

TOP MARKETING TIPS FOR

# EDUCATION ORGANIZATIONS



**Crescendo**

Major & Planned Gifts Marketing

TOP MARKETING TIPS FOR

# EDUCATION ORGANIZATIONS



## Crescendo

Major & Planned Gifts Marketing

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This booklet explores effective multichannel marketing strategies for education-based organizations. 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.

# TABLE OF CONTENTS

Introduction ..... 4

Strong Online Presence ..... 5

**WEBSITE EXAMPLES**

- Boise State University
- Alpha Sigma Nu
- McMurry University

Compelling Email Messaging ..... 7

**NEWSLETTER & EBLAST EXAMPLES**

- Utah Valley University
- Weber State University
- Furman University

Engaging Social Media Posts ..... 9

Effective Print Marketing ..... 10

**LITERATURE EXAMPLES**

- Boise State University (Estate Planning Guide)
- Heidelberg University (Guide to Gift Planning)
- Regis Catholic Schools Foundation (Trifold Brochure)
- College of Wooster (Extended Postcard)

Boost Engagement with CresSurvey ..... 12

CresPro Donor Proposals That Inspire Giving ..... 13

- Master Gift Case

Top Prospects in Your Donor Analytics ..... 14

Raise Gifts in Just a Few Hours Per Week ..... 14

Successful Marketing Plans ..... 15

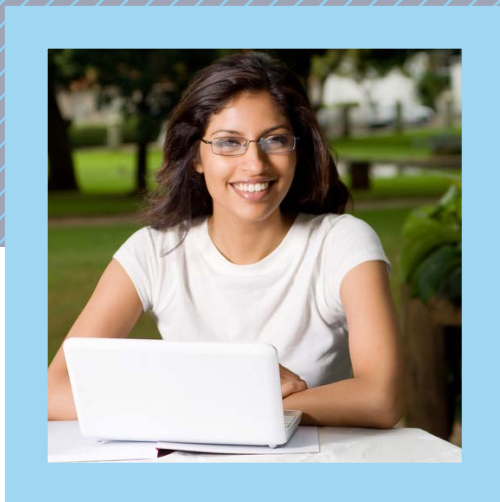
We Can Help ..... 16

# 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.

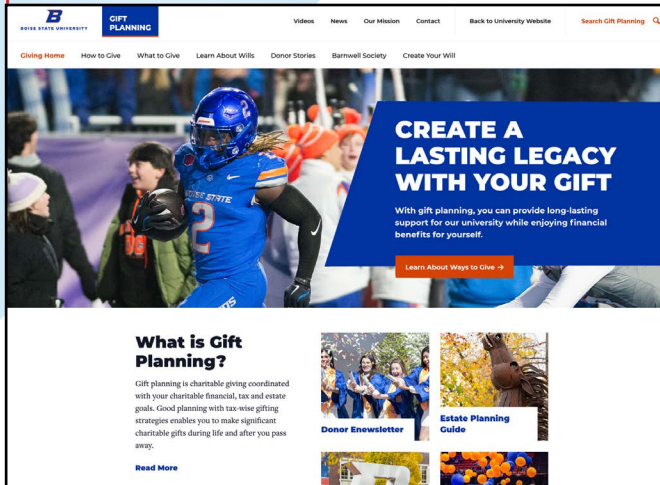
Along with your organization's branding, your website can feature articles, videos and donor stories that educate donors about ways to support your cause. Your website also needs to be mobile-friendly so that you can reach more visitors who are using all types of devices.

