Messaging and Communication Strategies in support of PAR’s Individual Donor Plan

A companion piece to the Individual Donor Plan

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Messaging Overview
This section helps develop the messages about low-level adult literacy that will best compel individuals to donate to Partners in Reading, the adult and family literacy program of the San José Public Library. Best selling author and marketer Seth Godin says that the three most important messages in fundraising are fear, hope and love. Fear-based messaging generally works best when it’s very clear that the threat to themselves or a loved one is real. So, while donors can and do respond to fear-based messages, they are far more likely to respond to the positive and constructive aspects of an organization’s work.

Research also states the most powerful messages used by nonprofits embody at least one of these characteristics:

- They emphasize the impact of one person, animal or thing
- They evoke specific emotions
- They reinforce personal identity
- They validate a decision or action by appealing to reason
- They have a clear, strong call to action

Messages for PAR: Guiding Principals

It’s Personal
People give to people – use messaging to highlight the personal stories of adult learners wherever possible.

It’s Transformational
The work of PAR highlights how lives and our community have been changed for the better through program participation.

It’s Local
While PAR is connected to the larger issue of literacy on a national scale, the focus on messaging is highlighting and framing the problem in San José.

It’s Community Driven
PAR succeeds because of the contributions of the community through volunteering and contributions; giving back is key to PAR’s ongoing success.

Target Audiences

Current Donors: Includes Volunteer Tutors, who have the power to donate, as well as to tap their networks with those who also care about the cause of literacy.

Prospective Donors with a Connection to PAR: Friends and employers of PAR participants, staff, etc.
Prospective Donors Not Connected to PAR: Not currently connected to the program, but would support if they knew about it, meaning their interests and passions align with PAR.

Communication Campaign Ideas

Literacy Changes the Lives of Adult Learners

Target Audience(s): Current and prospective donors

Campaign focus: Partners in Reading opens doors and provides opportunities that adult learners may have never thought possible

Inspiration: Lack of literacy skills holds people back from pursuing greater levels of success and opportunity; something most people take for granted. For many, higher literacy and essential skills is needed to obtain a better job and be more successful. One common challenge among adults with reading and writing difficulties is the stigma associated with having low literacy and essential skills.

Communication Ideas: Images of adults getting promotions, receiving accolades or awards

Sample Images/Visual Example [Note: images and text are just illustrative here to show idea; these are not professionally designed or intended for one specific communication vehicle at this point.]
Literacy Builds a Strong Community

Target Audience(s): Prospective donors

Campaign focus: Community is built when instead of focusing on single-minded gain, we think about the whole community

Inspiration: Quote from Cesar Chavez – “We cannot seek achievement for ourselves and forget about progress and prosperity for our community ... our ambitions must be broad enough to include the aspirations and needs of others, for their sakes and for our own.”

Communication Ideas: Image of adult learner and tutor

Sample Images/Visual Example [Note: images and text are just illustrative here to show idea; these are not professionally designed or intended for one specific communication vehicle at this point.]

Stronger Together ... Join Us
Partners in Reading
Literacy Helps Keep People Safe and Informed

Target Audience(s): Current and prospective donors

Campaign focus: Adult literacy can help make our communities stronger and safer

Inspiration: Literacy helps us countless times per day, in many ways that we take for granted. Reading street signs, prescription drug bottles, and posted warnings are just a few of the ways that literacy helps us.

Sample Images/Visual Example [Note: images and text are just illustrative here to show idea; these are not professionally designed or intended for one specific communication vehicle at this point.]
277,000 people in Santa Clara County can’t read this bottle ...
Partners in Reading

29% of adults in San Jose can’t read this sign.
Partners in Reading
Communication Tools

This section provides input into the development of the various communication tools that PAR needs to implement its individual donor plan. This section is broken down into tools for cultivation, solicitation, retention, and includes a separate section to talk about the role of online communications.

Cultivation Materials

Case Statement

The case statement is a living document that forms the basis of outreach and fundraising materials. The case statement accomplishes three things:

1. Clearly articulates the mission and goals to ensure that the fundraising program is mission-driven
2. Contains the information that anyone who is fundraising for the organization needs to know, and helps make sure that staff, board, and key volunteers are on the same page
3. Serves as the basis for the content that goes into external materials, such as fundraising letters, grant proposals, brochures, newsletters, and so on

[See Appendix for Staff Exercise, Polishing Up Your Case Statement.]

