Proven Methods to Improve Fundraising by Direct Mail

Second Edition
Proven Methods to Improve Fundraising by Direct Mail

There are many aspects to a successful Annual Plan. The focus of this manual is on getting the best results from direct mail appeals.

First, we cover some of the basics that every annual plan manager should practice.

Then, in the sections that follow, we get into appeal letter details—those specifics about writing and designing that will help improve your appeal results.

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The Annual Plan

A thank you to every donor

Prior to sending out your first mailing, be sure you have prepared a thank you response vehicle to send immediately upon receiving a gift. Suggested practices:

- Send a thank you/receipt within 24 hours of receiving the gift
- Send a receipt within 24 hours, and a personally signed thank you card within 2 weeks
- Send a receipt within 24 hours, and a personally signed thank you letter and membership or information package within 2 weeks
- Make a thank you phone call to larger donors

Use multiple channels

Using multiple channels in your annual direct mail plan increases response and gifts.

- The 2008 donorCentrics™ Internet Giving Benchmarking Analysis found that online donors tend to give larger gifts than traditional donors and have lower retention rates overall than direct mail donors.¹
- But when both communication channels are operational, retention is higher. Online donors have higher retention rates when they give by mail in year 2 and following.¹
- The 2010 eNonprofit Benchmarks Study found that donation rates in response to e-mails for small nonprofits are higher than large nonprofits but still averaged only 0.25%. Meanwhile, only 25% of online giving was driven by e-mails.²
- The 2010 Convio “Next Generation of American Giving” report shows that checks by mail still exceed online giving by a significant margin.³

¹ 2008 donorCentrics™ Internet Giving Benchmarking Analysis, Target Analytics, March 2009
² www.e-benchmarkstudy.com
Coordinate the multiple channels

- Ensure you have a make-a-gift button on your home page; and provide a link to an online donation landing page that ties to your direct mail
- Follow appeal mailings with an e-mail to all recipients
- Phone calls from volunteers increase the effectiveness of a mailing. They are most effective when the prospect already has a pledge card sitting on the kitchen counter waiting for action.
- Consider conducting a thank-a-thon. They have been shown to increase donor retention and gift size (see Penelope Burk’s book in the bibliography). You won’t reach most people, so leave a voice mail expressing appreciation.
- Effective year-end appeal scheduling showing use of multiple channels:
  - November 3: appeal letter mailed
  - November 15: follow-up e-mail blast
  - November 29: appeal postcard mailed
  - December 5-8: thank-a-thon/phone-a-thon
  - December 27: follow-up e-mail blast

Keep the conversation going

- Don’t let your only communications be appeals for money. Let your donors and prospects know what their money is doing to help people and to deliver your organization’s mission. Send newsletters, e-mails, links to website stories, Facebook posts, and event invitations. Engage them with a survey. They’ll be more likely to give and to give more.
- Avoid including enclosures in the appeal mailing (except for membership benefits or Giving Circle inserts). Send additional information with the thank you letter or membership package.
Be persistent

• Experts advise sending three to eight appeals per year: spring, early fall, and December is the minimum schedule for previous donors.

• Many recipients will not open, will misplace, or will not act on the first appeal. Donors lose response cards or envelopes. Some save them for end-of-year decisions. Sending a reminder can help them and help you.

• Others will give two or three times during the year, or each time they’re asked.

• Some fundraisers worry that asking more than once is pestering, but remember how much noise there is in the market. Donors are bombarded with hundreds of messages every day. The smartest nonprofits communicate every month and ask three times per year for a gift to the annual fund.

• Make sure your database codes donor requests to opt out of solicitation, to receive only one per year, to receive only e-mail solicitations, etc.

• Send additional appeals for other projects.

• Maximize your gift renewal rate by continuing to ask previous donors who haven’t given yet this year. This is your first priority. Target 70% annual retention as a benchmark—and ask others in your field what their targets are.

• Those who develop a habit of giving to your organization will be the most cost-effective donors, the most likely to increase giving, the most likely to become long-term consistent donors, and the most likely to contribute a major gift in the future.

Keep good data

• Review accuracy of data input regularly. Pay particular attention to correct spelling and addresses, salutations, gift dates and amounts, opt outs or preferences, and duplicates.

• Code every mailing and every segment in a mailing. Put the codes on the response card or return envelope and enter them accurately when received. Use donor ID numbers on response cards to improve data entry.
Set targets: Know your performance results and test when possible

There are many metrics you could track. Decide which are the long-term drivers of improved performance and track those. Here are two of the most important for annual fund managers:

- Donor loyalty is the key annual fund performance metric over the long run; do you know your donor retention statistics by heart?
- Are your prospect pool size and prospect conversion rates high enough to compensate for annual donor attrition?

