

THE POWER OF MAIL FOR CHARITY FUNDRAISING

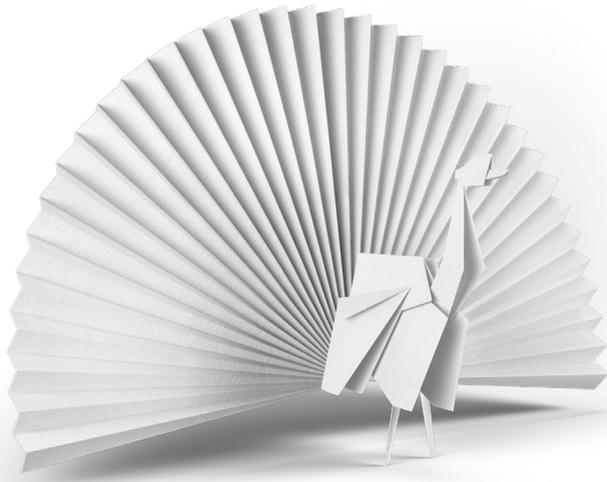
A guide for fundraisers

 **marketreach**
unleash the magic of mail



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INTRODUCTION

Mail has long been at the heart of charity fundraising and supporter relationships. In today's increasingly digital world, mail is a powerful media channel used by organisations large and small to reach audiences and to help supporters feel truly valued.

What do we mean by mail? In this guide, 'mail' is used to reference any communication that reaches the public through their letter box, whether that takes the form of addressed letters, unaddressed door drops, postcards, newsletters, reports, event packs, retail catalogues or more.

An integral part of the fundraising mix, charities often use mail to thank supporters for their commitment and donations; to provide updates; to equip event participants, campaigners and volunteers with what they need to take action and, of course, to appeal for funds. More recent developments have seen an influx of charity mail subscription services on the market, and the integration of new technology, bringing mail into the digital world.

“ Mail remains a critical medium for charities in today's fast paced omni-channel world. It allows charities to put a targeted personal message directly into the hands of their chosen audience. It offers charities an unmatched ability to tell their story and guide donors to engage further, whether that means going online for more information, making a donation via post, phone or online or strengthening donor relationships. ”

*Stephen Agar,
MD Letters,
Royal Mail*

WHAT FUNDRAISERS THINK

The largest and most recent industry survey of charities' use of mail, which captured the views of 200 fundraisers¹, shows that it remains a primary channel for fundraising. The Chartered Institute of Fundraising survey found that more than four out of five fundraisers say that mail is a key part of their fundraising programme, and that they currently use it for fundraising or supporter engagement.

Mail stands apart from other channels, not only as a tangible and physical product, but one that arrives in the home, and remains as a visible reminder of the charity's brand or message, often for days or weeks. And, with UK fundraisers reporting that donor acquisition is their biggest focus for the future², mail is an important and widely accessible way of reaching and engaging new supporters.

WHAT TO EXPECT FROM THIS GUIDE

This guide explores how charities can make the most of mail, finding both new and improved ways to connect with their audiences to raise funds and to nurture the all-important supporter relationship.



¹ Chartered Institute of Fundraising, Fundraising Mail Survey (December 2019)

² Fundraising for Impact, Chartered Institute of Fundraising (2019)

THE POWER OF MAIL



Total return on investment (ROI) increases by 12% when mail is included in the mix



92%
of charity mail is engaged with (opened, read, sorted, put aside for later, filed, put on display or in the usual place)



Mail's tactility enhances its impact. People value what they can both see and touch 24% more highly than if they can only see it

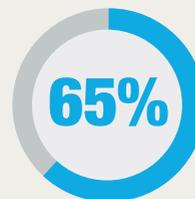


Typically, charity mail is kept in the home for as long as a week

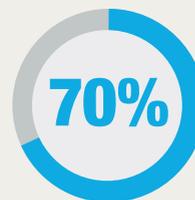


Each item of charity mail is read and revisited an average of

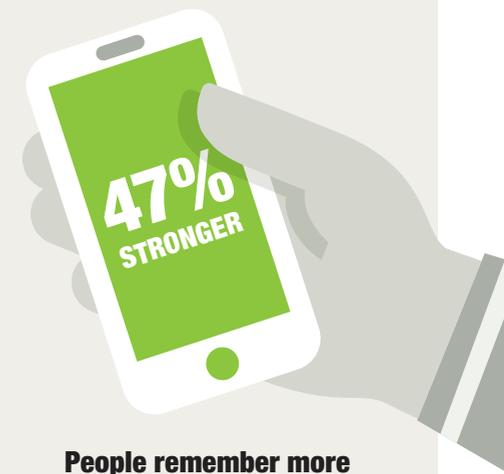
4 TIMES



65%
of recipients say they are likely to give mail their full attention



70%
say mail makes them feel valued



People remember more from mail items compared to email or social media content with long-term memory encoding 47% stronger

Source: JICMAIL (Q2 2017-Q1 2019) & MarketReach (2017-2019)

THE CHANGING WORLD OF MAIL

The latest developments in technology, mail services and data protection regulations have undeniably impacted the way in which charities use mail, enabling better targeting, more creativity and integrated multi-channel strategies for engaging supporters and the wider public.

Charities, like other organisations, have had to comply with recent changes to data protection laws. This has frequently led to contact databases getting smaller as organisations have deleted data they are no longer able to hold. As a result, charities have a clearer understanding of who is happy to receive different types of communication from them. Typically, that means a more responsive and engaged audience, offering greater potential for better and more successful fundraising.

Technology too is bringing about positive change: enabling even greater personalisation, helping charities build their brand and strengthen their storytelling by using personalised web links (URLs), QR codes and incorporating virtual and augmented reality devices, delivering a whole new supporter experience.

Charities can track user patterns and response metrics, matching mail recipients to their next actions, whether that's watching a personalised campaign video or going online to make a donation. For the first time, through Royal Mail's Mailmark service, charities have the ability to track where their mail is in the system and prepare for its delivery. And through JICMAIL, a representative consumer panel, they can monitor how people react and respond to what lands on their doormat.

Technology is also adding value in other areas: improving responsiveness by enabling charities to send out mail campaigns within 24-48 hours of an event. Meanwhile, recycled paper, packaging materials, and biodegradable inks have become increasingly accessible, enabling mail to become an even more sustainable, environmentally-friendly option.



WHY MAIL?

The latest research from the Chartered Institute of Fundraising tells us that the large majority of charities use mail for fundraising and/or supporter engagement.

