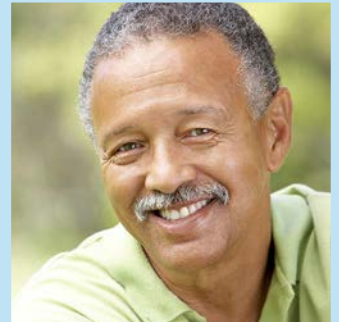


TOP MARKETING TIPS FOR

COMMUNITY FOUNDATIONS



Crescendo

Major & Planned Gifts Marketing

TOP MARKETING TIPS FOR

COMMUNITY FOUNDATIONS



Crescendo

Major & Planned Gifts Marketing

📍 110 Camino Ruiz
Camarillo, CA 93012

☎ 800-858-9154

💻 crescendointeractive.com



This booklet explores effective multichannel marketing strategies for community foundations. By utilizing a range of communication channels, organizations can reach diverse audiences, increase engagement and enhance donor relationships. The following examples highlight successful approaches that can strengthen your gift planning initiatives and drive meaningful support.

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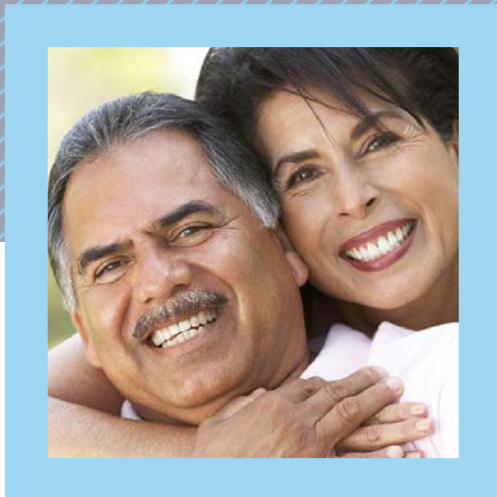
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INTRODUCTION

Your mission is unique and unlike that of any other nonprofit. Your donors are also special and they support your cause for reasons that are real and personal to them.

You will want to appeal to your donors with marketing that reflects what your organization is doing today and where it is going in the future.

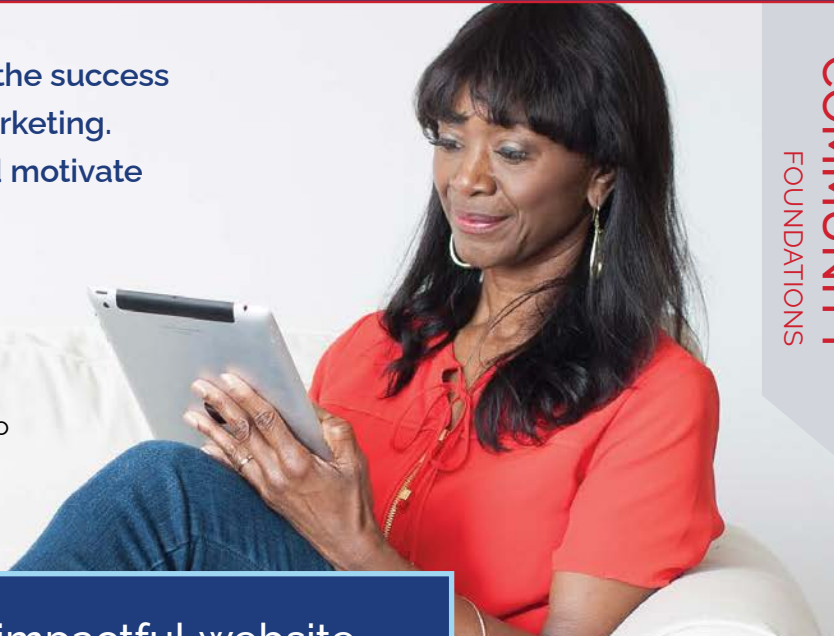
Crescendo will provide you with time-tested marketing concepts that can be customized to help your organization achieve its unique mission.



