Annual Fund Sample Correspondence

Please note that these are just portions of on-going correspondence our committee members had with their families last year. Some are follow-up e-mails or handwritten notes that occurred after a phone call or meeting. The important goal is to take the relationship you have with your family and communicate with them in a way that is most effective. We originally did not want to post examples as we strive for each committee member to speak in his/her own voice. However, we also know that some people really want to see how others have communicated in the past. Connect with your families in whichever way best suits your relationship. Phone calls, e-mails, notes/letters, meetings in person. Thank you!

SAMPLE E-MAILS

Dear ____________:

I know you and I have spoken recently, and I hope things are going well for you.

It is with great pleasure that I am sending you this letter in hopes that you will help second grade achieve 100% participation in this year’s Annual Fund.

There has never been a year that seems so challenging, yet despite our economic downturn, we can feel confident that Pine Crest is shining a bright light for our children.

While our investments may be down right now and things may look dismal, the one thing that will never be lost on paper is our children. Seeing their bright smiles come through the door every night and seeing the enthusiasm in their eyes, we know that our children are the one investment that we can see a return on everyday!

The purpose of your gift is to support the operating budget for the campus. It goes directly to support the teachers' salaries, student programs, utilities, and athletics—essence—the daily life of the school. Tuition covers approximately 85% of the cost of a Pine Crest education. The balance must come from endowment earnings, summer camp revenues, and tax-deductible gifts to the Annual Fund.

We have one goal and that is to give each of our children the best possible education money can buy. Your participation in that goal is crucial. We are looking for 100% participation; and as your Second-Grade Captain, I know we can achieve it!

Thank you so very much for your participation and for knowing that we are all in this together and together we can make a difference.

If you should have any further questions or comments, please feel free to give me a shout.

_____________________________________________________________________________________________________________________

Dear ________________:

The Country Fair was AMAZING, and it served as another reminder of how lucky we are to be part of the Pine Crest community. This event was a success thanks to you, and your entire team of volunteers who worked around-the-clock. Volunteers are one of the foundations of our school, and it is our work that makes our incredible school even more incredible!

As you know, I too volunteer for a cause that is paramount to the Pine Crest community – our Annual Fund. Over the years your family has been incredible supporters of the Annual Fund, and I am writing to ask for your support again this year.

Since this is a family decision, even though we spoke at the party last week, I didn’t want to call and put you on the spot. We were hoping that you would consider joining our Columns level Circle of Excellence with a $2,000-$4,999 gift. Your support of our school, on so many different levels, should serve as an example to all! Thank you and please don’t hesitate to contact me with questions. See you Friday!
Dear [Name]:

We are so happy to have you at Pine Crest. I can’t believe it was five years ago that the girls were at Happy Land together…now MIDDLE SCHOOL! Where does the time go? It was hard to talk at drop off this morning so I thought a quick e-mail might be helpful. You asked “what am I expected to give for the Annual Fund?” First, please understand that there is absolutely no expectation on a dollar amount. Our goal is to get as close to 100% participation from our class and parents as a whole. A high level of participation shows a belief on the part of our community in the education our children are receiving at Pine Crest. I know you believe in this education – this is why you are here. I was thinking that you may want to consider giving at the “Columns” level. This level is a gift of $2,000-$4,999 a year. Any amount though is greatly appreciated.

Gifts to the Annual Fund support the operating budget for our campus. Tuition only covers approximately 85% of the cost of a Pine Crest education. The balance must come from endowment earnings, summer camp revenues, and tax-deductible gifts to the Annual Fund. For those of us who have gone back to work to pay for tuition, this may seem crazy. But, this is how all independent schools like Pine Crest operate. Pine Crest is a non-profit and actually costs less than many other schools, especially given the resources and programs we offer. The money we raise this year is spent this year and goes to support teacher’s salaries, student programs, utilities, athletics – in essence—the daily life of the school.

I will see you this afternoon at dance. Can we grab a coffee and talk? In the meantime, please don’t hesitate to contact me with questions.

Regards,

_____________________________________________________________________________________________________________________

SAMPLE LETTER

OUR SCHOOL—OUR ANNUAL FUND

At this time of Thanksgiving, now that the election has settled down, I am contacting you again to ask for your support and participation in Pine Crest’s Annual Fund—the Fund for OUR children which supports all the programs our children enjoy every day. We have so much to be thankful for as we consider the experience Pine Crest provides our children, our families, and our community. Your contributions to OUR annual fund ensure that this experience continues to be excellent and that the comprehensive quality of education remains at the high levels that made us select Pine Crest in the first place.

I am part of a team of volunteer parents this year that has the pleasure and responsibility of contacting you to secure a commitment for this critical effort. In fact, there are over 150 parents on both campuses contacting every parent, in every grade. There are that many of us, all volunteering our time, because it’s that important…and that necessary.