## 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

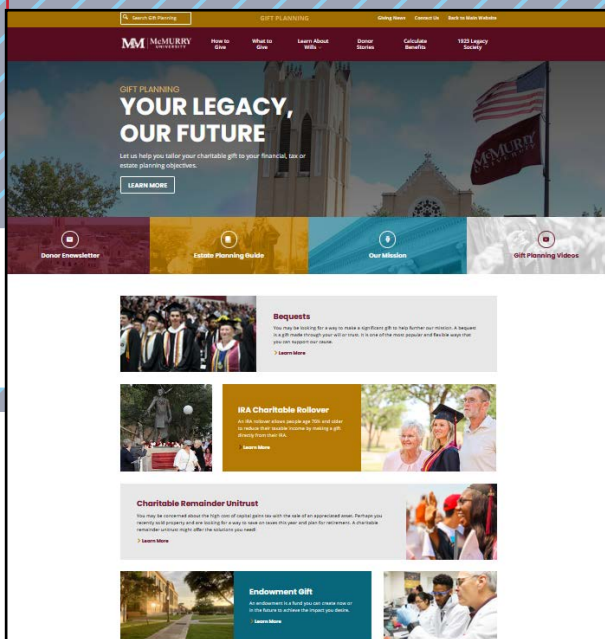
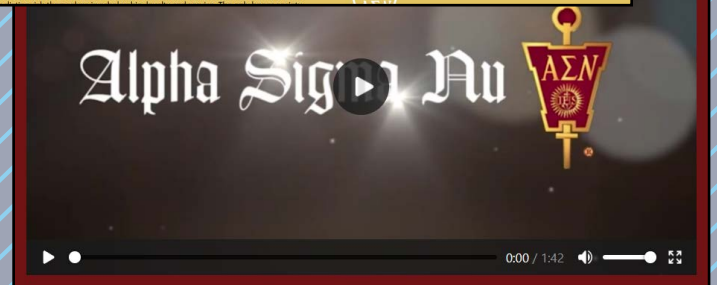
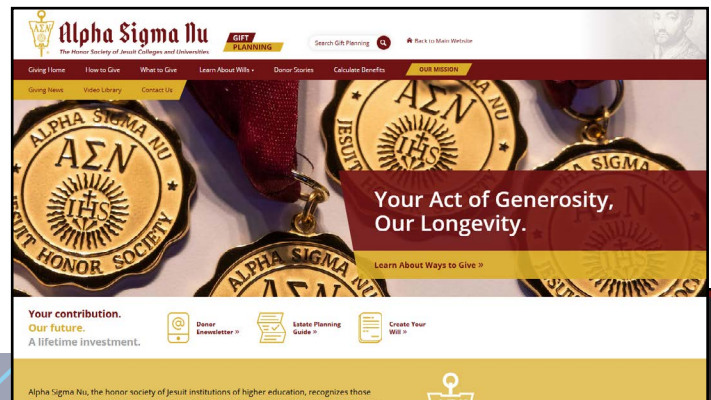
Here are examples of strong websites for education-based organizations:



## Boise State University

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

Alpha Sigma Nu displays their mission statement and mission video on the homepage, capturing the donor's attention quickly and communicating complex ideas in a simple, compelling way.



## McMurry University's

website layout is visually appealing with their branding colors and compelling mission-oriented images.

# 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 enewsletter and eblast messaging for education-based organizations:

**UTAH VALLEY UNIVERSITY**  
**GIFT PLANNING**

**AUGUST IS MAKE-A-WILL MONTH:**  
Time to Prioritize Your Family's Future

**Plan Your LEGACY**

August is Make-a-Will Month and it's a great time to craft a roadmap for your legacy, ensuring your loved ones are cared for and your values endure. Prioritize your family's future with our complimentary [Estate Planning Guide](#) and [online Wills Planner](#). These resources not only facilitate the planning process but also serves as valuable tools for your attorney.

We invite you to discover the peace of mind that comes with thoughtful estate planning and preparedness. There is no better time to create or update your estate plan. Learn more about how you can potentially reduce capital gains tax, income tax, or estate tax by supporting the charitable organizations that are meaningful to you by downloading our [gift vehicle guide](#). You'll feel good knowing that you have provided for your family, friends, and the causes that matter most to you.

For more questions, please contact the UVU Planned Giving Department at [plannedgiving@uvu.edu](mailto:plannedgiving@uvu.edu), 801.863.4666.

For more information, check out this UVU Office Hours Session with Professor of Financial Planning, [Financial Success](#)

## Utah Valley University's

enewsletter highlights National "Make a Will" Month while offering their Estate Planning Guide as a complimentary resource to their donors.

**WEBER STATE UNIVERSITY**

**ESTATE PLANNING WEBINAR**  
March 28 from 12pm to 1pm (MST)  
**When was the last time you reviewed your estate plan?**  
Weber State University is holding a webinar where you can learn more about estate planning from members of our Planned Giving Advisory Council!

[Click to register here](#)

**DOUG FADEL**  
Doug has been a practicing attorney since 1994. Focusing in estate planning, Doug is a respected attorney with extensive experience in estate, retirement, and charitable giving. Doug is the founder of a full-service estate planning firm located in Bountiful, Utah.

**MIKE GILES**  
Mike focuses on client matters related to federal and state taxation, estate and gift tax planning, probate and trust administration and guardianship and conservatorship law. Mike also advises businesses and their owners regarding the tax implications of entity choice, operations, and acquisition transactions of all sizes.

## Weber State University

sent an eblast reminder encouraging their donors to register for an upcoming estate planning webinar, designed to promote their Planned Giving Advisory Council.