All of the effective marketing examples in this booklet were created using Crescendo's GiftLegacy Pro subscription with minimal time and effort. If you have questions or need help with your marketing, please contact us. Crescendo can help you develop a strategy that is right for your organization.

A strong online presence is crucial for the success of your organization's gift planning marketing. The goal is to engage your donors and motivate them to support your mission.

Along with your organization's branding, your website can feature articles, videos and donor stories that educate donors about ways to support your cause. Your website also needs to be mobile-friendly so that you can reach more visitors who are using all types of devices.

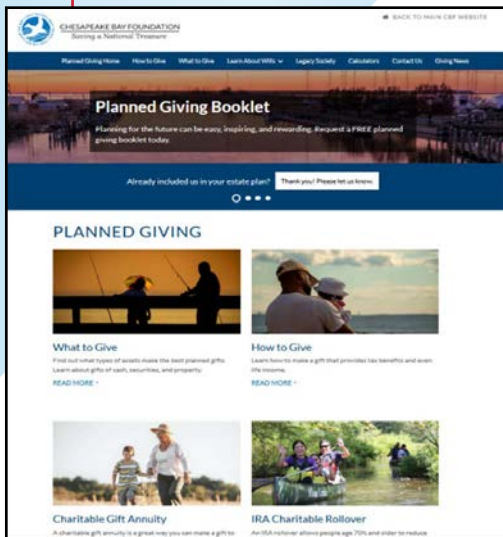


Best practices for an impactful website to market to your donors:

- ▲ **Use custom images that tell a story.** Show your organization's mission in action and positive impact through your donors' loyal giving efforts.
- ▲ **Create a focused experience.** We recommend a focused gift planning experience for your website visitors. When visiting your branded gift planning website, donors can learn how to give and what to give. Interactive features such as donor benefits calculators and a complimentary wills planner enhance their experience. Mission-related photos and heartfelt stories from donors show generosity benefits and rewards. We include a "Back to Main Website" link so users can easily navigate back to the parent website.
- ▲ **Show the most important topics on the homepage.** This is especially important if you have a campaign focused on a specific gift. This will create entry points for your donors to focus on the pages you want them to visit.
- ▲ **Be consistent with your branding.** You want your visitors to recognize your organization's branding colors and logo on your gift planning website. Create a unified experience for your donors, ensuring a seamless experience between the main website and the gift planning website.
- ▲ **Use content that is readable and easy to follow.** We recommend short paragraphs, headlines and bullet points to make it easy to read and scan your page.
- ▲ **Make clear and concise "call-to-action" words and phrases.** Customize your text to support your mission. This will inspire your donors to take action.

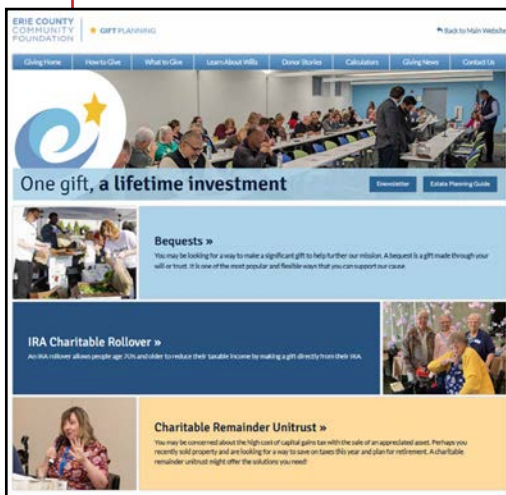
WEBSITE EXAMPLES

Here are some examples of strong websites for community foundations:



Chesapeake Bay Foundation

offers a dedicated gift planning website with a clean, streamlined navigation experience. A single “Back to Main CBF Website” link provides an easy path for visitors to return to the parent site.

