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Annual Appeal The Nitty Gritty

1. Assign responsibilities.

Determine which staff members or volunteers will manage the steps below.

2. Establish your timeline.

Include the steps below. Work back from the date you want your appeal to arrive in the recipients' mailboxes. Be realistic.

3. Set your fundraising goal.

It's important to have a goal so you can measure your success. Base your goal on your need, but do not be too aggressive. It helps to share the goal in your letter, and publicly state your progress regularly. Your goal should be practical. If your goal is \$25,000 and you only have a mailing list of 200, that's an unlikely target.

4. Prepare your mailing list.

Have you developed a prospect list yet? Do you have a list of prior donors? Will you mail to all Library cardholders or can you target your mailing? Your mailing list size determines the quantity of letters and envelopes you'll need to print and the postage costs, which tend to be higher per piece than the printing costs. Invest time in creating a list that will be retained and updated for future appeals. Develop a system by which you can track results and refer back to a specific donor's contribution. If you anticipate continued reliance on fundraising efforts, consider including fundraising software in your annual library budget (there are many options). Don't be shy when building your list. People do not give if they aren't asked. You'll be surprised by the results.

Maintaining your mailing list, or database, is an ongoing process. Spend whatever time you can adding names, updating addresses, removing those who have moved or passed away, removing duplicates, etc.

5. Budget your expenses.

Factor in cash expenses for printing (letters, reply envelopes, mailing envelopes, etc.), postage, and any others (graphic design fees, signs, promotional items, etc.)

6. Decide on your message/theme. Write your letter.

Take your time with this one. This is a creative process. Your message has to be compelling. In my opinion, it is not enough to recount the activities that occurred at your library last year. You have to remind people why the library is essential. Consider your mission, think about the role your library and staff play in people's lives. The message should speak to library users *and* non-users. Ask for a donation in the first paragraph of the letter. Be direct with your ask.

7. Design any necessary logos, other support materials.

8. Finalize the letter design, prepare mailing and reply envelopes.

These items should look attractive. It is okay to use a generic salutation, such as “Dear Friend.” However, if this is not your first appeal, prior donors’ letters should be personalized (see #11). Make sure to include your library logo, if you have one. Your reply envelope should ask the donor to state how he/she/they would like to be recognized, including an option to remain anonymous.

9. Print all materials.

10. Mail letter. Schedule volunteers if needed to help label, stuff, and seal.

11. Promote the appeal. Make a splash.

Use whatever resources are available to you to regularly expand your reach and remind those who got the letter. Web site, email, social media, signs in your Library, etc. Announce your progress toward the goal. Be consistent, using the same title/logo for your appeal each time you reference it.

12. Track donations carefully. Thank your donors.

Keep records for accounting purposes and for your reference. Note the dollar amount, date the donation was received, the type of payment (check number if applicable), name for recognition purposes (or anonymous), and keep a copy of each thank you letter with a copy of the contribution. You’ll be glad you did if a question arises.

IRS regulations require donors have a written acknowledgement for any single donations of \$250 or above, however, donors of any amount expect to receive a thank you letter. That receipt/letter must state the your library or friends group is a tax-exempt 501(c)(3) charitable organization, the date and amount of the cash gift (or, for non-cash gifts, a description of the property donated) and, if true, that the donor received no goods or services in exchange for the donation.

Helpful Resource: National Council of Nonprofits at www.councilofnonprofits.org

Best practices: thank donors within two weeks of receiving their contribution.

13. Analyze your results.

What was the return rate of your appeal (what % of your mailing list responded), what was the average gift amount, the total raised? This will help you set next year’s goal.

14. Announce your results.

Using the same resources as in #11, let your public know the end result, and remind them of the good those donations will do for the library. Those who gave will feel good, those who did not will be reminded and might decide to give in the future.

15. Recognize your donors.

Find ways to publicly acknowledge those who donated to your appeal. (Be sure NOT to include those who wish to remain anonymous.) Not only will donors feel appreciated, but others may be encouraged to give by this gentle reminder.

16. Thinking ahead.

If you can manage it, personalize letters to those who have given in the past. Acknowledge their previous donation in the letter and thank them again for their support.