bloomerang

BY CLAIRE AXELRAD, J.D., CFRE

FUNDRAISING SUCCESS: AN 18-POINT ANNUAL APPEAL CHECKLIST

"Direct mail appeals are unlike any other writing on earth. We write (and review) these letters at 1 mph. Readers, though, read at 100 mph. Things that are said just once tend to be overlooked. When you read direct mail at 1 mph (listen up, reviewers!), it can sound choppy. That choppiness disappears at 100 mph."

— TOM AHERN,
AUTHOR AND PRESIDENT,
AHERN COMMUNICATIONS

"Donors don't give to institutions. They invest in ideas and people in whom they believe."

— G.T. "BUCK" SMITH,
FORMER PRESIDENT OF
CHAPMAN COLLEGE

Introduction

Ultimately, the goal of every appeal letter is to get a resounding “Yes!”

With the right number of positive responses to your annual appeal letter, you can get the support you need for your mission. You could even surpass your short-term goals, giving your nonprofit the ability to focus on long-term strategies.

However, if you miss the mark — failing to connect with the recipients of your fundraising appeals, you could face the unfortunate prospect of cutting back on programs.

With that much at risk, you need an effective strategy for writing the type of appeal letters that clearly tell your story, generate empathy and get donors to share your passion for making a difference.

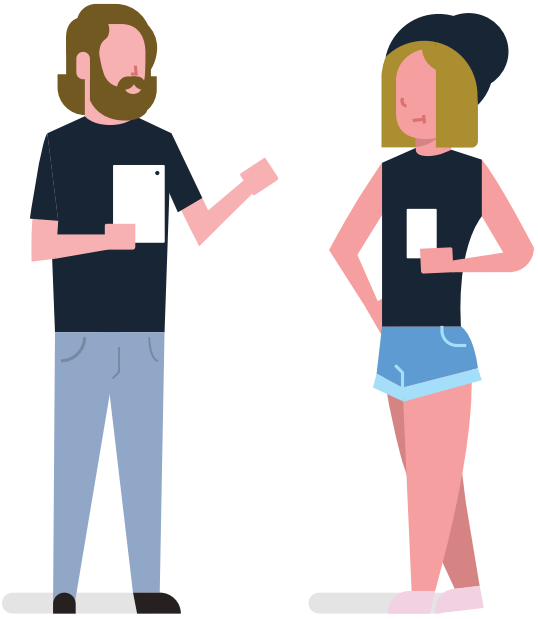
And it’s all possible with the right strategy!

Get the right responses to your appeals by implementing this 18-step Annual Appeal Checklist.

Take the time to carefully think through each step, and take plenty of notes along the way. With the right approach, you’ll be creating letters that make a connection with donors who will willingly contribute to your cause.

1. Have you outlined a compelling problem that connects with what your donor cares about?

What to think about ...	Did we do this well? How can we improve?
Begin with a one-sentence takeaway – the single most important thing you need to communicate. It should be something your donor can solve. Make them say “Yes” or “No.” Spell it out. Speak in language people can understand. Help them visualize a concrete problem — not abstract ideals like “health” and “hope.” Use **storytelling** and **images** with **succinct captions** to really paint a picture for your prospective donors.	



2. Have you offered a simple, results-oriented solution?

What to think about ...

Once you've persuaded your prospective donors that there's a problem, you can start talking to them about the solution. Don't make the all too common mistake of asking them to fund a teen pregnancy center without making the case as to why pregnant teens are a problem that needs a center as a solution. When you do offer a solution, make sure you **connect the dots back to the problem**.

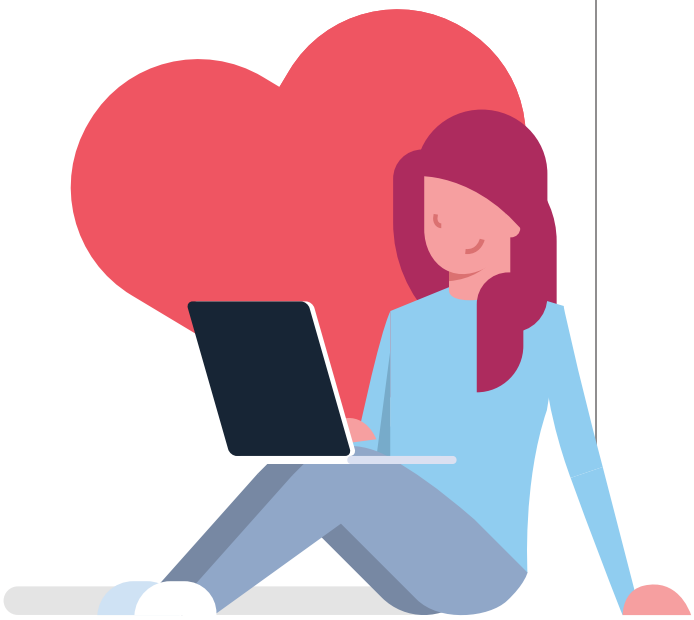
Are we clearly describing the problem? And the solution? How can we improve?

