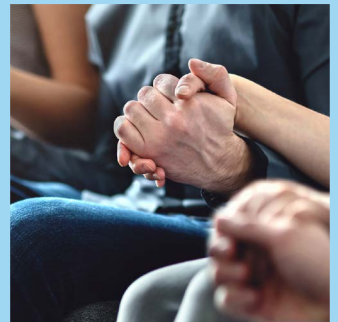


TOP MARKETING TIPS FOR

SOCIAL SERVICE ORGANIZATIONS



Crescendo

Major & Planned Gifts Marketing

TOP MARKETING TIPS FOR

SOCIAL SERVICE ORGANIZATIONS

Crescendo

Major & Planned Gifts Marketing

📍 110 Camino Ruiz
Camarillo, CA 93012

☎ 800-858-9154

💻 crescendointeractive.com



This booklet explores effective multichannel marketing strategies for social service 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.

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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.

STRONG ONLINE PRESENCE

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.

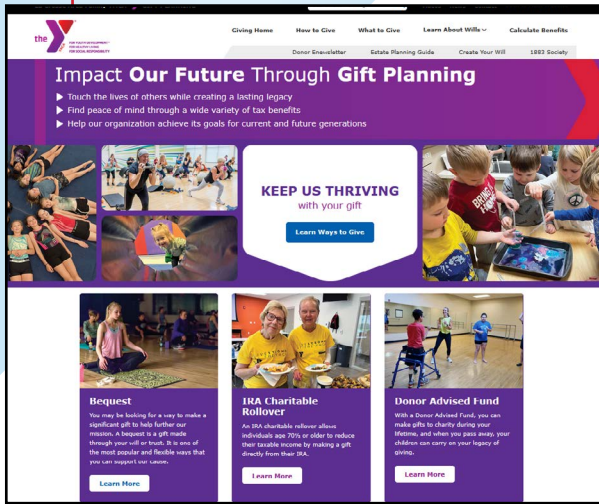
Best practices for an impactful website to market to your donors:

- ▲ **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 your 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.

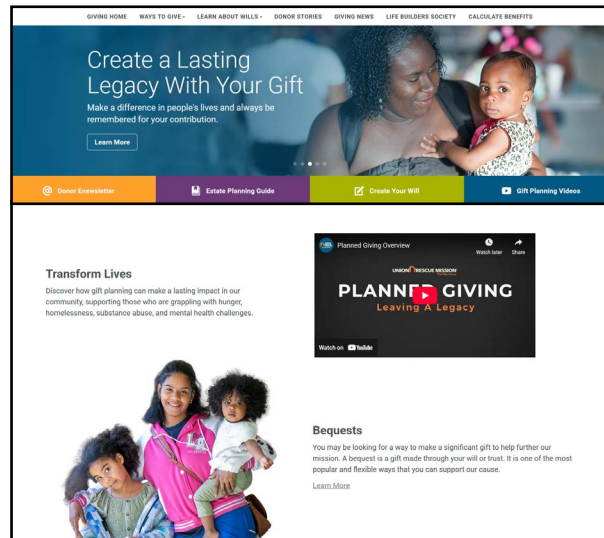
WEBSITES

WEBSITE EXAMPLES

Here are examples of strong websites for social service organizations:

