

Writing Effective Appeals

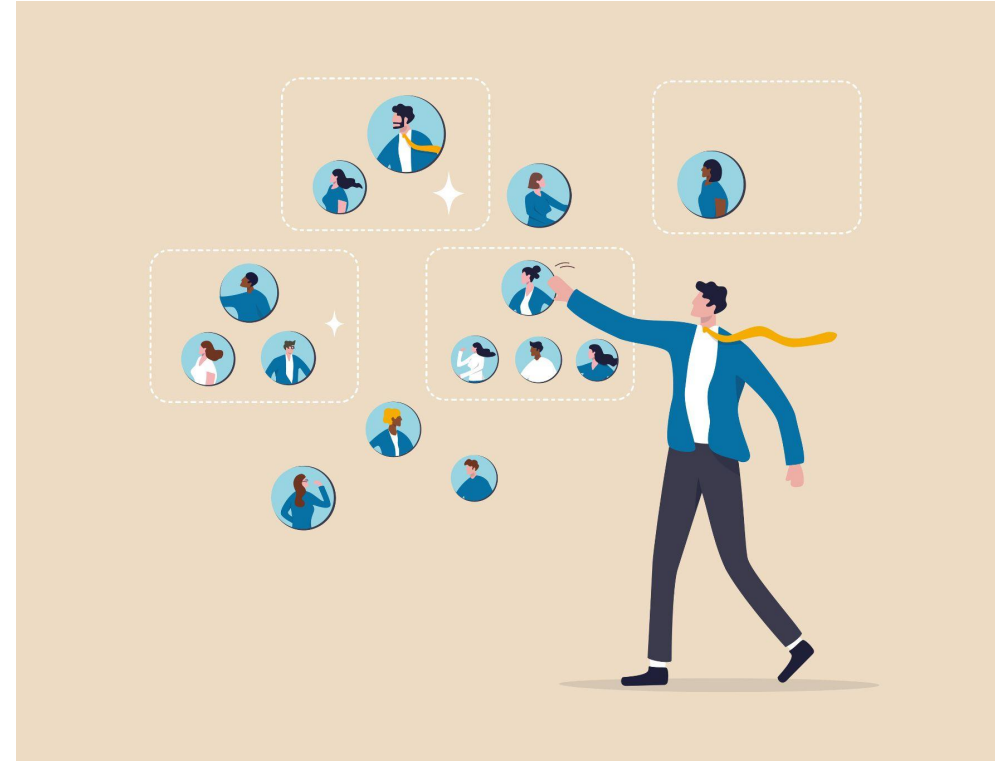
Agenda

- Understanding your role
- Defining your audience
- Establishing a framework
- Developing your message