Fact Sheet

A PAR Fact Sheet exists and is posted on PAR’s webpage. The fact sheet should be updated once the Case Statement has been revised, so it captures more completely the mission and fundraising goals of the organization. Items to consider when updating the Fact Sheet:
1) Adding photos of adult learners, and a short personal story
2) Include headings in the document for greater clarity: “History,” “What We Do,” “Successes” – this helps when people are skimming the page for information
3) Include a section on donating, and how contributions support program growth and development

Postcards

Postcards for donor cultivation can include:
1) *Become a Volunteer Tutor:* Postcards can be mailed out to current and prospective donors, and those who have indicated interest in volunteering. Content can include an overview of the volunteer tutor role, time commitment, and the date of the next Volunteer Tutor orientation.
2) “Conversations with PAR” Cultivation Invitations: Once cultivation gathering topics have been agreed upon and put on the annual calendar, a simple postcard invitation can be created. Content includes: What are “Conversations with PAR,” benefits of attending, a list of event dates, and how to sign up.
3) General postcard: This is an informational postcard that can be used to send notes, updates, etc. It can be a simple postcard with PAR’s logo on it. It gives staff and volunteers the ability to quickly jot down a note or thank you on a branded postcard.

Solicitation Materials

Remit Envelopes
PAR needs its own remit envelope that it can pass out at events. These are an easy item to order from a local printer or online.

Donation Page in Stories by Adult Learners Book
Recommendation: Add a donation page to the *Stories by Adult Learners* book. If a page is not added to the book, a remit envelope should be placed in the front cover.

PAR Fundraising Committee Pledge Form
See Appendix for *PAR Fundraising Committee Pledge Form*

Appeal Letters
Because the majority of giving happens in the last two days of the fiscal year, an end of year mailing is critical. The goal is to deliver this letter in early November, so it does not get lost in the large number of holiday mailings that reach mailboxes in late November and December. Spring is the second most successful time for direct mail. Other mailings can be done around occasions linked to PAR’s mission such as International Literacy Day in September.

Best Practices for Appeal Letters
- Use PAR’s logo on the actual letter so people begin to build better awareness of PAR
- Highlight one adult learner’s experience
- Think about the letter coming directly from one adult learner (or include direct quotes from the adult learner)
- Use a photo or photos for visual interest, and to allow the reader to connect emotionally with the adult learner
- Give people the chance to give monthly in support of one adult learner (“For just $XX per month, you can ensure that an adult learner like Jim gets our full range of support services from PAR ...”)

Give Your Appeal Letters a “Second Life”
Ask multiple, engaged PAR stakeholders to send the holiday appeal letter with a personal note to their networks:
- Volunteer Tutors
- PAR Fundraising Committee
Retention Material

Personalized “thank you” notes from adult learners
This does not need to be a highly designed item. They can be done on PAR letterhead, or even on a generic postcard or a simple postcard with only PAR’s logo on the front (the same postcard referenced above in the “Postcards” section under Cultivation Materials. The impact here is the personal thank you from the adult learner.

Best practices for “thank you” letters
A few tips for updating PAR’s formal thank you letter:
1) Send out thank you letters within 48 hours of receiving gift (this should be at the top of the communication pile – before sending out a newsletter, for example)
2) Tell donors what to expect next – for example, PAR will be adding them to their newsletter list, or give the date of the next cultivation gathering
3) Use creative openings where possible – instead of “Thank you for...” or “On behalf of...” try “You made my day” on the line by itself and then jump into a story.

Donor Welcome Packet
A donor welcome packet can increase the possibility of a second gift by almost 75%! Some possible items to include in a welcome packet:
- A quick, handwritten note of thanks from PAR staff
- PAR bookmark
- Most recent Stories by Adult Learners book
- Recent article on adult literacy
- Invitation to an upcoming PAR event

Donor Newsletter
The rule of thumb here is not to communicate unless you have something to say. In building your individual donor program, and continuing an ongoing dialogue of engagement with your donors, chances are there will always be something important to communicate. A donor newsletter keeps you in front of your donors, and let’s them know that the work (and the need for support) is ongoing. (See Appendix for Best Practices for Donor Newsletters)

Annual Report of Successes
You can’t underestimate the importance of reporting back the success of the program to donors. While PAR won’t likely give a reporting of financials, think about an oversized postcard highlighting program accomplishments for the year.