You have probably already received notes and phone calls from us regarding this effort and I am hoping this letter will now move you to action before the end of the year.

Please note and consider the following:

1. If you would rather make a contribution in fiscal 2009 due to tax planning or for any reason, you can pledge now and pay next year by June 15. All gifts are tax deductible.
2. You can pay by credit card (and get those points!) and/or arrange payments if you don’t want to pay all at once.
3. All pledge/contribution amounts are welcome. No contribution is too small. We really are hoping to get 100% participation from all parents and all classes.
4. Our School, like all other non-profit educational institutions, sets its tuition below its cost and makes up the difference through tax-deductible gifts to OUR Annual Fund, as well as earnings on our endowment. Tuition covers only 85% of operation costs. We need OUR Annual Fund to cover the rest.
5. OUR Annual Fund covers everything Pine Crest does, every day. It helps cover the cost of the amazing supplies our children have, the high quality and diverse programs, the pristine maintenance of our beautiful school, and the salaries of our dedicated and top-notch teachers.
6. This is definitely a tough economic year for all of us but OUR Fund is a solid investment in our children and their future.

Let’s show our kids how strong our commitment is to the school we selected for them. Please take time to make your pledge or send in your contribution now. You can fill in and mail the enclosed envelope by the end of the year; call Pat Boig (954-492-4102 or 561-852-2804) or Evelyn Farner, Gift Processing Coordinator (954-492-4106) to pay by credit card directly (or arrange installments), or email your Annual Fund volunteer with your desires/plans. Thank you in advance for your support and commitment. Hope you had a happy Thanksgiving and best wishes for a happy holiday season!
Notes and E-Mails

Your notes and e-mails should be personal and informal – they should sound like you. Since most of you will have relationships with your families, open with something about their children, upcoming event, past event, funny story…anything that highlights the relationship is important before getting into the Annual Fund part of the correspondence.

For Prior Donors you will not have to focus so much on highlighting our key messages as they already understand the need and importance. Instead, focus on your relationship and appreciation for their past support. You may want to note something like the following:

1. Thanks so much for your support of the Annual Fund last year! Hope we can count on you again this year. Would you consider a gift of $____ (we are always trying to get an increased gift but in this tough economy your relationship with the family should serve as your guide for how much to ask).

For Non Donors it will be important to highlight our key messages.

1. We are really trying to reach 100% participation for the seventh-grade class. We are very close and with your support we believe we can reach that goal. By participating you are part of a parent community that believes in the education their children are receiving. Would you consider making a gift of ____ this year?

2. I am a parent volunteer who is working on the Annual Fund because I understand the needs of our school. Independent schools, like Pine Crest, rely on gifts to the Annual Fund to support our operating budget. Tuition only covers approximately 85% of the cost of a Pine Crest education. The balance must come from endowment earnings, summer camp revenues, and tax-deductible gifts to the Annual Fund. Your participation in the Annual Fund is critical to the continued excellence and vitality of the school. We are confident that we can get 100% (or close to) parent participation this year. Would you consider a gift this year?

3. For new parents: By now you have received an appeal letter in the mail regarding our Pine Crest Annual Fund. Gifts to the Annual Fund support the operating budget for our campus, and the monies generated are spent directly on support of teachers’ salaries, student programs, utilities, athletics – in essence—the daily life of the school. Tuition covers approximately 85% of the cost of a Pine Crest education. The balance must come from endowment earnings, summer camp revenues and tax-deductible gifts to the Annual Fund. Our goal is to get as close to 100% participation as possible as this participation shows a belief on the part of the parent community in the education that our children are receiving. We hope that we can count on you for a gift this year as we strive for 100% participation in the ninth-grade class. Would you help us reach our goal with a donation of $____.

SAMPLE THANK-YOU NOTES

Upon receipt of a donation, the Development Office always sends a “thank-you” note. Our volunteers often choose to send a quick note or e-mail too. Here are some examples:

1. Thank you so much for your gift this year. Every gift to the Annual Fund is an investment in our children’s future, and I am so proud to be part of a community that values education as much as I do. I look forward to seeing you next week at the Smith’s dinner. Thank you!

2. Thank you so much for your donation to this year’s Annual Fund. As you know, our goal is to get as close to 100% participation as possible for our 9th grade class and the parents as a whole. Thank you for helping us get closer to this goal and for believing in the education our children are receiving at Pine Crest. Scotty and Ben played amazing at last night’s game. Will you be attending tomorrow’s game? Call me and maybe we can drive over together.

3. I am so glad that Jenny and Carly are adjusting to the new school, and I think it is incredible that you have become so involved even after just being here for a few short months. Thank you so much for your Annual Fund Gift. Your level of commitment and dedication to our school is amazing, and our school is so lucky to have your family as new members of our community. Have a wonderful holiday!