
THE ULTIMATE
GUIDE
TO
WRITING
MAJOR
DONOR LETTERS

Direct mail isn't dead. It's very much alive, and it's one of the best ways to engage donors, especially your major donors.

IN THIS GUIDE, YOU'LL DISCOVER THE STRATEGY, TECHNIQUES, AND FORMATS THE EXPERTS USE TO CREATE LETTERS THAT WORK.

With this information, now every letter you send will have the power to engage, persuade, and cultivate one of the most important donor segments for any nonprofit – your major donors.

THE STRATEGY

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THE STRATEGY

Direct mail letters that work all have two things in common – they’re based on sound strategy and proven techniques. It’s vital to have this underpinning in place in order to set yourself up for success when writing to major donors. Here’s what you should consider to make the letters you send to your major donors as effective as possible.

START BY QUALIFYING YOUR LIST

If you're a major gifts officer, you're probably responsible for a group of donors in your caseload or portfolio. The collection of donors might have been prepared after a review of some transactional data, including a donor's recency of giving, frequency of giving, and the monetary value of their gifts (also known as RFM). You might have a team behind you that conducts prospect research. Or you might enlist the help of a wealth screening or predictive analytics and modeling firm to help you identify the best donors for your portfolio. That's great! Identification is an important part of the process for assembling a target list.

But the next step, the *qualification* stage, is more critical, because you want to send your major gifts letters only to qualified prospects.

Just because someone matches a certain profile does not mean they should be on your caseload. They might not want to have a personal relationship with you (or any other fundraiser). They might just want an arm's-length relationship instead. Don't push these people too hard, too fast. Don't be

like so many overzealous (or over-pressured) fundraisers who skip the qualification stage and jump right into cultivation. And don't be like the fundraisers who skip both the qualification *and* cultivation stages to surprise supporters with their solicitation letters.

Major donors tell us they get appeals two or three times a year asking for donations of \$1,000, \$5,000, or more from organizations they've never given to and have not opted into communications with. Letters like these, sent to suspects – hi-capacity people you suspect might have an interest in your mission at a high level, but have never engaged deeply with you before – might generate some response. But the other people on your suspects list might balk, feeling they shouldn't have been on your list in the first place. Or worse, they might recoil because they were asked for too much too soon.



Don't skip the qualification and cultivation steps.

According to Richard Perry and Jeff Schreifels of Veritus Group, for every three donors who meet your major gift criteria, only one will want to relate to you personally. Having a donor on your caseload costs money. **Qualifying them ensures that your efforts will be exponentially more cost effective.** You'll spend less time writing, emailing, and calling people who won't respond, freeing up more time to communicate with people who want to make an impact and work with you to achieve their goals.

But just because two out of three donors might not want to be on your caseload now doesn't mean they'll want to be out forever. For many, it just means not right now. Or it means they don't believe they need to work with a facilitator to meet their needs. In that case, they should still benefit from cultivation and stewardship communications, especially if they have passion for your mission and capacity to make an impact.

They should always be updated, thanked, and invited, without being smothered or harassed. Everyone likes invitations even if they don't go to the parties. With the right communications, they might someday decide they want to talk to you so they can realize their dreams of making an impact and finding meaning in their life. We'll discuss this more in the next section, The Four Types of Letters.

So, how do you create a qualified donor list? If you want 100 qualified donors on your caseload, you'll need to qualify 300 donors with the capacity and interest in your cause. Then you'll need to find a way to determine who wants to work with you. The best way to do this is with one-to-one donor discovery visits, but doing 300 of those would be expensive and time consuming.

The next best way to develop a qualified donor list is with a [donor survey](#). With this tool, the most passionate supporters will lean in and help you get to know them. The fact that they took the survey is a qualifier, but their answers will provide you with invaluable information such as why they care, what they care about, how they like to give, who they might refer you to, where they are in the consideration process, when might be a good time for you to ask, and how you should ask. Plus, a [donor survey can help you capture wealth information you can't buy, such as whether or not they have children, a donor advised fund, or appreciated assets they would like to give away](#). With that information, your letters almost write themselves.

Lastly, if you're wondering who to survey, try our [Fundraising Report Card](#). It's free and thousands of nonprofits around the world use it to leverage their data.

