

Writing Appeals

Agenda

- Understanding your role
- Getting in sync with your audience
- Structuring your appeals
- Enhancing your work

UNDERSTANDING YOUR ROLE

Consider the different purposes of writing

- Describe
- Explain
- Entertain
- Analyze
- Inspire
- **Persuade**



Recognize the writing opportunities in fundraising



- Share information
- Engage donors
- Acknowledge gifts
- Describe impact
- Celebrate success
- ***Solicit prospects through direct appeals***

Know that *direct appeals* need to...

- Be persuasive
- Contain a “call to action” that is specific (and even urgent)
- Work within the bounds of the delivery vehicle (direct mail, email)
- Highlight what’s most important for the reader the see
- Break the rules of grammar sometimes
- Be tested
- Be measured



Define a writing process for yourself



- Find a good environment (light, sound)
- Pick a good time (know your own cycles)
- Have the right tools
- Set goals
- Establish time limits
- Take breaks (Pomodoro)
- Know when it's just not the "write" time

Overcome writer's block

- Reorient your brain
- Change your environment
- Do something physical
- Play a game
- Listen to music
- Freewrite
- Write an outline



Keep in mind that...



- Writing isn't easy
- Writing is a process
- Writing takes time
- Writing takes energy
- Writing well requires thinking well
- Writing is deciding what words to use
- Writing is deciding what words not to use
- Nothing is well written, only well *rewritten*