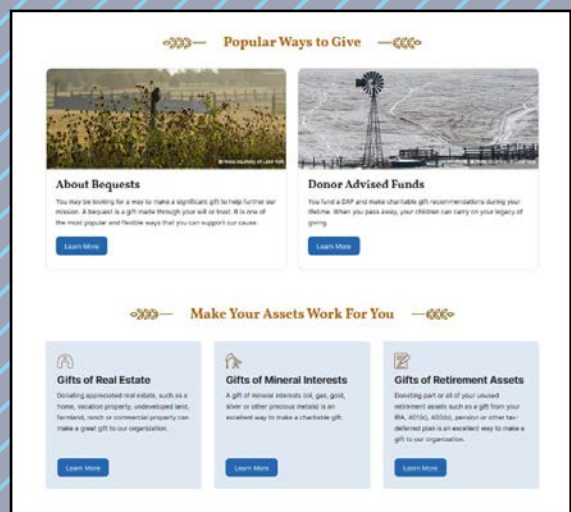
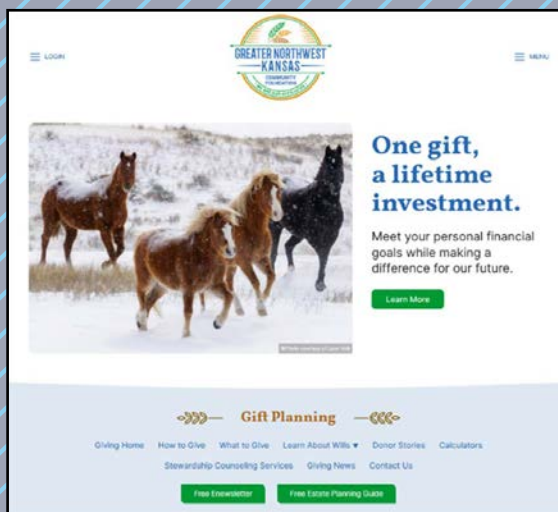


Erie County Community Foundation

displays its branding strongly, with the logo and brand colors throughout the website's design.

Greater Northwest Kansas Community Foundation

focuses on its most popular gifts on their homepage, making it easy for the donor to navigate to an interior page to learn more on how to give to this community foundation.



COMPELLING EMAIL MESSAGING

Email is one of the best ways to maintain regular contact with your supporters. Effective emails use catchy subject lines that encourage readers to open them and learn more.

Enewsletters should be sent on a consistent basis to steward donor relationships. Your messaging needs to be compelling to promote donor response. In contrast, eblasts are shorter, visually appealing emails focused on specific topics. Both email formats are effective marketing tools to drive traffic to your gift planning website and engage your donors and prospects.



Best practices for using email messaging for your marketing:

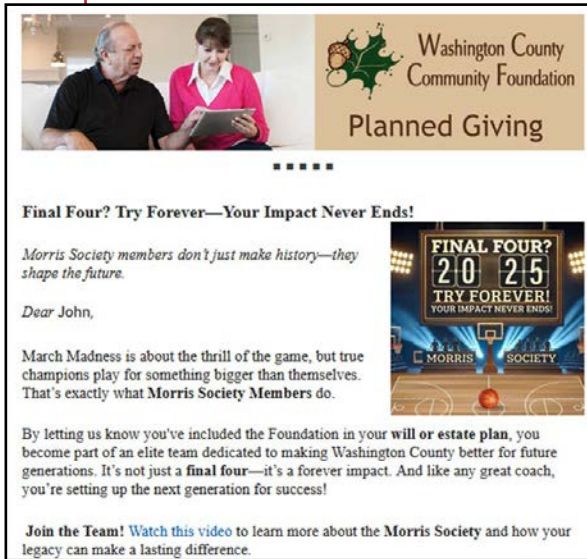
- ▲ **Use custom images** that relate to your email messaging, including showing a specific funding or campaign need, a donor who contributed to your organization, a person or program that was directly impacted by a gift or a meaningful image that pulls on the heart strings of your donors.
- ▲ **Keep your branding consistent** with your organization's colors and logo to help your readers recognize the email is coming from your organization and not a third party. This builds trust with the donor and encourages engagement.
- ▲ **Include "call-to-action" words or phrases**, but keep them short and concise. Make it clear what you are asking of the donor, whether it is a financial gift, serving as a volunteer or ways they can contribute and serve the organization.
- ▲ **Add links to the gift planning website** and/or sign-up pages for upcoming events to make it more convenient for your readers to engage and act in a timely manner.
- ▲ **Focus your email messaging** on one clear topic to perform better. Too much information will overwhelm the reader, discouraging immediate action.