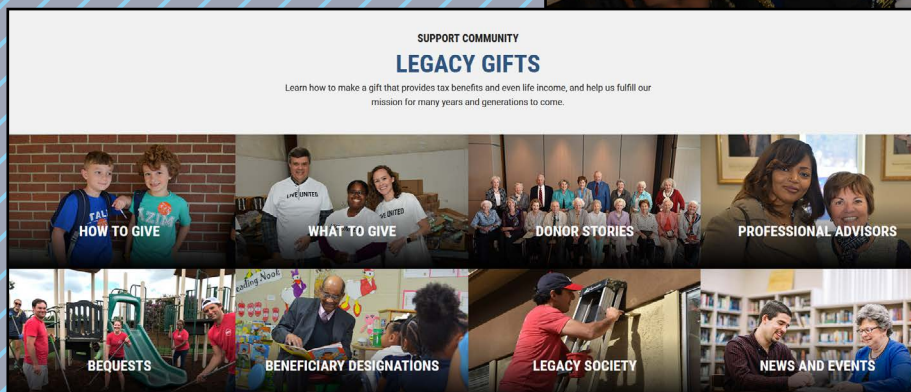
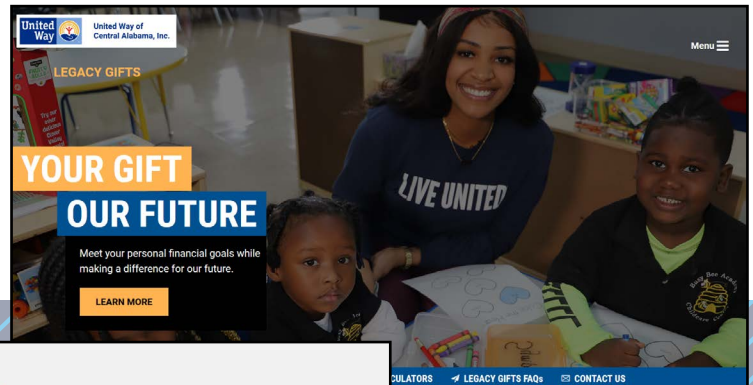


La Crosse Area Family YMCA's website displays its branding strongly, with the logo and brand colors throughout the website design.



Union Rescue Mission's website includes a mission video on the homepage with their president explaining different ways a donor can give and support their mission.

United Way of Central Alabama'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 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 impact the organization.
- ▲ **Add links to the gift planning website** and 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

These are examples of effective newsletter and eblast messaging for social service organizations:









Hi John,

This August, as we recognize National Make a Will Month, we at Food for the Hungry invite you to reflect on the legacy you wish to leave behind. Your commitment to ending hunger and serving the poor can extend far beyond your lifetime. By creating a will and including Food for the Hungry in your estate plan, you empower future generations to continue this vital work.


We understand that estate planning might feel daunting, but we're here to help! We offer a variety of resources, including our comprehensive Estate Planning Guide, designed to make the process simple and accessible. You can download the guide by [clicking here](#).



In addition, I invite you to watch the video below where I share valuable insights on charitable giving strategies, especially as we start to close in on the end of the year. This will be the first of many videos that I will be sharing with you to help you achieve your family's philanthropic goals. Please [click here](#) or on the picture below.

Food for the Hungry's

newsletter effectively highlights National "Make a Will" Month while offering their Estate Planning Guide as a complimentary resource to their donors. It also includes a video on charitable giving strategies for donors to learn about effective end-of-year giving to the organization.








Your Support Transformed 15 Lives

Thanks to your generosity and commitment, **15 men and women** took the courageous step of graduating from the **Santa Barbara Rescue Mission's 12-month Residential Treatment Program** this past Saturday at **Santa Barbara Community Church**. With this latest class, we have celebrated **over 1,000 graduates**, each overcoming addiction to embrace a renewed future. The evening was filled with powerful testimonies, heartfelt reflections, and the joy of families witnessing their loved ones reclaim their lives—an impact made possible because of donors like you.

Your support provides more than shelter and meals—it offers **hope, healing, and lasting transformation**. Each life changed is a direct reflection of your generosity. Thank you for being an essential part of this journey.

"Therefore if any man be in Christ, he is a new creature: old things are passed away; behold, all things have become new." 2 Corinthians 5:17



DOING THE MOST GOOD

Are Your Affairs in Order?

Are your affairs in order to provide care for yourself and loved ones, save taxes, and help charitable causes important to you!

If you do not have a retirement or estate plan, then your state may have a plan for you - which you may not like!