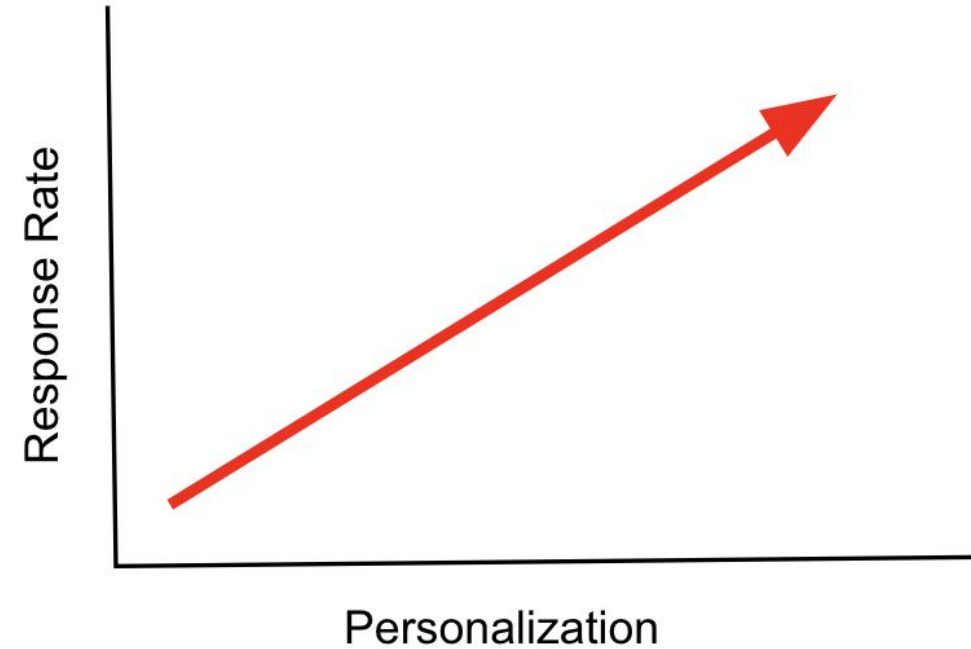
GETTING IN SYNC WITH YOUR AUDIENCE

Reflect on your organization

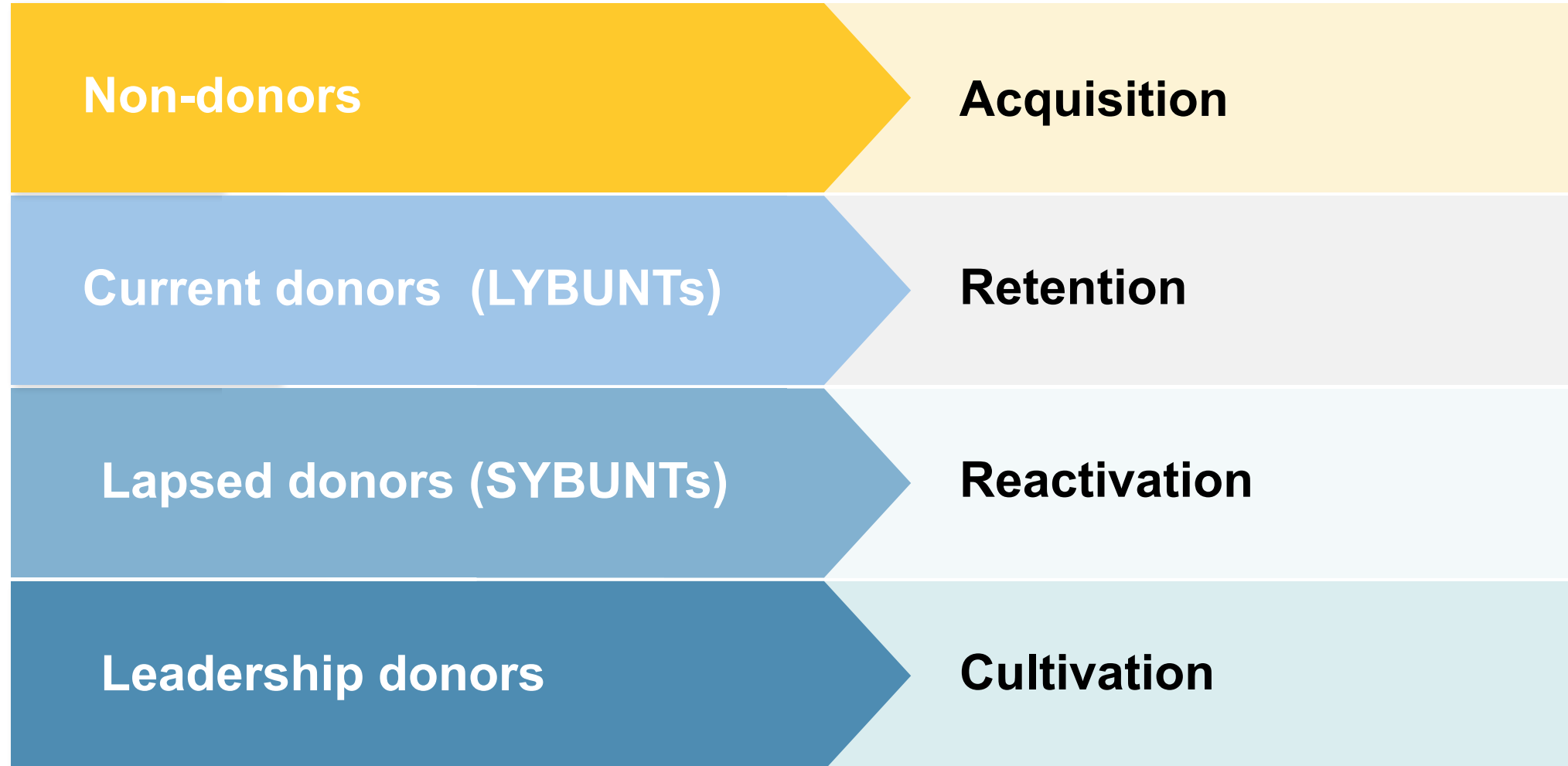
- Is there a long/consistent culture of giving?
- Do prospects/donors understand about the need/impact of gifts?
- Do you send a lot of appeals?
- Are there multiple units sending communications/competition?
- Is there strong, consistent and respected leadership?
- Are students and alumni generally satisfied?

