

## ANNUAL APPEAL GUIDELINES:

### Objectives

- 1) Provide leading Urban League Affiliate donors and prospects with an opportunity to invest in the mission of the organization through the annual fund (unrestricted gifts to the organization). Tailored versions of an appeal may be created for various audiences (donors, prospects, VIPs) but all versions should include an inspiring client success story, compelling program highlights/accomplishments, a specific gift request amount, and how the gift will make an impact. The appeal(s) should correspond with the end of the calendar year.

### Audience & Segmentation

- 2) Sent to all current donors (donor appeal), all prospects (prospect appeal), and all lapsed donors (donors with a giving history of more than one year who haven't given in the past year), with customization based on current donors (by level), lapsed donors (by greatest gift level), and VIPs. Personalize all VIP appeals (both donor, prospect, and lapsed) with a customized first line or note from the CEO; remove any major donors who have given a major gift within the past 3 months; remove any major donors with a pending gift request; and remove any major donors or prospects you have a major gift solicitation prepared for before the year-end.

### Timing

- 3) Schedule drop date for before the holiday rush. Consider sending between October 15 and October 30.

### Ask Details

- 4) **For the Donor Appeal:** Be sure to include a specific ask amount. Ensure the request amount is equal to or larger than the donor's most recent gift level. Attempt to "ladder up" for giving society requests or membership level requests. Consider including the donor's last gift amount and last gift date.
- 5) **For the Prospect Appeal:** Identify your organization's base/benchmark for first-time donors. Be sure to include identified benchmark as the request amount.
- 6) **For the Lapsed Appeal:** Include the donor's last gift date and amount. Ask them to renew their gift at that level. Include the specific ask amount.

### Length & Format

- 7) The letter should be no longer than one page in length.
- 8) Consider **bolding** stand out/important statements and the call to action.
- 9) The communication is a direct ask/appeal for gifts.



- 10) Personalize where appropriate for VIPs based on the recipient's relationship with the affiliate (Board Members, emerging top prospects, largest corporate and foundation partners).
- 11) The "first" content paragraph for all audiences should include a personal client story that inspires and evokes emotion. Share your impact/how your affiliate helped the client. Draw reader in by leading with an eye-catching and compelling first sentence.
- 12) The "middle" paragraph should demonstrate overall (beyond just the one client) program/organizational impact on the community and tie in the organization's mission. Consider sharing program highlights and outcomes to compel to support.
- 13) The "closing" paragraph should include the only "ask" that is made within the letter, the request for a specific financial contribution.
- 14) Consider adding a "P.S." after the closing to emphasize the urgency and impact of the request.

#### **Additional Details**

- 15) The letter should be printed on affiliate letterhead signed by the CEO. Regular donor/prospect letters can be signed with an electronic signature, but VIP donor/prospect letter should be hand signed (preferably blue ink) with any applicable special note desired handwritten by the President & CEO.
- 16) Always attempt to make the letter appear as personal as possible so that it stands out among other mail the recipients may receive.
  - a. **For VIPs (donors, prospects, and lapsed):** Outer envelope should be hand addressed and stamped (no address labels and no mail metering).
  - b. **For regular donors/prospects/lapsed:** Outer envelope can be typed and mail metered (if needed).
- 17) Be sure to include a pledge card/commitment form and return envelope.



**DRAFT PROSPECT APPEAL LETTER TEXT**

<DATE>

<CONTACT NAME>

<ADDRESS LINE>

<CITY>, <STATE>, <ZIP>

Dear <CONTACT NAME>:

**"I can't read,"** explained seven year old Tasha, to her second grade teacher. Imagine the fear she felt, knowing that she was so far behind and so different from her classmates. After participating in <URBAN LEAGUE AFFILIATE> tutoring services, Tasha was able to read at grade level, began making 100's on spelling tests, and successfully promoted to the next grade.

Unfortunately, Tasha's story is not uncommon. It is just one story of thousands being helped by the <URBAN LEAGUE AFFILIATE> every day. Urban League clients are faced with finding employment in a shrinking job market, avoiding foreclosure, and maintaining the basic necessities of food, clothing, and shelter. Clients continue to be drawn to us because of our proven track record of pulling people out of poverty and putting them on the path to empowerment, such as:

- 100% of school age program students improved grades
- 50% of employment clients have been placed in gainful employment
- Over \$200,000 in loans secured for entrepreneurship clients
- The completion of two new affordable housing developments in northeast Oklahoma City that will contribute over \$2 million to the local economy

The League works to not only provide services to the individual, but to economically empower the family in an effort to create sustainability, while minimizing the potential of them having to come back through the door.

**I urge you to consider a gift of at least \$100 to help us change more lives like Tasha's.** All donations are greatly appreciated. Your generosity will go a long way in our efforts to ensure that every child is ready for college, work and life; every person has access to jobs with a living wage and good benefits; every family lives in safe, decent, affordable housing; and every person has access to quality, affordable health care solutions.