SHOW ‘EM THAT YOU KNOW ‘EM

We have two ears and one mouth because we should listen twice as much as we talk. Most of your listening might happen when you’re face-to-face with a potential donor, but a survey can be just as effective in providing the initial discovery information you need. [Then once you’ve listened, you need to show them what you learned by personalizing your letters and making them highly relevant to your donors’ needs and interests.](#)

Using the recipient’s name in your letters, instead of an impersonal “Dear friend,” is a good start, but this is a hi-capacity supporter – you should go a lot further! Let’s say you have two different parts to your mission and you know (because you surveyed and listened!) which aspects each donor cares most about. Consider creating two versions of your letter and segmenting your list accordingly.

Send your supporters information, stories, and volunteering or giving opportunities that align with their wants, needs, and interests. If they told you they won’t give property, don’t target them with an appeal for property donations. If they say they’re interested in saving cats, don’t send them opportunities to save dogs. Your donor has a personal mission that they’re looking for you to facilitate on their behalf. Know what that mission is, and do your best to help them accomplish it.

USE THE WORD “YOU”

An amazing thing happens when you use the word “you.” Instead of writing to a faceless list of prospects, you write as if you’re speaking to one person with hopes, aspirations, plans, and desires. When you’re talking to just one person, you can’t help but adopt a “you mindset,” meaning that you think about how you can provide value to that person, instead of the other way around. You can easily describe how your organization can help her find meaning in her life and the outcomes that she can expect from her support.

Unfortunately, most organizations make their major donor letters about themselves, saying things like, “We are helping the poor,” “Won’t you help us save the children,” and our personal favorite, “Won’t you send in a gift to allow us to save this or that.”

WRONG! Instead, it’s important to **provide value**. In other words, help your donors realize the best versions of themselves. Help them feel like the heroes in their own life stories. Describe to them what their gifts will do. Talk about the impact and the outcomes they can help bring about, rather than the process that makes the outcomes possible. Bottom line, **make them feel good!**

For instance, let's say an organization needs a new \$10,000 piece of equipment to perform laser eye surgeries. Most nonprofits focus on the process – the machine, how advanced it is, how excited the doctors will be to use it, and so on. **The best organizations talk about outcomes thanks to the kindness and generosity of others:** the mother of two who will be able to see and the transformation that will create in her life thanks to you, your support and support from so many others like you. (Notice I used the word “you” and referenced the story of a specific person - more on that later).

They might *delicately mention* that hundreds of people will be helped. They might *touch on* the efficiency and the ROI of the machine. But they will *focus heavily on* outcomes and the donor's role in making them happen: “This woman who is blind today will be able to see because of *you*.”

INCLUDE THESE IMPORTANT LETTER ELEMENTS

We estimate that 80% of donors will scan your letter or proposal. But they'll read it only if they see something interesting during their scan. That means you should [use design \(formatting, bolding, underlining, and so on\) to call out the most important elements of your letter.](#) **Just like we do.**

Take great care in selecting which sentences to highlight – they will be the first things the donor reads. We recommend highlighting three or four sentences that either summarize the letter or request for the donor to send in a gift (if you are writing a solicitation letter).

6 MOST-READ PARTS OF ANY DONOR LETTER

Based on eye-camera studies

Professor Siegfried Vogele

Dean of the Institute for Direct Marketing

Munich, Germany

1. HANDWRITTEN TEXT

Special little notes that could make them feel special

*Here is some
handwritten text*

2. THE DONOR'S NAME

People like to make sure it was sent to them specifically and if the sender spelled their name correctly

Donor's Name

3. ANY UNDERLINED, BOLDED OR HIGHLIGHTED COPY

This helps them skim the letter easily for convenience

4. THE SIGNATURE

Supporters like to see if the sender signed it personally

[Handwritten Signature]

5. THE SENDER'S NAME

Because the donor wants to see who sent the letter

Sender's Name

P.S.

6. THE P.S.

Supporters figure the P.S. will help them get the gist of the letter quickly so they can see "what's in it for them"

Here are the most-read portions of any letter in order of importance. If you aren't focusing on these portions of your letter to grab attention and engage donors, you're making a mistake.

- 1 Handwritten text.
- 2 The donor's name.
- 3 Underlined and bolded copy.
- 4 The sender's signature.
- 5 The sender's name.
- 6 The P.S.

A major gift letter should feel more special than a mass mailing. Select high-quality paper and packaging. Send your letters in an oversized envelope with additional information or special enclosures, such as a photo, a handwritten letter from someone helped by your organization, a drawing from a child, or something else that signifies hands-on treatment. Show donors you care enough to offer something unique, something of value to them. Because that's what they're "buying" when they make a donation to your organization. They're "buying" a sense of purpose, they're "buying" the warm fuzzies, they're "buying" a way to make a real difference and feel good. Show them their generosity matters and they are awesome.