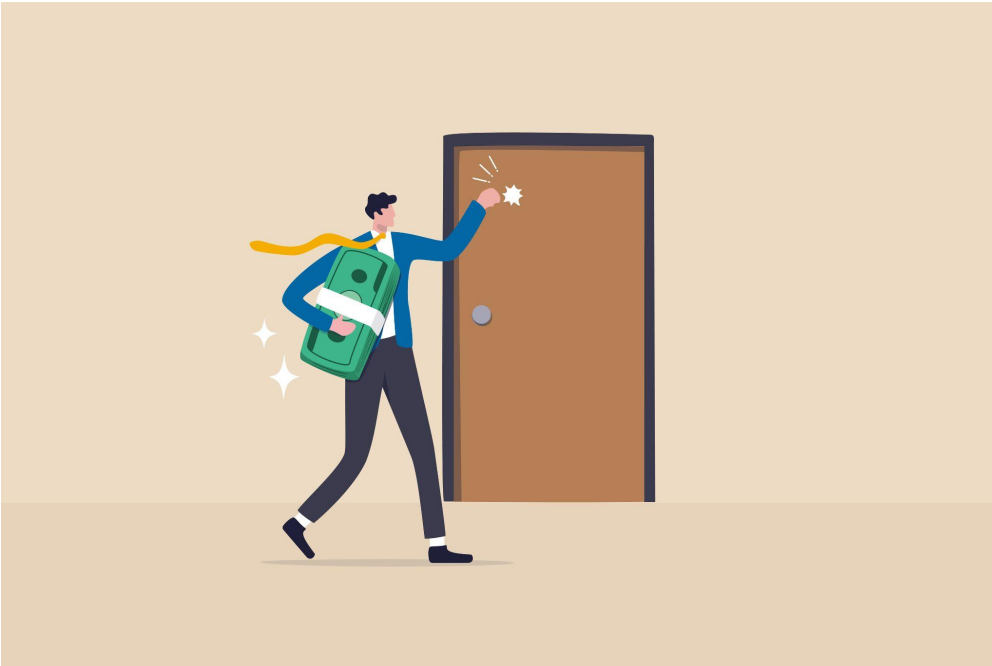
UNDERSTANDING YOUR ROLE

Appreciate the many roles in producing an appeal

- **Writer**
- Editor
- Designer
- Paper supplier
- Printer
- Lettershop
- Postal system
- Data manager
- Gift processor
- Project manager



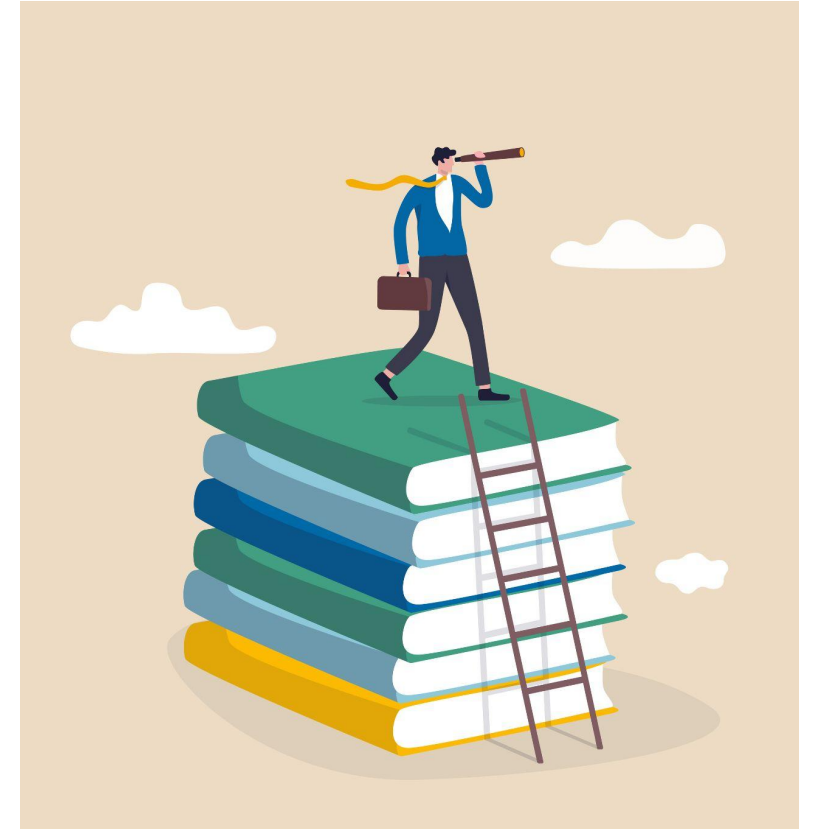
Imagine yourself a door-to-door salesperson



- Compel the reader to read
- Connect the reader to the institution
- Describe a need
- Explain the impact of support
- Persuade people to give money now

Know as much as you can about your organization

- Mission
- History
- Culture
- Leadership
- Org structure
- Academic focus
- Current events
- Students
- Faculty and staff
- Alumni
- Parents
- Strategic plans
- Fundraising priorities/goals
- Impact