Please join us for one or more informative free one-hour webinars to learn the basic steps and good ideas for putting your affairs in order! You will learn from expert speakers about:

- When and How to Put Your Affairs in Order
- When and How to Find Advisors: Attorney, Accountant, Investment/ Insurance
- Key Tools for Planning such as a Will, Trust, Power of Attorney, Health Care Appointment, Living Will, Guardianship, Joint Ownership, Transfer on Death, Beneficiary Designation, Executor, Personal Representative, Charitable Giving, and More
- Important State and Federal Tax Tips

We offer this free informative one-hour webinar on these dates and times:

Salvation Army – North and Central Illinois Division's

eblast sends an announcement on upcoming estate planning webinars to bring awareness to their donors on the importance of planning ahead for their charitable giving and estate wishes.

Santa Barbara Rescue Mission's

newsletter provides donors with a powerful impact story on how their support has changed lives at their organization for the better. The newsletter also expresses great gratitude to donors for their contribution to help further the organization's mission.

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.

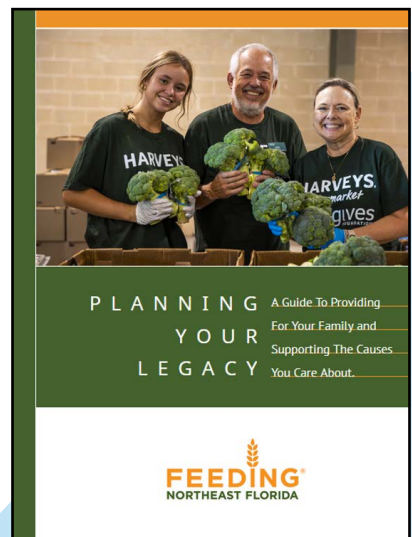


PRINT EXAMPLES

Here are some examples of effective print marketing for social service organizations:

Feeding Northeast Florida's

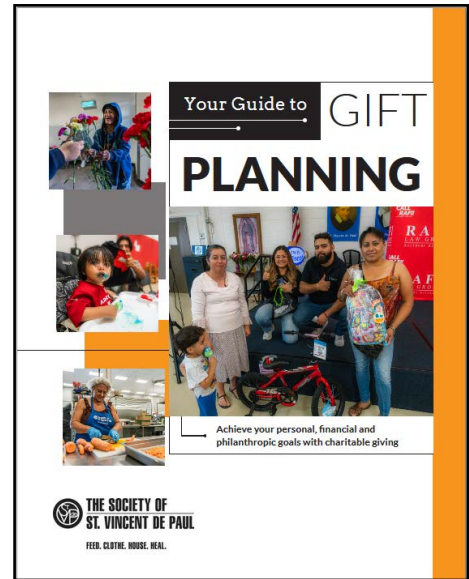
customized Estate Planning Guide provides information for donors interested in leaving a gift in their will or trust to the organization.



PRINT EXAMPLES

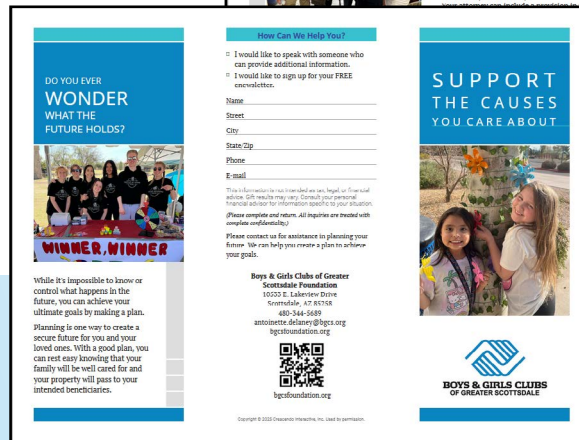
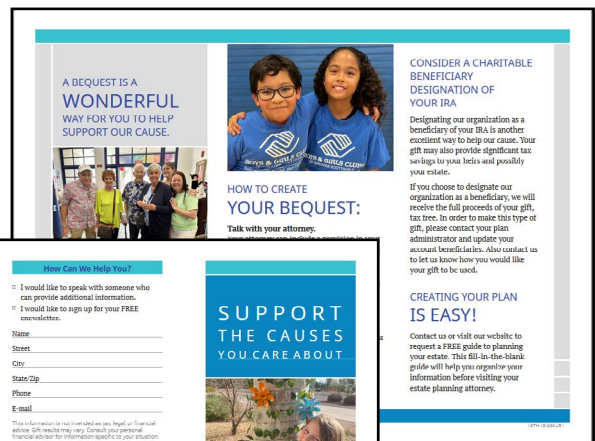
The Society of St. Vincent de Paul

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 for conducting personal donor visits.



