



# SCHOLARSHIPS FOR EDUCATION CHOICE

at SAGAMORE INSTITUTE

## Communications Toolkit Guide

**Purpose:** To provide school leaders communications templates and examples to be used to invite current and potential donors to learn about the opportunity to give through the SGO program.

**General best practices for fundraising communications:**

- Fundraising is about building relationships. The more personal the communication the better! Use mail merge features in documents and emails to include a personal greeting. Add a handwritten note as often as possible.
- SEC sends out the official receipt with their tax credit certification number. It is a GREAT idea for the school to send a personal thank you card for each SGO gift received. Handwritten is best!
- It's important to speak your donor's "communication love language". People prefer different methods of communication, for example, some people would much rather receive an email than a phone call. Others like the personal touch that a phone call brings or want to be able to read something that is mailed so that they can touch and see it. Try to determine the most preferred style of communication for each donor, track that information, and approach them in their preferred style.
- The best use of social media is to report impact and to build familiarity with things happening at the school. Requests for donations don't tend to do that well on social media. The most popular/successful social media options are Facebook, LinkedIn, and Instagram.

### Typical Timeline of SGO Communications:

- April 15: Use the end of tax season as an opportunity to congratulate donors on receiving their tax credits and let them know the impact that their donation made on students/families at your school this year.
- Start of the Fiscal Year: Mid-June - July 1: July 1 is when the state releases the funds for the new fiscal year. Begin educating donors a few weeks before July 1 that the new funds will be available on July 1. Post announcements on your social media channels and/or newsletter in mid-June. Send a hard copy letter early in the last week of June. Follow up with an email the first week of July.
- Optional: Start of the school year. It might be a great time to touch base again at the start of the school year. It provides a natural point where people will be thinking of students going back to school and about providing scholarships to assist with that.
- End of Calendar Year: Mid December - to end of December. Plan for a hard copy mailing to land in mailboxes in the middle of December and then follow up with an email during the last week of December. The latest research shows that the best time for emails to hit inboxes is on Saturday morning or weekday evenings.

### Primary Audience:

Fundraising and communications can feel a little daunting. It's hard to know where to start. We suggest that you start with those who already believe in what the school is doing. Here is a list of the best places to start:

- Previous donors to the SGO program
- Members of the board
- Grandparents or alumni
- Accountants, financial planners, and wealth advisors in your community.

We have also come across some misconceptions that might help you prioritize who to communicate with:

- It is a misconception that business donors are going to provide a lot of support. We do not receive very many gifts directly from businesses. Gifts almost always come through an individual donor who may be a business owner. Smaller businesses run their taxes through the individual business owner's personal tax return and larger businesses don't typically need the tax credits.
- We have had very limited success with setting up a booth or making a general announcement at a Grandparents day event. Grandparents are a great segment to communicate with, but we have found that presenting them with the opportunity at Grandparents day doesn't always work well, particularly in a large venue. An alternative that we have seen work is having a smaller side meeting specifically marketed as an opportunity to learn more about giving through the SGO.
- Parents are not typically the best audience to encourage to give. It is a good idea to *educate* the parents at your school about the SGO giving opportunity but be aware that most parents may not be able to provide support to the school beyond paying their tuition and fees. There may be some parents who are in a financial position to give, and others may have friends or relatives who could donate, so enlisting parents as advocates for the school and the SGO program is in your best interest.
- Another big misconception is that people feel like it's too complicated for them to explain. It's not! Give it a try and direct them to us if they ask a question you can't answer. Always encourage donors to check with their financial advisor for specific tax related questions – we always say that too! Here is a general outline of how to make an announcement or quick explanation of the SGO program. This is an outline so that you can make the words your own! Below you will find several other options for helping to solidify your "SGO pitch".
  - o Say that you would like to provide a quick explanation of a wonderful opportunity.
  - o Tax credit scholarships (or SGOs – stands for Scholarship Granting Organization) are available for students of lower and middle incomes who attend this school.
    - For example, a family of 4 can be making \$95,000 and still qualify.
  - o The scholarships are funded by generous donors.
  - o When a donor gives toward a tax credit scholarship the donor can claim half of the amount given as a CREDIT on their Indiana state taxes.

## Building a Case for Support:

A core case statement contains four key elements.

1. Cause - Why does the school exist? What must be accomplished? When making your case, you can state the problem that exists and why it exists. For example, you can make a statement like: Every day there are parents who are unable to send their children to the school of their choice because they can't afford it.
2. Organization/School - Who are you, what do you do and where? Pull some words directly from the school's mission statement. For example, you can make a statement like this: Crossroads Academy is a neighborhood school committed to inspiring the minds and hearts of our students; equipping them to embrace cultural, economic, and racial diversity; and empowering them to love and serve in community.
3. Impact - What impact are you having? How can you prove it works? Your case should demonstrate the progress you are making toward achieving the school mission statement. For example, you can make a statement like: Since starting the scholarship program in 2012, there have been 230 students who together received over \$250,000 in scholarships to make it possible for them to attend Crossroads. Several of those scholarship recipients have graduated and gone on to college or a career.
4. Invitation - Why and how should others get involved? Your case should include an invitation to DO something. For example, you can help provide a scholarship for an income eligible student to attend Crossroads. You may claim 50% of your donation as an Indiana state tax credit. You can give by writing a check, donating online through a checking account or credit card, or gifting non-cash assets (stocks).

