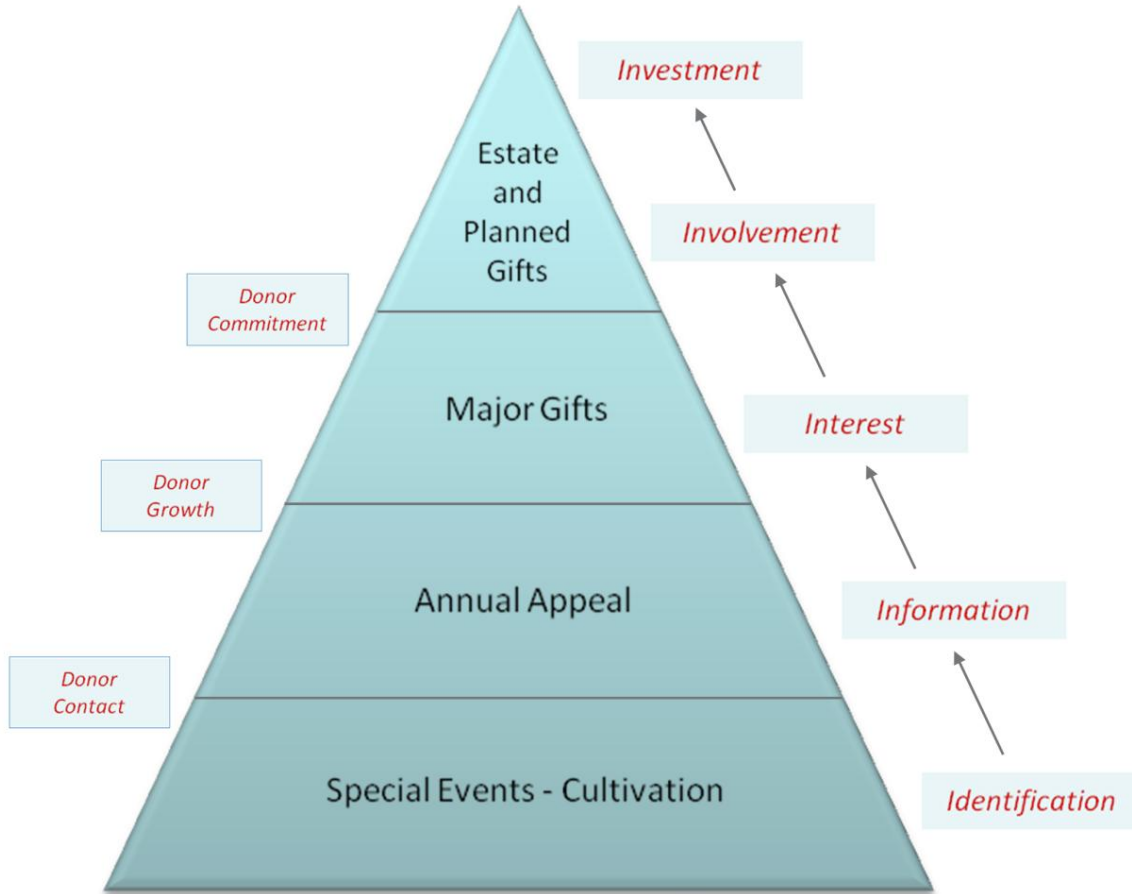




Annual Appeal Manual
Catholic Alumni Partnership



THE SOLICITATION PROCESS



ANNUAL APPEAL: THE FOUNDATION OF SUCCESSFUL FUNDRAISING

The Annual Appeal is the backbone of any development effort. It is an organized effort to obtain gifts on a yearly basis to support, at least in part, general operations of a school. Funds are typically raised through mail or direct solicitation efforts.

A well-run annual appeal program should make available a wide variety of activities that encourage individuals to participate in the ongoing life of the school. The following is a model for accomplishing an efficient and productive annual fundraising program:

OBJECTIVES OF THE ANNUAL APPEAL

The objectives of an annual appeal include:

- Establishing a habit of giving
- Reaching a broad base of prospects
- Allowing high-end donors to self-identify
- Being efficient and cost-effective
- Making it easy to give

ELEMENTS OF THE ANNUAL APPEAL PROGRAM

The elements of an annual appeal include:

- Mail appeals (letters, newsletters, email)
- High-end appeals (letters with follow-up call)
- Individual visits
- Events

MAKING “OUR” APPEAL

Donors react to a variety of messages, including:

- Emotional appeals
- Serving children
- Serving the community
- Practical reasons
- “Doing it better”
- Efficiency
- Cost effective

WHAT MUST BE IN PLACE TO SUCCEED?