Recommendation: Postcard or single page report of annual accomplishments. (See Appendix for Sample of a One-Page Annual Report)
Online Communication

Ideally, online communication will be used throughout all phases of individual donor development: cultivation, solicitation and retention. The segments below outline easy-to-use, low cost way to use online communication to build a strong relationship with donors.

Videos from Adult Learners
Producing web-quality videos is easier than ever with today’s technology. Posting videos of adult learners talking about the program and reading their stories, as well as Volunteer Tutors testimonials help tell a powerful story. Many people prefer to get information by watching or listening to it rather than reading, so this strategy helps you reach a wider audience of people.

Recommendations: Post short videos on Facebook and website, and use videos to promote Stories by Adult Learners campaign.

Email
Email can be used as a low-cost, efficient way to reach varied audiences. Some emails to be crafted include:

Volunteer Tutor Emails:
- “Does Your Company Do Matching Gifts?” – provides Volunteer Tutors the tools and information they need to approach their employers about matching gifts.
- “Lunch & Learn Overview” – provides Volunteer Tutors with information and tools for them to hold a lunch and learn at their company to talk about PAR engagement with fellow employees.

Current Donors and Donor Prospects
- “Join Us for a Cultivation Gathering” – Invites prospective and current donors to a cultivation gathering.
- “Adult Learner of the Month” – shares the inspiring story of an adult learner each month; helps build connection and emotional resonance with PAR.

Informal Uses for Emails
- Quick updates – a big win or update about PAR’s activities
- Messages that direct people to portions of the website – link to a current success story, for example
- Member surveys – collecting ongoing feedback from donors and prospects
- Newsletters – discussing current projects and achievements
- Requests and reminders – for volunteer help, upcoming special events, etc.
Social Media
Social media (Facebook, Twitter, LinkedIn) should initially be used as a relationship building strategy through informational posts, invitations to events, and non-giving calls to action, and later used as a solicitation strategy for donor campaigns. (See “Getting the Most Out of Facebook” in the Appendix).

Basic Improvements to PAR’s Online Presence
“The level of connection to an organization that a donor experiences online is directly tied to their likelihood of giving more – and more often. Even small upgrades to the donor experience make a measureable difference in online giving.” – From The 2011 Online Giving Survey.

Here are some key improvements that can help PAR capture interest, grow its mailing list and improve the overall donor experience:

1. **Capture email addresses directly from PAR website**
   This is a missed opportunity to have people opt-in to receive updates from PAR, and a perfect gateway for relationship building and cultivating these people as volunteers and donors

2. **Grow the PAR Mailing List**
   - Send a regular e-newsletter (and encourage people to forward to friends)
   - Include a simple sign up box on the PAR website
   - Do online sign-ups for events to grow your email list
   - Ask for email address on every form PAR uses

3. **Improve the Donor Experience on PAR’s Website**
   See Appendix for High Level Improvements to PAR’s Web Pages
Appendix
Communication Campaigns from Other Literacy Organizations

The following images are from various literacy organizations: The Adult Literacy League, Ardmore Literacy Council & New Dimension Literacy Council, and The Council on the Advancement of Adult Literacy.
Staff Exercise: Polishing Up Your Case Statement

The case statement should inform your work on a regular basis, be kept up-to-date, and be reviewed at least annually, with the budget and fundraising plan updated each year. Too often, however, board and staff spend a long time creating the case statement and then file it away never to look at it again. If this is true for your organization, this exercise is for you. Do it at your next board or staff meeting or board-staff retreat.

**Goal:** To make sure your organization has a case statement that provides a shared understanding of what the organization stands for and how it will get there.

**Participants:** Board and/or staff (preferably both)

**Time needed:** 30-60 minutes

**Materials:** Copies of the following checklist, flip chart with an enlarged copy of the checklist on it, markers

**Preparation:** Decide who will facilitate the discussion. Send the checklist along with your existing case statement (even if it is out of date) to participants before the meeting.

**Steps:**
1. The facilitator reviews the purpose of having a case statement and the goal of this exercise.
2. The group goes through each item on the checklist and discusses whether it is covered in the existing case statement and if so, whether it is fine as is or needs to be updated or rewritten. Discuss until there is group agreement on the rating for each component. Fill in the checklist on the flip chart so everyone is clear.
3. For the components you already have in place and are satisfied with (don’t worry about minor edits for now), give yourselves a pat on the back.
4. For components that need to be created, updated, or rewritten, choose a small committee to draft these elements for group approval at the next meeting.