PROVIDE VALUE

Creating value is easier said than done. Most fundraisers still believe their job is to show the donor how great their organization is – and they are failing! They fail for two simple reasons:

- 1 They don't recognize that value is in the eye of the beholder.** The donor decides the value, not the organization or the fundraiser!
- 2 They don't understand that value is about benefits and costs.** The donor considers giving \$10,000 or \$50,000 (whatever amount), and they instantly begin to think about what they'll get at that cost. Will they get notoriety? Will they get to live on in the minds of others? Will they get to feel like a hero in their own life story? Will they get to change something they want fixed in the world?

The potential value your supporters perceive they can attain from giving could be tremendous. It might even be incalculable. But the value could also be greatly diminished or entirely lost if donors don't perceive that they can get what they want.

You stand between your donors and your organization (and its beneficiaries). You can help facilitate the exchange of money for value. You can be the bridge. You can grease the skids.

You can make it easy or make it hard. You can make it a pleasure or a chore. All of that depends on your ability to first create value and then deliver an opportunity (in your letter) for each supporter to take advantage of it.

TELL A STORY

Storytelling is essential. It helps elicit emotions that build desire and move donors through the decision-making process. Choosing the right story at the right time is important. For instance, early in the relationship with you and your organization, a supporter might be looking for someone to “guide” them, to help them understand what you can do for them.

Here are three kinds of stories about you that can be used at this stage. Consider including one or all of these in your major gifts letters with varying lengths, especially when the relationship is new (from *What Great Salespeople Do: The Science of Selling Through Emotional Connection and the Power of Story*):

- 1 The Who I Am Story** – Describes who you are and your life journey succinctly (with emotion), including how you are connected to the cause, the reason why you’re reaching out to the donor now, why it matters so much, why you care, why it’s important, and so on. People give through people. So be real about who you are and you’ll gain their trust.

- 2 The Who I've Helped Story** – Describes with detail (and emotion) what other donors experienced and how they benefited as a result of supporting your organization's mission. Remember, it's not about you! It's about the donor and how she benefits from giving as a result of your partnership with her. Think of yourself as the facilitator of her giving. Explain how you've helped others get what they want. Once your donors realize that they can trust you and that you can help them achieve their unique philanthropic goals, they'll be more likely to partner with you.
- 3 The Who I Represent Story** – Describes the history and mission of your organization. You might use a timeline or infographic to describe what the organization did, what it does, what it wants to do, who it helps, and why all of that is important (and urgent). People give when they have belief and confidence in an organization's ability to take on what one, lone donor couldn't possibly contend with on her own. Prove your organization can get the job done on her behalf. But do it with a story.

After telling your story, you may want to consider handing control back to the donor. After all, people won't give because of your story. They'll give because of theirs and how it entwines with your organization's mission. So, ask them to share their own story with you online, by phone, or even with a return letter. If you're smart, you'll recognize that this is your opportunity to collect the information you need to determine what story you should tell next. That next story should move the donor through the decision-making process. Here's an example used in a stewardship letter:

Dear, _____,

I thought you'd like to know how you helped a fellow Soldier in need recently.

Staff Sergeant William Flores was facing real hardship and hurting. Living in Atlanta, his wife Sabrina was diagnosed with leukemia. The only treatment was a bone marrow transplant, and the only match was her sister Jennifer. But she lived across the world in Spain. SSG Flores and his family desperately needed help and, thanks to your generosity, he got it.

Struggling with medical debt, he requested a loan for Jennifer's travel expenses. Through a grant, [XYX Organization] was able to cover those travel expenses with no need for them to pay it back. "God sends angels," said William, fighting back tears last time I saw him. "Having so many supportive people, it's a big comfort."

Your stories can be short or long. Either way, it is essential that they include the following components:

- 1 A relatable character for whom your donors will have empathy;

- 2 A problem that, of course, ties back to the mission your organization shares with the donor;
- 3 Emotions expressed by the characters in your story, by you (thanks to your first-hand experience) or implied by others (like Jennifer);
- 4 A solution that came about thanks to the donor and her generous support. Remember, donors don't give to fundraisers or organizations, they give through them.

CREATE VARIETY FOR YOUR DONORS

You can't bore your donors into giving. You have to provide variety and novelty in the offers you deliver to your supporters. Novelty engages donors and helps them move through the consideration process. *People are naturally drawn to opportunities to acquire new information or become involved in fresh, new experiences, because it makes them feel good.*

Researchers at University College London studied this in 2006. They found that novel information and experiences trigger the release of dopamine – the feel-good chemicals – making us feel there's a reward waiting around the corner. Their research suggests that we associate positivity with novel offers.