Know who will be reading what you write

- Do your research
- Understand what matters to them
- Determine how their values align with your needs
- Consider what things might motivate them
- Find ways to personalize your communication



Determine which prospect segments they're in



Appreciate the unique needs of each segment

- Non-donors - *To understand the case for giving to your organization. Simple attention-grabbing image-heavy content. Many points of entry. Enthusiasm.*
- Current donors - *To know the impact of their past support and a reason they should continue giving. Sincerity. Warmth. Don't assume they know too much*
- Lapsed donors - *To know you miss them and that their past gift mattered. A reminder about case for support. Acknowledgment that they've done this before.*
- Leadership donors - *To understand that they are in a unique position to lead and support your institutions more than most can/will. To understand the benefits and/or impact of increasing their giving to an even higher level. To feel like an insider.*

Consider what tone might resonate

- Non-donors - *Informal, optimistic, excited, inclusive, proud*
- Current donors - *Purposeful, appreciative, impactful*
- Lapsed donors - *Ambitious, nostalgic, forward thinking*
- Leadership donors - *Formal, important, exclusive, constructive*

Understand what constituent group they belong to

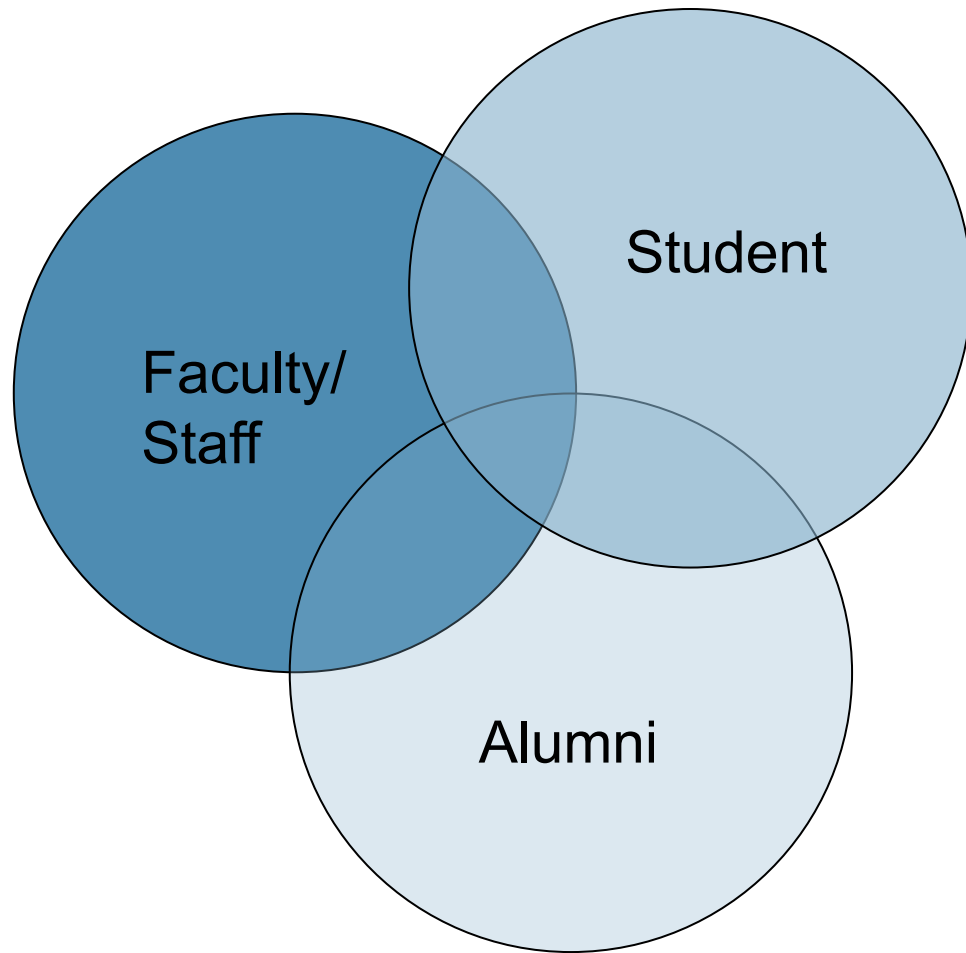
- Students
- Young alumni
- Reunion alumni
- Parents
- Faculty/staff



