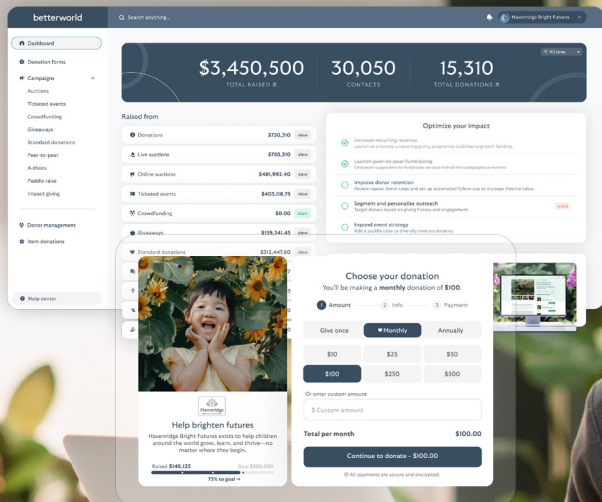


betterworld

The nonprofit summer playbook

A seasonal fundraising guide to staying visible, engaged, and funded during the quieter months.





Use the slow season to gain competitive advantage

Most nonprofit leaders have been conditioned to believe the summer is a three-month dead zone where donors vanish to the beach and the “out of office” replies stack up faster than donations.

But at BetterWorld, we see this season differently. The quiet isn’t a signal to stop; it’s your most valuable strategic asset.

Moving from transaction to relationship

Most fundraising is transactional: you ask, they give (maybe), and the cycle repeats. But summer provides a rare window to shift the narrative. When the noise of the sector settles, you have the space to move from transactional fundraising to relationship-driven growth.

This is the season to show donors the direct line between their last gift and its impact. By using these months to cultivate trust, you aren’t just staying visible, you are building the emotional equity required to secure their donations in December.

Don't underestimate a lean team

We know the reality is you're likely working with a small team and a limited budget. But influencing growth isn't just reserved for organizations with massive marketing departments.

This playbook is designed for the lean team. We're focusing on high-impact, low-lift maneuvers, like friction-free forms and recurring donor prompts that drive results.

Seamlessly transition to Fall fundraising

Nothing kills momentum like starting your Fall campaign from a standstill. The goal of this playbook is to ensure that when September 1st arrives, you aren't launching a campaign, you're simply continuing a conversation that started in June.

By building a foundation of recurring revenue and stewardship now, your year-end efforts will feel like a natural extension of your summer work. No frantic starts. No burnout. Just a steady, sustainable climb toward your mission.

Let's get to work. And if you want to see exactly how BetterWorld helps nonprofits like yours execute every strategy in this playbook, schedule a [demo](#) with our team at betterworld.org.





Stewardship over solicitations

The quiet summer season is the perfect time to build stewardship equity. Nonprofits that prioritize frequent, non-transactional touchpoints during the summer see a 53% increase in year-end contributions compared to those that only reach out during campaign peaks.

By the time you reach Fall, your donors shouldn't be wondering what your organization does or the impact you have, they should be waiting for the next opportunity to help because you've kept them in the inner circle all summer long. In fact, 71% of donors say that knowing the impact of their gift is the number one reason they give again. Summer is your window to prove that impact without the pressure of a deadline.

Humanize your communication and CTA

The most effective way to stand out in a donor's inbox is to stop acting like a brand and start acting like a human. Bulk emails (one-to-many) are necessary, but sending personalized emails (one-to-one) is what builds loyalty. With average donor retention hovering around 31.9%, stewardship is the only way to stop the leaky bucket effect.

THE STRATEGY:

Send a short, text-based email with a specific impact update and a simple CTA. Something like, “I’d love to know what inspired you to support this specific project. Hit reply and let me know!”

When a donor replies, they are no longer just a contact in your CRM, they are a partner in your mission.

Non-transactional touchpoints for summer

Use these no-ask templates to stay visible this summer and top-of-mind for fall giving:

1. Impact snapshot

A single photo from the field with two sentences explaining exactly what the donor's previous support achieved today.

