OVERVIEW: USING THE YEAR-END FUNDING LETTER TOOLKIT MATERIALS

Purpose of a Year-End Funding Letter

To raise a substantial portion of your annual budget in November and December

Toolkit Materials Overview

The Year-End Funding Letter Toolkit documents are listed numerically in the order they should be used.

1. **Overview** - How to use the Year-End Funding Letter Toolkit materials
2. **Setting Your Funding Goal** - Determine the amount to request in your appeal letter
3. **Pre-Designed Letter Templates** (optional) - Send professional-looking letters using these Word templates. (The templates are designed for Microsoft Word and can be used on a Mac or PC. They are not compatible with Pages or other programs.)
4. **Model Year-End Funding Letter** (designed) - Add your personal information, a ministry story, a photo, and your funding goals to this pre-written and designed letter.
   (4a) Model Year-End Funding Letter Alternatives (text only) - These model funding letters offer alternative verbiage to the standard model funding letter while including all components critical to a successful funding letter. Add text from one of these model letters to the template of your choice.
5. **Funding Letter Checklist** - Ensure clarity and success by including the checklist's suggestions in your letter—specifically the Must Haves. Letters qualify for MPD Made Simple incentives *only* when they include all the Must Haves.
6. **Giving Reminder Email Template** - Send partners this email message that includes your giving link to prompt giving.
7. **Follow-Up Phone Call Script** - Phone ministry partners to deepen relationships and personally invite them to give.
8. **Funding Letter Tracker** - Record who received the letter, follow-up actions, gifts received, and thank you notes mailed.
9. **Thank You Note Samples** - Mail a hand-written thank you note to every ministry partner who gave a year-end gift.
10. **Spanish Materials**

Who should receive your year-end funding letter?

Everyone on your mailing list except those with whom you've held a face-to-face funding appointment within the last five months.

Funding Letter Facts

- The average response to a funding letter with no follow-up is 5-7%. Mail to a wide audience.
- Calling ministry partners to follow up a funding appeal increases the response rate to 40%.
- Paper, not electronic, funding appeal letters are most effective.

- Funding letters are most effective in raising money for projects or special gifts as opposed to long-term monthly support. Face-to-face appeals raise long-term monthly support.
- In 2025, on average, each funding letter sent resulted in $54 of income.
- Average yield: 7.5 letters for one gift.