

# A complete guide to managing fundraising appeals in LGL



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# Table of contents

Introduction: How to use this guide	p. 3
Section 1: Appeal basics	p. 5
Section 2: Who are you asking for money?	p. 10
Section 3: How are you asking for money?	p. 17
Section 4: How to receive gifts	p. 23
Section 5: Sending your appeal mailing	p. 31
Section 6: Entering gifts	p. 34
Section 7: Reporting on your appeal	p. 36
Section 8: Looking ahead	p. 40

# How to use this guide

A successful appeal can be the anchor of your organization's fundraising operations. When you're able to reach out to supporters and prospective donors to solicit gifts and receive donations in return, it's an indicator of the health of your donor database, your relationships with donors, and your fundraising operations.

Certainly, there are many components that need to be managed when it comes to a fundraising appeal. And if they aren't familiar to you, it can be difficult to make a plan. That's why we've put together this guide. We'll start by taking a broad look at the basic components of an appeal so you know what you need to tackle.

Then, we'll examine each component in more depth and explore how you can use Little Green Light to help you manage and report on your appeal. Topics we'll cover include:

- Deciding who to solicit for your appeal
- Creating effective solicitation materials (letter, remittance envelope, online donation page, and acknowledgment letter)
- Sending your appeal mailing
- Gift entry
- Reporting on your appeal
- Planning for next time

## How to use this guide (con't)

For each section, we'll point you toward additional resources that you can refer to as you move forward with your own appeal.

You'll find that in some cases, there's more than one approach you can choose from, such as using appeal segments or not. As you read, you can consider the operations and circumstances at your own organization and use that knowledge to help you make the right choice for your nonprofit. Our hope is that this guide will help you feel less overwhelmed and more motivated as you plan your appeal, and that following these tips will help you meet your fundraising goals.

# Section 1: Appeal basics

What is an appeal, anyway?

An appeal is a targeted effort to raise money, typically a mailing. It answers the question, “How did we raise this money?”

It can be helpful to think through how appeals differ from funds. A fund indicates how money will be used. A donor might make a gift intended for a scholarship fund, which means that your organization will spend the gift on scholarships. But an appeal tells us what brought the gift to your organization in the first place. What action prompted the gift? A good example of such an action is a donor making a gift in response to your year-end appeal letter.

By creating an appeal in Little Green Light to manage your solicitation effort, you’re able to track which constituents were asked for money and how (and even how much). You can then report on the effectiveness of that specific appeal.

That’s the big picture. Breaking it down a bit further, there are a few key things you need take into consideration in order to plan and manage an effective appeal:



## What does your organization need to run a successful appeal?

- A way to track donors and prospective donors so you can decide who to include in your appeal
- The ability to target specific groups of constituents in your appeal, such as lapsed donors and prospective donors
- The ability to generate appeal letters that pull in personalized information, such as a salutation and a specific appeal ask amount
- A system to accept gifts via check and online, document those gifts, and send acknowledgments to the donor
- A way to report on your appeal

## Why are these elements so essential to a successful appeal?

- They help you set realistic appeal goals and target your solicitations
- They document your work, so you have a record to refer to
- They enable you to steward donors and prospects effectively over time
- They provide you with essential information that you can use to evaluate your appeal and plan for future appeals accordingly

**Tip:** You'll be best served if your data is in good shape before you start working on your appeal. That means you should reserve time well in advance to review your data carefully and use the Duplicate Checker and Address Verification to ensure that your data is clean and your addresses are up to date.

Additionally, running your data through the National Change of Address Registry (NCOA) helps you maintain up-to-date addresses for your contacts. It also saves you from having to manually update addresses in your database. Many printers offer this service for nonprofits. Otherwise, update address records manually and in a timely manner when you receive returned mail.

Remember that clean data requires consistent maintenance, so you should expect to review your data on at least an annual basis.

# Creating an appeal in Little Green Light

Now, let’s take a quick peek at the Appeals functionality in LGL so you can see what’s possible when you create an appeal and code constituents and gifts to it.

Appeal		Date	Status	Constituents/recipients	Gifts
2022 Year End Appeal	<div>Customize</div> <div>Actions</div>	Oct 3, 2022	<div>Active</div>	Appeal Status Open (116) Donated (11) ----- Total (127)	Total Raised vs. Target/Goal <div>\$88,850 of \$125,000</div>  Gifts 10 / \$88,850 from 10 Constituent(s)
2022 Spring Appeal	<div>Customize</div> <div>Actions</div>	Mar 15, 2022	<div>Active</div>	Appeal Status Donated (3) ----- Total (3)	Total Raised vs. Target/Goal <div>\$7,350 of \$10,000</div>  Gifts 6 / \$6,850 from 6 Constituent(s) Pledges (balance) 1 / \$500 (\$500) from 1 Constituent(s)
2021 Year End Appeal	<div>Customize</div> <div>Actions</div>	Oct 1, 2021	<div>Active</div>	Appeal Status Open (86) Donated (11) ----- Total (97)	Total Raised vs. Target/Goal <div>\$259,500 of \$150,000</div>  Gifts 10 / \$259,500 from 10 Constituent(s)

Here we have an overview of the active appeals in the account. You can see the name of the appeal and the number of constituents who were solicited, the fundraising goal and the progress toward that goal, as well as the number of gifts received so far.