Theorize about what areas might interest them

- Students - Scholarships, athletics, campus life
- Young alumni - Athletics, college or department fund, excellence funds
- Reunion alumni - Memories, traditions, campus buildings/spaces
- Parents - Student services, campus life, safety, career services
- Employees - varies by role
 - *Faculty > scholarships*
 - *Staff > campus improvements*
 - *Academic centers > their programs*
 - *Athletics > their teams*
 - *Admissions > scholarships*

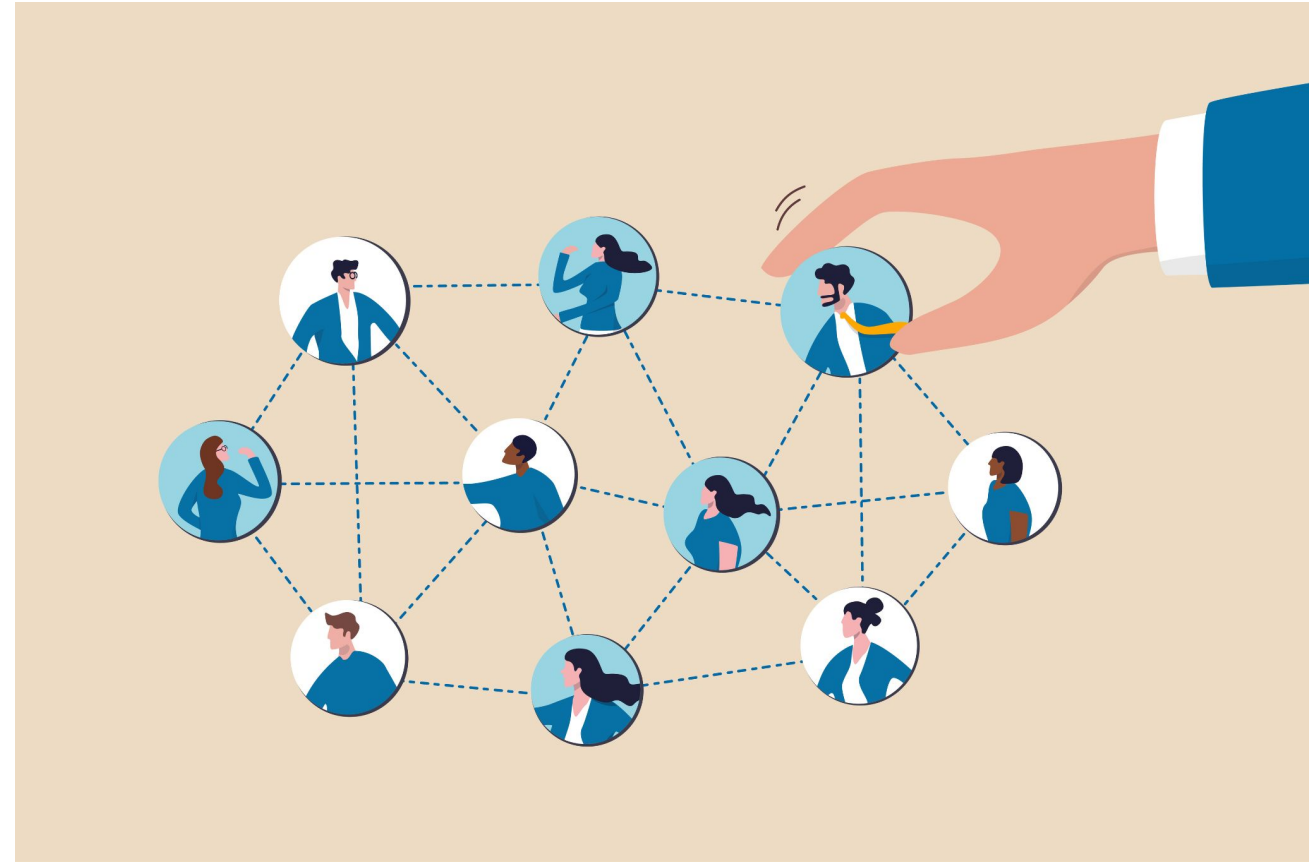
Recognize if they belong to more than one group