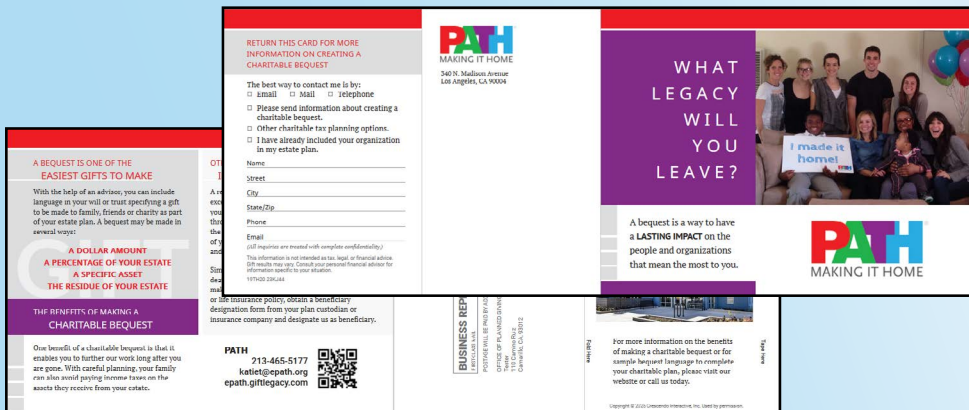
Boys & Girls Clubs of Greater Scottsdale Foundation's

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



SOCIAL SERVICE ORGANIZATIONS

THE BEST



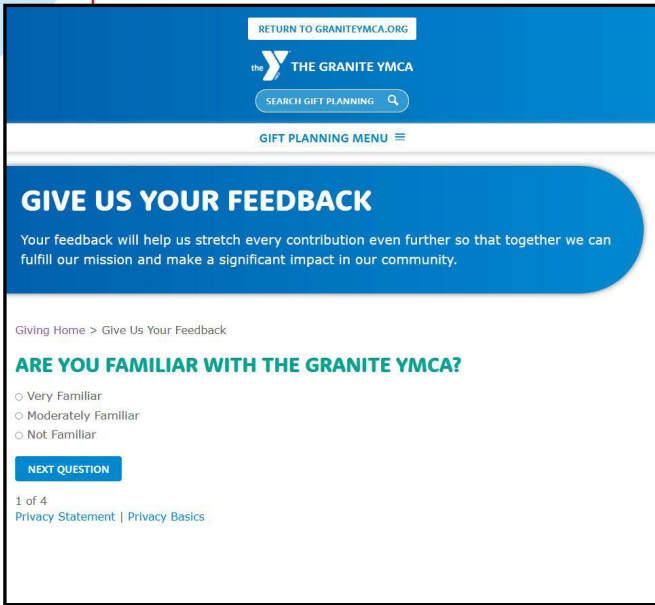
PATH's customized extended postcard focuses on ways donors can make an impact in the community by leaving a planned gift. A reply card is provided for easy response.