Keep learning

- Read the books in the bibliography
- Talk to other annual fund managers
- Go to the coffees, educational seminars and meetings of
  - AFP (Association of Fundraising Professionals)
  - CONFR (Council on Fundraising)
  - CASE (Council for the Advancement and Support of Education)
  - NEAHP (New England Association of Healthcare Philanthropy)
Example: **Annual Fund Direct Marketing Plan**  
*(downloadable from http://www.mailritevt.com/improve-fundraising/annual-plan/example)*

<table>
<thead>
<tr>
<th>Month</th>
<th>Activities</th>
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</table>
| July   | - Quarterly newsletter (mail and e-mail)  
- Develop volunteer committee. Volunteers must be those who have contacts and will participate in asks and phone-a-thons; they are not envelope stuffers!  
- Develop leadership circle group schedule for participation in special events with dates in the coming year. |
| August | - Identify leadership-gift prospects based on existing or found relationships  
  - Begin developing those who haven’t given previously  
  - Volunteers and staff solicit top prospects who have given previously  
- Thank you postcard with previous annual fund results or link to online annual report |
| September | - Direct mail  
  - Hand-addressed, special package to all who have given at $125 or above, inviting them to join a leadership circle group at the appropriate level.  
  - Direct mail package to all donors and prospects (members, alumni, visitors, patients, etc.), inviting them to give, renew, or become members.  
  - E-mail follow-up, notifying that package should have arrived and asking to give online or to return pledge card.  
  - Phone-a-thon follow-up to all previous donors within one to two weeks of receipt of package. Solicit monthly debited giving from those who give twice per year. |
| October | - Quarterly newsletter (mail and e-mail) |
| November | - Special letter to all current and previous donors or members about how gifts were used: accomplishments, who was helped, and how the mission was delivered. |
| December | - Second letter or postcard, mailed first week of December to those who haven’t yet given  
- Volunteer call to those not reached  
- Reminder e-mail last week of December to those who haven’t yet given |
| January | - Quarterly newsletter (mail and e-mail) |
| February | - E-mail survey of donors and members |
| April | - Quarterly newsletter (mail and e-mail)  
- Spring donor appeal and prospect mailing, different letters/ask strings for those who gave in fall and those who didn’t.  
- Phone-a-thon follow-up |
| May | - Postcard reminder |
| June | - Year-end e-mail reminder to those who have yet to give |
The Letter

Write a letter that works! Here are tips, based on the advice of experts in the field of direct mail fundraising, to help you produce more responses and higher donations. You don’t have to use all of these ideas, but if you don’t use many or most, at least ask yourself what you’ll lose by ignoring them. Research shows that design and typography choices can reduce readership and comprehension of your letter by up to 90% (See the bibliography for the references).

What recipients notice first: Capture the reader’s eye

Research shows that a direct mail letter is read in the following order:

• The letter heading and the recipient’s name
• Paragraph headings, bolded text, and photo captions
• The signature and postscript
• And then, maybe, the body text

Who is writing to me and do they know who I am?

• Use a personal salutation when writing to donors, members, alumni, visitors, patients, etc. If you don’t have a salutation field in your data, Mailrite can create one from your mailing list.
• Acquisition mailings using outside lists are sometimes generic due to cost. The reply device, however, should be personalized.

5 Words You Must Use in Your Fundraising Letter

They are simple words, but it’s so easy to write a donation request letter and not use them. Our schools and employers teach us to write impersonally, formally, pompously. So, go back through your letter draft and check for these five words: It’s an easy way to improve your donation request letter, thank you note, or donor update.

1. The donor’s first name. No word in the English language is more important than our own name. No word has the power to capture our attention like our own name. Our name is a power word. The most important people in your life use your name: your mother, your spouse, your children, your friends, your boss.
Use the prospect’s name three times in an appeal letter. Here are the best places to use it.

a. in the address heading
b. in the salutation
c. in a thank you sentence
d. in the ask sentence
e. in the P.S.

2. **You.** Fundraising letters are about what the donor wants, not about what you want. Donors want to do something about problems they care about. They want their contribution to be recognized. Not, “Our generous donors helped,” but “You helped.” “You can make a difference.” “Your assistance made it possible.”

3. **I.** Not, “We hope...,” but “I ask you to ....” “I’d like to let you know how your money has been put to work.” “I’d like to like to tell you how much your donation has accomplished.”

4. **Thank you.** I know, I know—thank you is two words, but for our purposes here, I’m counting them as one. Donors want to know that they accomplished something and that you appreciate them!

5. **Give.** “Please give $100 today.” Or, “I hope you will continue your support by sending a gift today of $100.” Use “donate,” “make a donation,” “make a gift,” etc. You get the point! (Never use the word “support” as a substitute for the more specific “give” or “donate.”)

Using these five words will go a long way to making your letter personal and less like organization speak. A personal letter touches the emotions. An organization letter speaks to the intellect. It’s the intellect’s job to say no. It’s the emotions’ job to say yes.

Here’s a sentence that uses all five words:

Gary, your generous support of our Capital Campaign made the new Y possible. Thank you! I hope you will continue your support with a gift to our annual Reach Out Campaign.