- Keep track in your database
- Determine priorities (e.g., lifelong over temporary constituency)
- Establish policies and communicate them
- Be mindful of how they view themselves
- Consider changing segmentation priorities periodically
 - Q1: Alumni > Faculty/Staff > Parent
 - Q2: Parent > Faculty/Staff > Alumni

Look for deeper affinity, interest and preferences

- Gift designations
- Channels
- Demographics
- Behaviors



Speculate based on demographics and behaviors



- Age
- Gender
- Academic major
- Profession
- Student clubs and organizations
- Attendance at events
- Engagement in social content

Imagine who might resonate as a signatory

- Greatest Generation - authority figures (e.g. President, Dean)
- Baby Boomers - students (e.g., stories of hard-working freshman)
- Gen X - non-authority figures (e.g. professor)
- Millennials - peers (e.g., volunteers)
- Gen Y - influencers (e.g., popular alumni or faculty)

Build a messaging matrix

Donor Type	Purpose	Tone	Signatory	Channel
Non-Donors	Inspire a first gift	Informal, optimistic, excited, inclusive, proud	Student	Social
Current Donors	Renew past support	Purposeful, appreciative, impactful	Peer	Email
Lapsed Donors	Win them back	Ambitious, collaborative, nostalgic, progressive	Staff	Phone
Leadership Donors	Secure larger gifts	Formal, important, exclusive, constructive	Leader	Direct Mail

STRUCTURING YOUR APPEALS

Consider the key parts of an appeal



- Introduction
- Case for support
- Call to action
- Conclusion
- Signature
- Postscript

Introduction

- Grab the readers' attention
- Create an outstanding first line
 - Ask a question
 - Share a quote
 - State a data point
- Tell a story about a student, a faculty member, or an alum
- Describe interesting things taking place on campus
- Make it personal/relevant



Case for support



- Explain why support is needed
- Describe the impact of support
- Illustrate the consequences of no support
- Include emotionally-based stories
- Include data and facts
- Help them imagine the future
- Make them the hero of the story

Call to action

- Always thank donors for past support before you make an ask
- Make it easy to find quickly
- Be clear and direct, but also polite and positive
- State a specific amount, purpose and deadline
- Request an amount that is accessible, easy to consider, more than their last gift, not too extreme of increase (i.e., the lowest amount listed on reply device)
- Frame it as a questions that speaks to them specifically
 - *Would you consider making your first gift today?*
 - *Would you please renew your support today?"*
 - *Can we count on you to increase your support today?*
- Follow it up with a description of what a gift would help achieve

Conclusion

- Synthesize your main points
- Restate your case for support
- Repeat the ask
- Be positive and express gratitude
- End with something about them



Signatory



- Give your message a voice
- Have someone who will resonate with your audience
- Use it as an opportunity to engage volunteers and donors
- Plan for their involvement and possible edits