When comparing their use of mail with other channels, fundraisers put it in first place for bringing in donations, for communicating with and building connections with donors, and in the top three for raising awareness, finding new donors, and helping charities stand out from the competition.

Fundraisers recognise the benefits of providing a tangible/physical letter, leaflet or other mail item that stays around the home, keeping the charity front of mind, and making room for storytelling. And, in an increasingly digital world, fundraisers say it feels much more personal than many other channels, helping supporters feel truly valued.

DID YOU KNOW?



82%

of fundraisers use mail for their fundraising / supporter engagement programme



93%

say that it enhances the supporter experience, building loyalty and engagement



82%

of fundraisers value the room mail provides for storytelling

Source: Chartered Institute of Fundraising, Fundraising Mail Survey (December 2019)

WHY SUPPORTERS LIKE MAIL?

MAKES THEM FEEL VALUED

The perceived effort and cost of writing or sending a mailing, particularly when its personalised to them, helps supporters to feel valued and appreciated: “They cared enough to write.”

THE ABILITY TO READ AND RESPOND IN THEIR OWN TIME

When mail arrives, supporters often hold on to it, looking at it later, sharing and discussing it with friends and family. This gives them the flexibility to respond in their own time.

A GOOD READ

With the space to tell and illustrate a story, mail can be engaging, informative and useful, helping people to understand the impact of their support and what their next actions / options are.

CONTROL OVER WHAT THEY RECEIVE

The public has the ability to control what they receive, and when they look at it, signing up to relevant preference services or making direct requests to organisations over how they wish to be communicated with.

CONVENIENCE

Arriving on their doormat, mail can be a convenient way for people to receive information, updates, newsletters, welcome packs, thank you cards, event participation packs and more, allowing them to engage when it suits them.



Source: Royal Mail MarketReach (2015 - 2019)

WHY MAIL?

CASE STUDY: NATIONAL YOUTH ORCHESTRA OF GREAT BRITAIN – BECAUSE OF YOU...

The National Youth Orchestra of Great Britain took a personalised approach with its award-winning direct mail campaign to bring in and nurture a new wave of committed donors. Theming its acquisition around the concept of turning talent into brilliance, the charity empowered new

supporters with a strong clear message about their impact: “Because of you... we have a National Youth Orchestra of Great Britain”. Thank you letters were hand signed, with the charity’s musicians writing their own postcards to donors giving at a higher level. The number of committed givers jumped from 149 to nearly 4,000 in just two years.

Source: National Fundraising Awards – Best Supporter Experience, Chartered Institute of Fundraising 2019



A TANGIBILITY THAT RESONATES

Mail reaches into the home, resonating with supporters and conveying how much they are valued. As a physical product,

not only is charity mail likely to be noticed, it is more likely to gain a recipient’s full attention for longer, to be held on to, considered and shared with family and friends.

“ Mail’s tangibility provokes a very different reaction than other channels, and with so much content vying for people’s attention in the digital space, it can be that much more substantive. So, even if you don’t give when you receive it, mail is a reminder that that charity is there and a physical reminder to respond when the time is right. It can have a particularly strong impact on emotional resonance and engagement. ”

*Daniel Fluskey,
Head of Policy & External Affairs,
Chartered Institute of Fundraising*

WHY MAIL?

USING MAIL TO ENGAGE AND STRENGTHEN SUPPORTER RELATIONSHIPS

As is the case with most fundraising channels, mail performs best when part of an integrated approach, building value and strengthening the supporter journey. Rather than seeing a piece of mail in isolation, mail will often help keep the

message in play – in the ‘to do pile’, discussed, acted upon – and driving a response. It’s a great opportunity to develop the narrative and build engagement, telling a fuller story. This means understanding how people use and engage with it to keep them moving through the mail journey.

“One of mail’s powers is that it’s a great partner with digital. In fact, our neuroscience research shows mail can enhance the impact of digital when people have seen mail first. It sends people online, and encourages people to grab their phone and engage with the charity further. We’re seeing a lot of innovation through the inclusion of technology such as Augmented Reality.”

*Ian Maynard,
Insight and Planning Director,
Royal Mail MarketReach*

UNDERSTANDING THE STAGES OF ENGAGEMENT

STAGE 1: INITIAL SORT



- Open
- Read/look/glance
- Throw away

STAGE 2: MAIL MANAGEMENT



- Put in usual place
- Filed for reference or records
- Used/did something with the information
- Put it on display
- Took it out of the house
- Passed it on to someone else
- Put aside to look at later

STAGE 3: USING MAIL TO TAKE ACTIONS



- Discussed with others
- Visited sender’s website
- Went online for more information
- Made a donation, payment or bought something
- Visited sender’s shop
- Called the sender
- Posted a reply
- Used tablet / smartphone

As defined by JICMAIL.
Source: Royal Mail MarketReach

WHY MAIL?

MAIL AS A RELATIONSHIP BUILDER

Mail makes people feel valued. In fact, 70% of people surveyed in 2017 said receiving mail from an organisation helped to build trust.¹

People recognise the effort and cost that goes into writing to them, particularly when it is personalised. Thanking someone for their support and telling them precisely what their donation has helped to achieve makes them feel appreciated and part of the story, deepening the supporter relationship.

CASE STUDY: ACTION AID'S POSTCARD – SONALI'S STORY

To update supporters on the charity's work to end violence against women and girls, and to inspire in them a sense of pride over their donations to the cause, Action Aid sent out personalised thank you postcards to its regular donors. Featuring a captivating photo and telling the story of Sonali, who had been

injured in an acid attack as a young child, the postcard was a cost-effective, simple and yet powerful way to showcase the charity's work. The card was easy to share or put up on the fridge or noticeboard. It conveyed both thanks and recognition without making any additional financial ask. For supporters that wanted to know more, Sonali's story was continued in an online blog at www.actionaid.org.uk/sonali.



Source: Action Aid (2020)

¹Royal Mail MarketReach, Mail in Uncertain Times, 2017

10 TOP REASONS FOR USING MAIL

1. PERSONALISATION

The ability to personalise and tailor mail helps to bring recipients closer to the charity and cause.

2. LONGEVITY

As a physical item, people tend to hold onto mail longer, to look at it more than once, reminded by its presence to act.

3. SHAREABILITY

It's easy to share and by arriving at someone's home is likely to be seen by more than the recipient alone.

4. STORYTELLING

Mail provides the space to tell and illustrate a story well, helping to communicate impact and build engagement.