For components for which you have information that has not been incorporated into the existing case statement, assign someone to pull those materials together and share them with the drafting committee. The committee members can then decide whether they are happy with these components or they can make needed edits. Include these components in the drafts for group approval at the next meeting.
## Exercise for Reviewing an Organizational Case Statement

<table>
<thead>
<tr>
<th>Components of a Case Statement</th>
<th>Does It Meet Your Fundraising Purpose</th>
<th>Rate Your Organization</th>
</tr>
</thead>
</table>
| **Mission statement:** Why the organization exists | Does it inspire donors? | ☐ We have it and it meets our fundraising purpose  
☐ We have it, but it needs to be updated or rewritten  
☐ We have it, but it is not yet incorporated into the case statement  
☐ We don’t have it |
| **Goals:** What your organization hopes to accomplish  
**Objectives:** How you will meet your goals | Do the goals and objectives help donors understand what you do? | ☐ We have it and it meets our fundraising purpose  
☐ We have it, but it needs to be updated or rewritten  
☐ We have it, but it is not yet incorporated into the case statement  
☐ We don’t have it |
| **History:** Summary of the group’s history to show how long you’ve been doing this work and key accomplishments | Does the history help donors feel confident in the group’s ability to reach its goals? | ☐ We have it and it meets our fundraising purpose  
☐ We have it, but it needs to be updated or rewritten  
☐ We have it, but it is not yet incorporated into the case statement  
☐ We don’t have it |
| **Organizational structure:** A chart or description of the structure of the organization that tells who is involved | Does the structure persuade donors to trust the organization’s leaders? | ☐ We have it and it meets our fundraising purpose  
☐ We have it, but it needs to be updated or rewritten  
☐ We have it, but it is not yet incorporated into the case statement  
☐ We don’t have it |
| **Budget:** Expenses and income | Is it clear to donors how much your work costs and where the money goes? | ☐ We have it and it meets our fundraising purpose  
☐ We have it, but it needs to be updated or rewritten  
☐ We have it, but it is not yet incorporated into the case statement  
☐ We don’t have it |
| **Fundraising plan:** How you are going to raise your budget | Does the fundraising plan help donors understand how they fit into your fundraising? | ☐ We have it and it meets our fundraising purpose  
☐ We have it, but it needs to be updated or rewritten  
☐ We have it, but it is not yet incorporated into the case statement  
☐ We don’t have it |
PAR Fundraising Committee Pledge Form

PAR Fundraising Committee Pledge

In consideration of the ongoing operational needs of Partners in Reading, I pledge $________ during the 2012–2013 fiscal year.

I designate my gift as follows:

Annual Giving $_______ Unrestricted (where the need is greatest)

Designated $_______ Stories by Adult Learners/Underwriting
$_______ Other

Total Pledge $_______

I understand that payment for this pledge is due by [insert date]. I will fulfill my gift in the following way:

☐ Check included $________________

Please make checks out to “San José Public Library Foundation”; in the “Memo” section, please write “PAR Donation.”

☐ Please charge my Visa/MasterCard $ __________________
Card number __________________ Exp. __________________
Signature __________________

☐ My company will match my gift.
Company Name __________________
Phone __________________

☐ I would like my/our names listed as donors to PAR as follows:

☐ I/We do not wish to have any public recognition regarding this gift.

Date: __________ Signature: __________________________

Name (print): __________________________
Best Practices for Donor Newsletters

Know your audience, ask what they want, and deliver it. As you write your newsletter articles, keep asking yourself these questions: How will this article make our readers feel? How will it make their lives easier or better? Does this article show our readers how important they are to us?

Send frequently -- if you have good content. No more than once a week and no less than every six weeks. You want people to remember you and look forward to receiving your newsletter, but you don't want to drive them crazy either.

Make it personal. Consider ways to make your newsletter sound as though it is written by one staff person speaking directly to one supporter. Include articles that talk about the staff, donors, or volunteers involved in the work. Include some headshots or other people photos.

Make the next step as easy as possible. Include a call to action. Do you want readers to donate, volunteer, register, tell a friend, learn more, write an email, make a call? Include specific calls to action and links that make following through as simple as possible.