Experiment and test



- Ask amounts
- Designations
- Phrasing
- Length
- Voices

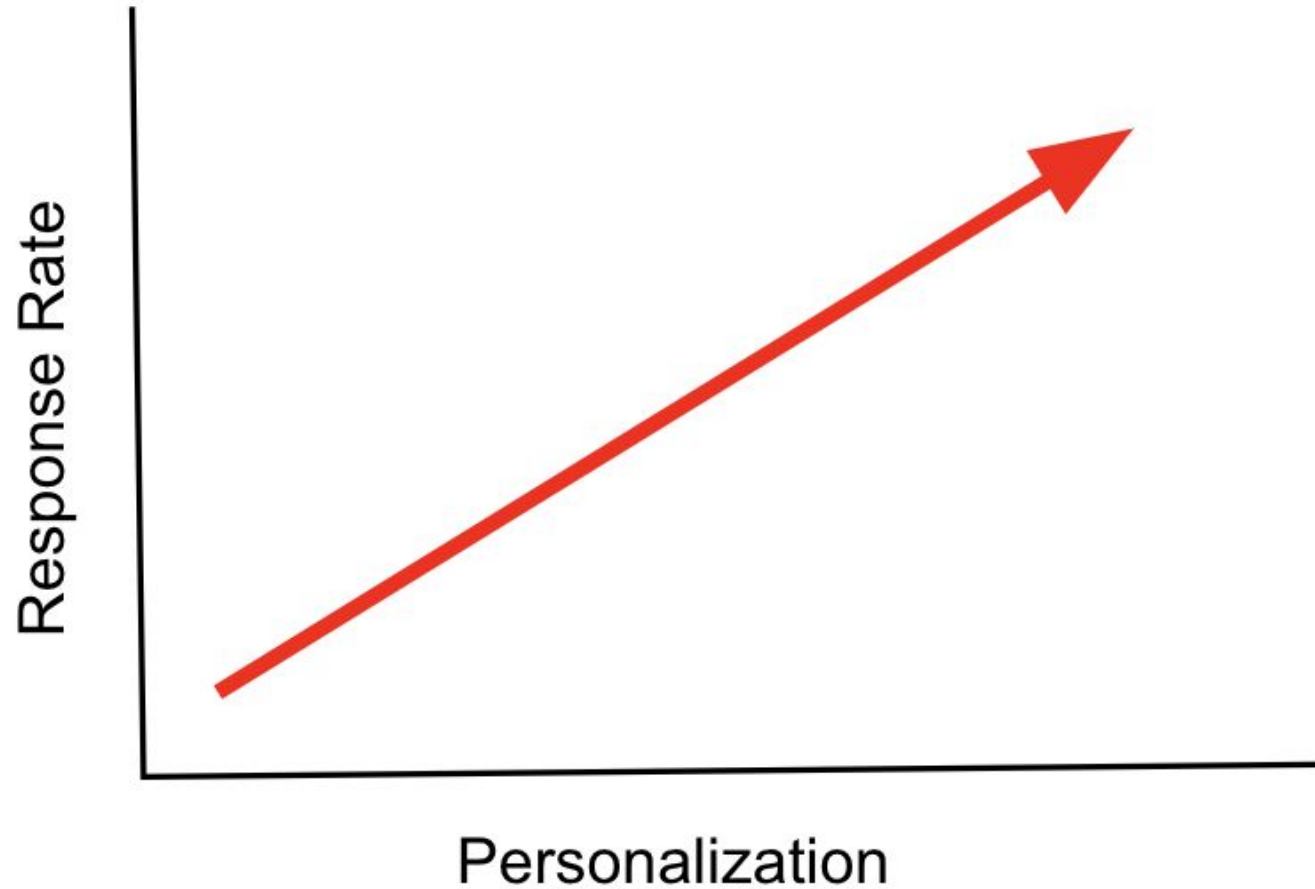
Keep in mind that appeal writing...