5. RELATIONSHIP BUILDING

The public recognise the effort and cost that goes into writing and sending mail, helping communicate that they are valued by the charity.

6. CONTROL

People can choose what they receive by mail and when to look at it, increasing their receptivity to charity communications.

7. INTEGRATION

It gives charities the ability to reach out to people who may have seen a campaign elsewhere to continue or expand the story (pairing particularly well with TV and digital).

8. IN THE HOME

Mail is unique; the only channel that will transport a physical item directly into people's homes.

9. VERSATILITY

Whether charities choose to send leaflets or welcome packs, newsletters or thank you cards, mail is versatile, enabling charities to communicate their message in their own way.

10. DRIVING RESPONSE

Mail adds value, particularly as part of an integrated approach, increasing ROI and driving response.

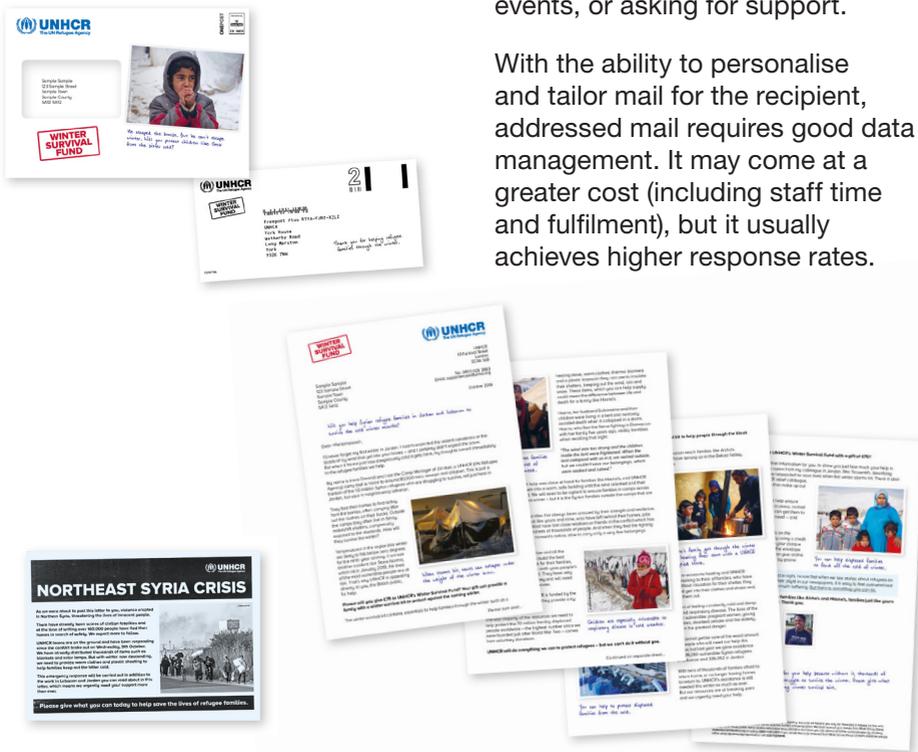
UNDERSTANDING MAIL

Mail can encompass a wide array of products and campaign messaging. With three different types of mail – addressed (direct mail), unaddressed and the newer option of ‘partially addressed’ mail, it’s helpful to have a clear understanding of how each one can work for charities.

DIRECT MAIL

Direct mail (addressed to an individual’s name and residence) is widely used by charities when communicating with current and potential supporters. This might include welcoming them on board, thanking them, updating them with the charity’s progress, issuing newsletters, inviting them to participate in other activities and events, or asking for support.

With the ability to personalise and tailor mail for the recipient, addressed mail requires good data management. It may come at a greater cost (including staff time and fulfilment), but it usually achieves higher response rates.



Source: UNHCR, the UN Refugee Agency, Winter Acquisition Campaign 2019 – Direct Mail. Created by Bluefrog Fundraising

PARTIALLY ADDRESSED MAIL

In recent years, partially addressed mail has been introduced to offer tighter targeting than is possible through unaddressed mail, but without requiring the recipient’s personal data. These campaigns are directed at households by postcode, each of which typically reaches around 15 homes. Because they are targeted by postcode and not name, the letters often have a shared salutation where a name would appear, such as: “Dear dog lover”.

This works well for charities with clearly identifiable target audiences and can also enable them to omit households that are already on their database. As with unaddressed mail, postcodes can be tested and ranked, and lookalike postcode profiles identified to achieve the optimum targeting.



Source: Great Ormond Street Hospital Children’s Charity 2019 with illustrations from Tony Ross

UNDERSTANDING MAIL

UNADDRESSED MAIL

Unaddressed mail or 'door drops' have the ability to reach almost 30 million households in the UK, targeting by postcode sector, which omits the final two characters of a postcode (e.g. LS8 4). Because they don't require or feature the recipient's name and address, unaddressed mail doesn't need to use personal data.

Each postcode sector covers around 2,500 households. Geodemographic data can be used to determine the general profile of a particular sector, which can then be ranked for their potential (by average response rate and other factors). This approach can be useful for targeting specific audience types, urban or rural areas, and to locate people living in close proximity to a charity or fundraising event.



Source: BookTrust.
Created by GOOD Agency

DID YOU KNOW?



5 days

Charity door drops have an average life span in the home of 5 days



3 times

Typically, they are engaged with 3 times



1 week

21% of charity door drops are still live in the home after one week

Source: JICMAIL (Q2 2017-Q1 2019)

UNDERSTANDING MAIL

CASE STUDY: MARIE CURIE – THE GREAT DAFFODIL APPEAL

The Great Daffodil Appeal is Marie Curie's largest annual fundraising campaign with mail accounting for a significant proportion of the total income. Launching in the lead up to Spring, it's a vital time of year for recruiting new supporters, as well as mobilising and stewarding the most loyal supporters. The appeal includes direct mail to existing supporters, along with cold direct mail, partially addressed, and door drops, totalling well over a million packs.

Source: Marie Curie and Bluefrog Fundraising (2020)

In recent years, recruitment packs have followed the same refined creative and design, featuring the ever-popular Nurse Alma, while the warm case study is updated each year. Campaign mailings are all incentivised, including the Marie Curie daffodil pin, a postcard, notelet and gift stickers. Issuing the mailing in mid-February allows for the spread of daffodils to begin, before wider activity kicks off throughout March.