Put these words to work for you. Remember, if one or two more people out of 100 respond, that’s a lot of help over the long run. So, details count!
Example: Connecting to the donor’s values (letter front)

For the rapid reader, note how the underlined text, the photo, and the P.S. make the case for giving and ask for the gift.

Identifies the need and makes it personal to the donor

Photo is irresistible and the caption tells the story

November 10, 2010
Gary Henricksen
131 Village Road
Surry, NH 03431
Dear Gary:

Equality * Pacifism * Community * Sustainability * Responsible Land Stewardship
Simplicity * Embodiment of a Spiritual Ideal * Quality in Work

Aren’t these values you hold dear? Don’t you see too little of them in the world around you? Would you like to see these values have more impact on our modern lives? Your gift to Hancock Shaker Village will help make that possible.

These are the values embraced by the Shakers—a group of ordinary individuals with deeply-held religious convictions who chose to gather in community to live a principled life.

I invite you to read the list again. Consider how these same values resonate for us today: think green building, renewable resources, local agriculture, respect for the environment, reducing consumption, the demand for peace and equality, the renewed interest in fine artisanship.

I think you’ll agree... the lessons of these remarkable people have much to teach us contemporary Americans. Our mission at Hancock Shaker Village is to preserve the experience and values of the Shakers, and bring their profound impact to your family and your neighbors throughout our region.

We’ve had many successes in the last year, our 50th, bringing the Shaker perspective and way of living to thousands of visitors and all the participants in our special programs.

This year almost 60,000 people visited, including nearly 8,000 children who entered free of charge and benefited from fun and educational activities. Here were some of the most popular programs this year:

- Renewable Energy Tour
- Young Shakers Tour (for ages six to twelve)

PO Box 927, Routes 20 & 41, Pittsfield, MA 01202
413.443.0188 800.817.1137 Fax: 413.447.9357 www.hancockshakervillage.org
Example: **Connecting to the donor’s values (letter back)**

- Attics and Basements Tour
- Timber Framing seminar
- To Bee or Not to Bee (beekeeping)
- So, You Wanna Have a Backyard Chicken Flock...?
- Shaker Cooking for Today

You can be proud that your Village is having so much impact.

But we must do more to change the world around us. So I set a new goal this year: provide more opportunities for a broader audience to connect with and learn about the Shaker perspective and way of living.

I need your help to do that. Your previous support at the $50 membership level on 7/8/2008 has been invaluable in sustaining Hancock Shaker Village both as an exquisite living museum as well as a place where the public—young and old—can experience and reflect on the Shaker values and their relevance today. I’m very grateful to you for your generous participation.

Gary, will you use the enclosed reply card and envelope to renew your membership now? Your generosity in renewing now will help us move forward with our plans for the coming year. We’ll bring the Shaker experience and values into more and more lives.

Sincerely, and with best wishes for the holidays:

Ellen Spear
President and Chief Executive Officer

P.S. Have you considered upgrading to the next membership level? Check out the enclosed membership card to see all the benefits that upgrading will bring you.

Renew your membership now, and put the members-only holiday gift shopping days on your calendar. Visit Hancock Shaker Village on November 26th, 27th and 28th to receive dramatic savings on all Shaker gifts!

Photo by A. Blake Gardner
The postscript: Use it!

- Always include a postscript on the letter. Research shows that 90 percent of all direct mail recipients read the postscript before the body text.

- The postscript should be a call to donate, but make it interesting—don’t just repeat the letter text. Add a new benefit or an additional intriguing fact, or explain why it is urgent to send now. Here’s some examples:

  P.S. Do you know that your membership dues support our program to make digital images of historic documents and objects available online! Support more “virtual exhibitions” by re-joining now!

  P.S. Have you considered upgrading to the next membership level? Check out the enclosed membership card to see all the benefits that upgrading will bring you.

  P.S. When we began planning for our new building, it was important to us that EVERYONE in our community feel welcome. But without your donation, some would be left outside looking in. Please help us provide access to all by returning your donation today.

  P.S. Gary, your previous support has enabled the School to educate graduates who can change the world. Please join us in doing the same this year as a member of the Annual Fund Leadership Society. Your gift will be put to immediate use, and will be particularly helpful if received by June 30, 2012.

  P.S. Every dollar you donate is tax-deductible and is used effectively and efficiently. Over the last five years, every $84 donated to the Conservancy has allowed the protection of a full acre of land!

  P.S. Gary and Charri, thanks so much for your previous support. Please make an annual fund gift now of $35, $50, or $75 to help us maintain our high level of staffing, equipment, technology and community healthcare. Every gift matters. And you matter to me. Let’s strengthen our community hospital together. Thank you for joining us again as an annual fund donor.
Use a picture and caption to draw your reader in

- Research indicates less than 50% of those who open letters read the body text. Readers often scan and skip unless something special draws them in. Most readers WILL look at a picture and read the caption.

