

Potential Donors List & Fundraising Letters Checklist

Here's a checklist to help you successfully complete this part of your fundraising strategy!

- **Print out this checklist.**
- **Initial the box next to each item to indicate that it has been completed.**
- **Include the completed original of this checklist in your package to headquarters.**

Letters or spreadsheets that are not submitted as outlined in both the [Fundraising Letters training page](#) and in this checklist will be returned and marked incomplete until successfully completed.

Remember: Do not send out any letters to donors directly yourself. If you are currently overseas and/or have donors with overseas mailing addresses, contact your team manager before adding them to your potential donors list or printing out letters.

POTENTIAL DONORS LIST SPREADSHEET

- A minimum of 15 names has been submitted.
- An accurate and full mailing address has been submitted for each potential donor (for U.S. mailing addresses, the correct state abbreviation and a 5-digit zip code are listed*)
- All of my contact information has been completed in columns I, J, and K (name, email, title).
- The Potential Donor List spreadsheet is in the original format - in the **Excel** document.
- I emailed the spreadsheet to donors@borgenproject.org and cc'ed my team manager.

FUNDRAISING LETTERS & ADVOCATE FLIERS

- Each letter is professional and high-quality in appearance: free of folds, tears, wrinkles, smears, fading ink, stains, and smudges.
- Each letter begins with a personalized greeting specific to the potential donor, such as "Dear Mom & Dad," or "Dear Miguel," or "Dear Aunt Laura".
- Each letter includes a "personal touch" statement handwritten in pen, such as "Can't wait to see you at the concert" or "Hope you're having an awesome trip!"
- My handwritten signature in pen appears in the closing section of each letter.
- My full name is typed out underneath my handwritten signature on each letter.
- (If Applicable) A select few of my potential donors are to receive an Advocate flyer and I have included their names on a separate list.

*Excel does NOT include zeros if the zip code starts with a zero unless you type an apostrophe (') before the zero. The apostrophe will disappear once you've moved on to a new cell.