As with all appeals, for the Catholic Alumni Partnership, our appeal is based on four critical components, both for the project overall and for each individual school:

- A compelling case
- Cultivated prospects
- Motivated volunteers/Leadership
- A detailed program plan

MOST LIKELY REASONS FOR POOR RESULTS

There are many reasons for poor results to ongoing appeal programs, including:

- Inconsistent appeals
- Inadequate (or ill-maintained) databases
- Failure to make targeted asks
- Lack of follow-through with timely acknowledgments

For the Catholic Alumni Partnership, because this is a new effort, we also have to consider that the lack of historical communication with alumni will affect the initial mailings and entire first year of the annual appeal program. We aim to counter the absence of historical communication with the public relations and marketing campaign.

ANNUAL MAIL APPEAL: WHO, WHAT, WHEN?

CAP Appeals may be a message from:

- The principal
- A long-time teacher
- The person who most embodies the school and would evoke a positive reaction from those who receive the solicitation
- Fellow alumni

Types of Appeals:

There are two types of appeals:

- **Indirect Appeal** (The Advocacy mailing is an example):
 - Envelope in newsletter or magazine
 - Directing donors to online giving in school publications

Challenge: Indirect appeals do not allow for a specific ask. However, they do provide an additional opportunity to give and may provide significant extra revenue. For the Advocacy mailing, many will be driven back to the CAP website, where we 'donate now' buttons will be prominent.

When considering indirect appeals, it is important to consider:

- *Timing*
 - *How this appeal relates to direct appeals?*
 - *How this appeal relates to fundraising events?*
- **Direct Appeal:**
 - Mailed solicitation with a specific ask amount

THANKING THE DONOR

- The single biggest fundraising mistake that charities make is **not** thanking the donor. Thanking a donor inappropriately or thanking a donor in an untimely fashion are also mistakes.
- Ensure that a formal thank you letter is mailed in a timely fashion, typically within 48 hours of the receipt of a gift.
- Personal thank you notes make a big difference. Personally signed letters, with a hand signed note next to the signature, are also a nice way to add a personal touch.
- It is almost impossible to “over-thank” a donor

SUSTAIN AND STRENGTHEN THE DONOR RELATIONSHIP

Effective stewardship usually leads to continued and increased philanthropic support. Cultivation and stewardship activities are often one and the same, and include:

- Communicating with the donor without asking for money (e.g., update letters, newsletters, holiday cards, email blast, etc.)
- Inviting high-end donor to special events or on-site school visits.

The overall objective: engage the donor more fully over time, and potentially move them up the ‘pyramid.’

HOW TO WRITE AN APPEAL LETTER

The appeal letter is an opportunity to communicate the school's mission and compel the reader to invest in that mission.

Objective

- To promote awareness of an organization's mission and needs, increase financial support and encourage donor loyalty.
- To build a broad base of donor support.

Components

- Appeal letters typically contain the following components:
 - An introduction of the cause, foundation or organization
 - An expressed need (and compelling story)
 - A specific ask
 - Acknowledgment of a prospect's consideration

TIPS

- **Keep it simple and direct.** The best appeal letters are typically one page or less, as the average reader will only spend a few moments reading the letter before making a decision.
- **Personalize the appeal.** If possible, segment your list and write letters that are directed at each segmented group.
- **Consider the voice of the letter.** If the same person has written past letters i.e., the principal, try a new approach. A letter signed by another individual, perhaps a recipient of the non-profit's work (e.g., a current student or alumnus), may be compelling.
- **Stand out.** Make each mailing unique by tailoring it to the season, audience and organizational need.
- **Be compelling.** Craft a compelling letter that differentiates the school from others by using personal stories and anecdotes.
- **Be specific!** Ask recipients to give a specific amount, even if it is a range. Consider personalizing the letter to thank the donor for the exact amount of their past gift and suggest a new – and higher – one.
- **Send out multiple letters.** Appeal letters may not be the most glamorous aspect of fundraising, but they are necessary in order to build a broad base of donor support. The average person needs to be touched up to seven times by an organization before they decide to make a gift.
- **Create a response device that matches the look, tone and ask of the letter.** A response device is a remittance envelope or card that the donor returns with their check. Consider duplicating your letter's message on the response device, as a reminder, in the event that it is separated from the original letter.
- **Include tax benefit information.** Although not the primary reason for individual giving, consider highlighting the tax benefits of a donor's contribution.