- Using pictures in appeal letters:
  - Show people rather than things. The subject should be looking towards the reader. Research shows that the most attractive things to the human eye are other human eyes and faces generally.
  - Mailrite can insert your black and white photos when printing the letter text at no extra cost.
  - Color captures more attention than black and white. If Mailrite digitally prints your color letterhead when printing the letter text, color pictures can be included at no additional cost.

Formatting rules: Write a letter that will be read and understood

- Black text only. Other text colors reduce comprehension by 30–90%.
- Use a serif font for body text. Sans serif fonts reduce body text comprehension by a factor of up to 5 [but san serif type doesn’t reduce headline readability].
- Use one of the following type size/leading combinations: 10/12, 11/12, 11/13, 12/13. They all get over 90% comprehension.
- Spot color increases initial attention to the letter by up to 80%, but use it only in non-text elements.
- Never use reversed type: readability is reduced by a factor of 5 or more.
- Never use more than a 10% tint behind black text. Color text on a color background reduces comprehension to near zero.
- Jumps and cutoffs annoy 70-80% of readers, but widows, orphans, and copy that wraps around an image don’t affect readership.
- Keep body measure to between 20 and 60 characters.
- Long and multi-deck headlines reduce readership.
• Compared to upper and lower case headlines, ALL CAPS headlines reduce perceived legibility by 30%.

• It’s a letter, so stick with flush left or justified text; no ragged left text.

• Display items like pictures work to increase attention without reducing readership when placed at the upper right top and middle left center.

• Have a compelling story or need to explain a special project that requires more than one page? Don’t shrink or squeeze the text; go ahead and continue onto the back of the page. Underlining, bolding of key phrases, and paragraph headings will lead the reader through a two-page letter.

• Acquisition letters may need to be longer so that prospects will have enough information to decide whether they’ll join your organization or make a first gift.

• Always take one last look and ask yourself: “Have I made this letter as easy to read as possible?” Use our handy checklist at the end of this section to evaluate your letter design.

The body text: Win their hearts—tell a story

• Explain how the donation will help a person. Recent research has shown that fundraising copywriters are less likely to use story-based language to compel action than writers in other professions. This just doesn’t make sense!

• Tell how the donation will help further the mission and goals that the donor shares with your organization

• Don’t wedge your story in between financial reports, news of staff changes, assurances of cost cutting, or other management issues. That information is important and you need to communicate it—but at another time.
The signature: Make it real

- Multiple signatures reduce the personal nature of the letter; one signature is recommended.

- The signature should look as clean as possible when printed. This starts with a good scan. Here’s how to do it:
  - Ask the signer to write his or her signature in large letters on a white page with a fine black felt tip pen.
  - Mail the page to us and we’ll scan and reduce the signature to the appropriate size. We’ll keep that signature on file for future use. (If you choose to scan the signature, we prefer that you send it to us in a lossless format, such as a .tif or a .bmp.)
  - Mailrite can print the signature in blue for a more authentic look.

Vary the message based on donor or prospect segmentation

- Craft the ask based on the donor’s past giving (e.g., LYBUNT, SYBUNT, NEVER; previous gift).

- Mine your database for ways to personalize your letter; e.g., size and/or date of last gift, frequency of giving, largest gift, date of first gift, number of years of consecutive giving or membership, date of birth, giving club membership, class year, indicated interests or designated gifts history, what the donor’s last gift accomplished based on its size or designation, or the donor’s location.

- Personalize as much as possible. Use the recipient’s first name in the body text, the postscript, and the reply card. You’re already using it in the salutation; why not make use of it in other places to make the entire communication more personal?
Checklist for Effective Appeal Letters
(downloadable from www.mailritevt.com/improve-fundraising/letter/checklist)

Content

☐ Has the marketing proposition behind the appeal been worked out? Is it consistent with the organization’s case for giving?

☐ Makes clear what problem the organization is addressing and how a gift will help solve that problem?

☐ Is the letter from one person to another? Not from a committee?

☐ Engaging? Personal, even chatty style?

☐ Creates a bond; uses “you” and “I”?

☐ Appeals to emotions via narrative?

☐ Uses a limited vocabulary, short sentences, and paragraphs? Have extra adjectives or adverbs, verbal crutches, circumlocutions been edited out? Uses active voice not passive voice?

☐ Includes a call for giving in the body of the letter (first or last paragraph) and in the P. S.?

☐ Asks for a specific amount, not just for “support”?

☐ Focuses on the difference the money will make in the life of an individual and how the gift will deliver the mission, not how much the organization needs the money?

☐ Includes “thank you”?

☐ Starts with a personalized salutation, and may include the donor’s name in a critical sentence in the body text?

☐ Reminds the donor of the benefits of giving? Describes an opportunity for the donor to meet personal needs or achieve personal desires by supporting a worthy charitable aim?

☐ Are the claims in the letter believable and the narrative authentic?

☐ Is it clear why readers need to respond right now?