- Is a process
- Isn't easy
- Takes time and energy
- Requires organized thoughts



DEFINING YOUR AUDIENCE

Spectrum of personalization



Keys to personalization - *beyond variable text*



- Constituency group
- Prospect segment
 - Goal
 - Needs
 - Tone
 - Voice

Determine which constituency they represent

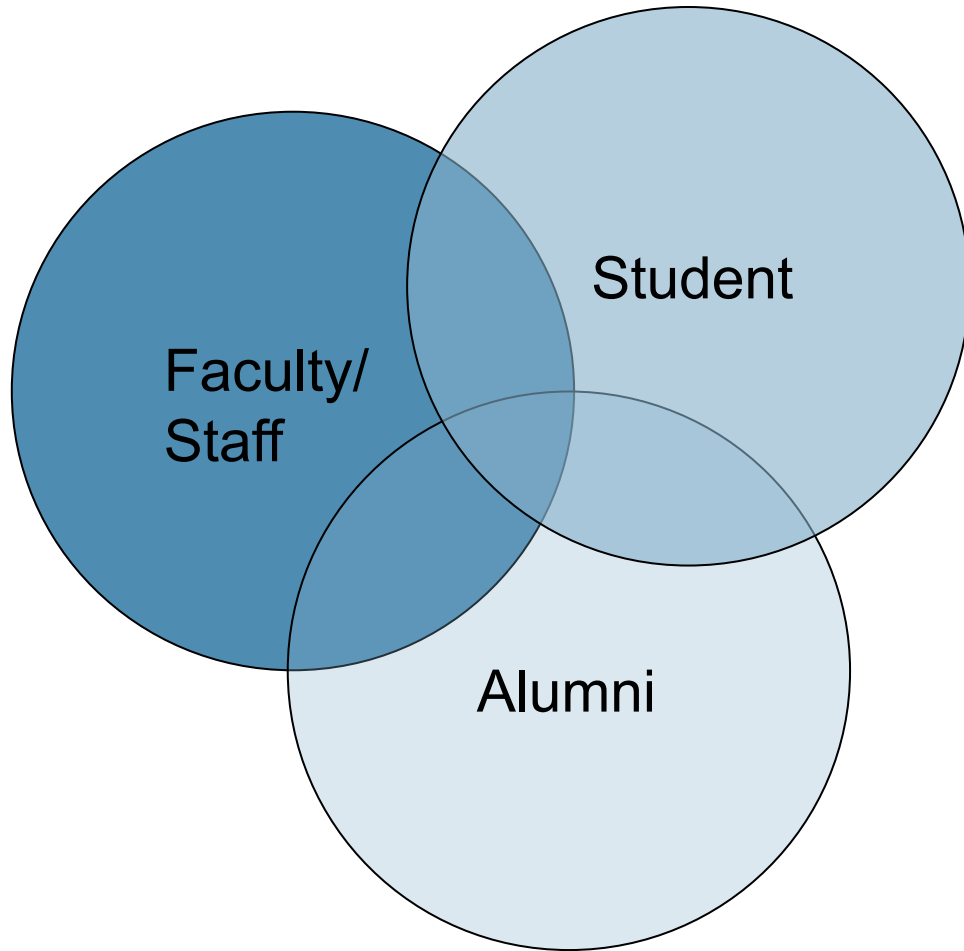
- Students
- Young alumni
- Reunion alumni
- Parents
- Faculty/Staff
- Friends



