
Charity appeal pack checklist

Tick each item as your appeal comes together. Share it with your agency and mailing house so everyone works to the same list.

APPEAL NAME

IN-HOME DATE

1. Components

- ☐ **Outer envelope:** teaser agreed; window lines up with the address on the letter or form; over-printed with the appeal if claiming VAT zero-rating.
- ☐ **Appeal letter:** one clear ask; personalised name and ask amounts; signed off by the right person.
- ☐ **Reply / donation form:** pre-filled name, address and supporter number; ask amounts match the letter; payment options clear.
- ☐ **Gift Aid declaration:** included where you can claim (see section 3).
- ☐ **Reply envelope:** Freepost or business reply licence and artwork approved; form fits without awkward folding.
- ☐ **Insert or premium** (pen, coin, seed packet, leaflet): supports the message; weight and thickness checked.

2. Data and suppression

- ☐ Fundraising Preference Service requests actioned (within 21 days of notification).
- ☐ Own opt-outs, complaints and "no post" flags suppressed.
- ☐ Non-consent data screened against the Mailing Preference Service.
- ☐ People known to have died removed; gone-away addresses suppressed.
- ☐ Ask strings calculated from giving history as intended; letter and form match.
- ☐ Salutations, joint names and "Dear Friend" fallbacks checked.
- ☐ Contact frequency justified for each segment.

3. Compliance

- ☐ Registered charity statement included (England & Wales: required above £10,000 gross income, Charities Act 2011 s39). Scottish charities: registered name and SC number.
- ☐ Claims about the charity, its work and use of donations are accurate (Code 8.1.3).
- ☐ Enclosures strengthen the message and do not rely on guilt or embarrassment (Code 8.1.6).
- ☐ Contact details and privacy information easy to find (Code 8.2.1).
- ☐ Simple opt-out offered (Code 8.4.3); no undue pressure to give (Code 1.1.2).
- ☐ Gift Aid declaration: donor's name and home address, charity name, gifts covered, confirmation they are Gift Aid donations, and an explanation of the donor's tax responsibility. No company or joint names. No signature needed.
- ☐ VAT: declaration given to the printer for zero-rated items (appeal letters, over-printed envelopes) under VAT Notice 701/58.

4. Production and postage

- ☐ Assembled pack weighed and measured. Royal Mail Letter: up to 240 × 165mm, 5mm thick, 100g.
- ☐ Postage service agreed (Advertising Mail / Mailmark) and volumes confirmed.
- ☐ Print proofs signed off.
- ☐ Personalised proofs checked: normal, long and missing-data records.
- ☐ Reply envelope, Freepost address, QR codes and web links tested.
- ☐ Seed records added so staff receive the appeal.
- ☐ Drop date and handover to Royal Mail confirmed with the mailing house.

SIGNED OFF BY

DATE

Code = Fundraising Regulator, Code of Fundraising Practice (from 1 November 2025). Gift Aid: HMRC charities guidance, chapter 3.6. This checklist is general guidance, not legal advice.