



HELPING YOU
STAND OUT IN A CROWD

*2016
Nonprofit
Year-end Appeal
Strategies*



2016 Year-end Appeal Strategies

With the upcoming appeal season right around the corner, it is important to note several unique factors that will come in to play this year. Specifically, there is a “perfect storm” brewing with regard to the timing of the typical appeal mail date. Over the last several years it is becoming quite common for nonprofits to target the time before Thanksgiving as the prime mailing period. This allows the donor to receive the appeal prior to leaving out of town or having guests come in for the holiday. The intent also is to get a jump start on the all-important year-end giving concentration by getting your message in front of the donor, plus allowing you time for follow-up messaging before December 31st.

While this logic is still good, the concern for 2016 is that we have a later than usual political election date – ***November 8th***, and also an early Thanksgiving – ***November 24th***. This narrows the available time for mailing your appeal by almost 1 week! The key to a successful appeal season now becomes in the planning – to begin the process of selecting a theme and writing copy, along with pulling your database records early enough so that production can be completed for either an early mailing, or one that is timed to drop shortly after the election day.

In addition, I also suggest that this year it is critical for you to engage your donor base in multiple “touches” spread throughout the appeal season. The opportunities to build a true ***campaign*** are many, and those that do not opt in to these additional contacts will find themselves in stiff competition from other nonprofits! Add to all of this the growing popularity of ***Giving Tuesday***, and this makes your ***advance planning*** even more critical to your appeal’s success.

On the following pages are several strategies that you could be using this year within your campaign...

Timing

Considering the aforementioned Election Day and Thanksgiving “squeeze,” you have several options available to plan for:

- Continue to mail right after the Election Day, up to about the 15th/16th of November – this will allow for delivery before Thanksgiving.
 - To ensure that this can happen in a very full production schedule, it is now critical for you to have all design and print production started at least by the week of October 10th, or perhaps even sooner. This will allow for all print to be completed and the mailing “sitting on the floor” waiting for your drop date.
 - Complete your database input well in advance as well – by October 17th latest.
 - Plan your pre-appeal and post-appeal messaging to hit accordingly.
- Shift your appeal earlier, in to October – look to mail the week of the 17th or 24th, so as to beat the bulk of elections mailing.
 - A good strategy if you would also consider doing a follow-up mailing in December – typically to your most loyal donors only, to ensure that they will make a gift prior to December 31st.
 - Or plan an even earlier fall appeal – at the start of October, with the idea of sending a separate year-end letter appeal in December – new story and ask entirely.
- OR, shift your appeal to be a true year-end appeal only, with a mail date the week of November 28th or December 5th. This had been the traditional timing of the annual appeals, but if this is what you plan – be sure to add in a pre-appeal message suggesting the later date and strong follow-up messaging prior to the actual December 31st date.

Pre-Appeal – 2 to 4 weeks in advance of mail drop

- Include an e-mail blast to donors highlighting some of the achievements your organization has realized in the past year – then include a “teaser” of what story you will be sharing in the appeal. Suggest that donors be looking for the full story coming soon.
- Include a “banner” ad within your website announcing the start of your appeal – again include a teaser for the story.
- If you have a newsletter scheduled to be distributed before the appeal – include a brief article about the importance of donor support to the campaign and likewise include the teaser copy about the story you will share
- Share stories of your impact in the community on Social media, along with teaser copy for your upcoming appeal story

Appeal Campaign

The actual appeal campaign should include multiple media formats to encourage reinforcement and promote online giving.

- **Print** – is still the driving force for any nonprofit appeal. While your goal should definitely be to encourage online giving, it is print that will drive them there!
 - Plan the message and story well in advance – a well written appeal is critical to your success. Make sure the initial few lines are compelling, to engage the reader.
 - Be unique and develop a campaign for a specific purpose or theme.
 - Be creative in your design – engage donors through the use of good images or unique design.
 - Include links and directions to your online giving sites or coordinated story features.
 - Identify your top 50 – 100 or whatever number of top donors – be sure to include personal notes from Board members (#1) and/or Staff (#2).
 - Include a Buckslip insert card that does one or more of the following:
 - Promotes Social Media interaction with suggested actions
 - Includes facts and figures of your organizations impact on the community or clients you serve
 - Includes donor testimonials as to why they give to your cause
 - Utilize our exclusive mail tracking reports to time your other media touches to when your appeal is delivered.
- **E-Mail** – In conjunction with your print campaign, send an e-mail blast including the same story and ask. Acknowledge that this is a reminder to go along with the printed campaign.
 - Time your e-mails to when your mailed appeal is delivered thru our mail tracking service.
 - Include live links to your online giving page, videos, testimonials, etc.
 - Ask for referrals and include a “forward to a friend” button.
 - Include live links to your social media pages and encourage posts relative to your campaign. Ask recipients to make posts on their own pages to refer friends to the giving site – “peer to peer” fundraising is highly effective
- **Social Media** – Announce your campaign on all social media sites you are active on and give weekly updates.
 - Use the example that the ALS Bucket Challenge used – suggest a campaign whereby donors post their commitment and then challenge friends to also give by a certain date. Encourage “selfie” pictures of individuals with a check in hand to your organization, or a self-made sign with your organization’s name on it.

