

Annual Fundraising Appeal Letter Checklist

Take a thoughtful look at the questions below and answer honestly.

Then take a closer look at any questions to which you've answered "NO." Those are red flags, and could tank your appeal's effectiveness. Consider what you might do to change your answer.

Aim for a bold "YES" in response to each question.

The Compelling Offer

- Do you lead with a story? YES / NO
- Do you have ONE story with which you could lead? YES / NO
- Do you have a compelling visual to demonstrate your story? YES / NO
- Have you included a brief story caption? YES / NO
- Does the first sentence make you want to keep reading? YES / NO
- Is the problem clear? YES / NO
- Is it a problem the reader will find relevant/resonant? YES / NO
- Is the problem approachable, rather than overwhelming? YES / NO
- Is the solution clear? YES / NO

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- Does the solution relate to the problem, and seem reasonable? YES / NO
- Is the offer (how the donor can help vs. what happens if they choose *not* to help) repeated several times throughout the letter? YES / NO

The Specific Ask

- Is it clear what the solution costs? YES / NO
- Is it clear exactly what the donor is being asked to contribute towards this cost? YES / NO
- Is the impact of giving (and *not* giving) stated directly? YES / NO
- Is the ask scalable to different levels of donor generosity? YES / NO
- Does the letter outline the benefits of giving? YES / NO
- Is the request urgent with a need to act now? YES / NO
- Is it clear the donor can make a difference by giving? YES / NO
- Are you asking many times, starting on the first page? YES / NO
- Does the letter ask the donor for an appropriate gift amount? YES / NO

The Conversational, Approachable Tone

- Is the letter addressed to one specific person (vs. “Dear Friend”)? YES / NO

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- Is the letter friendly, conversational, and framed as one person writing to another person (vs. writing to a group of people)? YES / NO
- Do the words “you” and “your” appear frequently? YES / NO
- Is the letter free of insider talk, abbreviations, and other jargon? YES / NO
- Is the letter free of too many statistics? YES / NO
- Is the letter inspiring and persuasive rather than explanatory and educational? YES / NO
- Are the sentences and paragraphs short? YES / NO
- Is the reading level of the letter 6th grade or lower? (Check using a tool like *Hemingway* or *Flesch-Kincaid*.) YES / NO

The Format

- Is there a strong P.S. that reinforces the ask? YES / NO
- Does the letter have at least one-inch margins? YES / NO
- Is there ample white space between lines and paragraphs? YES / NO
- Are you using sub-heads, bold face, underlines, and italics strategically? YES / NO
- Are lists formatted with bullets? YES / NO

- Will there be a reply card/envelope specific to the appeal and personalized with the donor's information, included as part of the package? YES / NO
- Do you include a URL for your donation landing page for donors who prefer to give online? YES / NO
- Do you include a phone number for donors who want to contact you directly? YES / NO
- Is your donation landing page tailored to match your appeal in language, imagery and ask amounts? YES / NO
- Does the mailing envelope make donors curious about what's inside? YES / NO
- Is the person signing the letter someone donors know and respect? YES / NO
- Is the signature in blue ink?

It's well worth your effort to review all of your appeals against this checklist of questions. Because just the act of *sending* an appeal does not guarantee success. Your appeal must **CRAM** in what your donor wants:

- **Connect** (be emotional and relevant);
- **Reward** (make donor feel good);
- **Ask** for a specific action, and be
- **Memorable** (e.g., tell a story; include a compelling visual).

To your success!

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