(s) with advancement committees. Determine dates and communicate early.
- Schedule meeting(s) with board chair.
- Draft Annual Fund solicitation #1 letter(s). Determine if you will have different letters for different constituencies. Proof names, addresses and salutations on all distribution lists.
- Share Lead Gift Event invitation list with principal and board. Draft Lead Gift invitation.
- Form a multi-class alumni committee and host a meeting.
- Prepare annual donor report. Share with development and marketing committees of the board for review and proofing.
- With marketing committee of the board, review and update marketing materials.
- Assess and update website for design, navigation and key messages.
- Identify, educate and engage key champions and create an Ambassador Team that will assist with recruitment events throughout the year.
- Complete a visual audit of the school, considering how everything would be viewed through the eyes of a visitor. Is the school clean and welcoming? Is the signage noticeable and easy to follow? Is the main lobby free from clutter? Are the classrooms bright and clean? Determine what should be fixed.
- Take a deep breath and get ready for the new year!