☐ Does the opening paragraph of the letter engage the reader’s attention?

☐ Does the P.S. disclose some benefit or intriguing fact that’s not discussed in the body copy? Is it especially interesting?

☐ Does an extra gift or upgrade letter lay out the reasons why the donor’s aims will benefit from giving more?
**Design**

- Looks like a letter?
- Photos or graphic elements are correctly placed: top right or middle left; no middle graphic crosses the whole page?
- Uses a high-quality signature; blue if possible?
- One signature?
- Photos, if any, are of people and have captions?
- Uses spot or full color in one or more non-text elements?
- Do a few important phrases in underline, italics, or bold lead the reader on the first glance-over through the essential elements of the narrative and the appeal?
- Uses two pages (front and back) if needed to tell the story without crowding?
- No more than seven lines per paragraph?

**Typography**

- Uses a serif typeface?
- Text is in black only?
- Uses 10/12, 11/12, 11/13, or 12/13 point text/leading?
- No reverse type?
- Any color behind the text is limited to 10% tint?
- Headlines, if any, are in upper and lower case, not ALL CAPS?
- Text flush left or justified?
The Ask

Studies show that even the most loyal donors may forget to give annually, as well as the amount of their previous gifts—without a reminder, that is. With the appropriate action on your part, you can improve the results of your annual fundraising appeal.

Successful direct mail fundraisers suggest that annual appeal letters should include a reminder of when the donor gave previously, the amount of the last gift, and a challenge to increase support.

Ask for a specific amount based on the donor’s history, or determine a donor's capacity through wealth screening or peer review. Every major gift development manager knows that a gift solicitor must determine the right “stretch” ask amount to set the level of expectation with the donor. Major donors expect this. The same principle applies to even the smallest gifts solicited by mail.

Here are two recent examples from Mailrite clients:

- The manager of a large annual fund reported to us that they sustained the highest renewal rates and amounts when they included the donor’s previous four years of giving history on their response form.
- Another annual fund manager, whose three-times-per-year appeals usually don’t include a personalized ask amount, reported to us that they got their best response when they did.

Be specific and direct. It works!

Ways to ask for the right amount: Don’t be shy

- Remind donors when they last gave and/or that you haven’t received their gift yet this year (or season).
  - Ask for the same amount as last year’s gift, plus one or two higher suggestions [see the end of this section for a table of ask suggestions].
  - Or ask for just one amount, at a higher level than last year’s gift.
  - Or ask for a larger amount than the last gift, no matter when it was given, when asking for support of special initiatives.
• Thank the donor for the amount given so far this year, and then ask for the final gift amount. Include the previous gift date; e.g., “Thank you for your gift of $100 on October 17, 2009. Your gift helped fund the visits of 1,000 school children this season. Your additional gift of $100 at this time will help us complete our annual visit program.”

• Invite the donor to join a higher giving circle/club. (You can try wealth screening to determine the appropriate level.) For example, “I’m turning to you, and 25 other special friends of the center, to ask that you provide a leadership gift of $5,000.”

• Repeat the reason for giving on the response card. Affirm the donor’s eagerness to help (As in, “YES! I want to support…”).

• Invite donors to make their gifts through monthly credit card or bank-debited giving. This increases the gift amount, makes the donor’s commitment open-ended, and constantly reinforces the donor’s involvement. Converting once-a-year donors to monthly sustainers works best when an enrollment form is combined with a follow-up phone call. The best targets for this conversion are those who have given smaller gifts several times.

• Select donors whose highest gift is less than $50 and who have made at least two contributions and send them a special invitation to donate monthly. Explain the benefits.

How Mailrite can customize the ask

If you include the last gift (or last year’s total) amount in the mailing list you send to Mailrite, and provide a set of instructions for suggested gift levels versus ranges of previous gifts, we can:

• Code for and output the correct suggested gift amount in the letter and reply card for each donor {SYBUNTS, LYBUNTS, NEVERS, class years, age groups, member/society groups, or other segments}.

• Insert different ask sentences into the letter, the postscript, and the reply card (and/or even different layouts or photos).

The DO NOTS

• Do not include a range of amounts from $25 to $5,000 in one ask card.

• Do not **not** ask for a specific amount.
Ask Strings

- Acquisition letters for first-time donors should use a generic set of gift amounts; e.g., $25, $50, $75. No big ranges. If wealth or peer screening has indicated that the prospect should be solicited at a higher level, than use a different ask string [see table of ask suggestions].

- The following chart is an example of an ask string table. When developing your table, review the distribution and history of last gift amounts, and adjust the table accordingly.

- Donors tend to give in round numbers. A donor is just as likely to upgrade from $75 to $100 as they are to upgrade from $75 to $85. So, start with the donor’s last annual fund gift, and round up to the next round number level, as illustrated in the table.

- You can also consider your budget...how much more do we need to raise this year, or for this project, and how does that determine what we would like to suggest to donors?