Researchers also found that novelty improves memory. By combining new information with familiar information during learning sessions, their subjects' memories of the familiar increased by 19 percent. So, providing your supporters with new information or new ways of engaging with familiar concepts may help them understand and retain your organization's mission, need, and how they can make an

impact. And besides, people get tired of hearing the same message over and over. With novelty, we're talking about bringing something new into the mix of your offers for engagement.

Bottom line, if you want people to engage with you and remember what your organization can do on behalf of donors like them who want to make an impact, make sure your offers are new and interesting.

END ON A STRONG NOTE

In effective communications, the closing is just as important as the beginning. So, here are some great ways to end the letters you send to major donors (especially when you are soliciting a gift):

- 1** [First name], I'm really counting on you!
- 2** [First name], when you look back on this moment, you'll be so glad you [mission-oriented copy here].
- 3** [First name], this is your chance to make a huge impact on [mission-oriented copy here].
- 4** [First name], you may not know their names and they may not know yours, but your thoughtful generosity will help [mission-oriented copy here].

- 5 [First name], your investment in [mission-oriented copy here] will make a difference in their lives for generations to come.
- 6 [First name], your compassion will give our children and grandchildren [mission-oriented copy here].
- 7 [First name], with your help [beneficiaries] will be able to [mission-oriented copy here].
- 8 [First name], you will be so glad that you decided to help!

By the way, did you notice how many times I wrote “you” instead of “I”?

READ IT OUT LOUD

When you've finished writing your letter, take a minute to picture your grandmother (or another dear friend or relative). How is grandma feeling? How does she sound? What does she want her family and friends to think of her? What is she concerned about?

Do you have a clear image in your head? Good. Now read your letter out loud. *If it doesn't sound approachable, earnest, and natural, you have some re-writing to do.*

You can't expect donors to wade through copy that sounds like a Ph.D. dissertation or like it was written by someone in junior high. Value their time and show them that you care about your relationship. Make sure your letter is clear, easy to read, and sounds like it's going to a trusted friend.

That means eliminating jargon. According to research by Dr. Russell James at Texas Tech University, philanthropy is a social act that relies on the mechanisms of family bonding, so warm, simple *family* words will always outperform cold, complex *formal* words. Instead of saying, "By making a transfer of assets through a donor advised

fund, supporters can realize a tax deduction and immense personal satisfaction.” Try, “Your gift is tax deductible and will preserve beautiful farmland for generations to come.” The second example is more heartfelt, conversational, direct, and encourages the reader to imagine the legacy she could leave for future generations. When you can get donors in this reflective mindset, thinking about their own life story and how they can be the hero in it, they’re much more receptive to giving opportunities.

THE FOUR TYPES OF LETTERS

For the most part, the time a donor spends thinking about charitable giving happens without your presence. But your donors do want to engage with you, and will use multiple channels to do so. Similarly, you and your organization should be using multiple channels to communicate with your donors. Engaging and cultivating major donors isn't a one-time thing. It's a process that involves a series of touch points that gain power over time, guiding your donor to the decision to give.

Face-to-face, one-on-one engagement is best, but it's expensive, and the donor doesn't always want to interact with you in this way. If donors see a post on Facebook, it may be emotional, but it's rarely personalized for them. The same thing goes for watching a video. Even an email, while it may be more personal, is digital and can still feel cold.

These channels and others have their place, but the truth is that a direct mail letter is often the easiest and most effective way to connect. If it's done right, it can enrich the relationship more than any other kind of communication. A letter conveys warmth and shows you are committed to the relationship. It's a personal experience that you took the time to create. That means a lot for the person receiving it.

Here are the four types of letters to send to major gifts supporters:

- 1 Invitation letter:** This will encourage your donor to opt-in to a deeper one-on-one relationship with you, get more involved or see your organization's work firsthand.
- 2 Cultivation letter:** This will show the difference your donor could make or is making and the great work she might be able to support or is contributing to at your organization. It should be welcoming and make her feel as though she can be or already is part of a team working single mindedly toward a shared mission.
- 3 Solicitation letter:** This is a very specific request of the donor, and it should detail an urgent need and how she can be a hero by answering that need.
- 4 Stewardship letter:** This letter should explain what was done with the donor's gift, and thank her with emotion and sincerity for her generosity.