**FURMAN UNIVERSITY**  
Office of Planned Giving

As we approach the final months of 2015, you may be considering making year-end charitable gifts. A [gift from your IRA](#), also known as a qualified charitable distribution, can be a great option for donors age 70.5 and up. If you are 73 years or older, you may even use a portion of your required minimum distribution (RMD) to fund your gift.

Making a gift directly from your IRA can reduce your tax liability while also supporting the students, faculty, and programs that make Furman a top-50 liberal arts institution. In addition, giving through your IRA is one of the easiest ways to make a gift to Furman.

**First, contact your IRA administrator.** Let them know that you would like to make a qualified charitable distribution to Furman University (TIN 57-0314395). Our website now includes a simple tool to help you contact your IRA custodian. Simply enter the appropriate information in the "Make a Gift From My IRA" box on the right-hand side of the screen to view the contact information for your administrator and helpful notes for completing your gift.

Most IRA administrators will mail the check directly to Furman, so you may wish to provide our mailing address:

Office of Development  
Furman University  
3300 Poinsett Highway  
Greenville, SC 29613

**Then, let us know your gift is on the way.** Call 864.294.3491 or email [elizabeth.mobley@furman.edu](mailto:elizabeth.mobley@furman.edu) to notify us when you have initiated the gift. If you are using the "Make a Gift From My IRA" tool, you can simply check the box to notify us of your gift online. This allows us to keep an eye out for your gift and ensure that your gift is designated according to your wishes.

If you have questions about giving through your IRA or the many ways you can support our [Clearly Furman](#) campaign with a gift, please contact the Office of Planned Giving at 864.294.3491 or [planned.giving@furman.edu](mailto:planned.giving@furman.edu).

**FURMAN UNIVERSITY**  
OFFICE OF PLANNED GIVING  
[PLANNED.GIVING@FURMAN.EDU](mailto:PLANNED.GIVING@FURMAN.EDU) | 864.294.3717

## Furman University's

eblast spotlights an IRA charitable rollover gift. It includes a link to their webpage and highlights the IRA charitable rollover widget to help donors with their next steps in giving this gift to their university.

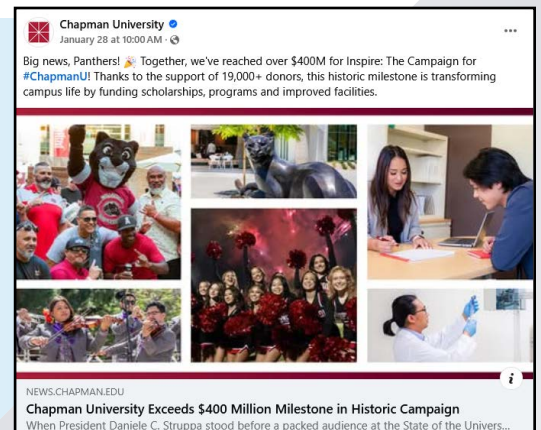
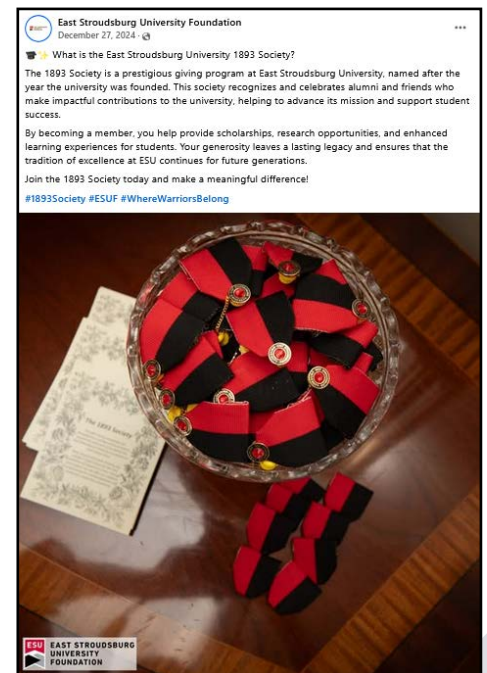
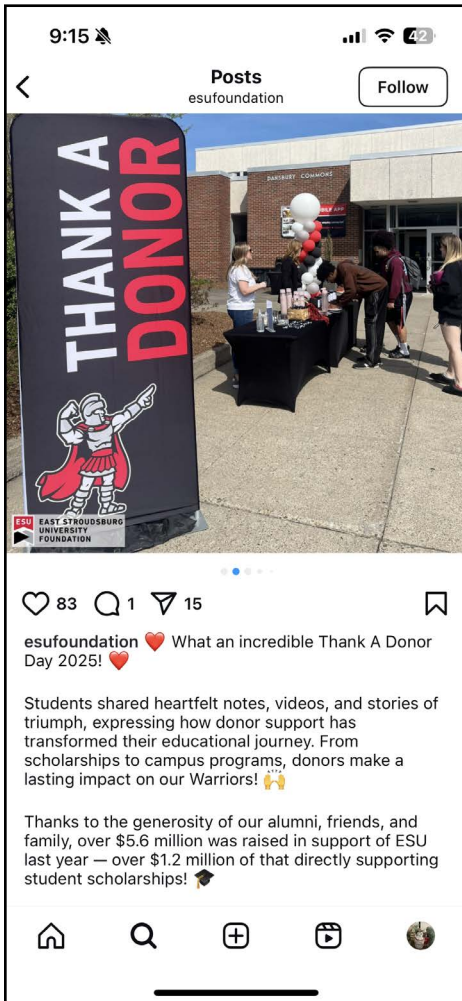
# ENGAGING SOCIAL MEDIA POSTS