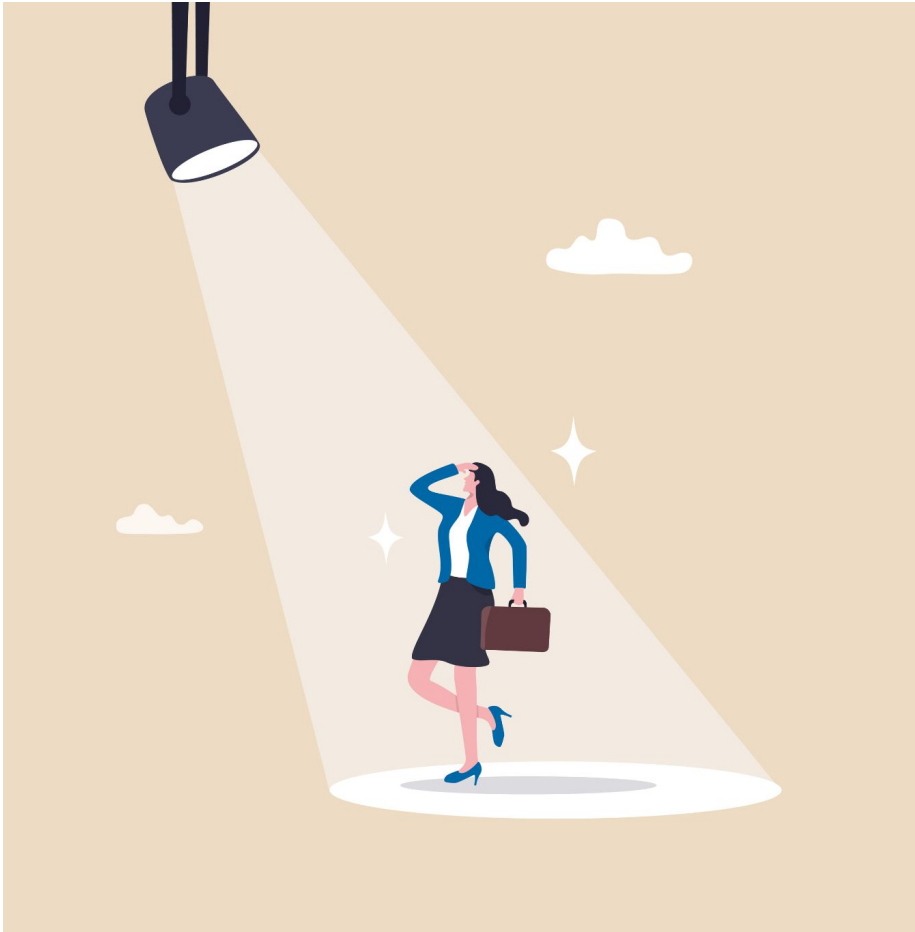
Postscript

- Know that it may be the first (or only) thing someone reads
- Highlight something important from the content
- Introduce something new



ENHANCING YOUR WORK

Stay focused on the donor



- Use the word “you” often
- Calculate ratio of “you/your” to “I/we/us”
- Describe how important *they* are
- Explain the impact *they* had/could have
- Don’t over emphasize your organization
- Personalize as much as possible

Speak to the segment

- Constituency group
- Channel
- Tone
- Giving history
- Ask amount/designation
- Signatory
- *Beware the pitfalls of too much variable text for “individuals”*



Balance emotional and analytical

Emotional

- Tell stories
- Use descriptive words
- Include images
- Show impact

Analytical

- State facts
- Support with statistics and data
- Include graphics
- Explain cause and effect

Convey that your institution is a winning cause



- Think of your prospects as investors
- Beware of appearing too needy
- Remember that donors can see the organization as an extension of themselves
- Use words that inspire and evoke feelings of strength and stability

Select words carefully

- Strength
- Vision
- Momentum
- Bold
- Lead
- Community
- Join
- Impact



Share information

- Remind them that they belong to a community
- Make them feel like an insider
- Satisfy their need to feel informed
- Establish some benchmarks
- Provide them with an example to follow
 - *Our alumni participation rate is 7% - just below the national average.*
 - *The average gift from parents last year was \$250.*
 - *Over 50% of our recent graduate donors choose to give \$20 a month.*
 - *Your last gift puts you in the top 10% of our donors.*

Create a sense of urgency

- Take advantage of actual deadlines (giving day, challenges, year end)
- Tap into seasonal opportunities (e.g., holidays, reunion, family weekend)
- Update them on progress to goal
- Include dates in your goal, even if it's not a hard internal deadline
- Write with excitement and create a sense of momentum
- Use “today” in your ask