Thank you in advance for your support of the <URBAN LEAGUE AFFILIATE>.

Sincerely,

CEO Name  
President & CEO

P.S. – Your contribution to the Urban League empowers people like Tasha every day. You can help change our community, one family at a time by making a gift.

Customize Client Story



**DRAFT DONOR APPEAL LETTER TEXT**

<DATE>

<CONTACT NAME>

<ADDRESS LINE>

<CITY>, <STATE>, <ZIP>

Dear <CONTACT NAME>:

**"I can't read,"** explained seven year old Tasha, to her second grade teacher. Imagine the fear she felt, knowing that she was so far behind and so different from her classmates. After participating in <URBAN LEAGUE AFFILIATE> tutoring services, Tasha was able to read at grade level, began making 100's on spelling tests, and successfully promoted to the next grade.

Unfortunately, Tasha's story is not uncommon. It is just one story of thousands being helped by the <URBAN LEAGUE AFFILIATE> every day. Urban League clients are faced with finding employment in a shrinking job market, avoiding foreclosure, and maintaining the basic necessities of food, clothing, and shelter. Clients continue to be drawn to us because of our proven track record of pulling people out of poverty and putting them on the path to empowerment, such as:

- 100% of school age program students improved grades
- 50% of employment clients have been placed in gainful employment
- Over \$200,000 in loans secured for entrepreneurship clients
- The completion of two new affordable housing developments in northeast Oklahoma City that will contribute over \$2 million to the local economy

<CONTACT NAME>, last year, your gift of \$<LAST GIFT AMOUNT> not only helped <URBAN LEAGUE AFFILIATE> provide services to individuals like Tasha, but to economically empower families in an effort to create sustainable a sustainable and vibrant community for us all. As we look to the year ahead, we are eager to serve even more individuals, with plans to [list expected accomplishments for the coming year]. With your help, we can make these goals a reality.

**I urge you to renew your commitment by considering a gift of \$<REQUEST AMOUNT> or more towards <URBAN LEAGUE AFFILIATE>'s annual fund to help us change more lives like Tasha's.** All donations are greatly appreciated. Your generosity will go a long way in our efforts to ensure that every child is ready for college, work and life; every person has access to jobs with a living wage and good benefits; every family lives in safe, decent, affordable housing; and every person has access to quality, affordable health care solutions.

Thank you in advance for your support of the <URBAN LEAGUE AFFILIATE>.

Sincerely,

CEO Name

President & CEO

P.S. – Your contribution to the <URBAN LEAGUE AFFILIATE> empowers people like Tasha every day. You can help change our community, one family at a time by making a gift.

Customize Client Story



**DRAFT LAPSED DONOR APPEAL**

<DATE>

<CONTACT NAME>

<ADDRESS LINE>

<CITY>, <STATE>, <ZIP>

Dear <CONTACT NAME>:

**"I can't read,"** explained seven year old Tasha, to her second grade teacher. Imagine the fear she felt, knowing that she was so far behind and so different from her classmates. After participating in <URBAN LEAGUE AFFILIATE> tutoring services, Tasha was able to read at grade level, began making 100's on spelling tests, and successfully promoted to the next grade.

Unfortunately, Tasha's story is not uncommon. It is just one story of thousands being helped by the <URBAN LEAGUE AFFILIATE> every day. Urban League clients are faced with finding employment in a shrinking job market, avoiding foreclosure, and maintaining the basic necessities of food, clothing, and shelter. Clients continue to be drawn to us because of our proven track record of pulling people out of poverty and putting them on the path to empowerment, such as:

- 100% of school age program students improved grades
- 50% of employment clients have been placed in gainful employment
- Over \$200,000 in loans secured for entrepreneurship clients
- The completion of two new affordable housing developments in northeast Oklahoma City that will contribute over \$2 million to the local economy

<CONTACT NAME>, in the past, your support has not only helped <URBAN LEAGUE AFFILIATE> provide services to individuals like Tasha, but to economically empower families in an effort to create sustainable a sustainable and vibrant community for us all. As we look to the year ahead, we are eager to serve even more individuals, with plans to [list expected accomplishments for the coming year]. With your help, we can make these goals a reality.

**I urge you to renew your commitment by considering a gift of \$<LAST GIFT AMOUNT> or more towards <URBAN LEAGUE AFFILIATE>'s annual fund to help us change more lives like Tasha's.** All donations are greatly appreciated. Your generosity will go a long way in our efforts to ensure that every child is ready for college, work and life; every person has access to jobs with a living wage and good benefits; every family lives in safe, decent, affordable housing; and every person has access to quality, affordable health care solutions.

Thank you in advance for your support of the <URBAN LEAGUE AFFILIATE>.

Sincerely,

CEO Name  
President & CEO

P.S. – Your contribution to the <URBAN LEAGUE AFFILIATE> empowers people like Tasha every day. You can help change our community, one family at a time by making a gift.

Customize Client Story