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 FLYERS

- □ 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,” “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.*