

Annual Solicitation Program & Mailing Strategy 2020-2021

We are currently building on our advancement system to be more effective and efficient in our solicitation process. This year's planning aims to increase response rates and the number of donors elevating their gifts in response to a direct ask.

I. Annual Appeals Mailing Calendar

- Fall (School Start)
- Winter (Christmas)
- Spring (TBD)
- Summer (SLAM)

II. Segmentation

- Major, Leadership, Transformational by mail
- Annual & Lead Annual
- Lybunt, Sybunt, Nybunt

III. Ask Amount

Lead annual and annual ask amounts are determined by the Last Contribution Amount, Last Contribution Date, and Maximum Contribution Amount. The Target Ask Amount is assigned and stored in Raiser's Edge.

Major, Leadership, Transformational Formula: Ask amount is determined by a combination of wealth screenings, last gifts and information pertaining to affinity and readiness.

Lybunt & Sybunt Formula: 70% (Maximum Contribution) + 30% (Last Contribution Amount) = New and Increased Ask Amount

Formula Example:

Max Contribution: \$200	70% (MC) + 30% (LC)
Last Contribution: \$150	140 + 45 = \$185
	(MC) (LC) = Ask Amount

(MC) = (LC) Example:

Max Contribution: \$100	Upgrade Ladder: \$100 to \$150
Last Contribution: \$100	Ask Amount: \$150

Upgrade Ladder:

\$31	\$100	\$250	\$500	\$1000	\$2500	\$5000	\$10000
\$50	\$150	\$325	\$650	\$1500	\$3250	\$6500	
	\$200	\$400	\$800	\$2000	\$4000	\$8000	

Nybunt Formula: Average of Contributions or Smallest Contribution

*No gift = predetermined ask amount (Ask amounts to associated with something that a list of options that would include up to the total cost of educating a child) or whatever they can give at this time.

IV. Solicitation Recurrence

We are shifting our practice of solicitation by mail to follow best practice and to increase the number of times a donor is asked to make a gift. We are also balancing asking more often with utilizing direct and indirect solicitations that are tied to each donor's response to prior appeals to prevent donor fatigue.

- Donors that gave within 30 days of an appeal will not receive an appeal.
- Donors that gave in response to the most recent appeal or any gift during the fiscal year will receive an indirect solicitation.

We also seek to increase giving through mail by asking for an elevated gift and balancing that with a plan to fall back to the amount of their last gift after two requests of an increased gift.

Direct Solicitation = Ask amount

Indirect Solicitation: Whatever you can give at this time.

Major, Leadership, Transformational:

A unique letter and solicitation will be developed for donors at these levels who are not a part of Moves Management.

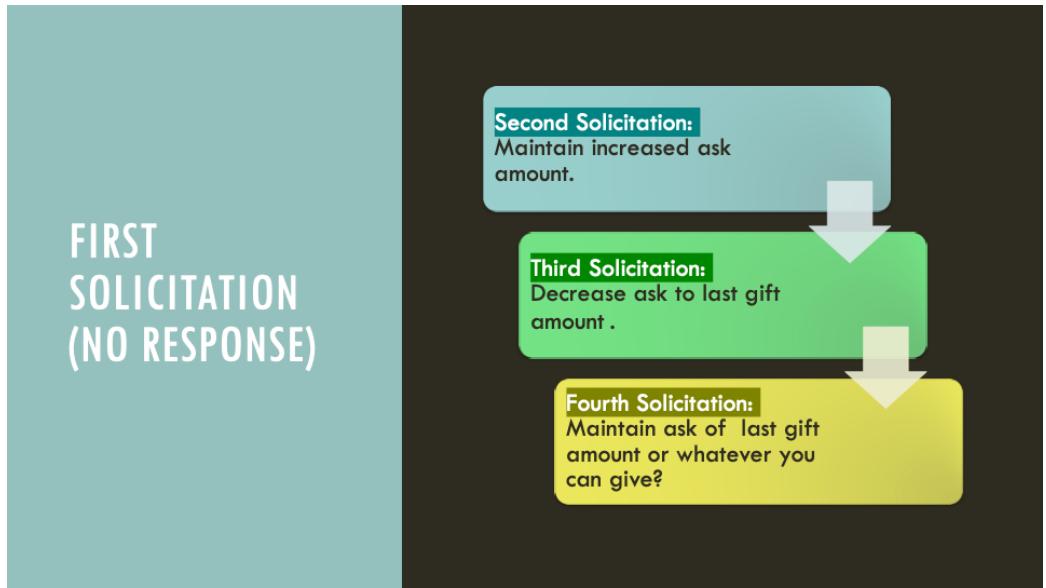
Lead Annual and Annual:**Assuming No Response**

First solicitation - Increase ask amount.

