

KEY MESSAGES

- A well-planned and well-executed direct-mailed campaign is essential in today's nonprofit landscape where **competition for visibility** is exponentially growing.
- A successful annual fund campaign integrates a **balance** of personalized donor solicitations and stewardship touchpoints delivered via measurable communications channels.
- Your marketing/communications staff are **key partners in expanding your donor reach** and providing support for cross channel communication opportunities for fundraising.
- Best practices are the fundamentals; but **it takes testing** to find the performing sweet spots.

FILL IN THE BLANK – DIRECT MAIL ESSENTIALS

SUCCESSFUL DIRECT MAIL CAMPAIGN PERFORMANCE IS...

- _____% list
- _____% offer
- _____% creative

The measurement of a successful annual giving program goes beyond _____.
(Direct mail response device)

1. _____, _____ acknowledgment when they make a gift.
2. Confirmation that each gift, no matter the value, will be assigned to a program, project or initiative _____ in scope than your mission.
3. A report on the measurable results _____.

When donors rank the importance of giving in their lives, they rarely place it _____ behind _____, _____ and sometimes _____.

A thriving annual giving program helps deliver _____.

BEFORE FINALIZING A DIRECT MAIL PACKAGE, ASK YOURSELF THESE QUESTIONS:

1. Did I give a compelling reason to open the envelope, or did I just advertise?
 - Is the postage, teaser, "look" of the mailing consistent with the offer/audience?
2. If I'm including a photo/photos, is it just a picture? Or does it have a message and will help sell the ask?
3. Have I told the donor how great they are and how they are making a direct impact with their gift?
4. Have I made the right typography and layout choices for maximum comprehension? And does this look like other communication pieces we're sending out?
5. Do I need an insert?
 - Have I made it interesting/compelling?
 - Have I proved what I said is true?
6. What is my follow-up plan?

ANATOMY OF A WELL-WRITTEN LETTER

Month Date, Year

Preferred or Formal Name
Address
City, State ZIP

Dear [Preferred First Name],

Grab! Grab! Grab! Your letter's opening line should capture the attention of the reader, otherwise you're in trouble from the get-go. A one-line sentence, an unfinished thought, a quote which will tie back to the body copy work best. Allow your first paragraph to develop the thrust/theme of the letter. Use upbeat words like *new, best, now, today, challenge*. And don't get hung up on grammar.

The best letters are broken up with an occasional one-line paragraph.

Make sure you have smooth transition between thoughts. Variety in paragraph line-length also helps hold reader attention, interest. Paragraphs are best at five lines. (Six lines make an inch. That's plenty). Serif type-face. 12-point type size.

Your letter's "look" (including letterhead) creates a first impression and may play a larger role than content. Indent the first line of each paragraph. Don't flush right. Let the letter "breathe." (You are writing a personal letter, not a memo).

Separating words—with hyphens, commas or periods ... adds variety and punch. Underline sparingly, if at all. **Bold can be used for emphasis.** Don't use capital letters to highlight: they tend to SCREAM at the reader (negative). Limit exclamation points!

Hey ... don't be afraid to indent a paragraph.

Write the way you talk. Short sentences. Read your copy out loud. Sound lousy? Reader will likely agree. If you wouldn't say it, don't write it.

Close the letter repeating the "ask" by tying it back to the original "pitch" (theme). Express urgency for reader's response: Today. Now.

Warmest regards,

Fancy Signature

(one signature, hand-signed, blue ink)

Grand High Schmoozer or Top Volunteer, Title

P.S. Postscripts are critical, often being read first. It should carry the "grab" of your letter's opening line. Emphasize gifting action: Today. Now. P.S. Test: Is it strong enough to replace your opening "grabber" line?

Resource originally developed by William D. Jenkins. Bill has written several thousand fundraising letters for some 60 men's and women's fraternity and sorority foundations. He completed a 36-year professional relationship with Phi Kappa Tau in 2006, including 8 years as the fraternity's executive director and 15 years as the foundation's executive vice president. He was a founding partner and creative director of a St. Louis-based direct mail fundraising firm and the director of development for Bowling Green State University. Bill is a 2005 recipient of the North American Interfraternity Conference Gold Medal. Additionally, the Foundation for Fraternal Excellence named the outstanding professional award the William D. Jenkins Award.