When you’re ready to set up your appeal, you can navigate to Fundraising → Appeals and click Add Appeal. Enter the name of your appeal. That’s the only required field you need to enter in order to create your appeal in LGL, but you can also set the fundraising goal/target and other details.

Now that your appeal is created in Little Green Light, we can start getting into some important details. We’ll start with determining who you’ll be soliciting.



# Section 1 Resources:

[Organizing your campaigns, funds, appeals, and events](#)

[Checking for and managing duplicates](#)

[Appeals](#)

## Section 2: Who are you asking for money?

Your database contains the names and contact information of your constituents. You'll need to decide which of these constituents you'll be soliciting as part of your appeal. Once you've decided, your next step is to add them to your appeal.

Adding constituent records to your appeal is key: It's how you can manage and measure the effectiveness of your appeal. Adding everyone to the appeal who will receive the solicitation gives you the ability to track the appeal response rate and determine who was asked to donate and either did or didn't. And, when you add constituents to your appeal, an Appeal Request is automatically added to each of those constituent records. This means you can easily see if a specific constituent was solicited for that appeal and whether they donated.

---

Appeal Req.	2022 Year End Appeal
	Appeal: 2022 Year End Appeal
Ask Amount:	- -
Team Member:	- -
Status:	Open ▼

# Making a plan of who to solicit

It’s important that you give yourself time to think about and plot out your solicitation before you start adding constituents to your appeal in LGL. We even recommend sketching it out on a piece of paper or in a Google or Word doc so you can really map it out. Consider it a rough draft—by seeing it sketched out in front of you, you give yourself the opportunity to make adjustments before you’ve gone ahead and printed appeal letters and only then realized you wanted to make a change.

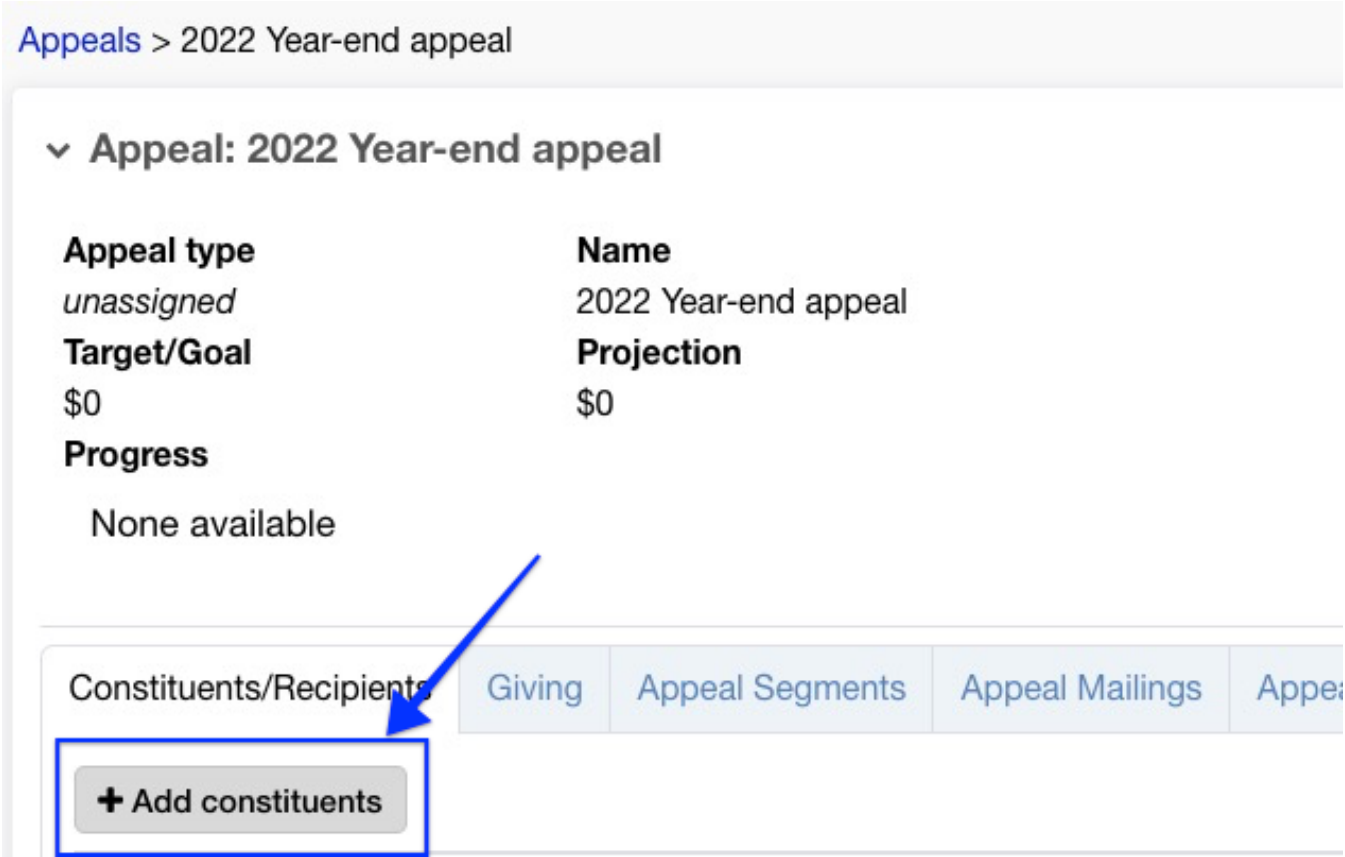
<i>Who are we soliciting?</i>
<ul style="list-style-type: none"><li><i>• Anyone who has made a gift in the past three years, but not within the past six months</i></li></ul>
<ul style="list-style-type: none"><li><i>• Board members</i></li></ul>
<ul style="list-style-type: none"><li><i>• Anyone who attended an event this calendar year</i></li></ul>

At this point, you’ll consider whether or not you’ll use appeal segments in LGL. But first let’s explore whether or not segments are the right choice for your appeal.