Second solicitation - Increase ask amount.

Third solicitation – maintain ask to last gift amount

Fourth solicitation – whatever you can give



Response to first solicitation

Increase ask amount - first solicitation.

Additional FY Appeals - Cultivation letter: Asked to contribute if able. Return envelope included.

Example of Solicitation Recurrence in Real Time:



V. Letters

The personalization of solicitation letters, messaging, and specific donor targeting is a crucial part of direct mail. Letters are personal as they are sent and received directly from person to person. Personalization increases the likelihood of response and is a simple step to include in the direct mail process. Our goal is to personalize appeal letters by giving levels to increase the response rate, engage possible new donors, and maintain our relationships with current donors.

Major, Leadership, Transformational:

- The sender (firstly, the donor wants to see who sent the letter)
- The donor/recipient's name (to see if the sender spelled it correctly and if it was sent to them specifically)
- The signature (to see if the sender signed it personally)
- The P.S. (to get the gist of the general theme quickly and to see "what's in it for them")
- Any handwritten text (special little notes that would make them feel special)
- Any underlined, bolded or highlighted copy (so they can skim the letter easily for convenience)
- Use executive letterhead/stationary

Lead Annual and Annual (Lybunt, Sybunt, Nybunt):

Lybunt

- Simplify appeal letter, concise emotional appeal and fund the need, clear and direct ask, condensed information regarding progress.
- Write a simple emotional letter.
- Use a short attention-grabbing sentence.
- Include copy that tells a story, presents a problem and a solution.
- Include a call to action.
- Make appeal letter donor-centered, i.e. utilize the word "you" instead of "we".
- Use a deadline to create urgency.
- Build the appeal letter around the ask.
- Add a heartfelt postscript (P.S.)
- Test the appeal letter.

Sybunt & Nybunt

- Create content within the appeal letter to promote the reconnection of lapsed donors.
- Let them know how important they are.

- Differentiate their experiences.
- Gather Data
- Go back to their beginning.
- Share your progress.
- Tell an impactful story
- Connect in new ways
- Give them new options

Nybunt (Those who have NEVER contributed)

- Modify appeal letter with content directed to the **potential donor**.

VI. Timing and Best Mailing Practices

Annual Mailing Calendar:

- **Period I: The January Surprise**
This is the second most lucrative time for fundraising. January is hot! While year-end giving peaks with the Dec. 31 tax-deduction deadline, data shows that the curve of year-end giving continues into January. Some donors save your appeal until their budgets recover from all that holiday spending.
- **Period II: Summertime**
July and August—the perceived least favorable time, but there are exceptions. Consider what **donor cultivation or stewardship** you can do at this time. Donors are three times more likely to give online in response to a direct mail appeal than an e-appeal.
- **Period III: Year-End**
October through December—the most lucrative time for donors to give and for nonprofits to receive donations. In preparation for the year-end appeal, **Thanksgiving is a time to say thank you!** Organize your staff, board and volunteers to call your donors to thank them for their support. Don't ask for money, just tell donors what you've been up to over the year and let them know you appreciate them. **Schedule major donor meetings. Non-responders need special care.** Sending just one year-end appeal letter is unwise. You need to plan to re-mail to non-responders within two or three weeks of the first mail drop. Apologize to them if their response and your reminder request crossed in the mail and let them know that if it weren't so important, you wouldn't be asking again. This tactic is usually overlooked, but if you include it, you're likely to raise your return.

Best Time to Mail Again:

- The first 90 days are critical. You have a better likelihood of receiving a second gift if you ask then, rather than waiting a full year to ask again.

Advice for Mailings:

- **Quarterly appeal mailings (not including newsletters)** is just about the minimum I'd recommend for any nonprofit if you want to stay top-of-mind.
- **One or two emails monthly** is certainly not out of bounds. As you expand services and need to raise more money, expanding the number of mailings you send makes a lot of sense.
- **Layering on social media to reinforce the message in your mailing** is generally a good idea. Generally, someone needs to see an ad seven times before it sticks. In our digitally revolutionized world, marketers say this number has increased to about 21 times.