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.

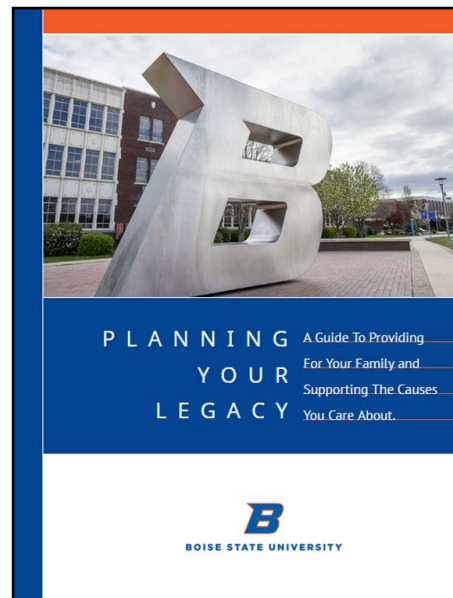


## PRINT EXAMPLES

Here are some examples of effective print marketing for education-based organizations:

### Boise State University's

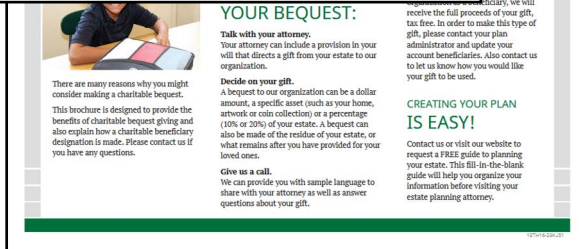
*customized Estate Planning Guide provides information for donors interested in leaving a gift in their will or trust to their organization.*



# PRINT EXAMPLES

## Heidelberg University

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



## Regis Catholic Schools Foundation's

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

## The College of Wooster'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

**Give Us Your Feedback**

**Let Us Help You With Your Gift Plans**

- I need more information about ways to give
- I have already included a gift to Baylor

Giving Home > 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.

**Are you familiar with Baylor University?**

- 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.

### Baylor University

*Website survey*

#### Have we made it easy to give to Baylor University?

- 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

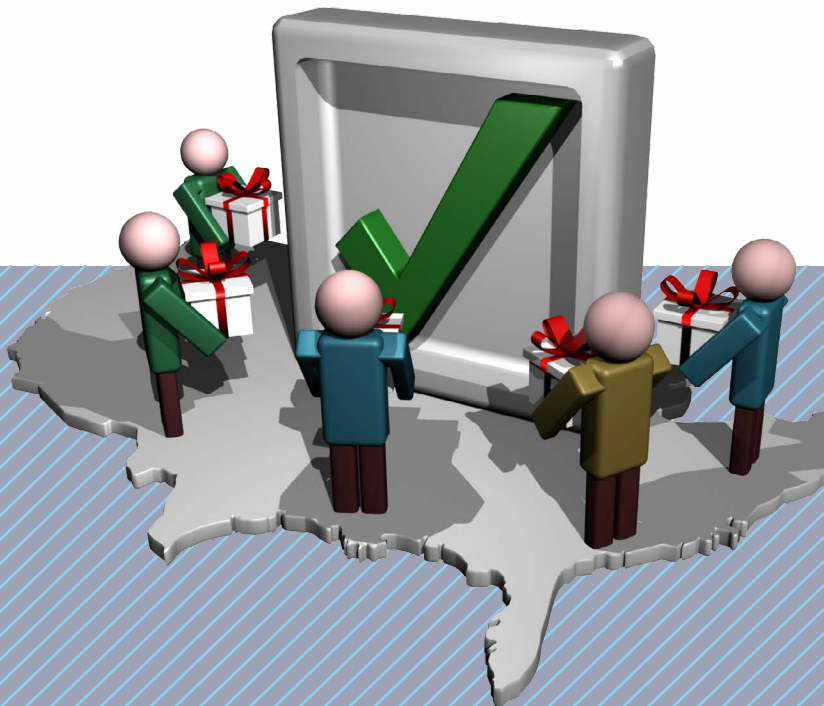
#### What type of charitable gifts would you be interested in learning more about?