SAMPLES TO REMEMBER

| | |
|---|--|
| STORYTELLING THROUGH THE READER'S EYES | |
| SEGMENTATION & PERSONALIZATION | |
| WAYS TO SURPRISE YOUR DONOR | |

NINE-STEP COMMUNICATIONS SELF-AUDIT:

1. Is the content "donor-centric"? Does it say over and over (in different ways):
 - "With your help, we can do amazing things. And without your help, we can't. It all depends on you."
2. Is it entertaining?
 - Does it have necessary unexpectedness, simplicity and a conversational tone?
3. Is urgency part of the message?
 - Does it ask the donor to contribute NOW?
4. Does the message talk about, or suggest, the chance of loss?
 - Response will increase if your message emphasizes the chance of loss.
 - Chance of loss is also far more persuasive than the promise of gain.
5. Does it pass the "you" test?
 - Print out and circle every time you see the word "you" – should be a lot of them!
 - Repetition of the word "you" keeps readers involved.
6. Is the communication built for browsing? Are the headlines effective?
 - People don't read deeply often – they browse and dig in if something interests them.
7. Is it convenient to respond to the offers?
 - Make offers easy to respond to and more people will do it
8. Is there accomplishment reporting?
 - What are your results?
 - One thing the donor cares about: "How did I change the world by sending you a gift?"
9. Is there credibility? Does it help establish the donor's trust in you?
 - Trust and results are the two things donors value the most.

Resource originally developed by Tom Ahern, donor communications advisor and national speaker. www.aherncomm.com

CHECKLIST FOR A SUCCESSFUL ANNUAL FUND CAMPAIGN

| | CURRENT CAMPAIGN √ OR × |
|---|-----------------------------------|
| At least 3 Direct Mail Appeals <i>(if possible, use customized landing page for each for tracking/conversion)</i> | |
| Tax Statement sent at the end of January including an (additional) ask | |
| Utilize Informed Delivery in each appeal with a Representative Image of the envelope and Ride-a-long with link to landing or donation page. | |
| Website and Donation page is user-friendly | |
| Email Follow-Ups to Direct Mail Appeals <i>(if possible, use customized landing page for each for tracking/conversion)</i> | |
| Founders' Day Email | |
| End of Calendar Year Email and End of Fiscal Year Email | |
| New Donor "Welcome" Plan - phone call, letter package, etc. | |
| Acknowledgment Letters sent within 48 hours of receiving gift | |
| Crowdfunding Event (Day of Giving) | |
| At least 2 Stewardship Pieces | |
| Social Media Posts on Fraternity/Foundation Page <i>(if Foundation, shared by Fraternity)</i> | |
| All of the above are cohesive and relate to one another/ similar messaging | |

DIRECT MAIL GLOSSARY OF TERMS:

- **Buck Slip**—Insert included in package, usually about the size of a dollar bill and designed to encourage a reader's response
- **Business Reply Envelope (BRE)**—Reply envelope where the organization sending the mail will pay for postage on the returned piece
- **Courtesy Reply Envelope (CRE)**—Reply envelope where the recipient of the mailing will pay for postage on the returned piece
- **Cyan, Magenta, Yellow & Black (CMYK)**—Basic ink colors processed together to create a specific color (also known as 4-color process)
- **First Class postage stamp**—Postage class where mail will be delivered in 1-3 business days (\$0.55/stamp as of January 2019)
- **Johnson Box**—Area in top right-hand corner of the letter, typically white space, where text can be printed with a similar purpose to the "P.S."—getting the attention of the reader
- **Nonprofit postage stamp**—Postage class where mail will be delivered in 7-10 business days, but no delivery guarantee (\$0.18/stamp as of January 2019). Quantity also must be 200 pieces or more, requires a barcode on the outside of the piece, and the sender must be registered as a nonprofit organization with USPS
- **Pantone Matching System (PMS)**—Specific ink color in library
- **Seed Records**—Samples that are typically employees of the Foundation and/or Board Members that are nested within the mailing—typically created using a sample record to show what a donor's mail piece looks like AND when they arrive in mailboxes
- **Teaser**—Captivating message on the outside of the mail piece to capture the reader's attention and prompt him or her to open it/continue reading

ADDITIONAL RESOURCES

- **21 Ideas to Refresh Your Donor Stewardship**
<http://www.thestorytellingnonprofit.com/blog/21-ideas-to-refresh-your-donor-stewardship/>
- **Amy Eisenstein's Blog**
<http://www.amyeisenstein.com/>
- **Association of Fundraising Professionals**
www.afpnet.org
- **Bloomerang Blog**
<https://bloomerang.co/blog/>
- **CASE: Fundraising Fundamentals Stewardship**
http://www.case.org/Publications_and_Products/Fundraising_Fundamentals_Intro/Fundraising_Fundamentals_section_7/Fundraising_Fundamentals_section_710.html
- **Direct Marketing Association (DMA) Nonprofit Federation**
<http://nonprofitfederation.org/library/>
- **Giving USA Philanthropy Spotlight: Annual Report on State Laws Regulating Charitable Solicitations**
- **Penelope Burk's Blog: Donor Centered Thank You Letters**
<http://www.burksblog.com/donor-centered-thank-you-letters-your-first-step-to-the-next-gift/>