2. In-the-field video

A 30-second cellphone video from a program director or volunteer saying, “I’m standing here at the site, and I just wanted you to see the progress we’re making.”

3. Behind-the-scenes access

A short virtual tour of your office, warehouse, or project site. Show them where the hard work is being done.

4. Progress report

A mid-year infographic or simple bulleted list of your wins from that year.





5. **Mission spotlight**

Introduce a staff member or a beneficiary (with permission) and tell their story. A Q&A is a great format to bring their voice to the story.

6. **Feedback loop**

Send a one-question survey and use this data to segment your Fall giving campaigns.

7. **Milestone marker**

Acknowledge the anniversary of the donor's first gift to your organization. Try something like, "Two years ago today, you joined us. Look at what you've helped us do since then."

Automate your stewardship efforts

Instead of letting stewardship drop off your list of priorities when staff goes on vacation, use automation and shared drives to keep on top of it.

- Block 15 minutes every Friday morning for your leadership or board members to send five personalized video thank-yous (using tools like Loom or even just a smartphone) to recent or lapsed donors.
- Set up a three-part automated email sequence for new donors that focuses entirely on donation impact for the first 30 days.
- Create a shared folder where field staff can drop photos and quotes throughout the week. This gives your communications team a bank of stewardship content to pull from.
- When someone engages with your summer content, tag them in your CRM. These are the candidates most likely to make a major gift or recurring donation in the Fall.

GROWTH TIP:

Stewardship is about making the donor the hero of the story. Instead of saying, "We did this," always say, "Because of you, this happened."



Accelerating recurring giving

While most organizations spend their summer waiting for the giving season, growth-minded nonprofits use this time to build their recurring donations. The value of converting one-time donors into sustainers is tremendous. The average recurring donor stays with an organization for over eight years, compared to the average one-time donor, who typically stays for just over one and a half years.

Pivoting donors from one-time to monthly giving

The biggest mistake nonprofits make is positioning a monthly gift as a huge commitment. It isn't. It's an invitation to join a community and make a lasting impact.

Shift your approach:

- Frame the recurring gift as a membership or an exclusive group of sustainers.
- Highlight that \$15/month (the cost of two lattes) provides more long-term stability than a one-time check.
- Use the summer months to tell stories of the people your mission serves every day, reminding donors that their needs don't take a summer vacation.

Launch your summer sustainer campaign in five steps

If you want to secure guaranteed revenue for the next 12 months, follow this high-growth framework:

1. Audit your form for friction

Before you send a single email, ensure your donation form makes recurring gifts simple. The monthly option should be pre-selected or the most prominent button. If a donor has to hunt for this checkbox, you've already lost the conversion. And make sure it's mobile-optimized!

2. Segment your previous donors

Don't blast your entire list. Identify donors who have given 2-3 times in the last year but aren't yet monthly givers.

3. Deploy the three-part sustainer summer email series

• Email 1 (Impact)

A no-ask story showing what has been achieved so far this year.

• Email 2 (Invitation)

Explain the necessity for recurring giving and how it allows you to plan and respond to needs instantly.



- **Email 3 (Closing)**

A direct appeal to become a sustainer before the Fall season begins.

4. Add a pop-up or check-in prompt

With BetterWorld, this feature is built in. After each one-time gift, donors see a monthly giving prompt – no developer needed. This simple addition can boost recurring donors by 43%. Not using BetterWorld yet? Set up takes less than a day at betterworld.org.

5. Automate welcome emails

Set up an automated email that triggers the moment someone joins your recurring program. This shouldn't be a receipt; it should be a message that confirms they are now a vital part of your organization's future.



GROWTH TIP:

Don't wait for perfect – update your donation form today. Summer is for speed and testing, not delays.



Ensure a frictionless donor experience

Nonprofits often refer to the leaky bucket – losing donors over time. But there is a second, more invisible leak: the checkout bounce. This section is about identifying the friction points that kill conversions and replacing them with a seamless experience that respects your donor's time.

Identifying high-friction points

Donors are more distracted than ever. If your form takes more than 60 seconds to complete, you are likely losing half of your potential revenue.