Let's go into more detail about each of these.

THE INVITATION LETTER

The invitation letter is a pathway for an opt-in relationship with your supporter. It's a personal communication inviting them to enjoy benefits once they engage with you, your organization, and its mission on a deeper level. It might ask the supporter to become more involved. It might offer opportunities to volunteer, take a tour, attend an event, see your work firsthand, join the board, and so on. Or it might simply ask the supporter if they would like to engage with you, the facilitator, to learn more about how you help others like them meet their needs and philanthropic interests. **Donors should not be treated as targets. They should be invited to be on your radar. Then, those who opt-in for a deeper relationship will be highly qualified and more likely to give over time.**

A letter that includes a donor survey is the most effective type of invitation. You've probably heard the old adage, "If you want money, ask for advice. And, if you want advice, ask for money." People love to share their opinions, and they love it even more if you show them that you listened. When you send out a survey and ask for advice, you bring people into the fold

and make them feel needed and appreciated while gathering invaluable information about their wants, needs, passions, desires, and interests for your long-term, relationship-building cultivation efforts.

People who respond to the survey are not only self-qualifying but also telling you everything you need to know to cultivate and solicit them: why they care, who they might want to honor, when you should reach out to them, how you should reach out to them, and more. They might also tell you about assets they'd consider giving, whether or not they ever had children and other important information for raising major gifts. If you survey them, they will give you all you need to succeed. And that's more than what you'd get if you were to chat with them at a volunteer event. So, the other invitations are good, but this is your most effective option.

THE CULTIVATION LETTER

Although many might consider the solicitation letter to be critical, your cultivation letters are actually the most important of the four letters because they build trust and confidence in you and your organization over time. They link your donor with your mission and build interest and then desire, compelling your donor to become more passionate about your cause. [In fact, if cultivation is done right, your supporter might self-solicit, making your “ask” easy and expected.](#) Donors who’ve been cultivated properly gain belief and confidence in your organization to get the job done on their behalf, making it feel natural to reach out to them in times of need with offers that are *meaningful* to them. The idea is to show donors they can realize the best versions of themselves by partnering with your organization. To do this, you need to understand your supporters’ wants, needs, interests, and why they care.

If you follow the [MarketSmart blog \(SmartIdeas\)](#), you’ve probably read about our CEO, Greg Warner, and his wife, who is diabetic. Because of this, we often support diabetes-related

nonprofits. Greg *wants* a cure for diabetes because he loves his wife and *wants* her to be healthy. But his wife *needs* a cure. In terms of *interests*, he's passionate about partnering with organizations to create a scientific breakthrough, but his wife, who's tired of hearing about a cure being just around the corner, prefers to support other initiatives. As you can see, wants, needs, and interests can vary greatly among donors – even within the same household! Each donor is like a Rubik's cube, with each square corresponding to a different want, need, interest, verbatim, digital data point, action, and so on. There are an infinite number of combinations, making the solution massively challenging for the fundraiser.

In your college sociology class you probably heard about a guy named Maslow, who created a “hierarchy of needs.” At the bottom of the list are your most elemental needs, things like food, water, shelter, and sleep. After that comes safety and security – the need to be a part of a community and to feel love and connection with other people. The next stage is status, a feeling that you've accomplished something and are respected. And at the pinnacle of Maslow's hierarchy of needs is self-actualization, the need to find meaning in your life.

People want to be a part of something bigger than themselves, and it's especially true of your major donors. They're accomplished people. They've fulfilled their lower-level needs, but they often struggle to reach the top of Maslow's pyramid. They're good at accumulating wealth, but when it comes to self-actualization, they often use their money in ways that don't create a lasting impact.

My favorite example is Oprah. Oprah's philanthropic journey began with a decision to give everyone in her audience a car. She did this for a while before realizing that her gifts weren't making her feel fulfilled. Growing up poor, Oprah was the beneficiary of charitable organizations, and she felt the need to give back. As the granddaughter of a woman who never graduated from high school, she had an interest in the power of education to lift people out of poverty. So when her good friend, Nelson Mandela, approached her with an opportunity to build a school in South Africa, the stars aligned. Now the Oprah Winfrey Leadership Academy for Girls in South Africa enrolls 300 disadvantaged students, and Oprah's legacy lives on as these remarkable young women take their place in the world.

[A big part of your job as a major gifts officer is to help donors reach this experience of self-actualization and find meaning in their lives through *successful* philanthropy.](#) This kind of giving isn't just a tally of annual fund gifts, but tackles the root cause of a problem, creating a ripple effect of good that ideally outlives the donor. Help your donor be the hero in her own life story. Help her be effective with her giving. Help her move from "donor" to "philanthropist."

