# Self-Assessment: Appeal Writing

Read each of the following statements and rate your program according to the scale below. Don't spend too much time thinking about each statement; your first instinct is usually the best one. If you're not certain, make your best guess or go with your gut instinct. If you don't think it applies, or if you feel neutral about it, rate it as 3.

*Strongly agree = 5    Agree = 4    Neutral = 3    Disagree = 2    Strongly disagree = 1*

## Structure/Flow

a) There is a strong opening that draws in the reader right away; no leisurely warm-up

b) It is easy to read; no unnecessarily "big" words

c) There is a mix of short and long sentences and paragraphs

d) The conclusion synthesizes the main/most important point(s)

e) A postscript emphasizes something new and important

## Tone/Feel

a) The appeal integrates variable text for various segments (donors, non-donors, lapsed)

b) It reads the way people talk; it uses contractions and feels conversational

c) There are no acronyms or jargon that readers will not easily understand

d) The word "you" is used more than "I" or "we"

e) The recipient's relationship with the institution is acknowledged (e.g., alumni, parent)

f) The recipient's donor status is clear (e.g., current, lapsed, never)

g) The appeal conveys that recipient belongs to a group and suggests a sense of *community*

h) It ends on a positive note

i) It is signed by someone with whom the recipient is familiar and will respect

## Case for Support

a) The appeal tells a story about someone or something specific

b) It includes emotional *and* factual information

c) It focuses on *outcomes* rather than *need*

d) It describes the impact of past support

e) It explains the consequences of inaction

## Call to Action

a) The appeal makes a clear request for a donation

b) Asks for a specific and appropriate amount based on the recipient's capacity and giving history

c) It gives a specific deadline

d) It creates a sense of urgency

e) It encourages the recipient to see themselves as part of the solution

f) It reinforces the request through repetition (up to three times)

## Process and Development

a) The process is guided by predefined steps from start to finish

b) The process is started early enough to give plenty of time for each step

c) The appeal is modeled after successful aspects of previous appeals

d) Realistic response rates and ROI are projected for specific segments in advance

e) It is clear what variables will be tested and how success will be defined before it's sent

f) It is reviewed by others (but not too many others) and proofread before it's finalized

## Look and Appearance

a) Comes in an envelope or package that the recipient *wants* to open

b) Font size and type are readable and match the intended tone

c) Content fills the pages in a balanced way; there is no awkward white space

d) Important words/points are highlighted using **bold**, <u>underlined</u>, or *italicized* text

e) Uses bullets, quotes, and subheads for emphasis

f) Includes visuals and/or infographics

g) The signature looks real

## Reply Device

a) There are clear and simple instructions for making a gift either online or via mail

b) Ask array listed largest to smallest (left to right) with an "other" option

c) Fund options are based on prospect's past giving or affinity

d) Gift society levels are listed highest to lowest (top to bottom)

e) A tracking code is included

f) Donor name and address are pre-printed

g) Recurring monthly or quarterly payment options are provided

h) An employer gift-matching checkbox is listed

i) A planned-giving information checkbox is listed

j) A biographical information update option is listed

k) An email, phone number, and URL are provided to learn more

l) A QR code to the online giving form is included

m) There are clear and simple instructions for making a gift either online or via mail

*Total:* _____