3. Have you described an attainable goal? What it will cost?

What to think about ...	How detailed are we about communicating how donations are spent. What can we do to improve?
Donors want to know exactly how much their gift is needed, and how much of an impact it will have. Don't just say, "We need money to help kids graduate from college." Share how the money will be spent and be specific about how much money you need.	

4. Have you packed in emotional triggers?

What to think about ...	Did we do this well? How can we improve?
Your case must be capable of being felt on a visceral level; not an abstract one. Human beings are wired this way. Always keep in mind that **heart trumps** mind. Human beings are **wired for stories**, not data. Talk about feeding people who are hungry, not about giving them hope. Better still, talk about feeding one hungry child and preventing her from starvation and death.	



5. Do you have an urgent deadline?

What to think about ...	How can we show the urgency of our appeal? How well are we using deadlines?
Why should your donor give now? Because winter is approaching? To make sure they don't miss out on a tax deduction? So that they can double their impact with a challenge grant? Don't give them the opportunity to put down your appeal without responding. You've just triggered their emotions; strike while the iron is hot!	

6. Are you speaking to the donor and using the magic word ‘you’?

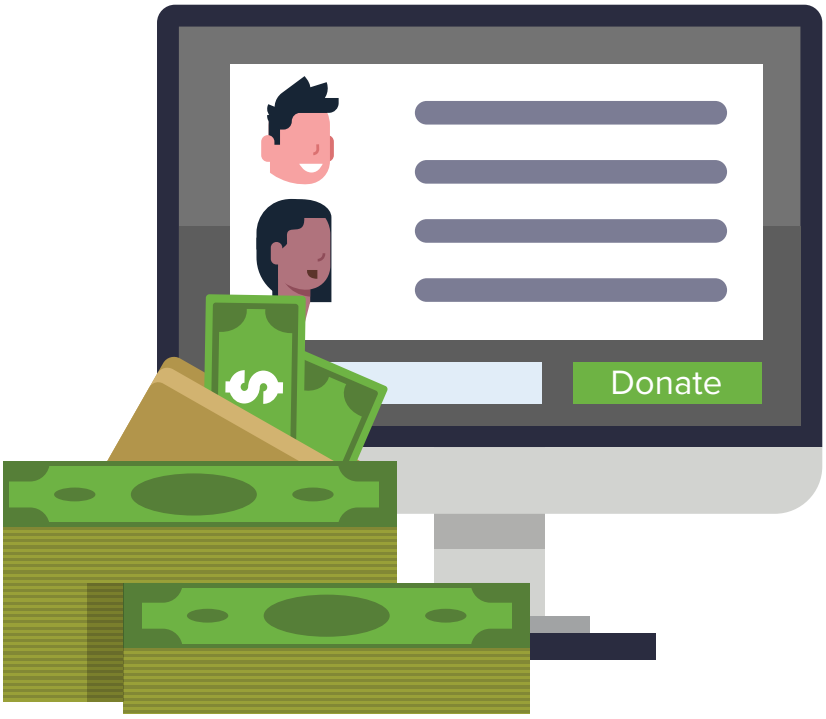
What to think about ...	Are we speaking directly to our donors? How can we improve?
Speak to your donors, not to your staff or board. **Make it reader-centric**. Never forget your job — to invite the reader to join you in something amazing, essential, critical and inspiring. Don’t make it about you. Make it about their experience. Use “you” rather than “I” or “we” or “our organization.”	

7. Are you reminding donors of the rewards that come from giving?

What to think about ...	Do we do this well? How can we improve?
Remind your donors of the many rewards that come from giving. Include some of those rewards in your fundraising appeal, such as feeling good about yourself; giving back; tax benefits; receiving something you value (e.g. a tote bag; preferred seating); and improving your community (making it more livable, prestigious, beautiful, fun, etc.)	

8. Are you making a clear *upfront ask*?

What to think about ...	Do we do this well? How can we improve?
Don't bury the lead! Don't waste a stamp by being timid about the ask. At minimum, **ask in the first few paragraphs; then ask again at the end**.	



9. Are you coming from an *attitude of gratitude*?

What to think about ...	How effective are we in showing gratitude? How can we improve?
People love to be flattered. Whatever you can do to put your reader in a positive mood is a good thing. **Make your donor the hero**. If they've given before, thank them. Assume they're about to give and thank them in advance. Making a gift to charity lights up a pleasure center in the human brain. Help the reader envision the gift, and in envisioning start to feel the pleasure.	

10. Is the solution you suggest *believable*?

What to think about ...	Are we talking realistically about the benefits of donations? How can we improve?
If you tell me that my $100 gift will end hunger, I won't believe you. If you tell me it will buy 300 meals for a hungry person, that's something I can comprehend.	