BOOST ENGAGEMENT

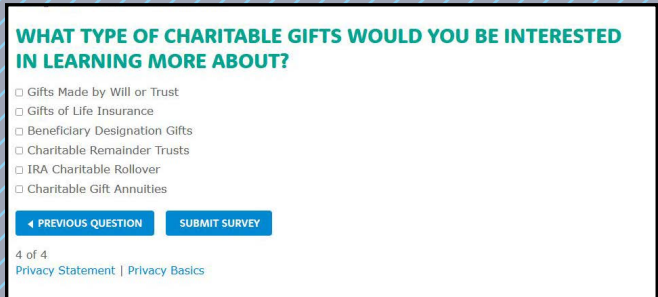
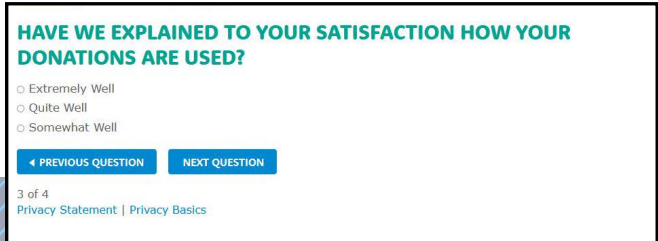
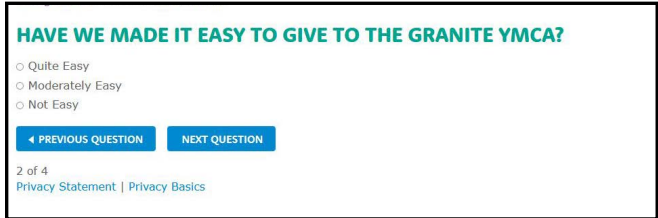
WITH CresSurvey

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.



The Granite YMCA *Website survey*



CRESPRO DONOR PROPOSALS

SOCIAL SERVICE ORGANIZATIONS

THAT INSPIRE GIVING

The CresPro software includes four-page color donor proposals for 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 United Way of Central Indiana

Our Mission

We partner to design, support and grow systems that accelerate financial stability and upward mobility for individuals and families living in or near poverty.

Our Community's Need

For over a century, United Way of Central Indiana has been a beacon of hope, rallying the community to support neighbors in need—from the War Chest of 1918 to today's fight against poverty. With 241,000 families living in or near poverty, the challenges are urgent and complex. The real cost of living far exceeds the federal poverty level, leaving ALICE households—those who are working but struggling—just one crisis away from losing everything.

Our Solution

United Way is uniquely positioned to lead a comprehensive response, uniting philanthropy, government, business, and community partners. Through strategic investments, a Two-Generation Approach, and proven pathways to stability, we've already helped thousands of families increase income, find jobs, and access essential services.

Your Involvement, Our Future

Our bold goal is to distance 10,000 households from poverty by 2028—and we're more than halfway there. Your support—through giving, volunteering, and advocacy—can help us finish the job and build a future where every Central Indiana family has the opportunity to thrive.



UNITED WAY
of Central Indiana

United Way of Central Indiana
2955 N. Meridian Street
Indianapolis, IN 46208-0409
317-921-1315
uwlegacy.com

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.

United Way of Central Indiana 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 his or her 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 Annually
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 Annually
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 Annually
62.00	Donor 16	Planned Giving Home	01/28/2011	Gift Annually
57.00	Donor 17	Planned Giving Home	02/01/2011	WillRequest
32.00	Donor 18	Planned Giving Home	01/24/2011	Unitrust
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

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 social service organization:

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

Campaign Tools – Social Services Organization

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 – [Month/Year of event date]
- Estate Planning Seminars – quarterly

Timing

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

Segmentation

- PG/Bequest marketing: Age 40+, Legacy Society, Loyal Donors, Major Gift Donors, C volunteers, Partners with organization, Members of specific programs
- IRA Charitable Rollover marketing: Past IRA Charitable Rollover donors, 70 1/2 or o
- CGA marketing: mid 70's+

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.

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.

As a social service organization, you have a unique mission and branding that can be reflected in your marketing.

We Can Help

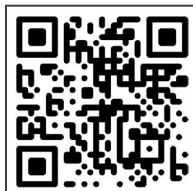
If you would like to learn more about Crescendo's GiftLegacy marketing services and how to use our products, please contact us at 800-858-9154 or visit crescendointeractive.com.

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



Crescendo

Major & Planned Gifts Marketing



crescendointeractive.com