

## APRIL 2007 Annual Fund Mailing Lists

on-the-go!  
e-TA

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A service of the Corporation for National and Community Service - Resource and Fund Development Initiative

## Dear "Mailing" Colleague,

Every program and nonprofit organization needs funds to keep the electricity, water, rent, etc. bills paid. Operating support is best found through solicitation of individuals through an Annual Fund campaign. First, you need a fundraising goal, the right audience-message-packaged appeal. Then you need to target distinguishing features of donors and prospects. In this issue of On-the-Go eTA you will learn about the importance of good mailing lists in

[Reaching Your Annual Fund Goal](#)  
[The 40-40-20 Rule](#)  
[Tracking the Wild LYBUNT](#)

Do you have questions about making annual fund donor and prospect lists? Any other needs? Contact us through [LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com). Access previous issues of On-the-Go eTA by clicking on the title at the right.

## Reaching Your Annual Fund Goal

The Annual Fund campaign is your source of funding for unrestricted operating costs. It is the mainstay of your fundraising efforts. The first step to understanding how much you need to raise is to gain an understanding of your budget ([see Creating a Cash Flow Budget, On-the-Go eTA, February 2007.](#)) When it comes to raising money, if you do not know your expenses, you can neither set fundraising goals, nor let prospects know your needs.

**Total Expense Budget**  
*minus* ( - ) **earned income**  
*minus* ( - ) **endowment income**  
*minus* ( - ) **special grants and gifts**

*equals* ( = ) **Total Amount To Be Raised**

Once your operating expense budget is clarified, your next step is to review your fundraising history and calculate expectations for the next year.

### IN THIS ISSUE:

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Careful evaluation of previous years' annual fundraising activities will help you build your annual fundraising goal based on the likelihood of achieving. For each source of annual fund income, list the previous year's achievement, identify what portion of that income is not likely to be repeated, and estimate new gifts and increases. From this information you should be able to project the total amount of contributions that can be realistically achieved.

[Click here to download a sample Annual Fund Campaign Evaluation and Goal.](#)

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## The 40-40-20 Rule

Advertising pioneer Ed Mayer popularized the "40-40-20 Rule." By his assessment, successful direct marketing campaigns should be built by focusing one's attention on the audience, offer and the package in the following percentages:

- 40 percent - audience
- 40 percent - offer
- 20 percent - package

Fundraisers who rely on reaching individual donors and prospects through the mail can apply this rule and focus on:

- 40 percent mailing list

The mailing list should be comprised of an audience who is inclined to be interested your program's mission. They should have the personal wealth or giving capacity to respond to that interest. Finally, they are likely to give to your program if they have a history of making charitable contributions to others.

- 40 percent "the ask"

Your letter should establish a link from the writer to the donor, and present a compelling case for action. Be sure to ask for a specific amount of money!

- 20 percent "the package"

Whether your appeal is professionally printed or produced "in house." every part of your direct mail package should be designed to keep the reader interested...from the stamp (or indicia) to the reply card. It matters to donors that their names are correct (spelling and punctuation) and that correspondence is as personal as possible.

Where can you get names for your annual fund list?

[Click here to gain ideas on how to build a](#)

## Upcoming Training

*Upcoming CNCS/Resource & Fund Development Initiative Offerings:*

### **Resources Now!**

#### **National Institute:**

Fundraising training and coaching opportunities offered over 3 days.

Next in **San Francisco, CA, May 22-24!**

**NOTICE-Registration Deadline-April 23!!**

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# Tracking the Wild LYBUNT

If you have been sending direct mail solicitations for several years and have collected a good number of donors and prospects, it may be time to segment your donor/prospect list to send targeted requests. People upgrade support and need tailored treatment, they lapse in giving and need reminding, or stop giving for personal reasons. Compose different versions of your asking letter to these different audiences.

Here are some categories to use when segmenting your annual fund appeal and some ways to vary your ask:

Best Donors	Tailored Request for Support
Past donors who have upgraded to large annual gifts.	Create a special “donor club” and invite them to a special event.
Past donors who have given consistently over a number of years	Tell them that they are most appreciated for their long-time support. Tell them what has changed since their first gift.
Donors who have made special gifts above their annual gifts or give multiple times in response to multiple needs	Make note of the special gift in your letter to them.
Previous Donors	Tailored Request for Support
People who gave last year	Ask for an increased donation
LYBUNTS (Last Year But Not This Year) SYBUNTS (Some Year But Not This year)	Tell them you have missed them. Let them know what has happened while they were away and not giving last year or two or three years ago.
People who gave one gift several years ago and have not responded to repeat requests.	They may not be at that address any more and the new occupants may be tossing the mail. It might be time to purge them from the list if you do not have any way to make contact. Save your annual fund dollars for better prospects.
Donor Prospects	Tailored Request for Support

## Share Square

A successful annual fund solicitation list needs to constantly be growing. Ask your fundraising volunteers to contribute names of potential donor from the membership lists of organizations to which they belong.