- Enlist 3-4 strong supporters to make a post on your behalf and share the link both on their page and your own.
- Include a video that is part of the campaign, or create a brief donor/staff/volunteer video and share it. Video can be a strong component to include and it increases SEO!
- **Website** – Be sure to have your online donation process updated and simple to use. Test the “experience” as if you were a first time user and update as needed.
 - Update the “banner ad” to shift from announcing your campaign to invite viewers to become part of the campaign – direct them to your “donate” button or better yet allow them to click on the banner add itself to take them directly to your donation page.
 - Include a campaign progress scale or thermometer that is updated weekly.
 - Include donor testimonials to encourage giving.
 - Include links to social media sites and encourage donors to post a statement of support or challenge to friends.
- **Video** – To truly engage your donors, include a video with your campaign story – make it personal.
 - Post links on your website and social media sites to the video.
 - Create or include the video within a YouTube site for your organization.
 - Include video links within your e-mail blasts.
 - Prepare donor testimonials on video as well.
- **Newspaper** – another form of print, and one that is not typically used for appeals, but could be a good compliment to your campaign.
 - If your organization typically utilizes print ads, shift the content to reflect your campaign.
 - Approach newspaper publishers to do small “filler” ads at no cost to promote your campaign.
 - Encourage Board members or staff to write “letters to the editor” announcing and encouraging participation within your campaign. Promote the social media campaign.
- **Community Presentations** – seek out local organizations such as your Chamber of Commerce, Lions Club, Rotary Club, etc – ask to make a brief presentation as to how they can help your cause/mission.

Campaign Follow-up – 4 to 6 weeks following your mail drop

Sometimes just as critical as the initial introduction, follow-up strategies can help your campaign achieve the results you expect. Especially useful when loyal donors do not make a donation initially, the follow-up can make up for missed communication.

- **Print** – consider a follow-up letter to those loyal donors that have not yet made a donation. This would be a much reduced list count. Especially important if you choose to mail your appeal earlier.
 - Create a “formal” follow-up letter with common branding and run in conjunction with your initial campaign materials.
 - Or, prepare a hand written note from staff or Board to select recipients.
- **E-Mail** – a less expensive follow-up strategy and effective for those you have e-mails for.
 - Include verbiage that thanks donors in the case of missed donations or ones that might have been made already and not yet received.
 - Include appeal campaign updates with results.
- **Website** – great way to give campaign updates!
 - Update the Campaign progress scale or thermometer weekly.
 - Update the “banner ads” with messages about still time to give.

Campaign Closing

Once your campaign has closed, be sure to extend updates to those who have contributed. Obviously you will need to officially recognize their donation with a receipt and tax deduction notice in a timely manner, and use these letters as also a time to hand write your thanks for the donor commitment. You may also consider the following:

- Include the results to date for your campaign. Compare with previous year’s results if appropriate.
- Reinforce the impact the campaign donations will have for your organization.
- Include client notes of thanks – either as a printed bucksliip, or for maximum impact – actual hand written notes!
- Consider a letter to donors 2-3 months following the end of year with an update of your programs sponsored by the appeal. While this may not be a “hard ask,” be sure to include a simple donation return envelope for any potential gifts (***you will be surprised!***). This is especially important if your organization does not do a regular Spring appeal.
- Include a brief survey to ask what is important to your donors – what causes or programs they are interested in at your organization, and if you are meeting their expectations as a donor.

Giving Tuesday

This campaign tactic is gaining strength across both national and local organizations, and should not be ignored. Studies are showing that it does not detract from your regular campaigns, and in fact can be a strong source of new donors for your organization.

- Look to stress the social media strategy with specific posts reminding people of the Giving Tuesday, both 1 week ahead of time and then the day before and the day of. Make this a priority!
- Consider boosting your posts on Facebook or including a paid ad. This can be done for a nominal amount of money, but could exponentially expand your reach – to not only your Facebook friends, but all of their friends plus similar demographics – check with us on how to incorporate this strategy.
- Partner with other organizations if your local community can be organized to promote the Giving Tuesday concept. An example of this is *#McHenryCountyGives* - a countywide initiative to promote Giving Tuesday within the county thru joint advertising and promotion. Giving page will allow visitors to select the organization they want to support.
- Prepare handout slips that can be distributed at local companies or even at retail stores (with permission).
- Solicit corporate sponsors that would be willing to share the Giving Tuesday links on their website or social media sites. Create employee campaigns at companies that support your organization and provide the handout slips.
- Approach your local governments to endorse your campaign with a letter or proclamation.
- Turn the Giving concept around by suggesting you *give thanks* to all of the community that helps you accomplish your mission through financial support.

Often times the biggest obstacle in achieving greater results for your campaign is in making the priority for advance planning and then the follow-through on identified strategies – call on C L Graphics to assist you in making this year's appeal the best ever!