Popular Email Topics:

- ▲ Specific gift topic or campaign highlight
- ▲ Motivating donor stories
- ▲ Impact stories and testimonies
- ▲ Volunteer opportunities and spotlights
- ▲ Upcoming event and seminar invitations
- ▲ Updated news and recap of important events
- ▲ Estate Planning Guide offer to donors

EMAIL EXAMPLES

Here are examples of effective newsletter and eblast messaging for community foundations:




**Washington County Community Foundation
Planned Giving**

Final Four? Try Forever—Your Impact Never Ends!

Morris Society members don't just make history—they shape the future.

Dear John,

March Madness is about the thrill of the game, but true champions play for something bigger than themselves. That's exactly what **Morris Society Members** do.



By letting us know you've included the Foundation in your **will or estate plan**, you become part of an elite team dedicated to making Washington County better for future generations. It's not just a **final four**—it's a forever impact. And like any great coach, you're setting up the next generation for success!

Join the Team! Watch [this video](#) to learn more about the **Morris Society** and how your legacy can make a lasting difference.

Washington County Community Foundation's

newsletter highlights its legacy society and encourages readers to learn more about how they can become a member.

Catholic Foundation of Northeast Kansas'

eblast reminds their donors to sign up for a Wills and Trusts Workshop to learn how they can effectively leave a legacy in their estate plans to the foundation. The email includes a registration link with clear event details, informing the donors what to expect from this event.




CATHOLIC FOUNDATION
NORTHEAST KANSAS

LAST CALL!

**Join us for a Wills and Trusts Workshop
at Holy Angels Parish**

REGISTER HERE

April 10 at 6:00 PM

WILLS & TRUSTS WORKSHOP
CREATING YOUR LEGACY

Holy Angels Parish
Held at St. Rose Philippine
Duchezne Catholic School
530 E. 4th Ave.
Gomett, KS 67032

APRIL 10, 2024
6:00 PM - 7:30 PM



SCAN TO REGISTER!



Speaker
Cassidy Connolly

[CFNK.ORG/EVENTS/WILLS-AND-TRUSTS-WORKSHOP](https://www.cfnk.org/events/wills-and-trusts-workshop)



LONGMONT COMMUNITY FOUNDATION



Reduce Your Taxes With an IRA Rollover Gift

Reduce your taxes this year by making a gift directly from your IRA to our organization. If you are 70½ years or older, you can roll over up to the limit that is adjusted each year from your IRA to charity free from federal income tax.

Required minimum distributions while helping our community.

IRA rollover gifts and to

Longmont Community Foundation & Nebraska Community Foundation's

eblasts spotlight a specific gift topic, effectively leveraging their branding — including logos, colors, and imagery — to communicate the need to their donors.



NEBRASKA COMMUNITY FOUNDATION

There is an easy way for you to help support your community.

A charitable gift in your will is an excellent way for you to leave a legacy and support your community. A bequest is also one of the easiest gifts you can make. Your estate planning attorney can include a provision in your will that leaves a lasting gift. It could be a gift of a specific asset, a dollar amount, or a percentage of your estate. You could also designate us as beneficiary of your retirement plan, life insurance policy, bank or investment account.



Please contact us to learn about all of the benefits of making a gift to help support your community.

ENGAGING SOCIAL MEDIA POSTS

The goal of social media for a nonprofit is to engage and encourage supporters to rally behind your organization's cause. The best social media posts use imagery and video to capture attention, tug on donors' heartstrings and motivate supporters.

Many nonprofits share impact stories, mission-oriented images and videos, donor testimonials and snapshots of staff or beneficiaries.

Social media platforms allow nonprofits to go beyond their existing donor base to reach new supporters, volunteers and advocates. A single compelling post can be seen and even shared by thousands.

If you have a social media calendar, consider creating and scheduling regular posts about the work and mission of your organization.



Inspire action by blending your mission with heartfelt opportunities to give by highlighting the impact of every gift through compelling images and video stories.