- 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

## THAT INSPIRE GIVING

EDUCATION ORGANIZATIONS

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 Heidelberg University**

*Prepared for «Donor Name»*

**Our Mission**

Heidelberg University is a community of learning that promotes and nurtures intellectual, personal and professional development, leading to a life of purpose with distinction.

**Our Impact and Goal**

Heidelberg University touches lives across the nation with a profound impact on the Tiffin community. Every day, Heidelberg empowers students to become leaders, thinkers, and **Opportunity Builders** equipped to tackle the world's most pressing challenges. Our graduates make significant contributions to their communities, inspired by the values and education they received here. They are the educators inspiring the next generation, the caregivers supporting our well-being, the professionals driving progress, and the advocates protecting our environment and communities.

**Your Contribution, Our Future**

Heidelberg's mission makes a real difference in people's lives, and all of this is made possible through the generosity of those who believe in our mission. Donors like you play a pivotal role in ensuring that our students have the resources, support, and opportunities they need to succeed. Your contributions directly fuel the programs that prepare our students to live lives of purpose with distinction. You help us maintain a vibrant campus where intellectual curiosity thrives and where students from all walks of life come together to learn and grow.

By giving to Heidelberg, you are investing in the future of countless individuals and the betterment of our communities as a whole. Your support is not just a gift—it is a catalyst for change, enabling us to continue our mission and extend our positive impact even further. Together, we can shape a brighter, more compassionate world.

Heidelberg University  
310 East Market St.  
Tiffin, OH 44883  
419-448-2233  
aheilmste@heidelberg.edu  
heidelberglegacy.org

This information is not intended as tax, legal or financial advice. Gift results may vary. Consult your personal financial advisor for information specific to your situation. Copyright © 2025 Crescendo Interactive, Inc. Used by permission. 23P7

### Heidelberg University'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	Last Download
100.0	Donor 1	eNewsletter Preferences	19/05/2010 WillRequest
100.0	Donor 2	Planned Giving Home	10/11/2010 Unltrust
100.0	Donor 3	Today's News - Finance News	03/09/2015 Gift Annulity
92.00	Donor 4	Today's News - Savvy Living	02/26/2011 WillRequest
89.00	Donor 5	GiftLegacy Donor Manager - Logout	06/09/2015 IRA
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 Annulity
79.00	Donor 9	GiftLegacy Login Page	01/25/2012 WillRequest
75.00	Donor 10	Today's News - Savvy Living	08/27/2010 Unltrust
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 Unltrust
68.00	Donor 14	GiftLegacy Login Page	12/08/2011 WillRequest
68.00	Donor 15	Planned Giving Home	01/24/2011 Gift Annulity
62.00	Donor 16	Planned Giving Home	01/28/2011 Gift Annulity
57.00	Donor 17	Planned Giving Home	02/01/2011 WillRequest
32.00	Donor 18	Planned Giving Home	01/24/2011 Unltrust
28.00	Donor 19	Today's News - Finance News	01/24/2011 IRA
17.00	Donor 20	Today's News - Savvy Living	02/10/2015 WillRequest
14.00	Donor 21	Today's News - Savvy Living	08/27/2010 WillRequest
14.00	Donor 22	Personal Planner	08/27/2010 WillRequest
7.00	Donor 23	Privacy Statement	01/20/2014 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 education-based organization:

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

### Campaign Tools – Education-Based Organization Example

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

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

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

#### Timing

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

#### Segmentation

- PG/Bequest marketing: Age 40+, Legacy Society, Alumni, Loyal Donors, Major Gift Families of current and past students
- IRA Charitable Rollover marketing: Past IRA Charitable Rollover donors, 70 1/2 or older
- CGA marketing: mid 70's+

## SEGMENTING YOUR MESSAGING

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.

Crescendo

Creative Gift Marketing

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

As an education-based organization, 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](http://crescendointeractive.com).

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



# Crescendo

Major & Planned Gifts Marketing



[crescendointeractive.com](http://crescendointeractive.com)