Put an unmistakable name in the "From" field. If you decide to put a person’s name in the “From” field, use a name that at least 80% of the people on your mailing list will recognize.

Use a specific, benefit-laden "Subject" line. Pack your subject lines with details about what’s inside, emphasizing the benefits to the reader of taking a few extra seconds to see what's in the body of the message. That's a tall order for 50-60 characters, which is the rule of thumb for subject line length.

Design a simple, clean newsletter. Readers should be able to skim through the newsletter and take something away from it. The design should include a balance of text and relevant images to build engagement. Content should drive the reader back to your website, blog or social media pages for more information, so it’s important to include those links in a prominent location.

Write and design for the preview pane. Most people don't actually open each email message. Instead, they use the preview pane to view them. That means you've got a fairly small space to impress your reader enough to make them either scroll through your email or open it fully.

Appeal to skimmers. Use lots of headlines, subheadings, and short chunks of text. People scan and skim email before they read it. Short paragraphs and sentences are easier to skim. Descriptive headlines and subheads with active verbs and vivid nouns will grab your supporters' attention and nudge them into actually reading the text.

Use an email newsletter service. If you have more than 20 people on your mailing list and you want that list to grow, you need to use an email newsletter service provider or ESP. Many online client database/fundraising service providers include email marketing in their packages.
Sample of a One-Page Annual Report

A one-page annual report of accomplishments can fit on an oversized postcard. The sample below was designed by Elissa Schloesser, and shows a great way to reduce printing and postage costs, while still delivering critical organizational information to your supporters (in a format that might actually get read). You can always direct your audience to your website or a more detailed PDF if need be.

[Note: Elissa used stock photography below, but suggests using original photos when creating your own; it will allow PAR to tell a further story with captions.]
High Level Improvements to PAR’s Web Pages

Make Changes to current “Donate Now” fields
PAR should rethink its website to make it more donor friendly. A good example can be found at http://www.literacychicago.org/donate/. For now, focusing on just tweaking the basics can vastly improve the donor experience.

1. Add a “Donate” button near the top of page – easy to see, and stands out
2. Add some engaging text under “Donate to PAR” in the box to the right. Example: “Your donation helps PAR train more volunteer tutors and adult learners – every dollar counts!”
3. Include some additional information about the online donation experience. Example: “Donations are processed through the San José Public Library Foundation. Please enter ‘PAR Donation’ in the Additional Comments section of the form.”
4. Add a contact person for additional information.
5. Put the box on all of PAR’s web pages.

Did You Know?
About 16% of American adults function at the lowest level of literacy.

In San José, that means over 153,000 adults lack the basic skills to read the directions on a medicine bottle, find an intersection on a map, or fill out a job application.

Recognize the Signs of Low-Level Literacy (PDF)

Make a difference: Donate to PAR
Suggestion: Add a link in the “Related Pages” box shown above called “Donate to Partners in Reading.” This will keep the opportunity to donate consistently in front of visitors to the page.

When you click on the “Donate & Volunteer” button at the bottom of the screen shown above, it takes you to the web page shown below. Suggestion: Add text under “Donate Money” that says: “If your donation is to support Partners in Reading, please note that in the ‘Additional Comments’ section of the donation form.”
Maximize PAR’s Facebook Page

The number of “likes” your page has does not always translate into user interaction. Even with a smaller amount of fans, if they are more proactive on your site they will be more useful than gaining a lot of fans who do not take notice of your posts:

- In addition to posting relevant things about PAR, keep track of what your fans are interested in and cater to their needs (helps make PAR’s Facebook page a regular destination for them and truly contribute to PAR’s overall online presence)
- Test a variety of content: photos, videos and questions are the most engaging kinds of Facebook posts
- Use Events in Facebook to track attendance and help spread the word about events
- Use Facebook “Causes” to launch a fundraising drive for PAR (www.causes.com). This allows PAR supporters to create a drive for PAR and promote it directly to their networks. It can exponentially expand PAR’s fan page through outreach done by those people who are already fans. How do you get them to start a cause for PAR? You create a post on your Facebook page with the link and you ask them ...

Save Time

- To post to and monitor Twitter, Facebook, and LinkedIn at the same time, use Hootsuite or a similar tool for simultaneously posting, and the ability to analyze trends and data.

Use a Blog

- A blog is a great way to become thought leaders in the space, share innovative ideas, highlight adult learners ... the list goes on here.