Imagine their likely interests

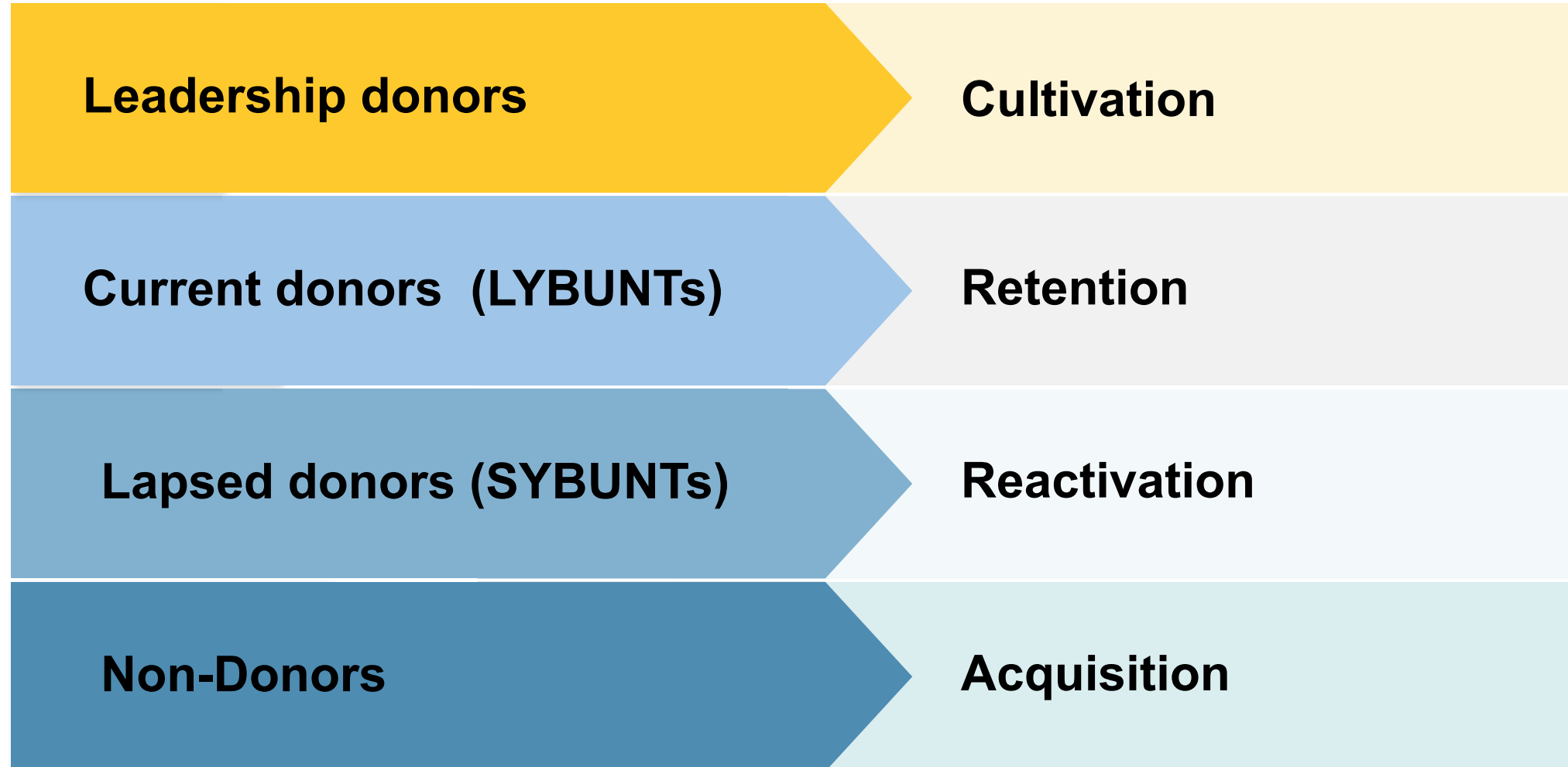
- Students - *Scholarships, athletics, campus life*
- Young alumni - *Athletics, college or department funds, excellence funds*
- Reunion alumni - *Memories, traditions, campus buildings/spaces*
- Parents - *Student services, campus life, safety, career services*
- Faculty/Staff - *Campus improvements, their programs, financial aid*
- Friends - *Whatever they've supported in the past*

Recognize when they belong to more than one group



- Track in your database
- Understand priorities
- Establish policies
- Alternate at different times of the year
- Let them indicate how they view themselves