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<thead>
<tr>
<th>Previous Gift Field Amount</th>
<th>1st Value</th>
<th>2nd Value</th>
<th>3rd Value</th>
</tr>
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<tbody>
<tr>
<td>$0 or Nevers List</td>
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</table>

(Ask String table downloadable from www.mailritevt.com/improve-fundraising/ask)
The Response Form

Design a response vehicle that increases giving

When donors fill out the response card, it’s their chance to interact with you. This is their part of the conversation, so make it enjoyable and rewarding for them.

- Don’t make them fill out their name and address.
- Ask for a specific amount, personalized for the donor’s giving history.
- Give donors choices: let them help manage their relationship with you.
- Collect and correct donor information.

Here is a menu of response card items to consider

- Organization logo, address, website
- Donor commitment or ask sentence, with a thank you for the last gift (amount and date) and a reminder of how their new gift will help.
- Donor name
- Donor address
- Donor home phone and work phone
- Donor home e-mail and work e-mail
- Donor ID number
- Donor giving history (sets a baseline)
- Number of years in a row the donor has contributed (encourages consistency)
- Phone number to make a phone donation
- Website address to make an online donation
- Tax deductibility statement
- Date the fiscal year or campaign ends
- Choices for designating the gift to a specific need
- Giving circle or society choices
- Chance to make a gift in memory or honor of someone
• Choice for the gift to be anonymous or published
• Employer match information request
• Option to be contacted about planned giving
• Pledge schedule
• Whether the donor wants pledge reminders and how often
• Credit card information
• Option to convert to monthly giving
• Mailing and/or donor ID code
• Development department contact person(s), phone number(s), and e-mail address(es)
• Option to be removed from the fundraising mailings list or be contacted only by e-mail

It is because these choices are so valuable to the donor experience, and so helpful to the nonprofit, that donor reply cards are increasing in size and complexity. Even a well-designed 3.67” x 8.5” response form allows only limited choices and small type. Using a printed wallet flap envelope is even more limiting: there is no way to avoid tiny type and cramped spaces. Why make it so inconvenient for the donor?

The cost of a personalized 7.5” x 8.5” (bi-folded) or 8.5” x 11” (tri-folded) response form costs only a little more than a personalized buck slip, and it may be more than justified by the additional donor information gathered and choices offered. Even acquisition mailings should have a personalized response card in order to make response easier and more personal for the potential donor.
Example: **3.5" X 8.5" Response card**

A personal ask

Yes, Ellen, I want to renew my membership and support Hancock Shaker Village.
My previous membership level was $50 on 7/7/2008. I'm rejoining at the following level:

- $75
- $50
- Other $____

Please help us by correcting or adding your contact information...

Gary Henrickson
Mailrite, Inc.

78 River Rd. South
Putney, VT 05346
802-387-5157 x104
garyh@mailritevt.com

Your gift may be doubled when it is matched by your employer. Contact your Human Resources Department for details.

- I am enclosing my company’s matching gift form with my payment.

I would like information concerning:
- Including Hancock Shaker Village in my will
- Other planned gift opportunities

Method of Payment
- Check enclosed, payable to Hancock Shaker Village
- Visa  □ MasterCard  □ AmEx  □ Discover

Card Number □□□□□□□□ Expiration Date

Signature
Or give online at hancockshakervillage.org
Mail this form in the attached reply envelope to:
Hancock Shaker Village,
PO Box 927, Pittsfield, MA 01202
Example: **8.5" X 7" Response form**
(variable printed information shown in brackets)

{Yes, Peter, I want to support the Hancock Shaker Village Annual Fund}
{My previous gift was {$50} in August, 2009}.
Enclosed is my contribution of:
{[$75]}  {[$100]}  {Other __________}_

Method of Payment:
- [ ] Check enclosed in the reply envelope (payable to Hancock Shaker Village)
- [ ] Credit Card Gift
  Please charge in Full $_________
or
  Please charge Monthly Installments of: $_________
- [ ] Visa
- [ ] Master Card
- [ ] AmEx
- [ ] Discover

_ _ _ _  _ _ _ _  _ _ _ _  _ _ _ _ __/  __
Card Number Expiration Date

Signature

I wish my gift to be:  [ ] Anonymous  [ ] In Honor of  [ ] In Memory of

Name

[ ] HSV may publicize this contribution

Recognition Name

Your gift may be doubled when it is matched by your employer. Contact your Human Resources Department for details.
- [ ] I am enclosing my signed company matching gift form with payment

I would like information concerning:
- [ ] Including Hancock Shaker Village in my will
- [ ] Other planned gift opportunities
- [ ] Being an Annual Fund volunteer

Thank you! Gifts are tax deductible.  (MailCode)

Please help us by correcting or adding your contact information:
{Name}
{Company}
{Address}
{City, State, Zip}
{Country}
{Home e-mail:}
{Home Phone:}
{Work Email:}
{Work Phone:}

Please share your e-mail address to receive our e-mail newsletter and announcements about upcoming events.