11. Is the solution scalable so it can be attained by different donation levels?

What to think about ...	How can we better describe how different levels of gifts can help us reach our overall goals?
If I can afford a $100 gift, I want to know what I can accomplish with that. If I can afford a $1,000 gift, I want to know what else can be accomplished. One size doesn't fit all, so be sure to **break your goal down into chunks** to suit the needs of different types of donors.	

12. Can the donor understand how their gift will be used as leverage?

What to think about ...	Do we do this well? How can we improve?
People love a good “deal.” There are different ways you can offer them one, including through the Multiplier Effect: **Can you get someone to offer a challenge or matching grant?** If I know I can double my gift, I’m excited. Impact: S**ome gifts have impact far beyond the initial donation**. If I pay for a well to be dug in Africa, an entire community will have drinkable water.	

13. Is your writing conversational?

What to think about ...	Do we do this well? How can we improve?
Your communications should sound like you're reaching out to a friend. **Read them out loud.** Every place you're tempted to put in a contraction, do so. If you want to begin a sentence with "and" or "but," go right ahead. If you want to have a one-word sentence, that's just fine. **Go back to middle school**. There's something called the Flesh-Kincaid score (a built-in tool in Microsoft Word) that will tell you if your writing is above a 7th-grade level. You don't want it to be. Use short sentences. Short words. Plus, people respond to **warm and welcoming** copy more than they do to technical and corporate writing styles. Since folks give from the heart, you're well-served to wear your heart on your sleeve.	

14. Are you using simple legible fonts?

What to think about ...	Can our donors easily read our letters? Are all of our communications reader-friendly?
Serif fonts are best for text (e.g., Courier or Times Roman) while Sans Serif are best for headlines and subheads. Also, when it comes to font point sizes, 14 is the new 12. It used to be accepted that 12-point text was readable by most people. No more. Baby boomers are aging, and many are your major donors. **The new recommended standard is 14 points**. Yes, that means you can't fit as much on a page. Turn the paper over and write on the back. Resist the temptation to eschew editing in favor of squishing your font down to 11-point so you can fit everything in.	

15. Have you given your readers' eyes a rest?

What to think about ...	Is it easy to skim our copy? Is it too cluttered? How can we make it more reader-friendly?
Indent paragraphs. Not only is this a more friendly style, it invites the readers in and gives their eyes a little rest. Our brains use indents in "pattern recognition," which keeps reading speedy. And, remember, your reader has no time. **Keep lines and paragraphs short.** The perfect line length is usually shy of 70 characters (with spaces), according to direct mail guru Tom Ahern. **Use subheads, boldface, italics and underline to emphasize key points.** Good direct mail is highly skimmable. I like to consider my letters several letters within one letter. If the reader reads only the subheads, they'll get the point. If they read only the bold-face, they'll get the point. And so forth. Since you don't really know which part of the letter your donor will read, repetition is essential. You've got to hedge your bets and **put your key messaging and ask in multiple places.**	

16. Have you eliminated buzzwords and jargon?

What to think about ...	Have we eliminated buzzwords in our communications? How can we improve?
You're used to calling your organization by your acronym but your readers aren't. You use words like "clients" and "caseworkers"; your readers don't. It can be hard to avoid these words and phrases because they're so ubiquitous within your culture. But no one will stick with your writing if you use phrases like, "providing preventive, educational, therapeutic and supportive services emphasizing inter-generational ties and community responsibility." Huh?	

17. Have you included a P.S.?

What to think about ...	Have we included a P.S. in every letter? How well is it written?
This is the Boardwalk and Park Place of your appeal. Per Professor Siegfried Vögele, author of the influential *Handbook of Direct Mail*, "Over 90 percent of readers read the 'P.S.' before the letter. It is the first paragraph, not the last." This is no place to put boring stuff, like the fact the gift may be tax deductible! Put your absolutely most important message here. It may be all your donor prospect reads.	

18. Have you thought carefully about the signature?

What to think about ...	How familiar are our donors with the name or role of the person whose signature is listed? Is it effective?
People always want to know who the letter is coming from. **Is it someone they know and trust?** A known authority they're likely to admire? Don't make this an afterthought. Most people will look first at the salutation (so be sure to personalize using their name) then at the signature, and then at the P.S. (per Professor Vögele's famous eye motion studies). Also, **avoid signatures that are messy** and unreadable; these annoy people. And **sign in blue ink** so it appears real, and not done with a printer.	

ABOUT THE AUTHOR

CLAIRE AXELRAD

Claire Axelrad, J.D., CFRE is a fundraising visionary with 30 years of frontline development work helping organizations raise millions in support. Her award-winning blog showcases her practical approach, which earned her the AFP "Outstanding Fundraising Professional of the Year" award.

Claire, who teaches the CFRE course that certifies professional fundraisers, is a regular contributor to Guidestar, Nonprofit Pro, Network for Good and Maximize Social Business. Her passion is coaching nonprofits to address 21st century challenges and overcome barriers to sustainable funding.

5724 Birtz Road,
Indianapolis, Indiana 46216
(317) 296-8100
bloomerang.co