Determine a *goal* for each prospect segment



Appreciate the unique *needs* of each segment

- Leadership donors - *To feel appreciated and important.*
- Current donors - *To feel recognized and that they belong.*
- Lapsed donors - *To feel missed and that past gifts mattered.*
- Non-donors - *To feel excited, but that they're missing out.*

Consider a *tone* that resonates with each segment



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

Identify a *voice* that resonates with each segment

- Leadership donors - *Authority figures* (e.g. *President, Head of School, Dean*)
- Current donors - *Beneficiaries* (e.g., *students, faculty*)
- Lapsed donors - *Stewards* (e.g., *staff*)
- Non-donors - *Peers* (e.g., *classmates*), *Influencers* (e.g., *popular alumni/faculty*)



Bring it all together in a messaging matrix

Constituency A

| Segment | Goal | Tone | Voice |
|-------------------|----------------------|--|---------|
| Leadership Donors | Secure larger gifts | Formal, important, exclusive, constructive | Leader |
| Current Donors | Renew past support | Purposeful, appreciative, impactful | Staff |
| Lapsed Donors | Win them back | Ambitious, collaborative, nostalgic, progressive | Peer |
| Non-Donors | Inspire a first gift | Informal, optimistic, excited, inclusive, proud | Student |

ESTABLISHING A FRAMEWORK

Core components of an appeal



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

Introduction

- Make the most of the first 20 seconds
- Create a strong first line - no leisurely warmups
 - Ask a question
 - Share a quote
 - Make a shocking/controversial statement
- Draw the reader in
 - Tell a story
 - Evoke a memory
 - Acknowledge their relationship to the institution (e.g., parent, reunion)
 - Make it clear you know their donor status



Case for support



- Explain a problem/why money is needed
- Provide example(s) of the impact
- Illustrate the consequences of inaction
- Balance facts/numbers with emotion/stories
- Help them see themselves as part of a solution

Call to action

- Ask for money (i.e., gifts) - *not support!*
- Be clear and direct
- State a specific amount (refer to gift society levels and milestones)
- Create a sense of urgency with a specific deadline
- Test asking (higher response %) vs telling (higher average gift \$)
 - *Interrogative (ask): “Will you please join in this effort with a gift of \$X today?”*
 - *Declarative (tell): “Please join us in this effort with a gift of \$X today.”*

Conclusion

- Synthesize your main points
- Repeat the ask
- Get them thinking about themselves
- Express gratitude in advance
- End on a positive note



Signatory



- Give your message a voice
- Choose someone your reader is familiar with, respects and relates to
- Use it as an opportunity to engage volunteers and donors
- Plan for their involvement and possible edits

Postscript

- May be the first (or only) thing someone reads
- Highlight something important from the content
- Introduce something new
- Restate the ask (up to 3 times)



DEVELOPING YOUR MESSAGE

Establish a process that you can follow

- Trust your framework
- View “starting” as the smallest (but most important) step
- Plan for multiple drafts
- Assume that nothing is well written - *only well rewritten*
- Arrange feedback (i.e., developmental edits) early on
- Prepare a careful proofreading of your final draft

Set yourself up for success

- Give yourself plenty of time - don't procrastinate
- Pick a good time - know your own cycles
- Find a good environment - light, sound
- Have the right tools - computer, pencil, recorder
- Establish goals
- Set time limits
- Take breaks (Pomodoro)



Overcome writer's block



- Reorient your brain
- Change your environment
- Do something physical
- Play a game
- Listen to music
- Freewrite
- Leverage AI tools
- Refer to past versions for ideas

Portray the institution as a winning cause

- Don't make your institution look like a sinking ship
- Think of your prospects as investors
- Focus on outcomes rather than need
- Remember that donors may see the organization as an extension of themselves
- Create pride through association



Choose strong words



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

Highlight what's most important

- **Bold**
- *Italics*
- Underline



Write the way you talk



- Include a mix of short and long sentences
- Use contractions
- Don't use any unnecessary big words
- Avoid acronyms and jargon
- *Try* to be concise
- Don't be afraid to repeat