“ We are fortunate to have a strong, recognised brand, particularly at this time of year, and a healthy mailing pool for continuous testing and learning. Direct mail appeals provide supporters with an easy, convenient way to donate and a cost-effective way to raise much needed funds from a wide and diverse audience. We rely on a very responsive, core group of supporters, so mailings remain a pivotal part of our fundraising mix at Marie Curie. ”

*Michelle Golding
Appeals and Mid-Value Development Manager,
Marie Curie*



USING MAIL FOR FUNDRAISING

Mail's strengths lie in building engagement and relationships, particularly as part of an integrated media plan. This enables charities to use mail at each and every stage of the supporter journey, while complementing and strengthening the narrative conveyed through other fundraising channels.

The beauty of mail is that it gives charities opportunities to reach out to recipients at the beginning of the supporter journey, and at every stage thereafter. A visual and copy rich story can leave a lasting impression; one that can be expanded and developed as the relationship builds.

OPPORTUNITIES FOR MAIL TO BUILD & STRENGTHEN SUPPORTER RELATIONSHIPS



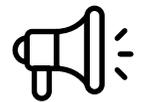
EDUCATE AND BUILD AWARENESS

ESTABLISH CONSIDERATION AND TRUST



WELCOME AND THANK, RELATIONSHIP FORMING

PROMOTE OTHER WAYS OF SUPPORTING THE CHARITY



DEEPEN ENGAGEMENT AND BUILD TRUST, HIGHLIGHTING DONOR IMPACT

MAINTAIN FOCUS ON SUPPORTER CARE



USING MAIL FOR FUNDRAISING

APPEALING FOR FUNDS

Mail is widely used to appeal for funds from the charity's current support base and beyond. This might include large-scale Christmas campaigns and other planned appeals or more targeted

outreach to lapsed donors, potential high value or legacy donors. And now, with print technology meaning it is possible to issue a mail campaign in as little as 24-48 hours, emergency appeals can also encompass mail.

CASE STUDY: MÉDECINS SANS FRONTIÈRES – THE WORLD'S MOST COMPLEX HUMANITARIAN DISASTER

When responses to its emergency appeals declined over a two-year period, Médecins Sans Frontières sought to break through supporters' fatigue of seeing generic images of war-torn areas and raise vital funds. In 2017, the charity sent out a mailing telling the story of its staff in

Lake Chad – 'The World's Most Complex Humanitarian Disaster' – in the style of a graphic novel. Line drawing allowed MSF to tell a story too distressing for photographic imagery.

The uniquely styled pack created intrigue the moment it landed on the doormat, with MSF seeing a dramatic and immediate uplift in response, income and ROI compared to its previous emergency appeal.

Source: DMA Awards Entry 2017



USING MAIL FOR FUNDRAISING

REACHING AND ENGAGING NEW SUPPORTERS

Reaching, recruiting and engaging new supporters remains critical to charities, with fundraisers saying that mail is one of the top three most successful channels (alongside

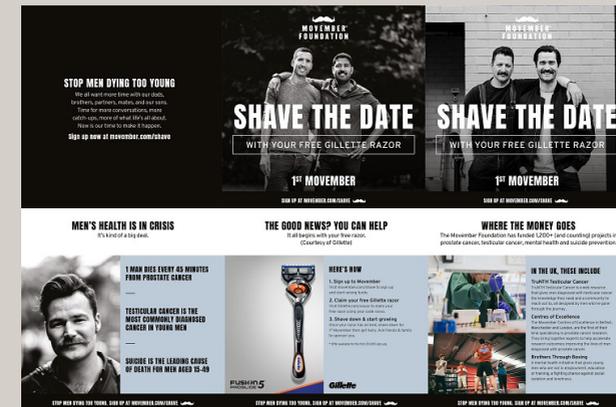
social media and online) for donor acquisition. The space mail affords to tell a story and to illustrate it with imagery makes it effective for drawing the public in, educating them about the cause, the charity's work and starting the supporter journey.

CASE STUDY: MOVEMBER – SHAVE THE DATE

When Movember – the men's health charity – set out to attract new supporters for its 2018 campaign, the charity carried out a door drop to key postcode sectors, calling on people to "Shave the Date". Sent to 250,000 households, the leaflet

explained the 'what, how and why' of Movember, offering a free razor to the first 20,000 people to sign up. With a clear message, the door drop alone attracted 1,500 new donors and enticed over 300 existing supporters to commit to take part in the campaign again.

Source: Movember (2018)



USING MAIL FOR FUNDRAISING

BUILDING LONG-TERM SUPPORTER RELATIONSHIPS

Every charity knows how essential supporters are, and the importance of acknowledging and thanking them for their generosity. Mail has a key role in developing and deepening that relationship, boosting donor retention. A simple, prompt and heart-felt welcome message or thank you letter can be immensely powerful. Many charities will schedule their mail programmes in line with key moments along the supporter journey (such as donation or event anniversaries) to remind supporters how valued they are.

CASE STUDY: RNLI – SHANNON

In a recent RNLI Christmas campaign, raising funds to launch a new boat, the charity invited supporters to add their name to a list etched into the boat's number. Targeting Baby Boomers, they sought to tap into their strong sense of community by offering them the opportunity to become part of that boat forever.

The front of the mailing featured the Shannon boat and her number, which had been magnified to show supporters' names, including that of the recipient. Over £1.6 million was donated, smashing the charity's £1.4 million target. The average gift was over £30, with overall ROI reaching £8.77.

Source: DMA Awards Entry 2016



USING MAIL FOR FUNDRAISING

TAKING SUPPORTERS TO THE NEXT LEVEL

Just as in the business world, where it is used to cross- and up-sell to customers, mail can be a great way to help charities take supporters on to the next level, whatever that might be. To turn a volunteer into a donor, a one-time giver into a long-term supporter or event participant, a regular donor to a legator, or to encourage opt in to future communications and the take up of Gift Aid.

ADDRESSING LEGACIES & MAJOR GIFTS

Leaving a legacy or major gift are not decisions most people make quickly, so mail can be an ideal way to introduce the idea, challenge misperceptions and open up the conversation, giving the recipient time to consider their response.

“ Mail enables charities to communicate with supporters directly in a way no other medium can. A mail pack creates that feeling of ‘they cared enough to write to me’ – meaning people feel recognised and valued for their support, closer to the charity and cause and more likely to support it not only for longer, but also in additional ways. ”

*Amanda Griffiths,
Head of Communications Planning,
Royal Mail MarketReach*

CASE STUDY: CENTREPOINT – DREAMS

After identifying that a major barrier to leaving a legacy to Centrepont was the public perception that homeless people lacked ambition, the charity planned its multi-channel Dreams campaign. A mailing was issued featuring an arresting image on the envelope of a child playing at being an astronaut.