# Adding constituents to your appeal in Little Green Light and how to use appeal segments

You might decide that for your year-end appeal, you want to solicit everyone in your database who has made a gift to your organization in the last three years. That will include anyone who gave last year, as well as constituents who made a gift three years ago but not last year. With that criteria, you're hoping to retain active donors and also recapture those donors who lapsed. And, though you haven't drafted your appeal letter yet, you plan to use the same language in your appeal letter for all of those constituents.

If the approach described above is the one you'll be taking, you don't need to use appeal segments. You can go ahead and navigate to Fundraising → Appeals, just like you did to create the appeal. Click on the name of your appeal and then click the Add Constituents button. On the next screen, you can search for the appropriate constituents, click Refresh Search, and then add them to your appeal in bulk.





That’s one approach.

The other approach is useful if you want to target your solicitations to specific segments of constituents. If that’s your plan, you’ll need to create appeal segments in Little Green Light.

Appeal segments refer to groups of constituents within your appeal who share a commonality. For example, you might want to send one solicitation to your active donors, but you may also want to send a letter with a different message to lapsed donors. And, you may want to send a third version of the letter to constituents who haven’t yet made a gift to your organization.

If your segments are straightforward, like the ones described above, you can click the Appeal Segments tab in your appeal to create segments and then add constituents to them.

Constituents/Recipients

Giving

Appeal Segments

Appeal Mailings

Appeal Emails

Appeal Ack. Settings

+ Add segment

Segment Summary Export

Segment Detailed Exports

Position	Segment Code	Segment Name		Ask Amount	Constituents
1 <div>⬇</div>		Active donors <div>⚙ Actions</div>	\$0	41 records <div>🔄 Refresh</div> <div>0 excluded due to overlap</div>	
2 <div>⬆⬇</div>		Lapsed donors <div>⚙ Actions</div>	\$0	75 records <div>🔄 Refresh</div> <div>0 excluded due to overlap</div>	
3 <div>⬆</div>		Non-donors <div>⚙ Actions</div>	\$0	11 records <div>🔄 Refresh</div> <div>0 excluded due to overlap</div>	



## How to best manage a multi-segmented appeal with overlap in criteria

But, if you're choosing to create more complicated segments, we recommend that you first use the List Manager to create a list of all the constituents you'll be including in a single segment. Then when you add constituents to your segment, you can choose to add everyone on that list.

That approach is the right one to take if you're targeting a segment with multiple criteria, such as everyone whose last gift was made three years ago, excluding anyone who's attended an event this year, OR anyone who is a nondonor but has volunteered with your organization in the past two years. If all those constituents should be in a single segment, start with the List Manager.



**Whatever approach you choose, it's helpful to know the following:**

- A constituent can be included in only one appeal segment, so you don't need to worry about duplicating constituents in your segments.

- You can set the hierarchy of your segments, which means that if a constituent meets the criteria of multiple segments they'll be included in the one that falls highest in the hierarchy and excluded from any others.

Position	Segment Code	Segment Name
1 		Active donors
2  		Lapsed donors
3 		Non-donors

- In your appeal, you'll notice you can set ask amounts. You can set a default ask amount by segment or customized ask amounts for specific constituents, and you'll be able to merge that Ask Amount field into your solicitation letter.

Segment Name	Ask Amount
Active donors  Actions	\$100
Lapsed donors  Actions	\$50

We'll turn to your appeal letter next.

## Section 2 Resources:

[Adding segments to your appeal](#)

[Use a constituent list to build an appeal segment](#)

[Appeal Segmentation Worksheet](#)

## Section 3: How are you asking for money?

While it's crucial to know whom you're asking for money, your mailing list won't do any good on its own. You need to create effective appeal materials so you can ask those constituents for money and so they will know how to make a gift to your organization.

### Your solicitation letter

It's a feeling every fundraiser knows and dreads. You need to write an appeal letter. It needs to be compelling and inspiring, and it also must bring in the money for your organization's important work. How do you start?

If you don't already have an idea in mind, we recommend that you start by asking the following:

- What are the most compelling stories from the year so far?
- What will your organization be focused on in the year ahead, and why is it so important?

Make time to talk with program staff and hear the stories that have stood out to them in recent months. They may also be able to connect you with program attendees or other stakeholders who can share their story directly with you. In addition, make a point to witness your organization’s work firsthand. Attend a program or workshop as an observer. Seeing your organization in action and collecting stories from program staff will give you plenty of material to work with when you sit down to plan and craft your appeal letter.