*“A friendship can weather most things and thrive in thin soil; but it needs a little*

New prospects who have made an inquiry or asked to receive your newsletter	Thank them for their interest. Send them a brochure or informational packet.
New prospects provided by a fundraising volunteer	Have the volunteer write a note at the bottom of the page.
New prospects who attended an event.	Thank them for coming to the event. If it was a fundraising event, let them know how much was raised.

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## Let us know

Do you have insights to share about making annual fund donor and prospect lists?

Contact us at [LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com) (LEADline is sponsored by the Corporation for National and Community Service through its Resource & Fund Development Initiative.) We would be happy to answer questions or to give you more support.

Thank you for your interest in On-The-Go eTA. We encourage you to [send this and other issues of OTG eTA to friends and colleagues](#) who would benefit from the information. Also, if you're on information-overload, you may request [email removal](#). Otherwise OTG e-TA will be back soon with another edition.

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*mulch of letters and phone calls and small, silly presents every so often - just to save it from drying out completely."*

Pam Brown, Australian poet, b. 1948

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*Details from above:*

## Build a Solicitation List

- Ask previous donors. Those who have given before are your best prospects for giving again.
- Send a solicitation to the members of your advisory board. These people have the greatest investment in your program's success.
- Ask your advisory board and/or fundraising volunteers to provide names to be put on the list.
- Ask your advisory board and/or fundraising volunteers to provide lists from organizations to which they belong.
- Send to your newsletter mailing list.

- Capture the names and addresses of people who come to events.
- Capture the names and addresses of people who contact your organization for information
- Write to your vendors or suppliers.
- If appropriate, ask your clients or their families.
- Add the names of local business and community leaders.
- Buy or rent a list from a list broker.
- Gather names from public contributor lists found in other nonprofit publications.

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## Resources

*The National ASK (Awareness, Skills, Knowledge) to Sustain Institute*, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 1998, 2002

*Resources Now! National Institute*, sponsored by Corporation for National and Community Service, provided by Campaign Consultation, Inc. 2006 - present

Support Center for Nonprofit Management at <http://www.supportctr.org>

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## Additional Learning Products and Services

### **LEADline:**

*(Learning Experiences At a Distance)* LEADline is designed to give information fast. Have a resource & fund development question? Use LEADline and within 24 hours you will receive response and advice from a fundraising professional.

### Contact us

[LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com)

### **GIZMOs:**

*(Giving Information for Zooming Money Objectives)* Gizmos are resource and fund development tools for you and your volunteers. They are tangible products in packets, pocket brochures, CD-Roms, games, etc. They feature a myriad of fundraising topics such as **The Power of Direct Mail**, an interactive cd-rom and detailed companion booklet on developing your direct mail program.

To order, contact us through

[LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com)

or call 410.243.7979

or toll free at 1.877.243.2253

For more information:

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### ***The Chronicle of Philanthropy:***

Everyone who comes to a Resources Now! National Institute gets a free subscription to the Chronicle for a year. Participants in CNCS Campaign Consultation workshops receive the latest issue free of charge plus a \$20 discount on one year's subscription.

### ***Workshops/Clinics:***

The Corporation for National and Community Service (CNCS), through its T/TA service provider Campaign Consultation, Inc., offers a three-hour workshops and clinics for those interested in mastering key skills need to write for individual donors.

### ***Online Courses/Webinars:***

Web course delivery of topics pertinent to resource development such as — **Build Fundraising Volunteer Champions** and **Cause Related Marketing and Corporate Partnerships**.

Available through the Resource Center, [Click Here](#)

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## **Tell Us!**

Let us know by contacting us through [LEADline@CampaignConsultation.com](mailto:LEADline@CampaignConsultation.com)

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- [March 2007 Government Funding](#)
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- [Mid-January 2007 Nonprofit Branding](#)
- [December 2006 Baby Boomers](#)
- [Mid-November 2006 Thank You and Recognition](#)
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- [Mid-June 2006 \*Plan Your Fundraising Year\*](#)
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