Source: National Fundraising Awards – Best Legacy Campaign, Chartered Institute of Fundraising 2018 and shortlisted for DMA Awards 2017

The campaign asked:

“What were your dreams when you were growing up? Astronaut, nurse, chef, footballer, designer... No one ever dreams of being homeless.”

RESULTS

The campaign generated legacy pledges with a predicted value of £6 million and an ROI of 60:1.



USING MAIL FOR FUNDRAISING

SUBSCRIPTION-BASED MAIL PROGRAMMES

Charities have long provided member benefits and supporter services in the form of newsletters and other engaging mail packs. Increasingly, many charities are now offering creative subscription services by mail, which generate a regular source of income and inform the public, while also helping charities meet their objectives.

These range from ShelterBox's book club, with monthly book choices inspired by people and places supported through the charity's work, to Unicef's Paddington's Postcards, a themed activity pack for 4-10 year olds exploring a different country and the life of a child there, and to Scope's Mindful Monsters campaign.

CASE STUDY: SCOPE – MINDFUL MONSTERS

Disability equality charity Scope launched its Mindful Monsters monthly subscription service in answer to a particular challenge. Low brand awareness and a cause that people found hard to relate to meant recruiting regular donors had been difficult. With research showing that mums were keen to build the emotional resilience and life skills of their primary school-aged children, the charity came up with Mindful Monsters – a 12-month programme with a monthly activity pack. The pack starred four illustrated monsters reflecting each of the four themes of mindfulness that mums told Scope their children needed: concentration, positivity, relaxation and creativity.

The colourful campaign delivered 33% more sign ups than predicted in the first three months, with cost per regular donor 75% lower. Retention was nine times higher than the charity's usual recruitment channel of face-to-face.



Source: DMA Awards Winner (Charity) Silver 2017

USING MAIL FOR FUNDRAISING

GAMING WITH LOTTERIES AND RAFFLES

For some charities, lotteries can provide an alternative route to bring in regular supporters who may not otherwise sign up to a committed gift. Mail can be a great way to promote charity lotteries, and to share raffle tickets with volunteer sellers.

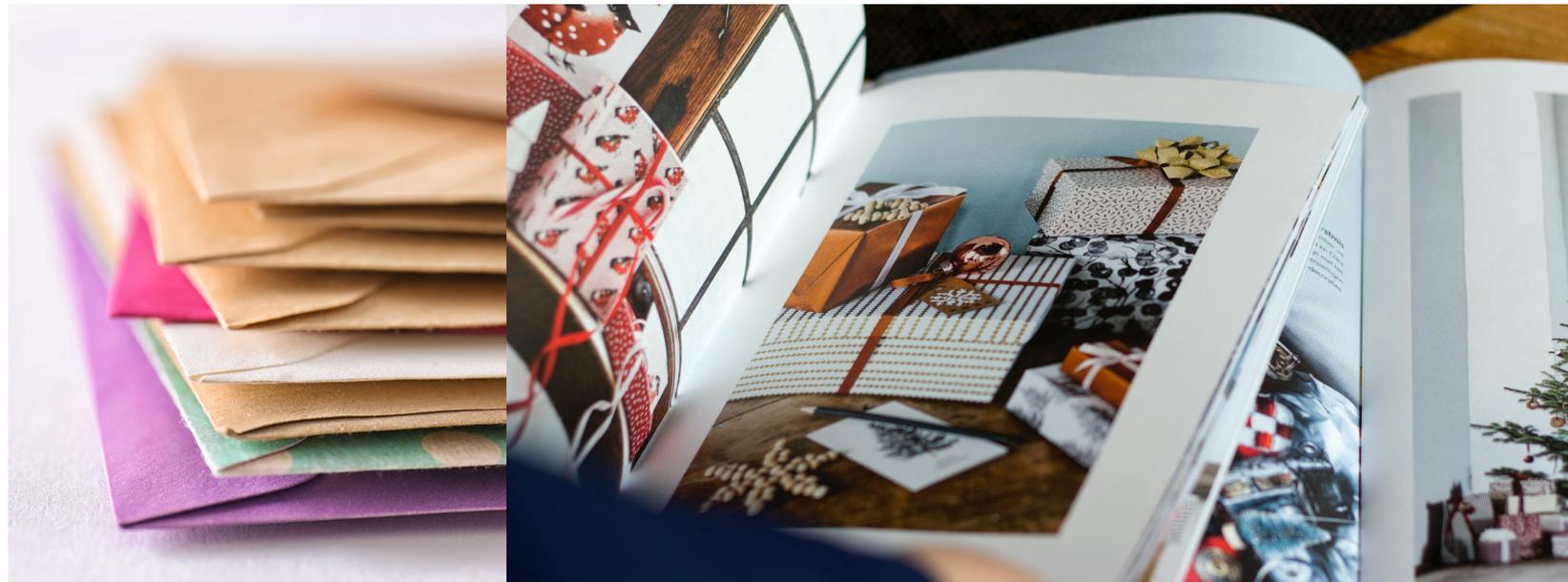
There are a number of rules and regulations that relate to lotteries and other gaming. Specialist advice should be sought regarding these before engaging in such activities.

PROMOTING EVENTS AND EQUIPPING EVENT PARTICIPANTS

Mail can be particularly useful for promoting events, recruiting participants, volunteers and more. In the run up to the events, it is often used by charities to equip event participants and volunteers, sending out entry packs, sponsorship materials and more.

RETAIL CATALOGUES AND MORE

Particularly in the run up to Christmas, many charities will send out retail catalogues by mail to promote their range of charity gifts, merchandise, or items related to their cause. Buying gifts is something that people like to spend time thinking about, browsing for ideas and so a physical catalogue can help to keep the charity front of mind, driving traffic to the website. It can also help engage a different audience, connecting with those beyond their traditional supporter base.



PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

As with all forms of fundraising, good planning is vital. You will need to have a clear objective, understand who you intend to reach, consider what form of mail to use, how to encourage recipients to respond and how you will measure and track success.

OBJECTIVE & AUDIENCE

Whether your objective is to strengthen supporter engagement, increase Gift Aid take-up or recruit a new tranche of legacy prospects, keeping that goal front of mind will help to guide campaign planning and delivery from start to finish.