Give online at hancockshakervillage.org
For further information, or to make a gift by phone, call Elissa Haskins-Vaughan, Director of Membership and Annual Giving 413-443-0188 ext 275
ehaskinsvaughan@hancockshakervillage.org

Hancock Shaker Village
PO Box 927, Pittsfield, MA 01202
www.hancockshakervillage.org
Example: **8.5" X 11" Response form**
Personalized Appeal Instruction Form
(downloadable from www.mailritevt.com/improve-fundraising/appeal-instruction-form)

Organization:

Contact Name and Phone:

Additional Contacts:

Appeal/Project Name: Date:

Target Drop Date:

Expected Domestic Quantity: Foreign Quantity:

Specify Postage Class:

Use Stamps or Preprinted Permit?

Run NCOA?

Dedupe (Household; Exact; or No)?

If any files have priority over others, list the priority.

<table>
<thead>
<tr>
<th>File Name (and Excel Tab name if files have multiple tabs)</th>
<th>Expected Quantity in the file or tab</th>
<th>Priority for Deduping</th>
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Will you be providing a suppression or pull list?

Are we to add seeds to the list? Seeds provided by e-mail or in a file?

List all the Components of the Appeal Package:

<table>
<thead>
<tr>
<th>Component Name</th>
<th>Size and other physical specs</th>
<th>Quantity to be shipped to Mailrite</th>
<th>Who is the printer?</th>
<th>Date Expected at Mailrite</th>
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</table>
How many letter versions?

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How many ask sentences and ask strings?

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Signature in Letter or Provided Separately?

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### Appeal Letter Versions (add lines as needed)

<table>
<thead>
<tr>
<th>Letter Version Name</th>
<th>Letter Version File Name</th>
<th>List Name or Code that goes with this letter</th>
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### Appeal Reply Form Versions (add lines as needed)

<table>
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<tr>
<th>Reply Version Name</th>
<th>Reply Version File Name</th>
<th>List Name or Code that goes with this reply form</th>
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</table>

**OR, use this table**

<table>
<thead>
<tr>
<th>Segment</th>
<th>Segment Code</th>
<th>Letter Version</th>
<th>Reply Form Version</th>
<th>Approximate Quantity</th>
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</table>
List all Fields in the File(s) that Mailrite is to use, or to keep with the data:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Field Name</th>
<th>Purpose or Use</th>
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If the letter or response card has variable Ask amounts to be coded by Mailrite, fill out the following chart, or provide a separate table.

<table>
<thead>
<tr>
<th>Previous Gift Amount within Range (or specify field and code to use)</th>
<th>1st Ask Value</th>
<th>2nd Ask Value</th>
<th>3rd Ask Value</th>
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If the letter or response card has variable ask sentences that Mailrite is to code, fill out the following chart, or provide a separate table:

<table>
<thead>
<tr>
<th>Letter name, or Letter code in data. Specify the data field:</th>
<th>Ask string text:</th>
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</table>
Code Format if any:

<table>
<thead>
<tr>
<th>Mailing, List or Version</th>
<th>Code to use</th>
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Ink-jet Signer’s Name above Return Address?

Ink-Jet a message on the envelope? Details:

Additional Instructions:
The Envelope

The Envelope: Get Noticed and Get Opened

The traditional #10 envelope formatted with your brand is still the most frequently used and most effective mail piece for direct mail fundraising. A donor’s familiarity with your brand is reinforced when you use it consistently (visual brand—logo, colors, typeface, shapes, style). That’s why it’s important that the first thing the donor sees on an envelope is your brand; it also sets your piece apart from the bills, credit card solicitations, and junk in your donor’s mailbox.

Note: Window envelopes do not invite donors, members, or alumni to connect with and express their passion for your cause—they look too much like a bill or credit card solicitation. If necessary, use window envelopes for acquisition mailings or membership renewals; however, some tests indicate they reduce response.

Use a handwriting typeface to increase the envelope opening rate.

Shown on the facing page is an envelope addressed with a handwriting font in blue ink and a signature in blue ink. Unlike script fonts, this handwriting font really looks like it came from a pen. But it was actually ink-jetted by machine at little more cost than regular addressing. Keeping the postal codes in the lower right and left corners, and a non-profit live stamp in the upper right helps with the personalized look.

Put the signer’s name on the envelope

- To make the envelope more personal, have Mailrite ink-jet the name of the person who signed the letter above or below the return address. We’ll use the same typeface as that of the mailing address or letter text.
- When multiple letters from different people are used in the mailing, e.g., class giving agents, the correct name may be ink-jet printed on each envelope above the return address during addressing.
Example: **Envelope teaser added to preprinted envelope**

![Example envelope teaser](image)

Live signature and handwriting
font increase personal feel

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Example: **Personalizing the sender to connect to the addressee**

![Example letter personalization](image)

Variable signer’s name added during addressing personalizes the letter.
Add a message to the outside of the envelope

- Studies show that teasers do not guarantee increased opening rates. They can smack of advertising direct mail.