Impress them with numbers

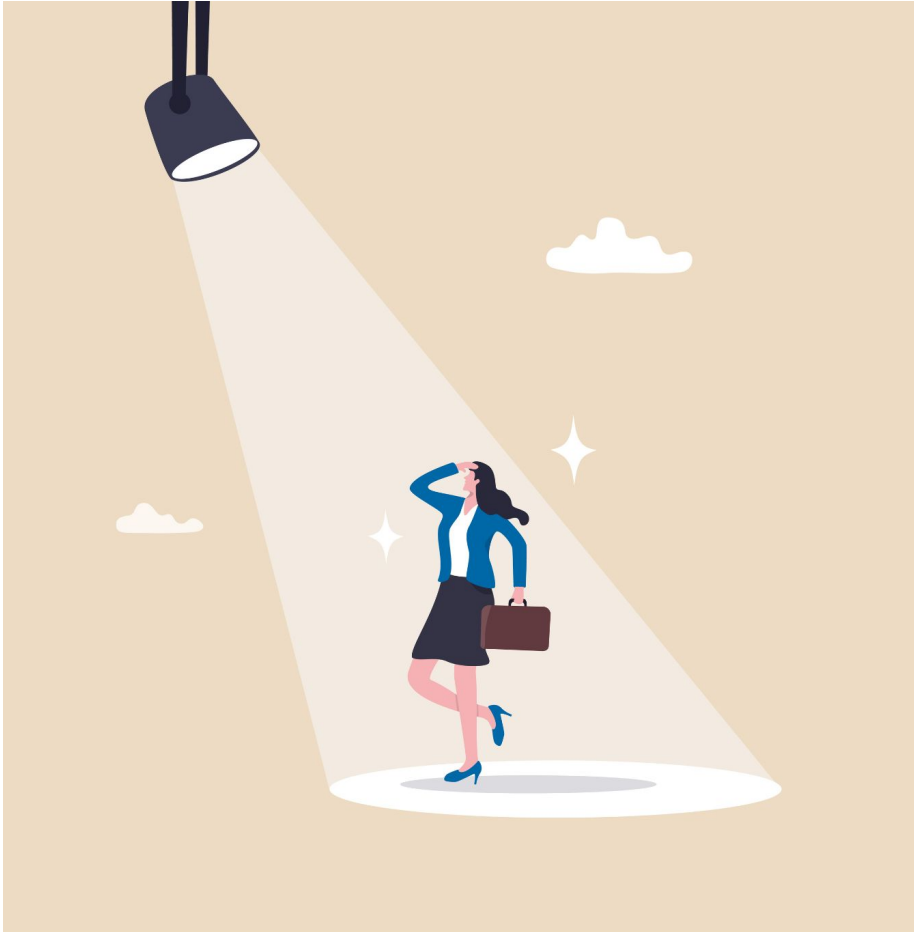
- Your last gift puts you in the top 10% of our donors.
- The average gift last year was \$250.
- Our alumni participation rate is 7% - just below the national average.
- Over 50% of our recent graduate donors choose to give \$20 a month



Move them with stories

- Focus on an individual (1,000 people vs. 1 person)
- Introduce the individuals who benefit from donations to the reader
- Make them real (names, background, relationships)
- Describe challenges and obstacles, but ultimately point to positive outcomes
- Avoid “thought verbs” (what the subject was thinking/feeling)
 - *Don’t: He was so excited to get into college.*
 - *Do: He shouted the news out the window to the entire neighborhood when received his acceptance letter.*

Focus on the donor



- Write to an audience of *one*
- Don't over emphasize your organization
- 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
- Make them the hero in the story

Key Takeaways

- Understand your role as a writer
- Know your audience, so you can personalize your appeal as much as possible
- Work within a sound end established structure
- Develop a process that allows you to produce good work
- Focus on the donor



aGn

ANNUAL GIVING NETWORK