When it comes to your audience, this will likely be influenced not only by your campaign objective, but practical issues like what data is available and how much it will cost. While mail is sometimes primarily thought of as a communication channel for older audiences, research into the Life Stages of Mail¹ shows that younger age groups are equally responsive. When you consider the multitude of emails and social posts they get, mail brings a real opportunity to create stand out across all age groups.

CHECKLIST: QUESTIONS TO CONSIDER WHEN PLANNING YOUR MAIL CAMPAIGN



- What are our objectives and goals?
- What audience do we want to reach?
- What do we want people to do?
- What should we say?
- Do we have a clear call to action?
- Is the message right for this audience?
- What form of mail (addressed, unaddressed or partially addressed) should we use to meet our needs?
- Do we have the data we need and is it compliant with data protection legislation?
- What is the best format for this purpose and our message?
- How will we integrate mail with other channels?
- Who on our team will do what?
- Do we need help from third parties?
- Have we allowed enough time?
- How will we manage responses?
- What success measures will we use?
- How will we monitor and track results, and other campaign feedback?

¹ Royal Mail MarketReach, The Life Stages of Mail (2016)

PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

MAIL AS PART OF A MULTI-CHANNEL CAMPAIGN

All too often, mail gets planned in isolation, but campaigns are most effective when delivered in an integrated way across multiple channels. Consider carefully how mail fits into the mix and where it should fit in the campaign timeline. Is it designed to build on other media or will it be the first time the recipient has received communication from your organisation? Are you combining mail with email, online, TV and/or other channels? Where do you hope recipients will go next and what will they do?

“ Mail can bring things to this mix that other channels can't. When used well it is highly targeted and yet allows charities to reach large volumes of people. Uniquely, it gives the charity space and creative freedom to tell emotional stories that drive action when seeking support or make donors feel amazing when thanking them and telling them what their donation has achieved.

The most effective fundraising campaigns will usually have multiple touchpoints, using a mix of channels to achieve what each delivers best and to achieve maximum impact.

Of course, no channel will ever be a silver bullet. To get the most out of mail, you need to use it in the right way, with a clear focus on what you want to achieve, who you want to reach, a clear call to action and to make it really easy for people to respond. ”

*Roger Lawson,
Director,
About Loyalty*

PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

CASE STUDY: WWF – THE GREAT ORIGAMI MIGRATION

WWF urgently wanted to stop the dredging of Spain's Donana National Park – an important site for migratory birds; many of which fly from the UK.

To connect UK supporters with what might be perceived as a distant issue, WWF created a parallel migration – 'The Great Origami Migration'. The charity sent out a ready-made origami square and instructions in their loyalty magazine, making it easy for their audience to create a bird and send it back (freepost).

Source: DMA Awards Entry 2017

The origami birds were to be used to form an installation outside the Spanish Parliament – something that would be impossible to ignore. Integration with email and digital created urgency, with #OrigamiMigration spreading the news.

The target was 500 origami birds – WWF received 3,000. The President of the Parliament met with WWF and announced the cancellation of the dredging plans.



DESIGN & PRODUCTION

Printed mail can take a variety of formats and charities are well known for their creativity. You have a limited window to capture people's attention and to entice the recipient to read on. So, make sure your key message is clear, using imagery and graphic elements to draw the eye. Personalising the copy can help too, with data insight and variable printing making it possible to cost-effectively target every piece of mail to the individual.

Inspiration can be taken from award-winning campaigns celebrated annually through the Chartered Institute of Fundraising's National Fundraising Awards, DMA Awards, from SOFII – the Showcase of Fundraising Innovation and Inspiration, and specialist third parties and creative agencies.

“If someone is engaged with your brand, the chances are they will look at your mail but even so, and particularly with cold mail, you have a matter of seconds to grab people's attention. Make mail as simple and easy as possible and have a single, clear objective to avoid confusion as to what you want them to do.”

Nicola Thornton,
Mail Media Specialist,
Royal Mail

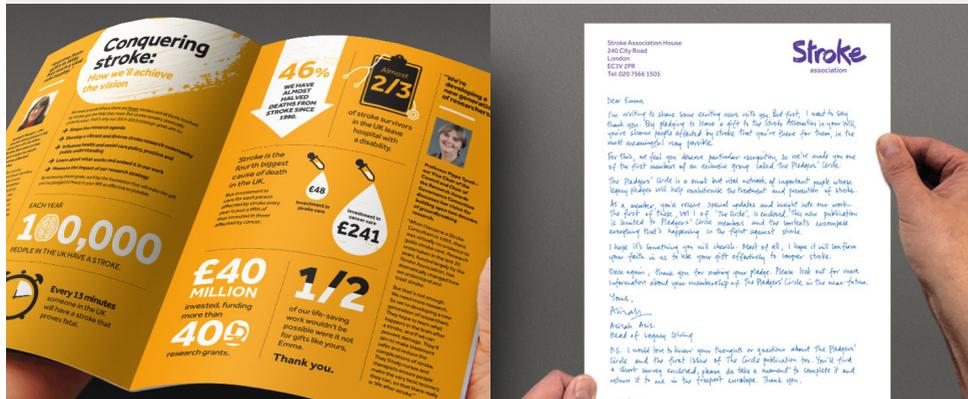
PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

CASE STUDY: STROKE ASSOCIATION – THE CIRCLE

To strengthen the charity's relationship with its legacy pledgers, Stroke Association sent out a high-quality publication called *The Circle*, featuring stories that showed the difference a legacy gift would make. These were personalised throughout

to deepen the connection between the pledger and the charity. Feedback showed that its pledgers felt honoured to be a part of this small and intimate 'Circle'. Although softer metrics – such as how the campaign made recipients feel – can be hard to measure, the importance of those relationships and legacy income are paramount to the charity.

Source: DMA Awards Entry 2017



PLANNING FOR RESPONSE

Mail is highly effective at driving response. So, when planning a campaign, you will want to think carefully about how you want them to respond and the way in which you might encourage them to do so, as well as how long it is likely to take for people to respond. Be aware that it may well take a number of weeks for responses to come in, so ensure you are prepared to handle responses for the full duration.

The easier you make it for recipients to respond or the more enticing, the more likely they are to act. Consider what response mechanisms you can offer and give a clear call to action so that they have no doubt what they can do to help or what they should do next, whether that's to go online, make a telephone call, send a text or fill in a form. Offering supporters a chance to become part of the charity's work – such as by making a WWF origami bird (see page 40) or having your name on an RNLI boat (see page 29) – can be a great way to inspire a response.