EFFECTIVE PRINT MARKETING

Most nonprofits recognize the value of print marketing. Print is still important for introducing and reinforcing marketing messages. Coupled with electronic marketing, also known as multi-channel marketing, print is highly effective in reaching donors. Many organizations send smaller marketing pieces, such as postcards and inserts, that are effective and less expensive to print.

Traditional print marketing is often used as a follow-up method when a donor requests information on a particular gift topic. The Estate Planning Guide, which can be mailed, emailed or downloaded from your gift planning website, is the most popular print piece according to Crescendo's research.

Including QR codes in your print marketing is highly recommended because it bridges the gap between print and online engagement, making it easier for supporters to learn more and take action.

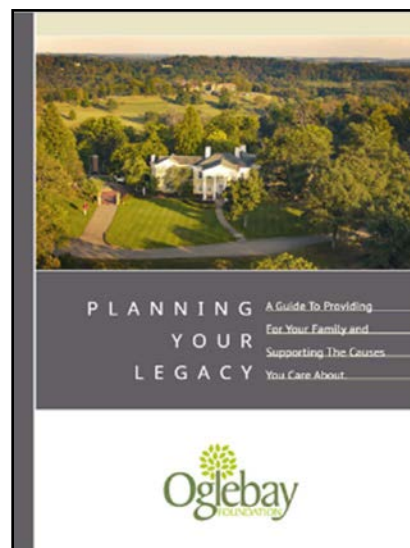


PRINT EXAMPLES

Here are some examples of effective print marketing for community foundations:

Oglebay Foundation's

customized Estate Planning Guide provides information for donors interested in leaving a gift in their will or trust to the organization.



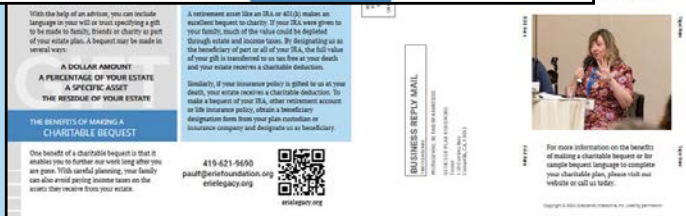
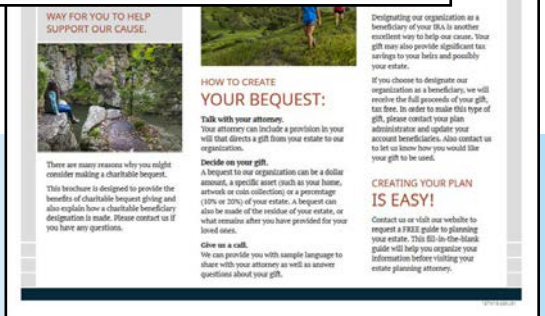


Longmont Community Foundation

helps donors explore meaningful ways to give, making gift planning easier to understand and respond with their customized "Guide to Gift Planning" booklet. It is available as a downloadable PDF or as a printed booklet when conducting personal donor visits.

South Dakota Community Foundation's

customized brochure includes custom images relating to the organization plus resourceful information about planned gifts.



Erie County Community Foundation's

customized extended postcard focuses on ways donors can make an impact in the community by leaving a planned gift. A reply card is provided for easy response.

BOOST ENGAGEMENT

WITH CresSurvey

Search Gift Planning Q Back to Main Website

SOUTH DAKOTA COMMUNITY FOUNDATION GIFT PLANNING Gift Planning Menu

Give Us Your Feedback

Your feedback will help us stretch every contribution even further so that together we can fulfill our mission and make a significant impact in our community.

[Advisor Resources](#) [Free Enewsletter](#) [Free Estate Planning Guide](#)

Giving Home > Give Us Your Feedback

Are you familiar with South Dakota Community Foundation?

Very Familiar
 Moderately Familiar
 Not Familiar

[Next Question](#)

1 of 4
[Privacy Statement](#) | [Privacy Basics](#)

With CresSurvey, you can produce a survey customized for your donors and your organization.