Using social media to communicate? Refer to this guide for image sizes on various platforms: <https://blog.hubspot.com/marketing/ultimate-guide-social-media-image-dimensions-infographic>

## Helpful Resources:

- o Christian organizations may find Henri Nouwen's [Spirituality of Fundraising](#) useful.
- o In [Building a StoryBrand](#), author Donald Miller invites readers to think of marketing and messaging as story-telling. Miller identifies seven elements found in every story:
  1. A Character
  2. Has a Problem
  3. And Meets a Guide
  4. Who Gives Them a Plan
  5. And Calls Them to Action
  6. That Helps Them Avoid Failure
  7. And Ends in a Success

We recommend you read the book with your team and create some succinct and clear language around the SGO program. Here's an example of what this could look like for a school:

1. An SGO Donor is the main character and they want to be generous in order to make a difference and transform a life.
2. The donor is stirred by the fact that because a family has limited funds, they don't have a choice or control over their child's education. Parents feel hopeless and powerless. Every child should be able to attend the school that best meets their needs and the values of the parents.
3. The donor meets a guide - a school representative or another donor who is reaching out to their circle of friends.
4. The guide can spell out the basics of the program. Donors provide scholarships for

#### TOOLKIT CONTENTS:

- Sample Year End Communications
- Sample April 15 Email
- Sample July 1 Communications
- Sample Back to School Letter
- Sample Bulletin/Newsletter
- Sample Letter to new potential donor
- Donor Trifold (customize to be school specific)
- Donor Video
- Samples from schools

<https://scholarshipsforeducationchoice.com/forms/communications-toolkit/>

income eligible students and claim 50% of their donation as an Indiana state tax credit.

5. People can give by writing a check, donating online through a checking account or credit card, or gift non-cash assets (stocks).

6. They avoid having parents who couldn't provide what they knew was the right thing for their child.

7. End success: Kids who are learning, donors who are playing a greater role than they thought they could, and grateful parents.

What SEC can do to help:

- Suggest, review, and edit any communications pieces.
- Answer donor questions or concerns.
- Provide donor reports - the most helpful are donor SYBNT (gave Some Year But Not This Year) and LYBNT (gave Last Year But Not This Year) reports. Most previous donors recognize the leverage that can happen when they give through the SGO and would love to have the opportunity to give again. They may just need to be reminded.
- There have been times, particularly with major givers, where a donor may want to talk to another previous donor about their experience and the benefits. We would be happy to make that connection.
- If a donor has any problems claiming their tax credit on their state income taxes, PLEASE contact us and let us help resolve it. Our contact at the DOR is very responsive to any issues that arise and can usually clear things up the same day. We don't want a donor to potentially get frustrated by trying to handle it through one of the branch offices where they

may not get it resolved quickly. The DOR has streamlined the process and we get very few denied claims but just in case, please send them to us.

- Provide a donor video that is customized to your school. Check out the sample in the toolkit and let us know if you would like us to customize one for your school.
- Provide an SGO landing page customized for your school. The school website can link to this page so that donors can give online directly to the school without having to navigate the long list of schools on the SEC website.
- Provide customized materials: tri-fold brochures, family brochures, power point and donor video.

## SENDING EFFECTIVE EMAILS

**CONTENT:** Be clear about what you are asking the reader to do and make sure that your website is ready to handle the call to action. Is this email an ask? Thank you? Report? Encourage recipients to share the message with family and friends. If the email is long (a report, for example), provide a link back to the whole story or break up the text with graphics and/or pictures.

**FORMATTING:** Mobile-friendly is a MUST. Email is opened more frequently on a phone than on a desktop, so make sure the display looks good on your own phone before sending. Boost your “open rate” by having the email come from a person rather than the organization.

**FREQUENCY:** As long as you are varying the content (so that not every email is asking for something), emails sharing the impact can be sent twice a month, with an appeal at least quarterly. The highest rate of email opening is in the morning.

**SUBJECT LINE:** Be brief, personalize the email, and if appropriate, convey a sense of urgency. Some sample subject lines for SGO appeals:

You can give the gift of education  
 DONOR NAME - Don't miss out on this amazing opportunity!  
 DONOR NAME - Don't Miss Out  
 To good to be true?  
 Credits are NOW available

Test your subject lines, content and template to see which ones are generating the most response (test one element at a time and measure your results).