So how do you do this in a single letter? Well, you don't. Donor cultivation should be a series of interactions that unite the donor's wants, needs, and interests with your cause. But well-executed cultivation letters over time can do a lot of the legwork for you.

The first step is to identify what's meaningful to your supporter based on her persona. In their book, *The Seven Faces of Philanthropy*, Russ Alan Prince and Karen Maru File outline the following major donor personas:

- 1 The Communitarian:** Doing good makes sense to these local business owners who often get involved with a nonprofit to build relationships and help their communities prosper.
- 2 The Devout:** Doing good is God's will and a moral obligation.
- 3 The Investor:** Doing good should be examined like any other business strategy with careful analysis of the "win-win" potential and the opportunity to obtain tax benefits.
- 4 The Socialite:** Doing good is fun because it allows them to socialize with their networks through fundraising events.
- 5 The Altruist:** Doing good is something that will allow them to grow spiritually and selflessly.
- 6 The Repayer:** Doing good is a way to pay back an institution or organization that helped them or someone they love at one time in their life.
- 7 The Dynast:** Doing good is a family tradition and responsibility.

If you followed my advice in the “Basics” section of this eBook and you employed a survey, you already have a list of qualified donors who’ve opted into communication with you. And because of the information from that donor survey and through other interactions, you should have a good idea of which persona your donors best fit. With that in mind, build trust and grow the relationship by sending them highly relevant offers for engagement that makes them feel good because it meets *their* wants, needs, and interests. Don’t try to educate them about initiatives they don’t care about. That will turn them off.

Here’s an example of how to do it. Let’s say you have major gifts prospects that fit the Investor persona. You should craft your communications to this group to help them recognize the “win-win” potential of the gift and possibly include a calculation of their individual tax and estate benefits. But, for a group that fits the Socialite persona, consider inviting them to your organization’s signature event. In fact, send them two invitations, and ask them to invite a friend who they feel would want to support your organization’s mission. Consider adding a hand-written sticky note to the invitation or include a list of other people they might know who already said they’ll be attending.

Once you’ve determined the right type of offer to send, make sure you’re presenting it in the right way. A cultivation letter should never talk about the organization, but should emphasize how your donor and others like her are making a difference. For example, instead of saying, “Give to our organization so we can make a difference in the lives of children.” Try, “Checkout this video so you can see how your

support is making a lasting difference in the lives of children and in our community.” See how the cultivation offer is simple and provides value?

Or, even better, tell stories of how others have realized the best versions of themselves by giving. For instance, send a letter along with a picture of the school children another donor helped. Be sure the picture shows them benefitting from the books, clothes, shoes and furniture delivered by your organization’s field staff thanks to her generous support. Consider having the children sign the letter. That would be powerful!

Remember, people give through organizations, not to organizations. Your efforts need to make your donors feel good. They must provide opportunities for self-reflection and self-actualization. Then, then they’ll move themselves through the consideration process and even solicit themselves once they believe in your mission and your ability to carry it out on their behalf.

THE SOLICITATION LETTER

Your solicitation letters will be the most direct. They will ask for money or some type of deep involvement and work best after your donor has already received invitation and cultivation letters. As I mentioned, you never want to move from identifying a prospect to asking for a gift, skipping the qualification and cultivation stages.

In our globalized, digital world, many of your most active supporters may live far from your headquarters, and that makes in-person solicitations difficult and expensive. Plus, because most of the thinking donors do about your cause happens without your presence, it makes sense and will save time and money to send a solicitation letter that encourages donors to reflect on building their personal mission and how they can accomplish it through your organization.

But before you start writing your solicitation letter, you must know:

- 1 The need (the reason the gift is needed)**
- 2 How much you'd like them to give**
- 3 Exactly what their gift will accomplish**
- 4 How you'd like them to respond**
- 5 When you'd like them to respond by**

The reason major donor letters fail is because they are sent to the wrong people, at the wrong time (not ready to be asked) while ignoring their personas, needs, and interests. But they also fail because the five points mentioned above aren't included or communicated well. If you've thought about these things before you start, and include them in your letter, you're well on your way to success.

When communicating the need, be sure to make it as clear and compelling as possible. Too often, nonprofits don't talk about the need because they've internalized it.

Although you know all about your organization's need, and it seems obvious that people should give, it might not be so obvious to your donor. She spends far less time thinking about this stuff than you do. So, be specific. The more dire, the better.