- Exceptions to the no-teaser rule, to be used judiciously:
  
  - Membership or annual renewal notice messages.
  
  - A mailing that differs from those the recipient normally receives from you.
  
  - To grab the attention of a new donor or member.
  
  - To start a narrative to be continued on the inside
  
  - A leading, personal message on the envelope can lure the recipient to see how it continues inside.

Different sizes or colors for the envelopes attract attention

- Brightly colored large envelopes [9” x 12” or 10” x 13”] can be very effective for high-dollar value appeals when combined with multi-page letters, major gift response forms, and special communications. Let the content influence the size.

- A 6” x 9” envelope costs the same for postage and processing as a #10, but it presents a different look and makes your piece stand out in the mailbox or draws attention to a special request. Use it when you have an insert that works well in a 6” x 9” envelope.

Use quality matched envelope and stationery

- Quality envelope and stationery paper can enhance your brand image and will stand out in the mailbox, thereby subtly moving your appeal toward personal communication and away from bills or mass-marketing.

- When the letter signer is someone outside your organization, consider adjusting the stationery and address heading from business to personal.

- Hand addressing compels the recipient to open the envelope.

- Use standard white paper and envelopes for acquisition mailings.
The Postcard

Postcards are handy for brief messages

- Use postcards as reminders to give. Send several weeks after a letter mailing to those who haven’t given yet—and while the pledge card is still somewhere the donor can find it!
- Send just prior to a phone-a-thon to improve the calls.
- Mail first class on Christmas Eve as a final reminder to previous donors just before the tax year ends.
- Announce events.
- Use postcards as a thank you at the end of the year or end of a special campaign. Let donors know what the campaign achieved and how many people it helped. Provide a link to an online report.

Example: **Personalized follow-up postcard**

![Personalized follow-up postcard example](image)

**Example:**

Dear Gary,

Families love experiencing the simple and meaningful lives of the Shakers at Hancock Shaker Village. I’m sure you do also. And, I hope you agree with me that our world benefits from the example of the Shakers and from the work of Hancock Shaker Village.

HSV depends on the financial support of its members and donors, especially in these challenging times. Your generosity makes it possible for us to bring the values of the Shakers into many lives.

Please make a year-end donation. You will be helping us preserve Hancock Shaker Village and reach more families and children with the values of the Shakers.

You may use the reply card and envelope which you recently received from us, or you may donate online at www.hancockshaker.com/donate.

If my message has crossed in the mail with your check, please accept my heartfelt thanks for your gift!

**With gratitude,**

Ethan Spear
President and CEO

P.S. If $40 is too much for you to give at this time, will you consider a gift of $20?
Bibliography

Research on Typography and Design for Readability


_Handbook of Direct Mail_ by Siegfried Vögele, Prentice Hall, 1992. Professor Vögele’s eye motion research of how readers interact with direct mail letters forms the basis of his recommendations for designing direct mail. Out of print but available used; and summarized in chapter 2 of Mal Warwick’s _How to Write Successful Fundraising Letters_.

Writing Fundraising Letters and Communicating with your Donors


Handbook Number 23:


“The Way We Write Is All Wrong: Fixing the Broken Discourse of Fundraising” by Frank C. Dickerson, Ph.D., _The Nonprofit Quarterly_, Vol. 17, No. 1, Spring 2010, pp. 40–45.


Bob Burdenski at www.bobburdenski.com

Direct Mail Fundraising Testing: Theory, Practice, and Examples

_Testing, Testing 1,2,3: Raise More Money with Direct Mail Tests_ by Mal Warwick, Jossey-Bass, 2003. Mal Warwick explains what to test and how to test with statistical significance; and gives the results of over 300 fundraising letter tests.

Acknowledgement: Examples used with permission of Hancock Shaker Village, The Smith Fund, Landmark College, Bennington College and the Keene Family YMCA.
About Mailrite
From planning, copywriting, testing and analysis…to designing, printing, and mailing

Mailrite helps clients:

- Communicate effectively
- Improve direct mail marketing and fundraising results
- Acquire new customers and donors

Knowledge, accurate on-time performance, and great customer service are the foundation of our many long-term client relationships.

Services

- Direct mail plans for fundraising and product and service promotion
- Mailing list sourcing
- Direct mail tests and analysis
- Development writing and editing
- Postcard, newsletter, and fundraising appeal design
- Mailing lists: cleaning, merge-purge and deduping, National Change of Address (NCOA), selects
- Black and color digital and offset printing
- Complex mail merges and variable printing
- Domestic and foreign mailings, from one to hundreds of thousands of pieces (folding, ink-jetting, labeling, inserting, match inserting, glue dotting, polybagging, kitting, assembly, packaging)
- Literature and product fulfillment
- Mail order processing and fulfillment
- E-commerce store setup, maintenance, and product fulfillment
- Warehousing