Your solicitation letter needs to clearly ask for a gift—you may even be asking for a specific amount. Don’t be shy about asking, and don’t bury the ask. Your first draft might read like this:

<i>Date</i>
<i>Name</i>
<i>Address</i>
<i>Dear donor,</i>
<i>Hundreds of families in our community benefited from meals provided by ABC Food Bank this year. We want to serve even more families in the year ahead, and that’s why we’re asking you to make a year-end gift of \$X.</i>



Note: For the purposes of this guide, we’re working with a letter as our example. You can also create an email solicitation using LGL Direct Email if you prefer to send your appeal via email. Check the Resources sections for guidance on how to create email templates and use LGL Direct Email; note that if you haven’t activated LGL Direct Email in your account, there are some daily sending limits during your initial period of use, so do activate LGL Direct Email as soon as possible.

## Personalizing your letter using LGL merge fields

When you create a letter template to use with your appeal, you can include LGL merge fields to personalize your letters. This way, you can greet your constituents by name rather than addressing them by “Dear Friend,” and you can even pull in the appeal ask amount. You’ll find the available merge fields listed Mailings → Templates → Merge Field Reference. Once you’ve included merge fields in your letter, it may look something like this:

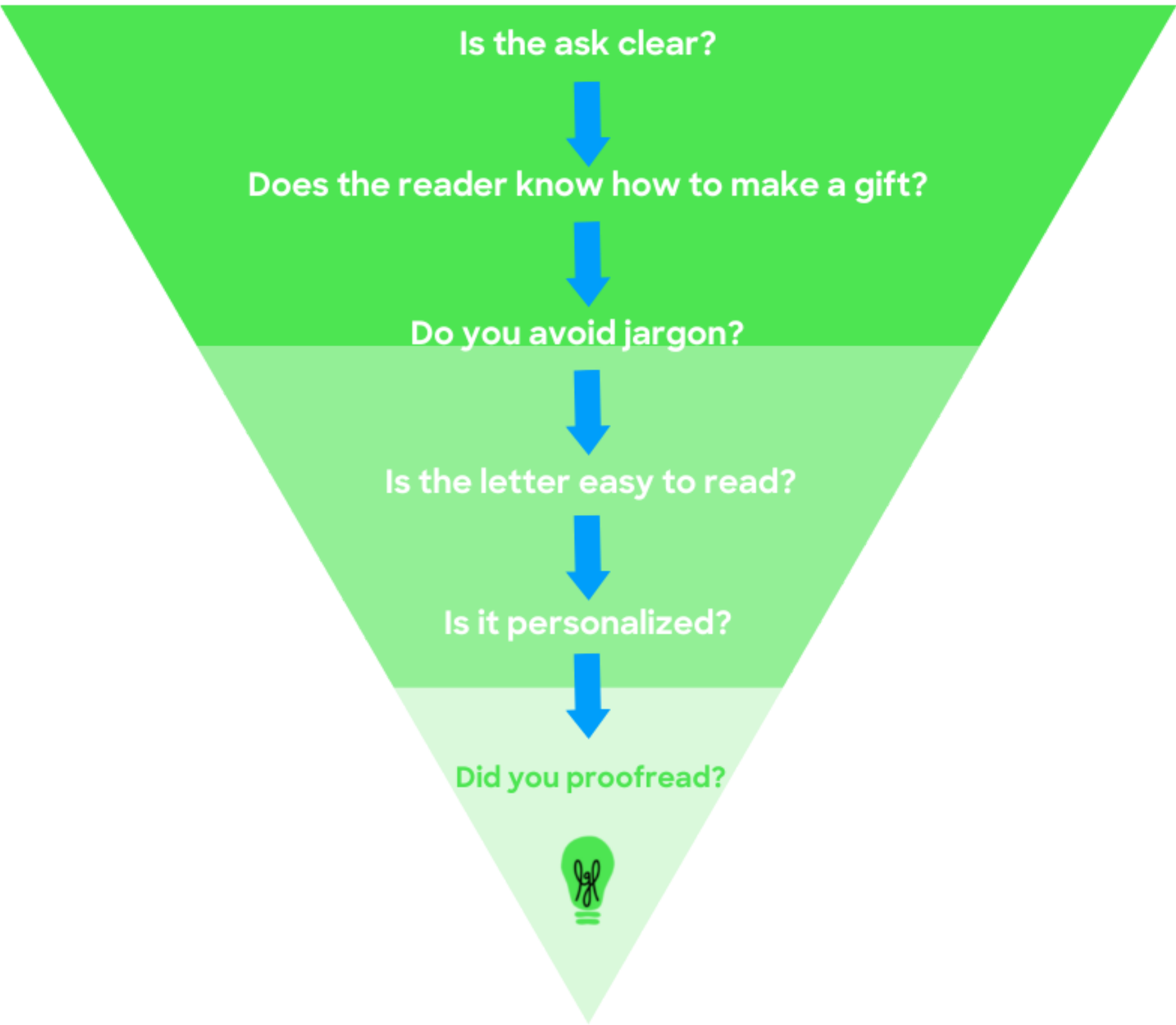
[[date]]

[[address\_block]]

Dear [[salutation]],

Hundreds of families in our community benefited from meals provided by ABC Food Bank this year. We want to serve even more families in the year ahead, and that’s why we’re asking you to make a year-end gift of \$[[appeal.ask\_amount]].

