Know Your Audience and What to Send

See the full SGO Marketing Guide from Scholarships for Education Choice

Understanding your donor audience is the most important part of any communications and marketing strategy. Generic blasts and messaging tend to underperform, so take some time to think through your donor audiences for the SGO programs. Using an understanding of your segmented audiences, you can then start to determine messaging content, channels and cadence. **With the new federal program (January 2027) that offers a 100% federal tax credit, this may also be an opportunity for schools to expand their donor audience, especially with parents and community members.** The purpose of segmenting your audience is to ensure that individuals receive the most relevant and critical information that compels them to donate and/or stay engaged with the program.

Key Audience Segments

Audience Segment	What They Want	Cadence and Channel	What to Send
Regular annual donors	Tax info, info on new federal program, proof of impact	Monthly/quarterly, email	Impact updates + 1-2 renewal asks/year
Major givers	Recognition, direct contact, info on new federal program	As-needed, personal	Thank-yous, named point of contact
Last Year But Unfortunately Not This year (LYBUNT) and Some Years But Unfortunately Not This Year (SYBUNT)	Reason to come back	A few times/year, personal	Acknowledge gap + specific ask
Federal → State donors	Proof their first gift mattered, key info on federal program	Quarterly or post-gift, email	"In addition to" framing + combined-giving math
New donors	Reassurance + relationship-building	Consistent, early on	Deadlines + impact stories, building toward regular giving

One strategy we anticipate many schools to pursue is to engage regular annual donors through a "federal first, state second" strategy. Messaging would encourage individuals to donate their first $1,700 through the federal program, receiving a 100% tax credit. Further donations to the state program are framed as a way to continuing to maximize their benefits and impact. These donors trust the current program/process but do not know about this new option and want key information on how they can maximize their benefit and impact while contributing to the school's mission.

Similar targeted outreach to key audiences like LYBUNT/SYBUNT and new donors will prove more effective in the long-term than one-size-fits-all messaging. Take some time to think about your donors (current and potential) and what information they want and need to continue their engagement and investment.

Know What to Say and How to Send It

It is critical that all the stakeholders involved with your program's marketing and fundraising have a shared language. Below are suggested elevator pitches for SGO programs that can be adapted and used to inform messaging across all your channels. Notice how these pitches link donations with both tax benefits *and* real impact for students.

Suggested State and Federal Combined SGO Elevator Pitch: There are two simple ways to support scholarships for students at [School Name] and get real tax benefits. The state program gives you a 50% tax credit with no cap on all scholarship donations that help pay for tuition at our school. There's also new federal credit starting on January 1st, 2027, that gives you a full dollar-for-dollar credit up to $1,700 per year. *We're expecting many of our donors to use both: the federal credit for the first $1,700, then add a state gift on top for additional impact and tax benefit. Either way, 100% of these funds are being used to fund tuition and key educational services for students.*

Suggested State SGO Elevator Pitch: Did you know you can help fund scholarships for students at [School Name] *and* lower your Indiana state taxes at the same time? When you give to our Scholarship Granting Organization, you get a credit for 50% of your donation directly off your state tax bill — not just a deduction, a dollar-for-dollar credit. So, a $1,000 gift could cost you as little as $500 out of pocket, and it goes straight to helping a student afford tuition at our school.

Suggested Federal SGO Elevator Pitch: There's a brand-new federal tax credit starting on January 1st, 2027, that lets you support educational fees at [School Name] and get every dollar back on your federal taxes — up to $1,700 per year, dollar-for-dollar. It's about as close to a "free'" donation as exists and the money funds tuition, tutoring, and other education costs at our schools for eligible students in need.

Email is likely the best value-for-money communications channel for SGO donor audiences. This is also where you can most practically put your audience segments into practice through targeted messages. See some of our example emails on our School Resources page. **Here are some key fundraising email tips:**

1. **Put the ask and key info at the top of the email and keep it short.** Use clear language and bolding, headers, and bullets to create signposts. Break up stories into sections (e.g. a donor ask + an impact story + event) or consider sending separate emails.
2. **Have the from field be a real person's name if possible and experiment with subject lines**.
3. **Make sure your email is mobile-friendly.** Don't use too many busy or complex graphics and check a mobile preview before sending.

Other Channels

- **Social:** Use for impact stories, not asks - donors rarely convert from social media. Post student stories, milestones, and program updates to build familiarity and trust.
- **Events:** Piggyback on existing events - grandparents' day, PTA, parent-teacher conferences rather than creating new ones. For more, see our small donor event toolkit.
- **Website:** Your home base. Keep tax-benefit info and the donate link on the same page, use clear contrasting buttons, and add a short FAQ for common questions, along with a clear point of contact.