

# *The Sheridan Group* – Education Series

## How to Write the Best Annual Appeal Ever

Autumn to the annual fund director signifies none of the pleasantries of the season. It is instead dominated by the massive anxiety which accompanies the need to write and produce the annual appeal.

This edition of *The Sheridan Group Education Series* provides an in-depth briefing on how to write your best annual appeal ever.

Let me provide some initial points of orientation:

***Don't Write the Annual Appeal in a Vacuum.*** Time and time again the annual fund director views the writing of the annual appeal as some monastic act of self-flagellation in which he or she locks himself or herself in office or home until the awful deadline is met by a finished document. The problem is, the document is usually mechanical, derivative, uninspiring and relentlessly institutional, just the kind of letter I get from my own alma mater.

The fact is, for the above reasons, the annual fund director often should not be the sole author of the annual appeal. Consider having a particularly loyal, familiar and articulate faculty member, alumnus or alumna, or other institutional friend or a class agent write the annual appeal. Consider asking several to take a crack at the letter and edit the results. It will make your job much easier, and a much better product will result.

***Don't Follow the "We've Always Done It This Way" Philosophy.*** "Our mailing is always accompanied by a brochure." Really? How many additional dollars does the brochure produce for your annual fund, at what cost, and at how much extra staff work and design and production cost?

Test your results and adjust your scheduling of peer solicitation, phonathon, and direct mail programs accordingly.

***Before You Write, Know Your Audience.*** How? Try talking to them. Conduct your own phone survey among class agents, parents or friends about how they view your institution, what interests them, and why they care. Conduct direct mail surveys that measure the attitudes and interests of different constituencies. This can provide excellent marketing information as well as help identify major prospects. The results of these activities can be given to your writer or writers of the annual appeal, helping to direct and inform their letters.

## The Annual Appeal Letter

Remember to target as much as possible - get to know your prospects and why they would be interested in contributing to your institution or program.

The case must validate the importance of your institution or program. Just a cry for funds is not enough - present an overriding reason for supporting your appeal over the others that your prospects receive.

# *The Sheridan Group* – Education Series

## Strategy and Content

Remember that people give to help people, so focus on people, not institutions.

- *Get right to the main point* - don't bore your readers with excessive warm-up copy.
- Be continually interesting to the reader - *tell a good story or develop a theme*.
- Make your needs real -- it is your job to communicate.
- Be specific about the gift amount and how gifts will be used.
- Be realistic about the size of the gift requested.
- *Avoid asking questions* that can elicit a negative response ("Won't you send \$100 today?").
- *Donors need direction* - instruct them to place their check in the postpaid envelope enclosed.

## Copy Style

- Remember that you are writing to an individual, not an audience.
- Be *informal* and *emotional* in your approach.
- Put description and narrative into your copy that make it flow, but *be concise*.
- Read the letter aloud to *check the rhythm*.
- *Be believable* - don't exaggerate or shout the message.
- Make the reader absorb the message effortlessly.
- *Write in clear, simple sentences*, yet remain moving and memorable.
- *Use short and direct words*: "use" not "utilize"; "I'm worried" not "I'm concerned."
- *Use the active voice*: "John was hit by a truck" is not as strong as "The truck hit John."
- Get rid of excessive verbiage such as *unnecessary adjectives* and *"thats."*
- Eliminate those favorite words or phrases you have that don't belong in the letter.
- *Check for repetition* in words and phrases and replace them whenever appropriate.

## Format

- Make the document look like a *personal letter*, regardless of the production process.
- Use first-line-indented paragraphs.
- Incorporate only one idea into each paragraph.
- Use short paragraphs.
- Use visual, expressive, *action-oriented words*.
- People seldom read an entire letter, *so underline and create different size paragraphs* to hold interest.
- *There is no ideal length* - eliminate everything that is not needed, but state your case thoroughly.
- Do not include long lists of board members or honorary advisors on your letterhead, particularly if the list is not impressive.
- In most cases, the highest ranking executive or volunteer leader should sign the letter.
- *Celebrity endorsements can be convincing*, but only if they are strongly identified with the cause and can write sincerely about it.
- *A P.S. is effective* - be substantive, providing an additional reason for giving and a date to give by.
- Before going to press, proof the text again and again for accuracy (content, grammar and format); also have two colleagues do the same.

# *The Sheridan Group* – Education Series

## The Direct Mail Package

Although you may produce what you believe is an exceptional fund raising letter, the letter is only part of the package that your prospects will receive. Remember that overall package concept is important - it must work as a unit.

### Enclosure

- An enclosure should provide information which cannot be included in the letter, such as the full services offered by your institution or specifics about the project needing funds. Otherwise, an enclosure is not necessary and should not be used.
- *Photographs* or *graphics* can be very effective.
- *Newspaper stories* and *endorsement letters* on different paper stock make good enclosures.
- Mention the enclosure in the letter.

### Reply Slip

- The reply slip should be a self-contained and complete fund raising document.
- Keep the reply slip simple to read and to complete.
- The reply slip must clearly identify the donor's name, address, gift/pledge amount (pledge payment schedule, if applicable).
- *Include a return address in case*, for whatever reason, your donor does not have a reply envelope.
- Print the reply slip on colored paper stock so that it stands out from the rest of the package.

### Reply Envelope

- A windowed reply envelope is appropriate in a direct mail package which uses a donor identification label on the reply slip.
- *Repeat the theme* of the campaign on the envelope.
- A first-class stamp should be used for a special donor or friend.
- Mentioning "Your stamp is an additional gift" can be worthwhile.
- *Address the reply envelope to an individual*, preferably the person who signed the solicitation letter.
- Use a business reply envelope when direct mail prospecting.

### Outside Envelope

- Mail first-class rather than bulk to top donors.
- Use a commemorative stamp when appropriate, not a metered envelope.
- A precanceled stamp is the next best alternative to a first-class stamp.
- *Type the name and address* rather than use a label for a special donor or friend.
- *Use an envelope that is not the standard #10 size (6" x 9", which looks like an invitation)* to attract attention.