Now you’ve drafted your letter and you’ve added LGL merge fields to it to personalize the letters. How do you know when you’re done? To take away the guesswork, we’ve put together six questions you can use to efficiently determine if your letter is ready to send or if it needs some specific improvements. Review your draft alongside this handy editing tool:



## Acknowledgment letter

Your appeal letter likely tells a story that engages the reader and inspires them to support your organization. Rather than sending your usual thank you letter, craft an acknowledgment letter for your appeal donors that continues that story or theme.

We recommend that once you've finished your appeal letter, you can go ahead and draft your acknowledgment letter, too. That way you'll be well-prepared to acknowledge gifts as soon as the first ones arrive in response to your appeal letter.

**Here are 5 general tips to keep in mind as you draft the acknowledgment template for your appeal:**

**Tip #1:** Although the IRS doesn't require acknowledgment letters to be sent for gifts under \$250, it's a good rule of thumb to express thanks for every gift, regardless of its size.

**Tip #2:** Your letter needs to include the date the gift was received as well as the amount of the cash gift (whether received by check, credit card, etc.).

**Tip #3:** If the donor did not receive any goods or services in exchange for their gift, include a sentence stating that. If they received goods or services, you'll need to say so. You can review [the IRS guidelines here](#).



**Tip #4:** Include a statement that your organization is a tax-exempt nonprofit organization recognized by the IRS under Section 501(c)(3).

**Tip #5:** If your organization receives a gift made through a Donor Advised Fund such as Fidelity Charitable, you must handle the acknowledgment differently. We’ve put together [detailed instructions and sample text for you here](#).

In Little Green Light, you can set your new acknowledgment letter as the default acknowledgment template for your appeal so that it will be automatically assigned as the acknowledgment template for gifts coded to the appeal. If you’ve segmented your appeal, you can even create a specific acknowledgment letter template for each segment. Your donors will appreciate the added personalization.

Constituents/Recipients

Giving

Appeal Segments

Appeal Mailings

Appeal Emails

Appeal Ack. Settings

Set up the gift acknowledgment defaults to use in the following cases:

1. When a specific appeal is selected during gift entry. In this case, the default acknowledgment for that appeal, if available, will be automatically selected.

2. When a constituent is within a specific segment in that appeal. In this case, the default acknowledgment, if available, will be automatically selected.

Appeal/Segment	Default Ack.
Appeal: 2022 Year-end appeal	Annual Appeal Thank you
Segment: Active donors	-- use appeal default --
Segment: Lapsed donors	-- use appeal default --
Segment: Non-donors	-- use appeal default --

Update settings

## Section 3 Resources:

[Worksheet to combat writer's block](#)

[What is an LGL merge field and how is it used?](#)

[Letter templates](#)

[Microsoft Word guidelines for LGL mailings](#)

[Setting up your account to send LGL Direct Email](#)

[Limits on sending email directly from Little Green Light](#)

[Email templates](#)

[Create an acknowledgment letter template](#)

[Create an acknowledgment email template](#)



## Section 4: How to receive gifts

You know who you're soliciting, you know how you'll be asking, and you know how you'll be thanking donors. But, there's another important step we need to cover: How your donors will make their gifts to your organization.

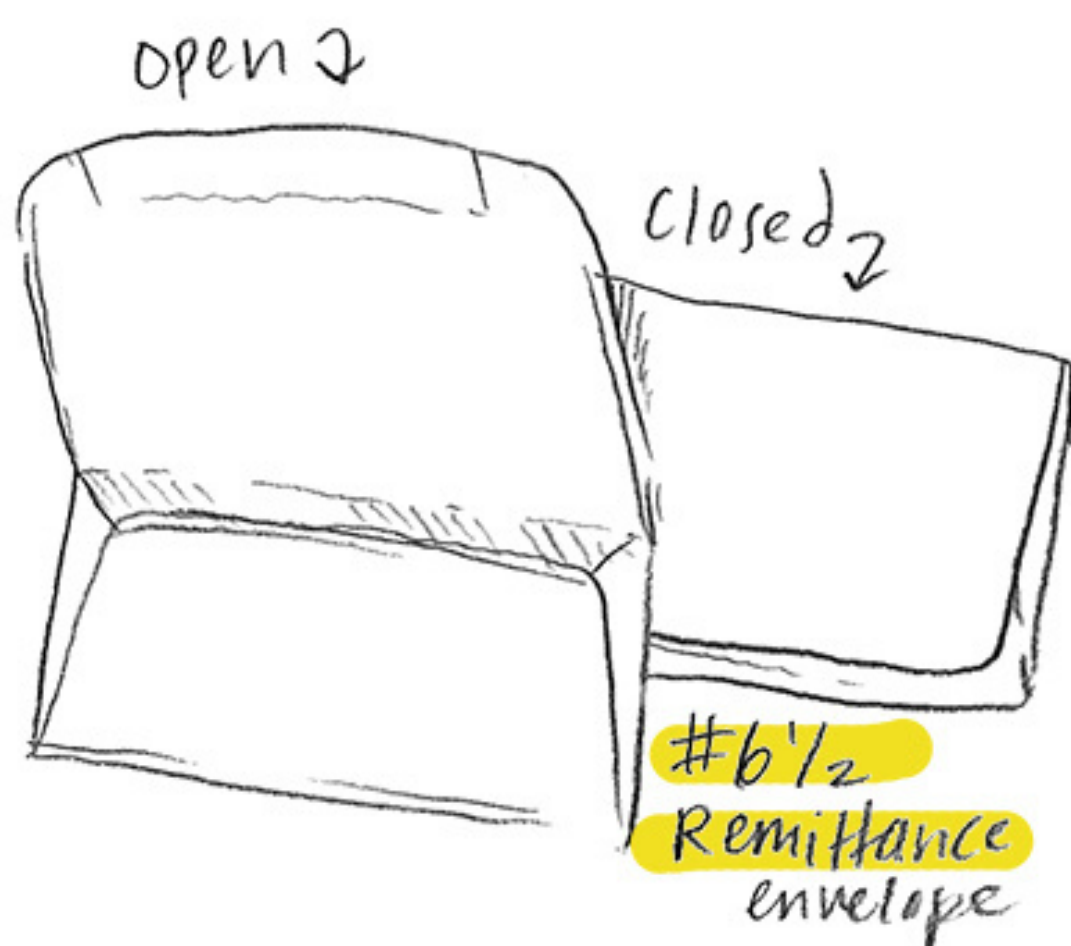
Make it simple for constituents to give to your organization by providing mechanisms for them to donate. Typically, you'll include a remittance envelope with your appeal mailing, which people can use to enclose a check and mail it back to you. You'll also want to offer donors a way to make gifts online in case that's more convenient for them.