Eliminate these high-friction points:

- **Too many fields**
Every extra field you add to a form decreases conversion by roughly 10%. Ask only for what you absolutely need to process the gift.
- **Forced account creation**
Requiring a donor to create an account or sign in before giving is a massive roadblock. 8% of visitors will abandon a gift immediately if forced to register.
- **Missing digital wallets**
On mobile, typing in a 16-digit credit card number is tedious. Nonprofits that offer Apple Pay, Google Pay, or PayPal see a 35% increase in conversion rates because they enable one-touch payments.
- **Desktop-only design**
92% of donors discover your mission on a mobile device, yet many forms still look like they were designed for a desktop. A non-responsive form converts at just 8%, while a mobile-optimized one can reach 18% or higher.

Small updates lead to big results

You don't need a website redesign to boost revenue – often, small visual tweaks deliver the biggest gains.

Make monthly giving the default option or give it a prominent highlight to encourage long-term support; this simple change alone can increase mobile donations by 35% or more.

Use action-oriented buttons like “Feed a Family” or “Protect the Forest” instead of generic labels like “Donate Now” to reinforce intent and boost clicks. Add SSL or secure payment icons near the credit card field to reduce anxiety and build trust at the point of decision.

By removing friction and creating a simple, secure experience, you'll increase donations and strengthen credibility for future giving.

GROWTH TIP:

In a mobile-first world, convenience is a form of stewardship. When you make it easy for someone to give, you are showing respect for their time and their intent to do good.



Building a strategic EOY blueprint and planning for scale

By using the quiet weeks of August to build your blueprint for end-of-year giving campaigns, you move into the season with a proactive, scalable strategy. Summer isn't just a countdown, it's a strategic runway. By shifting your focus from surviving the giving season to planning for scale, you transform the chaos of Q4 into a controlled, high-impact execution.





Preparation has a significant impact on revenue

Scaling your mission requires a foundation built on data and efficiency.

Start by cleaning your data. Following the NIO Summit methodology, you should exit the summer with a clear view of your most loyal monthly sustainers, your active year-round donors, and those who have lapsed. This segmentation is the key to personalization at scale. It ensures when the high-volume season arrives, your message lands in the right inbox with the right resonance, which can significantly lift click-through rates compared to generic blasts.

Simultaneously, you can defeat the inevitable year-end burnout by embracing narrative batching. Instead of drafting emails in the heat of a November deadline, use the quiet weeks of late summer to build your creative bank.

Select a single, powerful story that defines your season and draft your entire campaign arc, from direct mail to social captions. Using AI-assisted drafting during this phase allows you to move from a blank page to a finished product three times faster, freeing your team to focus on high-touch major donor relationships when they matter most.

Finally, a successful blueprint requires an honest audit of your technology tools. Ensure your donation platform and CRM are communicating flawlessly without manual intervention and that your donor experience remains mobile-first.

If your current systems force your staff into manual data entry or create friction for the donor, that needs to be fixed before the September surge, not in the middle of it. BetterWorld is purpose-built for nonprofits raising \$1M–\$15M+: seamless CRM sync, mobile-optimized donation pages, recurring giving tools, and real-time reporting all in one place. Organizations that switch to BetterWorld before their fall campaign report saving an average of two full work weeks of manual effort during their busiest months. If you're ready to see how it fits your organization, our team can walk you through a personalized demo at betterworld.org.

GROWTH TIP:

Scale isn't about doing more things; it's about making sure the things you do are magnified by good data and better tools. BetterWorld is that tool. Set up your account in under a day at betterworld.org, and let's make this your best giving season yet.

Month	Growth focus	Key BetterWorld summer actions
June	Foundation & list hygiene	Data cleaning; Personal video thank-yous; Strong, humanized CTA engagement email.
July	Recurring acquisition	Launch sustainer summer campaign; Audit donation forms for mobile friction.
August	Campaign batching	Draft EOY/Giving Tuesday content; Segment high-value donors for Fall outreach

Visit betterworld.org/connect to learn more and schedule a campaign assessment with one of our fundraising experts who will walk you through the platform.

We can't wait to learn more about your mission!