



Heritage
Consulting Inc.

Donna Ann Harris - Principal
donna@heritageconsultinginc.com

www.HeritageConsultingInc.com

o. 215.546.1988 c. 267.251.5444

422 South Camac St., Philadelphia, PA 19147

Outline for direct mail letters and other advice for year end appeals 2018

Outline for direct mail letters

- Show your donors why your history organization is relevant and important to them and why they should care in your letters and emails to them.
- Ask them to contribute in the first line of the second or third paragraph.
- Tell them what you have done in the last year at your site or organization, and what your plans are for the coming year.
- Show how their gifts to you make a difference.
- Tell your supporters that the tax deductibility deadline is near December 31! and ask them again to make a gift again in the last paragraph.
- Do not tell donors that you need to “end the year in the black,” because it is just not a compelling reason.
- Explaining that their gift goes toward general operating expenses is unappealing to donors.
- Focus on specific but general programs that are helping you meet your mission, such as event programming, concerning artifacts, restoring historic buildings, doing school programs, or hosting educational or other much-loved seasonal events.
- Seek unrestricted gifts if possible rather than gifts aimed at projects.
- A great blog post about LONGER letters and why they work was posted on Guidestar.com http://www.guidestar.org/rxa/news/articles/2012/why-long-fundraising-letters-outpull-shorter-ones.aspx?hq_e=el&hq_m=1858226&hq_l=16&hq_v=bed1c6047b

Other advice for year end appeals

- Your first direct mail letter will get lost in the holiday mail if it is sent after Thanksgiving, make sure you mail it the week before.
- Plan ahead and talk to your local postmaster about timing to mail bulk mail from your post office. Develop your calendar dates back from that.
- Ask your postmaster about business reply mail, and make sure your postal Indicia is correct according to post office standards.
- Talk to your printer and mailing house ASAP about timing and costs.
- You MUST include a self-addressed return envelope in your direct mail appeal, make it green or another color that stands out.
- Envelopes with tear off sheets can be effective, but are expensive to print, ask your printer for advice.

- You may want to call these solicitations end of year appeal or annual fund, but do not call them membership or renewal. This is NOT membership solicitation.
- Use the back of the letter too, do not waste this space, it is a great place for stats, photos and quotes.
- Do not mix up end of year appeal and annual gifts (membership). End of year gifts are over and above regular membership.
- Merged letters on letterhead are effective. If you can include the person's name on the letter rather than "Dear friend" you will likely see better response.
- A more effective letter is hand signed, with a personalized note from someone who knows the letter recipient, asking them to consider a gift. Or even a note from a volunteer works.
- Hand typed envelopes (or ones that look like it) are better than ones from a mail house.
- Color helps—photos, reply form, the envelope in color or the letter itself.
- You MUST be able to accept credit card donations, despite the fact that 80% send checks.
- Asking for small pledges—monthly, quarterly—can be very effective—but you have to have the mechanics to process the gift. Network for Good, PayPal and others have this functionality.

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