Surveys can enhance connections with your donors, help you better understand your donors' motivations and uncover existing legacy commitments or leads.

South Dakota Community Foundation

Website survey

Have we made it easy to give to South Dakota Community Foundation?

Quite Easy
 Moderately Easy
 Not Easy

[Previous Question](#) [Next Question](#)

2 of 4

Have we explained to your satisfaction how your donations are used?

Extremely Well
 Quite Well
 Somewhat Well

[Previous Question](#) [Next Question](#)

3 of 4

What type of charitable gifts would you be interested in learning more about?

Gifts Made by Will or Trust
 Gifts of Life Insurance
 Beneficiary Designation Gifts
 Charitable Remainder Trusts
 IRA Charitable Rollover
 Charitable Gift Annuities

[Previous Question](#) [Submit Survey](#)

4 of 4



CRESPRO DONOR PROPOSALS

COMMUNITY FOUNDATIONS

THAT INSPIRE GIVING

The CresPro software includes four-page color donor proposals for all major, blended and planned gifts.

Donor proposals are available to GiftLegacy Pro subscribers with a CresPro license. These motivational proposals are fully customizable, allowing you to insert your logo, branding colors and mission-related images that resonate with your donors. Additionally, you can edit the text and save the proposal as a high-quality PDF to send electronically or to print for your one-on-one donor meetings.



MASTER GIFT CASE

Support Washington County Community Foundation
Prepared for Test

Consider a Lasting Legacy
At Washington County Community Foundation, we believe in giving you the power to make a lasting impact. By giving through our Foundation, you can support the causes you care about most, forever. When you include the Foundation in your Will or estate plan, you set in motion a legacy of kindness that endures for generations.

Washington County Community Foundation
Washington County Community Foundation
PO Box 50, 1707 North Shelby Street
Salmon, IN 47167
812-888-7354
director@wccf.biz
wccfgift.org

At Washington County Community Foundation, we believe in giving you the power to make a lasting impact. By giving through our Foundation, you can support the causes you care about most, forever. When you include the Foundation in your Will or estate plan, you set in motion a legacy of kindness that endures for generations.

Your gift through your Will or estate plan can become an endowed fund named especially for you. This special type of fund supports your favorite projects and causes now and in the future. As your endowed fund grows, so does the positive impact on our community, ensuring your values live on forever.

Giving through our Foundation means your good works continue to thrive. Every gift you give supports programs and projects that matter to you. Your support can help schools, nonprofits, and community projects, creating opportunities for families and young people throughout Washington County.

The beauty of this approach is that your generosity keeps giving back. The good works you start today will touch lives long into the future. You can see the change you want to make, knowing that your support will help future generations thrive.

We are truly grateful for your vision and commitment. By choosing to leave a gift through your Will or estate plan, you are making a difference that lasts. Thank you for partnering with us to build a stronger, more vibrant community for all.

Washington County Community Foundation's Master Gift Case

For GiftLegacy Pro subscribers with a CresPro license, the CresPro charitable gift programs also include a Master Gift Case. This is a one-page explanation of your organization's mission and information on why donors should give to your organization. The gift case is customizable with your images, text, colors and logo.

TOP PROSPECTS IN YOUR

DONOR ANALYTICS

The Top Prospects Report lists your top prospective donors based on website and newsletter activity.

A suggested gift for the donor is also displayed based on their personal activity. If an individual demonstrates frequent activity, it is one of the strongest indications of interest in your organization and its mission.

