

UNIT-PRODUCED MAILINGS AND APPEALS

Does your unit want to produce a small mailing or an email appeal to raise funds? Follow the process checklist below to ensure your appeal is a successful one.

- ❑ **Define your audience.** What are your goals for this appeal? What is your budget? Once you have answered these questions, you can begin to draw up your data parameters using your budget to determine a feasible audience. The CAS Advancement Services or MarComm teams can help advise you on your audience.
- ❑ **Determine the components of your appeal.** Will you be sending your appeal by email or direct mail? Leave yourself enough time to work with colleagues to do things like design an email or to create the artwork for the printed campaign. Will you be creating a vanity URL to track the number of online gifts?
- ❑ **Request the data.** Once you've defined your audience, submit a Report Request in Reportal. Please allow two weeks for the Information Management reporting team to accurately produce your report results. Make sure you mark this list "For Solicitation" so the reporting team knows to attach your created appeal code to your list of solicitation recipients.
- ❑ **Partner with Gift Services.** Reach out to [Gift Services](#) with the details of your appeal, including the estimated audience and drop date. If your mailing has a response device:
 - a **SCAN LINE** is necessary for accurate gift processing, especially for large mailings. It is printed on the response device. It's comprised of leading zeros, followed by the **APPEAL CODE**, Advance ID, and ending zeros. Have your vendor send you samples so you can test the scan line with Gift Services.
 - an **APPEAL CODE** needs to be printed on the response device, as well, in case the scan line is compromised.
 - If you are including a University of Washington-branded **RETURN ENVELOPE** (AKA Response or Remit envelope) please use the following address so they are received directly by Gift Services for quick and efficient processing:

Gift Services
Box 359505
Seattle, WA 98195-9505

- ❑ **Create an Appeal Code.** An Appeal Code is **REQUIRED** when producing any solicitation! [Request an Appeal Code](#). The Appeal code is entered into Advance and subsequently attached to each donation received for that particular solicitation. Appeal codes are not tied to funds but to appeals. Please request an appeal code for every solicitation you send, DO NOT USE one appeal code for the entire fiscal year. Please be sure to request your appeal code at least 5 business days in advance of the solicitation.

- ❑ **Create a Response Device.** [Download Annual Philanthropy's campaign-branded artwork in Word doc format for easy editing!](#) Please note that only your fund information, appeal code, donor information, paragraph and scanline are available for editing. Editable sections are highlighted. You can ONLY download this template if you have requested an appeal code, requested data FOR SOLICITATION, and confirmed that your solicitation list will be updated in Advance with the appeal code. These are REQUIRED for all solicitations.
 - The paper weight for UW Foundation's standard response device is 70# and the size is 3.67 x 8.5.

 - SCANLINE Dimensions: Please locate above address block (as seen in template above). Needs to have blank space all around perimeter for our scanner to read properly. Criteria:
 - Font: OCR Extended A
 - Font size: 12 pt
 - Include the following fields: (for a total of 20 digits)
 - Id_number
 - Appeal_code
 - Append to end of all: 10000
 - Margins: Top = .6 in, Right = 1.1 in

 - Example:
000106574617NV410000
[ten digit Advance ID][5 digit Appeal Code][10000]

 - Questions about scanlines? Please contact Gift Services at gifts@uw.edu.

- ❑ **Contact Annual Philanthropy.** Let them know about any upcoming solicitations for your unit. They are happy to exclude your donors from central AP solicitations if you are sending an appeal around the same time they are. Contact Thomas Duke at tjduke@uw.edu.