Sample

Logo

September 22, 2008

Name
Address
City, State, Zip

Dear Mr. and Mrs. Smith,

With the new school year beginning just a few weeks ago, nearly 22,000 elementary school students dressed in their uniforms and arrived at one of 58 schools throughout the Diocese of Rockville Centre.

This year, were it not for the Tomorrow's Hope Foundation, 1,750 of those students may not have been able to attend their Catholic school. Two of these students are my daughters, Maria, a fourth grader, and Sari, a kindergartener.

When our family immigrated to the United States eight years ago, we knew Catholic education was what we wanted for our children. My wife, Carolina, attended Catholic school in Colombia, and we both value the quality of education, discipline and morals provided at Catholic schools. But, we soon came to realize that we could not afford tuition on our own. Then, Tomorrow's Hope stepped in.

Our family is not alone. This year, Tomorrow's Hope Foundation awarded financial aid scholarships totaling more than \$2 million to students throughout the diocese. However, there is nearly \$4 million in overall need from families across Long Island in the coming year.

We need your help. A student can be fully sponsored through the Stars for Students Program for \$2,000, and 100% of donations of all sizes are allocated to student sponsorships. As we begin this school year, please consider supporting these deserving students through a donation to Tomorrow's Hope Foundation. I can tell you, first hand, what a difference it will make.

Thank you for your consideration.

Sincerely,

Signature

Name
Title

Engage the reader

Introduce the foundation

Personalize the letter with a compelling story

Detail the foundation's goals or past successes

Express the need and make the request

Thank the reader for his/her consideration

Sample

Logo

Fall 2007

Name
Address
City, State, Zip

Dear Dr. and Mrs. Jones,

I greatly appreciate the opportunity to share with you the vision for the future of the Church of the Immaculate Heart of Mary.

} Engage the reader

The Archdiocese of New York's Bicentennial Campaign is a historic endeavor that addresses the current and future needs of our Catholic community. At IHM, we seek to meet a variety of needs:

} Introduce the campaign

- Restore stained glass windows in the church and chapel
- Repair roofs and leaks in all buildings
- Upgrade air conditioning in the church and rectory
- Clean and refinish church woodwork
- Carpet and paint portions of the church and sacristy
- Establish a reserve fund

} Express the need

In addition to attending to the needs at our parish level, the Bicentennial Campaign will aid in supporting a fund to secure the future of needy parishes in our surrounding areas.

} Detail the foundation's goals or past successes

I ask that you thoughtfully consider a gift of \$3,000 which may be contributed over three years for payments of \$1,000 per year. While the primary focus of this campaign is our parish and neighboring needy parishes, this gift would also help fulfill our 2007 Cardinal's Appeal assessment and could be honored in any combination of cash, trust, appreciated securities or property. Please review the enclosed materials which outline the needs of IHM in more detail.

} Make the specific request

I am grateful for your time and thank you in advance for your prayerful consideration of this important request.

} Thank the reader for his/her consideration

In the Lord,

Signature

Name
Title

Sample

Logo

Spring 2008

Name
Address
City, State, Zip

Dear Ms. Ellis,

Thanks to the generous support of alumni our University is what it is today. We have six schools serving more than 8,200 students in 33 bachelors, 40 masters, and 19 doctoral degree programs – NJIT is growing rapidly. We have transformed our campus, improved our university life, and we have risen to Division 1 status in 10 men’s and women’s sports. I am asking you to consider an institution that played a significant role in shaping your life.

Engage the reader by highlighting past successes

Many believe that because NJIT is a public university, the cost of educating a student is covered by the state. However, over the past 10 years support from the State of New Jersey per NJIT student has remained static while the cost to provide education has increased. Ten years ago, the state covered about 60% of educational costs; now it is less than 40%. And where public investment is inadequate, tuition must rise to cover the difference. This means that many promising student are at risk of being priced out of an education at NJIT – something generations of alumni have enjoyed. This is why supporting the Annual Fund is so vital to the future of NJIT.

Express the need

As you know, the Annual Fund is a dependable source of unrestricted gifts that can be applied to areas of greatest need. Student scholarships and financial aid, curriculum enhancement, athletics, and library and laboratory resources are just some examples of support provided by the fund.

Introduce the Annual Fund

Please take the time to reflect on the ways NJIT has shaped your life today, and continues to shape the lives of so many young men and women. Last year you generously donated \$125. I write to ask you to renew and, if possible, increase your support to the spring 2008, Annual Fund using the enclosed, personalized pledge card.

Make the specific request

With gratitude and best wishes,

Thank the reader

Signature

Name
Title