“A mail campaign typically requires a window of around 12 weeks for production and mailing, and 12 weeks afterwards. But these timescales can change, and for emergency appeals can be turned around much more quickly. Think about what options you are giving your audience to take action. Attention to detail is critical, but it's also important to ensure that enough time is factored in from proofreading through to printing and response handling.”

Sophie Longhurst,
Mail Media Specialist,
Royal Mail

PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

TESTING

As with any medium you'll want to test, measure, and analyse what works best. Evaluation might include looking at your target audience, the message and creative or identifying what drives the best response. It may also mean sending out a control pack along with a variation, such as a different creative or call to action, and tracking response to see which one performs best. Ongoing testing helps to continually refine campaigns and improve results, but remember to test one variation at a time, or you may not be able to distinguish what caused the difference.

TRACKING & MEASUREMENT

Mail offers a multitude of metrics ranging from ROI to response rates and net income, all of which can be tracked through the likes of personalised URLs, response telephone numbers, QR codes or by matching donations or other responses from recipient addresses included in the mailing. Volumes of mail items that are being prepared for delivery can also be tracked with Royal Mail's Mailmark service. The Mailmark service uses a barcoding system that enables Royal Mail to provide web-based customer reporting to see where your mail is in the system, allowing charities to put the capacity in place to deal with the response at the right time.

Responses are likely to spike shortly after the mailing lands, but may continue to trickle in over a sustained period. There are also softer metrics, such as uplift in engagement and awareness, and lifetime value, which can be tracked too. In addition to proactive measurement, make sure you encourage supporters to give you any other feedback, both positive and negative, which can help you to strengthen future campaigns.

KEY CONSIDERATIONS FOR MAIL:

MAKING MAIL ACCESSIBLE

The most successful charity fundraising materials and letters tend to be clearly worded and widely accessible to a range of audiences. Choosing simple language, clear typefaces and font sizes, drawing out key points with features such as images, box-outs and bullet points can all help to break up blocks of text and make it easier to read. Consider offering a range of formats and features such as Braille, large print, audio CD, and assistive technologies such as VoiceOver support to ensure that your message is accessible to those with sight loss or learning difficulties for example.

USING ENCLOSURES RESPONSIBLY

Used well and selectively, mail enclosures can help to raise funds, engagement, and awareness, or to equip

supporters, volunteers and event participants. They might include anything from a magazine to a raffle ticket, or a gift such as a pen or pin badge. The key thing to remember is that an enclosure should always be designed to enhance a campaign and benefit the supporter experience. Consider the safety of enclosed items as well as the environmental impact. This might include avoiding unrecyclable plastic goods or those with limited use or appeal.

ENVIRONMENTAL IMPACT

Most mail in the UK is paper-based and the European Paper Recycling Council reports that 72% of paper in Europe is now recycled¹. However, it's still important to consider the carbon footprint and potential waste that mail campaigns might generate. Always think about how you can reduce the environmental impact of your mailings, from using recycled paper and biodegradable ink to including a recycling logo as a reminder to recipients. Careful targeting can be one of the most effective ways of reducing waste.

¹ Two Sides UK (October 2019)

PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

CHECKLIST: 10 QUESTIONS TO ASK FOR REDUCING THE ENVIRONMENTAL IMPACT OF YOUR MAIL CAMPAIGN



- Are you using FSC certified or recycled paper?
- Can you use vegetable or biodegradable inks?
- Do you include the recycle symbol on all mailings?
- Do you regularly clean your data and employ good targeting techniques to avoid waste
- Are you clear on your supporters' preferences, avoiding mailing those who don't want to be contacted by post or sending mail too frequently?
- When it comes to the outer, is this paper-based or biodegradable?
- Can you avoid using envelopes that feature a plastic window?
- Are you keeping enclosures to a minimum, avoiding the use of single-use plastics?
- Does your print partner demonstrate robust environmental principles, complying with ISO 14001 Certification for Environmental Management?
- What more could you be doing to reduce and recycle any waste?

“The impact of the climate emergency is widespread across society, so it's vital that the breadth of our sector recognises the need to play their part in tackling this crisis. Systemic change is ultimately what we need, but there are also a lot of immediate and straightforward steps fundraisers can take to reduce the climate impact of their actions, like ensuring they use recycled materials and that mail is only sent to those who wish to be communicated to in that way.

Ethical choices can come at a cost premium, but not always and it's important that we strive to do the right thing. The more emphasis we place on ethical materials and production, the more competitive those prices will become. And remember that these steps are often the very same changes that supporters want to see from charities, helping to improve the supporter experience. ”

*Kathryn Holloway,
Interim Director of Fundraising,
Friends of the Earth*

PLANNING & DELIVERING A SUCCESSFUL MAIL CAMPAIGN

WHAT MAKES GOOD MAIL?

KNOW YOUR AUDIENCE

This isn't simply about using compliant and up-to-date contact details for those you mail, but using real insight about supporters to target relevant audience groups. This might include modelling audiences who exhibit the demographics and behaviours you wish to attract.

MAKE IT EASY TO READ

Using clear language and breaking up the copy with relevant images, text boxes, bullet points, graphics and case studies can all help draw the eye across the page.

HIGHLIGHT YOUR KEY MESSAGE

There is room to tell a good story in a piece of mail but ensure it has a powerful, clear message and a compelling hook that connects with the recipient and encourages them to read on.

BE CREATIVE

Creativity can bring your story to life, boosting engagement, whether that's through the format or shape of the piece, the design, colours, paper used, or a relevant enclosure.

USE THE SPACE ON THE OUTSIDE OF YOUR MAILING

Help to make sure your mail stands out by including a picture, branding and/or short message on the envelope or other outer so that people want to open and read it.

TAKE AN INTEGRATED APPROACH

Consider how your mail will be perceived, how it will integrate with and reinforce other channels as part of your wider strategy to build awareness and engagement with your cause.

PERSONALISE YOUR MAIL

Where personalisation is an option, explore how you can tailor mail items for each recipient, helping to make them feel valued.

INCLUDE A CLEAR CALL TO ACTION

If you're including an ask, make it clear what that is; whether it's to donate, to join an event, or more.

REDUCE THE ENVIRONMENTAL IMPACT

Always question what you can do to minimise the environmental impact of your campaigns. This might include using biodegradable inks, recycled paper, and targeting your campaign carefully to minimise wastage.

ENSURE IT IS ACCESSIBLE

Consider the needs of your audience. Some may be partially sighted, or require information in a different format or language. What can you do to make your message clear and widely accessible?