Your appeal letter, donation page on your website, and remittance envelope need to feel cohesive to your donors. The look and feel of each should be similar and in keeping with your organization's branding. If your appeal letter includes suggested ask amounts (for example, \$35 dollars will provide art supplies for one kindergartner), confirm that those amounts are listed as options on your donation page and remittance envelope.

## Remittance envelope

Remittance envelopes may be the unsung heroes of a successful appeal. A well-crafted letter inspires your donors; a remittance envelope makes it easy for them to turn that inspiration into action and actually donate to your organization. The reason for this couldn't be simpler: The more convenient it is to donate, the more donations you'll receive.

Remittance envelopes are small envelopes that are pre-printed with your organization's mailing address and are used by donors to enclose a donation and provide their contact information. A flap covers the donor's information. The size of the remittance envelope is typically 3  $\frac{5}{8}$ " x 6  $\frac{1}{2}$ ". The envelope collects the donor's contact information, lists suggested donation amounts, and allows them to enclose a check or provide their credit card details.



Source: [Print & Copy Factory Corporation](#)

## Remittance envelope checklist

1. The look and feel of the remittance envelope should be consistent with your organization's letterhead, website, and other materials.
2. Keep it simple for the donor to fill out. The remittance envelope should make it easy and efficient for donors to contribute to your organization. It can be tempting to try and collect lots of information (How did you hear about us? Are you interested in volunteering?), but posing too many questions can make the remittance step cumbersome and deter giving. Once you receive a donation, you'll have the donor's contact information and can follow up with them then.
3. Display a few suggested donation amounts with an example of what each covers (for example, \$25 provides five kindergartners with school supplies) and leave a space for "Other" in case donors want to give a different amount that feels right to them. If you're using an online donation form, confirm that there is consistency between the amounts listed online and those listed on the remittance envelope.
4. Use a font size that's easy to read, and remember that your donors need room to comfortably provide their information. If they have to write in tiny print, you'll have a hard time deciphering their contact info.

## Remittance envelope checklist (con't)

5. When designing the layout, be careful not to place lines for essential information where they will be consumed by the gluey seal of the envelope flap.

6. Don't mail an appeal without including remittance envelopes. Remember to track inventory of your remittance envelopes just as you do for letterhead, mailing envelopes, and postage. You can ensure your appeal gets mailed on schedule by having all the materials on hand when you need them.

Your remittance envelope is something you'll create outside of Little Green Light. Though you won't be using LGL to create it, do make sure that when your appeal letters are downloaded and you're ready to stuff your mailing (either in your office or by a mailing house) you also remember to enclose remittance envelopes with the mailing.




## Accepting online gifts

Accepting gifts through an online payment form is a convenient way for your supporters to make a gift. The key is to keep things simple so that donors aren't discouraged from giving:

- Keep the form simple; resist the urge to collect lots of information from the donor
- Donation amounts should be consistent with what you listed on the remittance envelope
- Keep branding consistent with your appeal letter and remittance envelope









You can use LGL forms to build an online donation form and map it so that the data flows into your database. Here's an example of a form you might create for your year-end appeal:



The image shows a screenshot of a web form for the Smallville Historical Society. At the top is a logo featuring a colorful illustration of a town with buildings and trees, with the text "SMALLVILLE" in bold and "HISTORICAL SOCIETY" below it. Below the logo, the text "Yes, I'd like to make a gift!" is displayed in green. Underneath, the "Gift amount:" section includes radio buttons for "\$100", "\$50", and "\$25", and a selected option for "\$" followed by a text input field. Below this is a section titled "I would like to make my gift:" with a dropdown menu showing "Monthly". A horizontal line separates this from the "Contact Information" section, which is also in green. It contains a "Name" section with two input fields labeled "First Name" and "Last Name", and an "Email" section with a single input field containing the text "email@example.com".