For instance, if your organization has a financial shortfall, how big is it? If people are homeless, what is it like to be homeless? If medical research is not supported, what's the human cost? If you're asking your donors to solve the world's problems with their gifts, you're taking a huge risk to assume that they know the problem is as big and urgent as you know it is.

Next, you need to communicate how much you're asking the donor for. **Every solicitation letter you send to a major donor should have a gift ask amount customized for that donor's letter.** The most successful major gift fundraisers know each donor, their giving history, and their giving potential. They use that information, along with the specific need they're trying to meet, to determine how much to ask for. Your gift ask should fall into one of two categories:

- 1 Fully customized:** the amount is set for each donor based on how much you think they can give at this time (and is often based on a giving goal you've set for your donor for the year)
- 2 Semi-customized:** this is a gift ask based on the donor's most recent gift

Fundraisers are often too vague in their ask, and it weakens the credibility of the need. If any amount will work, how big and urgent is your need really? If you need \$1 million dollars for a new piece of medical equipment that will save hundreds of lives, consider making a giving chart with different

giving levels that show the number of gifts needed at each level to meet your goal. You might also try productizing the opportunity. For example:

- \$512 feeds one classroom of children for one week
- \$8,371 feeds one classroom for a year
- \$16,742 feeds two classrooms for a year

Notice that these are not round numbers, because they should be real figures! Be specific and honest with your needs, and encourage supporters to give at a level that will make a lasting impact.

When asking for a specific amount, be sure to include what the donor's gift will accomplish, and remember that stories work better than statistics. You should never say, "Did you know that 7 people every minute go hungry" or "1.5 acres of rainforest are lost every second." Statistics drain emotion from your letters. [Giving isn't a pragmatic decision. It's an emotional decision, and your donors don't connect with cold statistics. But they do connect with people and stories. So, instead, focus on humanizing your need.](#) Try including a photo of someone who will benefit from your donor's generosity, and explain how a gift will change that person's life.

Once you've communicated your need, asked for a specific amount, and explained what impact the donor's gift will have, include a call to action. The letter should make it clear what

you'd like your donor to do after reading the letter. You should say something like the following at least two times in your letter: "I hope you'll fill out the enclosed response form and send it to me with a check today." This is important: Tell your donor what you want her to do. Give them your direct address instead of a post office box. Remember, people give to people in support of causes, not dubious boxes with numbers.

Finally, include a deadline. This reinforces the urgency of your need. Let donors know what will happen if you cannot raise the money in time. Then, remember to end on a strong note, thanking your donor for her previous support and reiterating that her gifts will make a lasting impact so she'll feel like a hero in her own life story.

THE STEWARDSHIP LETTER

The stewardship letter is often overlooked, but it's integral because donors are going to wonder what you did with their money. So you owe it to them to report back about how they made a difference. *If you neglect this step, you're leaving the door open for your donors to feel remorse, driving them to find another charity that will treat them right.*

Be thankful for the donor, not the donation. You should have a “you mindset” when you write all donor letters, but it's especially important in stewardship letters. Three very powerful words to use are “because of you.” Because of you, students were fed. Because of you, people were clothed. Because of you, animals were saved. Don't focus on what your organization accomplished. Instead, tell your donor what she's accomplished with her gift and how thankful you and others are for her.

You should thank your donors frequently, but it's important to keep your communications interesting by offering something new and novel. Here are some ideas:

- Include quotes or testimonials in your letter. Better yet, enclose printed photos with captions written on the back from your organization's beneficiaries.
- If you work with children, consider asking the kids to write a note or draw a picture, and include that with your letter.
- Tell the story of someone who benefitted from the donor's gift, or have the beneficiary write the story in her own words.
- Send a handwritten card.
- Make a photo book showing the success of the donor's project.
- Send an engraved plaque officially honoring the donor's outstanding support.
- Acknowledge the anniversary of your donor's gift, giving her an update on the continued impact of her generosity.
- Alternate who the thank you is coming from. Your gratitude probably doesn't mean as much to the donor as that of a child she has fed or a family she has helped to house or a noted activist for your cause.

- Are there certain objects that are associated with your cause? Incorporate them. A horse rescue thanked a major donor by telling the story of a neglected horse with deformed feet that she helped save. They also included a bronzed shoe from the first set of horseshoes that saved his life. A wildlife preservation organization pressed fall leaves and sent them to donors, thanking them for preserving this beauty to be enjoyed forever.