KNOWING YOUR RESPONSIBILITIES

The Code of Fundraising Practice covers the Fundraising Regulator's standards for all aspects of charity fundraising, including mail. It's essential for practitioners to familiarise themselves with the full Code, which highlights the importance of treating recipients fairly as well as communicating honestly and respectfully.

CHARTERED INSTITUTE OF FUNDRAISING TIPS BOX: FUNDRAISING MAIL

1. Make it clear who and what you are fundraising for, including the charity name and registered charity number
2. Ensure that any claims you make in your mailings are true and can be backed up, taking care not to mislead people
3. Give people the opportunity to opt out of future communications in each mailing, always adhering to supporters' contact preferences
4. Always collect and process personal data in line with data protection legislation (see Code, part 1, standard 3.1.1)

5. Be sure not to send mail to those who have asked you not to or fundraising appeals to children under the age of 16
6. Don't send direct marketing mailings to people who have registered with the Mailing Preference Service (MPS) unless you can demonstrate a lawful basis to market
7. Ensure your content is appropriate, avoiding the use of offensive material such as shocking imagery or anything that might cause fear or distress (see Code, part 3, standard 9.1.3)
8. Treat fundraising enclosures with caution, only including them when it is safe and relevant, ensuring you can justify that they enhance the campaign
9. Consider the frequency of your mail contact, and the impact on those who may be vulnerable
10. Check that you have permission from all relevant parties before including case studies, quotes or images in your campaign, complying with copyright laws (see part 1 of the code, sections 3.2 and 3.3 for further information)

DATA PROTECTION

One of the biggest considerations for direct mail campaigns is the use of personal data, so it's important that charities are familiar and compliant with the UK's Data Protection Act and GDPR. This means taking a transparent, responsible and accountable approach to data collection and processing.

If you have any questions about Data Protection and GDPR, we recommend you talk to your own compliance officer or legal advisor. Guidance is available from the Information Commissioner's Office (ICO) which governs the way organisations protect individuals and the data that they hold on them. The Chartered Institute of Fundraising has also produced a short checklist (see page 53) on some of the key points to consider when processing personal data.

“As a result of GDPR, we've seen some charities pause acquisition campaigns over the last couple of years in order to answer those key questions of: Who can we now mail? How much can we use legitimate interests? And, can we source third party data? The good news is many are now looking to restart it using the better quality, more responsive data that is now available.”

*Daniel Fluskey
Head of Policy & External Affairs
Chartered Institute of Fundraising*

Source: Chartered Institute of Fundraising (2020)
*It is recommended that all practitioners read the Fundraising Regulator's full Code of Fundraising Practice, particularly sections 3 (processing personal data) and 9 (fundraising communications and advertisements).

KNOWING YOUR RESPONSIBILITIES

UNDERSTANDING WHO YOU CAN MAIL

Data protection rules make it clear that organisations need to have a lawful basis to use personal data. In the case of marketing, this will often be a choice between two options: consent and legitimate interests.

Charities must not mail anyone listed on the Mailing Preference Service (unless you can demonstrate that you have a lawful basis to market) or the Fundraising Preference Service, and should cross-check data against relevant suppression lists. Unaddressed and partially addressed mail are not covered by these services, but the public can still opt out of these through Royal Mail's Door to Door service or the DMA's Your Choice scheme.

SOURCING THIRD PARTY DATA

When sourcing contact names and addresses from third parties, charities will need to be satisfied that they are complying with data protection laws.

“ Cold mail can be a very useful channel for charities. The pool of data available may be smaller than before, but there are still over 4 million records that the charity sector can mail, and because of GDPR, this data is now more responsive than pre-implementation. Be sure to do the required due diligence on the data sources and have good in-house capabilities to deal with questions such as “why are you mailing me?” ”

*Suzanne Lewis,
Founder,
Arc Data*

CHARTERED INSTITUTE OF FUNDRAISING CHECKLIST: PROCESSING PERSONAL DATA



- Are you required to register with the ICO as an organisation that processes personal data?
- What is your organisational policy on collecting and processing personal data?
- Do you have a strong and clear data protection policy and have you communicated this to your fundraising team?
- What is your legal basis for contacting each of the people on your mailing list and how is that information sourced?
- Have you checked that none of those contacts have opted out of mail, either with the charity directly or via a third party (such as the Mailing Preference Service, Fundraising Preference Service)?
- Are any of the names or addresses of those that you plan to contact featured in relevant suppression lists (such as deceased registers)?
- Is your privacy policy easily accessible to the public and clearly written?
- Do you give people the option to opt out of further communications in every mailing?
- How will you ensure that all personal data is kept safe, secure and regularly updated?
- Have you checked that any third parties you are working with to source or process data meet GDPR requirements?

Source: Chartered Institute of Fundraising (2020)
*This is not an exhaustive list. For more information, see the ICO's Guide to Data Protection

KNOWING YOUR RESPONSIBILITIES

WORKING WITH THIRD PARTY EXPERTS

Whether working with a fundraising consultant, print or mail specialist, data supplier, creative agency or distribution house, external specialists can really help to create and deliver strong mail campaigns. The insight, innovation, and skills they provide can identify new opportunities, thinking and techniques to help you increase and

engage your supporter base. But it's important to ensure that they share your ethical values and commitment to best practice, putting a contract or agreement in place that defines the parameters of the campaign. This might cover requirements of the project, key performance indicators, pricing structure, data protection policies, tracking measures, responsibilities for complaints handling and more.

FURTHER READING

FOR FURTHER INFORMATION, PLEASE VISIT:

Royal Mail MarketReach
marketreach.co.uk

Chartered Institute of Fundraising
institute-of-fundraising.org.uk

Fundraising Regulator
fundraisingregulator.org.uk

Information Commissioners Office
ico.org.uk

ABOUT ROYAL MAIL MARKETREACH

Royal Mail MarketReach has a team of mail experts; data, media and communication planners; as well as free reports, tools and services to support you. It is committed to ensuring that when you consider mail as a communication channel, you can use it to maximum effect. And this support is, as always, available for free.

CHARTERED INSTITUTE OF FUNDRAISING

The Chartered Institute of Fundraising is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have over 600 organisational members who raise more than £10 billion in income for good causes every year, and over 6,000 individual members.



As the UK's leading expert on the power of mail, we help organisations to achieve their goals by unleashing the magic of mail.

Whether you need broad market insight or have a question about making mail work for your organisation, we've got it covered. And our advice is always available for free.

For more information, visit [marketreach.co.uk](https://www.marketreach.co.uk)

 **marketreach**
unleash the magic of mail