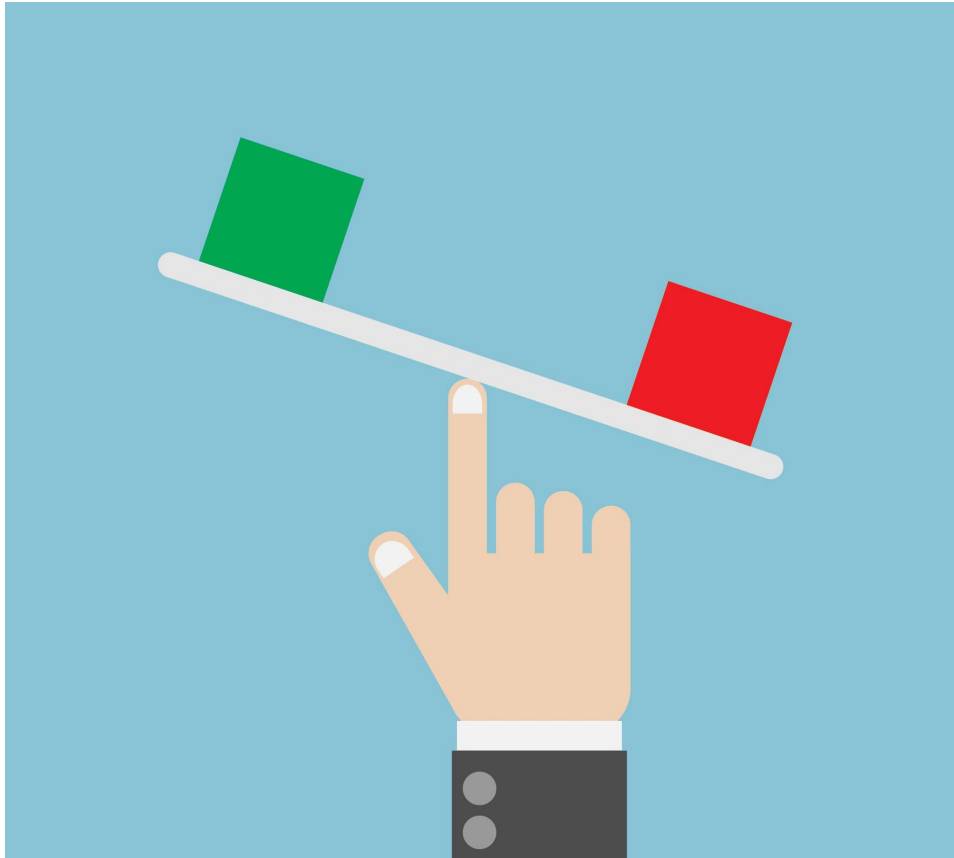
Take your reply device into account

- Think of it as part of the ask
- Customize as much as possible within reason
- Raise their sites with suggested amounts, but always leave an opportunity for them write in any amount
- Highlight important funds (i.e., institutional priorities, past giving)
- Offer ways to enhance the gift (e.g. employer matching, recurring gifts, honorary/memorial gifts, pledges)
- Customize for each segment/donor as much as possible
- Provide room for them to write-in feedback

Strive for continuous improvement

- Remember that nothing is every well written - only well *re-written*
- Distinguish between the need for developmental edit and proofreading
- Highlight what's most important - bold, underline, italics
- Don't be afraid to repeat - within the text, in the ps, on the reply card
- Get input and feedback from others
- Test, don't guess

Know what you can test



- Format (letter vs brochure)
- Length
- Font
- Design
- Ask amount
- Purpose/designation
- Signatory
- Phrasing

Example: Call to Action test

- Focus: Phrasing
 - A: Ask (interrogative): “Will you please join in this effort with a gift of \$X today?”
 - B: Tell (declarative): “Please join us in this effort with a gift of \$X today.”
- Observation
 - Interrogative segment’s participation rate was higher (3%)
 - Declarative segment’s average gift was higher (100%)
- Takeaway
 - ASK for more donors (acquisition, reactivation)
 - TELL for more dollars (upgrades)

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ANNUAL GIVING NETWORK