Donors give in order to feel good, so your stewardship letter should help them feel like they got what they wanted and accomplished what they set out to accomplish, which is to realize the best version of themselves. Self-actualization is the reward for giving. Not a tax receipt (although you should provide that to them as well). Give your donors this opportunity to reflect on the amazing things they have accomplished through your organization. Give them something they can treasure long after the check is signed.

SOME FINAL THOUGHTS

In this guide we've covered a lot of the thinking that goes into major gift letters as well as the specific techniques that help make them effective. We've covered everything from defining the audience, to storytelling, to striking the right tone, to using the right letter formats, and more.

These things are important, because the better your fundraising letters are, the better you're serving your donors. And that's what donor communications is all about. [Fundraising should never be an intrusion in our donors' lives.](#) The reality is that donors want to give. They want to make a difference. They want to change our world for the better. It's true of all donors, and it's especially true of major donors.

The people giving at higher levels know they have the resources to make an even greater impact. Many feel they have a responsibility to give. They're just looking for the right opportunity, and it's up to us as fundraisers to help them find it and facilitate the exchange of money for value. When we do that well, our cause benefits, the ones we serve benefit, and our donors themselves benefit. Everyone wins – what could be better than that?

APPENDIX

GENERAL MAJOR DONOR LETTER WRITING CHECKLIST

The supporters on my list have been qualified.

The supporters on my list have been cultivated appropriately.

I have personalized my communications with information I know about the donor.

I am using special paper and packaging that reflects hands-on treatment.

I am using the word “you,” and have focused on how the donor can benefit and make an impact, NOT on my organization and how great we are.

I have humanized my request with stories and not just statistics.

I have used formatting, like bolded or underlined copy, to highlight key messages.

I have included a handwritten note on the letter or other special enclosure.

My key message is highlighted in the P.S.

I know what the donor values and have included an opportunity for her to realize that benefit through supporting my organization.

I have included something novel in or with my letter that will delight the donor.

My ending is strong and repeats the key message of the letter.

I have read the letter out loud and it sounds natural and sincere.

I have chosen family words over formal words.

INVITATION LETTER CHECKLIST

My letter is phrased in a way that allows donors to “opt-in” to communications with my organization.

My letter includes a donor survey.

My letter clearly invites the donor to get more involved in a specific way (i.e. attend an event, see our work first-hand, take a tour, etc.).

I know what the donor values and have included an opportunity for her to realize that benefit through my organization.

CULTIVATION LETTER CHECKLIST

The people receiving my cultivation letter have opted in to communications with my organization.

The people receiving my cultivation letter have been qualified.

I have reached out to the qualified, opted-in donors through several channels they prefer as part of a robust cultivation process, including through email, donor surveys, special events, in-person chats, LinkedIn, invitations, etc.

I have identified my donor's wants, needs, and interests.

I have given my donor the opportunity to fulfill her wants, needs, and interests through my organization.

My letter does not focus on my organization and how great it is, but rather how my donor can make a difference.

My letter offers the donor an opportunity to feel good about themselves.

My letter includes specific stories about the impact we are making together.

SOLICITATION LETTER CHECKLIST

The people receiving my solicitation letter have opted in to communications with my organization.

The people receiving my solicitation letter have been qualified.

The people receiving my solicitation have carefully cultivated with direct mail letters, emails, special invites, phone calls and in-person communication through the channels the donor prefers.

I have clearly communicated a specific need and included compelling stories to illustrate its urgency.

I have asked the donor to for a specific amount of money that correlates with a real, demonstrable need.

I have shown the donor what her gift can accomplish in a moving, emotional way.

I have clearly told the donor the methods by which she can respond.

I have clearly told the donor when I'd like her to respond by.

I have thanked the donor for her previous support.

STEWARDSHIP LETTER CHECKLIST

I am sending this stewardship letter in a timely manner following a donor's gift.

I am thankful for the donor, not the donation and I make use of the phrase "because of you."

I thank my donors frequently with sincerity.

I am thanking my donor in a unique and memorable way by including something novel with my letter that will inspire, surprise and delight.

I am giving the donor something she values in return for her generosity.



We help you qualify and prioritize major donors
and legacy supporters for outreach.

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Generate more major gifts and uncover previously undisclosed planned gifts with donor surveys.

giftmaker+[®]

Take the guesswork out of marketing by using proven technology to rank, score, and automatically nurture leads with relevant, timely, personalized messages. You'll maximize your gift disclosures by spending your time with the most qualified and interested donor prospects, and letting Giftmaker+ take care of the rest.

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