When you map your form, you can connect the form to the appeal and map the gift record to the appeal so that all gifts received through the form are coded to the appeal. You can do that by setting a default on the gift record:

Gift #1 · <a href="#">Collapse</a>			<a href="#">Map a field</a>	<a href="#">Add default</a>
Actions	Form Field		LGL Field	
 	Gift amount: - Amount	➔	Gift amount	
 	Payment Processor	➔	Payment type	
 	Submission Date	➔	Gift date	
Actions	Default Value		LGL Field	
 	2022 Year End Appeal	➔	Gift appeal name	

Once you’ve mapped your form, it’s time to test it! This is a crucial part of the process because it tells you whether you’ve created and mapped your form successfully. You want to make sure your form is correct before you share it, so always reserve time to test your form rigorously. Then you can review the test submission in your LGL forms Submission Queue to see how the data is mapped. If something is amiss, you can correct your mapping.

Once you’ve confirmed that everything is working as you intend, you’re ready to publish your form! When submissions are made, you’ll find them in your LGL forms Submission Queue where you can review and save them.

## Online form checklist

- 1.If you haven't already, set up LGL forms and enable a payment processor.
- 2.Build a simple donation form, making sure the look and feel and the donation amounts are consistent with your remittance envelope. Resist the temptation to collect information beyond the donor's name, contact information, and gift amount.
- 3.Map your form to LGL.
- 4.Define your form's confirmation options.
- 5.Test your form rigorously, and correct any issues you may encounter.
- 6.Publish your form.
- 7.Make a habit to review and save submissions in your LGL forms Submission Queue on a regular basis.

## Section 4 Resources:

[The financial perks of building a simple donation form](#)

[Introduction to LGL forms](#)

[Integrate your LGL forms data to flow into LGL](#)

[How can I test a payment form without actually making a donation?](#)

[Manage your LGL forms submission queue](#)

## Section 5: Sending your appeal mailing

By now, you're well on your way to launching your appeal. You've created your appeal in LGL, decided which constituents to solicit, and you've invested time in creating effective appeal materials, including a solicitation letter, acknowledgment, remittance envelope, and online donation form.

It's time to create a mailing to solicit your constituents. You can do this in Little Green Light by navigating to your appeal and clicking on the Mailings tab. Here you can set up a mailing to your appeal or, if you've created segments, you can create a mailing for each segment.

We recommend using the Mailings functionality in LGL so that your mailing is documented in your database. An added bonus to using the Mailings functionality in LGL is that exclusions are automatically applied to remove constituents who are marked "deceased" or "do not mail", or who do not have a valid mailing address.

Note: If you'll be using a mail house rather than producing the mailing yourself, check out the resources at the end of this section for guidance on how to prepare your mailing list for your mail house.



You should always merge and review your letters, labels, envelopes, etc., before printing the whole batch to make sure the merge fields are working as you intend. Also confirm that the formatting of your letter is what you expect. Remember that merge fields (such as a three-line address block) take up more space once the letters are merged, so you must format your letter template to accommodate the merged fields.

Check to make sure the names, including addressee and salutation, are correct. If you find errors, correct them in your database and then regenerate the letters. Allow plenty of time to review and make any corrections to your letter or its formatting.

Once your letters are downloaded, you’re ready to get those letters in the mail and mark the mailing as “Sent” in LGL.

Mailing ▾	Download & Print Files	Type	Recipients	Status	Send Date ▾
Active Donors <div>EditCloneDelete</div> <div>Updated: Aug 25, 2022 at 02:34 PM</div>	Letters Not available Envelopes Not available Labels <div>SampleDownload All</div>	Other	26	Draft ▾	Aug 25, 2022 📅

## Section 5 Resources:

[How to successfully organize volunteers to help with a mailing](#)

[Creating a mailing list to send to a mail house](#)

# Section 6: Entering gifts

You’ve put a lot of effort into creating your appeal. Now you can look forward to receiving gifts in response to your solicitation.

When you receive a check in the mail and create a gift record in LGL, you can code the gift to a particular appeal. This way, you’ll be able to determine how much was raised as a result of the appeal. Since the constituent record was already added to the appeal, coding the gift record to the appeal will update the constituent’s appeal status to “Donated”.

Alexander, Susan

Mrs. Susan Alexander  
185 West 82 Street  
New York, NY 10002  
US  
(888) 555-0012  
alexander@citizenkane.com

+ Comment

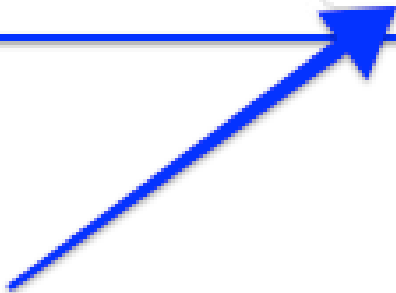
+ Contact report

+ Task

Segment:Active donors

Team Member:- -

Status:Donated



Earlier, we set our acknowledgment template as the default acknowledgment for this appeal. That means when you enter a gift manually and code it to the appeal, the acknowledgment letter template will be assigned to the gift automatically. When you’re done entering gifts for the day, you can go ahead and download your file of acknowledgment letters to print and mail, and then mark the acknowledgment mailing as “Sent”.

## Section 6 Resources:

[Gift entry](#)

[Learn the fundamentals of gift entry](#)

[Acknowledging gifts in LGL](#)

[Guide to acknowledging gifts](#)



# Section 7: Reporting on your appeal

A lot of planning goes into a fundraising appeal, and it’s worth investing that same level of careful thought once your appeal winds down. You can glean helpful information from an appeal evaluation, which will guide you on what to repeat and what to change next time around for stronger results.