Score	Name	Last Page Visited	Visit Date	Gift Model
100.0	Donor 1	eNewsletter Preferences	10/05/2010	WillRequest
100.0	Donor 2	Planned Giving Home	10/11/2010	Unitrust
100.0	Donor 3	Today's News - Finance News	03/09/2015	Gift Annuity
92.00	Donor 4	Today's News - Savvy Living	02/26/2011	WillRequest
89.00	Donor 5	GiftLegacy Donor Manager - Logout	06/09/2015	WillRequest
89.00	Donor 6	Planned Giving Home	02/06/2015	IRA
82.00	Donor 7	Planned Giving Home	09/20/2010	WillRequest
80.00	Donor 8	Privacy Statement	08/27/2010	Gift Annuity
79.00	Donor 9	GiftLegacy Login Page	01/25/2012	WillRequest
75.00	Donor 10	Today's News - Savvy Living	08/27/2010	Unitrust
75.00	Donor 11	Your Plan Download	09/22/2010	WillRequest
73.00	Donor 12	Privacy Statement	02/28/2015	WillRequest
70.00	Donor 13	Today's News - Finance News	08/27/2010	Unitrust
68.00	Donor 14	GiftLegacy Login Page	12/08/2011	WillRequest
68.00	Donor 15	Planned Giving Home	01/24/2011	Gift Annuity
62.00	Donor 16	Planned Giving Home	01/28/2011	Gift Annuity
57.00	Donor 17	Planned Giving Home	02/01/2011	WillRequest

RAISE GIFTS IN JUST A FEW HOURS PER WEEK

As a fundraiser, you want to spend most of your time meeting and talking with donors. If you can find a way to minimize the time spent on marketing and other administrative duties, you will have more time to focus your energies on closing gifts.

Crescendo's GiftLegacy marketing system uses an integrated approach including web, print, email, video, social media and donor surveys. Our goal is to assist fundraisers in educating, engaging and motivating donors to close major and planned gifts.



To help you increase loyal donor engagement and cash gifts in the next quarter, consider enrolling in our CresCoaching class, available at no additional cost to GiftLegacy subscribers.

SUCCESSFUL MARKETING PLANS

Creating a winning marketing plan for your organization will lead to success. Think about the types of campaigns or initiatives you want to highlight.

You might focus on a different marketing concept or gift offering for each quarter. In developing your marketing plan, you need to also consider the timing for each of your marketing touches and how frequently you will reach out to your supporters. Using a donor survey can also help you evaluate how often donors desire to hear from you.

MARKETING PLAN EXAMPLE

Here is an example of a marketing plan for a community foundation:

Annual PG Marketing Plan: Bequests, DAFs, CGAs IRA Rollover

Campaign Tools – Community Foundation Example

Annual PG Marketing Plan: Bequests, DAFs, CGAs, IRA Charitable Rollover

Quarterly Mini-campaigns (print mail piece + eBlast + Crescendo eNewsletter + social media posts)

- Bequests + Estate Planning Guide Offer – [Month/Year]
- DAFs – [Month/Year]
- CGAs – [Month/Year]
- IRA Charitable Rollover – [Month/Year]
- Crescendo donor and advisor eNewsletters – monthly
- Social media posts – monthly
- Annual Impact Report – [Month/Year]– ads on Gift planning and/or donor story spotlight
- Legacy Society Reception – [Month/Year of event date]
- Estate Planning Seminars – quarterly

Timing

- 12-month plan (*tentative*): Fiscal Year: [Month/Year] – [Month/Year]

Segmentation

- PG/Bequest marketing: Ages 40+, Legacy Society, Loyal Donors, Major Gift Donors, volunteers, Partners with Community Foundation, Financial advisors and attorneys
- IRA Charitable Rollover marketing: Past IRA Charitable Rollover donors, Ages 70+
- CGA marketing: Ages mid 70's+

Crescendo

Creative Gift Market

As you develop your marketing plan, think about the marketing tools, timing and segmentation that would work best for your organization.

SEGMENTING YOUR MESSAGING

Timing is as important as creating a polished marketing piece. The sample marketing plan includes bequest marketing to donors age 40+, loyal donors, board members and legacy society members. IRA charitable rollover and charitable gift annuity marketing is segmented for donors age 70+, which fits the demographics for these gifts.

As a community foundation, you have a unique mission and branding that can be reflected in your marketing.

We Can Help

If you would like to learn more about Crescendo's GiftLegacy marketing services and how to use our products, please contact us at 800-858-9154 or visit crescendointeractive.com.

Our team is happy to help you develop a marketing strategy to achieve your goals.



Crescendo

Major & Planned Gifts Marketing



crescendointeractive.com