At the beginning of this guide, we looked at the Appeals dashboard in LGL. Now that you’ve received and documented some gifts to the appeal, you can refer to your Appeals dashboard for an overview of your appeal progress.

Appeal ▾		Date ▾	Status	Constituents/recipients	Gifts
2022 Year-end appeal	<div>CustomizeActions</div>	Oct 3, 2022	<input checked="" type="checkbox"/> Active	Appeal Status Open (118) Donated (9) ----- Total (127)	<div>Total Raised vs. Target/Goal \$83,350 of \$125,000</div> <div>Gifts8 / \$83,350 from 8 Constituent(s)</div>

If you created segments in your appeal, you can navigate to your appeal and click the Appeal Segments tab to see how much was raised by segment.

Position	Segment Code	Segment Name	Ask Amount	Constituents	Progress
1 <div>⬇</div>		Active donors <div>Actions</div>	\$0	41 records <div>Refresh</div> <div>0 excluded due to overlap</div>	Gift: \$59,350
2 <div>⬆⬇</div>		Lapsed donors <div>Actions</div>	\$0	75 records <div>Refresh</div> <div>0 excluded due to overlap</div>	Gift: \$24,000
3 <div>⬆</div>		Non-donors <div>Actions</div>	\$0	11 records <div>Refresh</div> <div>0 excluded due to overlap</div>	Gift: \$5,500

Another handy way to check on how much you’ve raised through this appeal, and to compare the total against other appeals, is to navigate to Fundraising → Giving and make use of the “Giving by appeal” fundraising view.

**View:** Giving by appeal

Results 1 - 4 of 4

Appeal	Total Raised ?	Gifts	Pledges	In Kind	Soft credits	Other Income
Totals	\$99,200	\$98,700	\$500 (\$500)	\$0	\$4,850	\$0
2022 Membership Drive	\$2,100	\$2,100	\$0	\$0	\$1,000	\$0
2022 Spring Appeal	\$750	\$250	\$500 (\$500)	\$0	\$0	\$0
2022 Year-end appeal	\$88,850	\$88,850	\$0	\$0	\$350	\$0
Annual Solicitations						
2022 Board Ask	\$7,500	\$7,500	\$0	\$0	\$3,500	\$0

If you’ll be creating your own constituent searches and reports, it’s important that you understand the distinction between searching by “Appeals” versus searching by “Appeals (giving)”. If you want to run a constituent search to find all constituents who have a gift record coded to an appeal, navigate to the Constituents page and search by “Appeals (giving)”.

If instead you want to search for all constituents who were solicited for this appeal, you would search by “Appeals”. Your search results will include everyone who was added to your appeal, whether or not they made a gift coded to the appeal.

Always schedule ample time for reporting. Note on your calendar when your reports will be due, and spend time in advance practicing running the reports you'll need. It's crucial that you review your reports carefully to make sure they give you what you need. A good rule of thumb is to practice running your reports a minimum of a week before they're due; with this approach, you'll have plenty of time to tweak them if you need to.

## Section 7 Resources:

[Common reports and how to create them](#)

[Quick searching and reporting with Fundraising Views](#)

[4 questions to consider after your fundraising appeal](#)



## Section 8: Looking ahead

Every fundraising appeal offers you a glimpse into the engagement of your donors and the health of your database. This is an opportunity to evaluate your own efforts, too. With the information you learn from an appeal evaluation, you'll be poised for an even more successful appeal next time around. Once you've created your reports, ask yourself:

**What went well?** Consider the aspects of your planning and operations that helped these things go smoothly and well.

**What aspects of the appeal caused frustration for you?** Brainstorm ways to resolve these issues so they aren't a problem with your next appeal.

### Next steps

The takeaways from this appeal will fade with time. Once you've considered those two, it's crucial that you document your findings. When it's time to plan your next appeal, you can use those findings as a guide as you set goals and define your work process.

# Conclusion

In addition to this guide, we hope you'll utilize the various free resources that are available to help you in your work with Little Green Light.

Our [Knowledge Base](#) and [Video Library](#) are the first places to learn about LGL. There you'll find articles about every feature and videos about the most commonly used features, as well as recorded webinars on topics like using event management and the fundamentals of importing data.

If you're looking for guidance on general fundraising tips and best practices, like how to launch a planned giving program without a planned giving officer or how to read nonprofit financial statements, check out [Little Green Light's blog](#).

We also recommend reading Erik Hanberg's "The Little Book of Gold," which offers a practical and step-by-step guide to professional fundraising. We wrote a companion guide to "The Little Book of Gold," which explains how to use LGL to complete the work laid out in that book. You can access those resources [here](#).

Take advantage of the free training webinars we offer throughout the year:

We highly recommend that every LGL user attend our Basic Training series. This webinar series is made up of three separate sessions, which we recommend participating in sequentially:

- Constituents 101: The basics of managing constituent data as well as a review of simple searching and filtering techniques.
- Gift management 101: The basics of managing gift data as well as a review of the Acknowledgments process in LGL.
- Reporting 101: The basics of generating reports in LGL.

Your goal is to raise funds to help your organization achieve its mission. Our goal at Little Green Light is to help you do just that.