



Welcoming and Retaining First Time Donors



DonorSnap
Donor Management Made Easy

Agenda

- The 1st Time Donor Opportunity
- Developing a welcome system
 - Acknowledgements
 - Welcome Email Series
 - Survey
- Identifying 1st Time Donors
- Put it in action



The First Time Donor Opportunity

- First-time donor retention is only 18.1%
(Fundraising Effectiveness Project, Q1 2025)
- Second-gift retention jumps to 59%
- The gap between first and second gift is where nonprofits win or lose
- New donors present key opportunity to steward for future giving



Welcome System

- Personalize first time donor communications
 - Acknowledgement Letter (Batch Codes)
- Personal email/hand written letter from Director or Board Member
- Welcome Email Series
- New Donor Survey
 - Responsive Forms



First Time Donor Thank You

- Acknowledge that it is their first gift to your organization
- Welcome them and express gratitude
- How to stay in touch
- Use PS Wisely - next steps like volunteer or attend an event



CRESCENT BAY MARITIME MUSEUM

Dear Mr. Williams,

Thank you so much for your generous gift to the Crescent Bay Maritime Museum. Your first gift to our museum is something we don't take lightly, and we're so glad you decided to be part of what we're building here.

Thanks to the generosity of donors like you, we recently restored our 1920s lighthouse lens display & welcomed over 1,200 students through our doors this past school year. That kind of impact is only possible because people choose to invest in what we're preserving here.

As our community grows, so does our ability to provide more access for everyone who loves the sea and its stories. Every new supporter who joins us expands what's possible, and your first gift puts you right at the heart of that momentum. We're genuinely glad you're here.

We'd love to stay connected with you! Here are a few easy ways to keep in touch and stay in the loop:

- Visit us online at [website URL]
- Follow us on Facebook and Instagram @CrescentBayMaritime
- Sign up for our monthly newsletter at [newsletter sign-up link]
- Contact us directly at [email] or [phone]

We look forward to sharing updates, behind-the-scenes stories, and future opportunities with you as we grow together.

With gratitude,

Benjamin Shah

Benjamin Shah
Executive Director

Crescent Bay Maritime Museum

P.S. We'd love to meet you! Come join us for Family Fun Day on April 30th— a free, laid-back afternoon at the museum with activities for all ages, from nautical crafts for kids to free tours of the collection. It's a great way to see your support in action. Hope to see you and your crew there!

Mention first gift

Recent, specific impact + why new support is crucial

how to stay connected

Invite to Event



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Welcome Email Series

- Should start sending out after their first gift
- Helps build trust
- ~5 Emails over 60 days with more frequent emails early on
- Should be simple emails (no graphics/newsletters) & from real person
- Serve as a “bridge” to your regular communications
- Build in **Automated Task Manager**



Sample Nonprofit Welcome Email Series

- ✉ Personal Thank You from ED
- ✉ History of Your Organization
- ✉ Meet the Team/Bios
- ✉ How to Get more Involved
- ✉ How to Stay In Touch/Survey



New Donor Survey

- Use DonorSnap's nonpayment forms
- All this data will feed into their donor record for future use
- Sample Questions
 - Interested in our cause?
 - Communication Preferences?
 - How did you hear about us? (link them to another supporter)
 - Interested in Volunteering



Identifying First Time Donors

- Donation history
- First Time Donor Report
 - Reports>Fund Development Analysis>New Donors
- Data Miner Platinum
- DonorSnap Analytics....

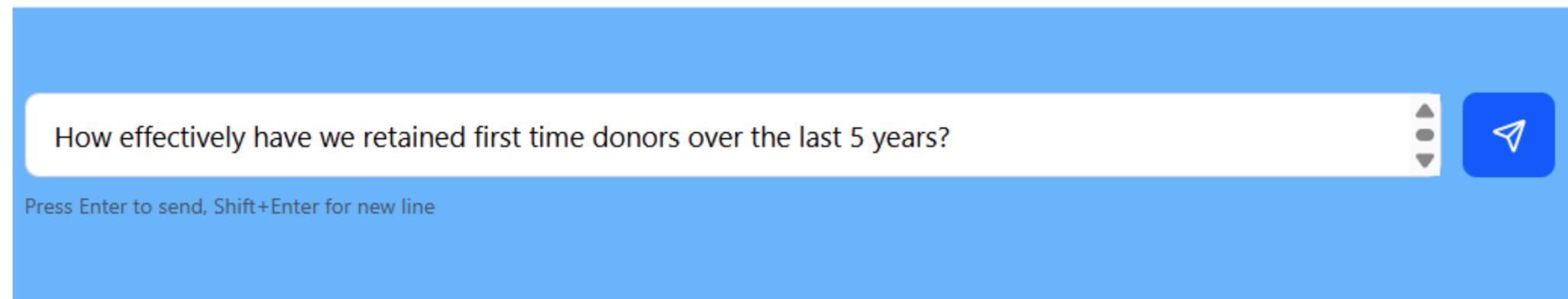


DonorSnap Analytics

- DS Analytics makes it easy to segment donor retention
- Set up a dashboard to track throughout the year

Use the chat to build completely custom reports

Ask about contacts, donations, interactions, volunteers, and tasks.



How effectively have we retained first time donors over the last 5 years?

Press Enter to send, Shift+Enter for new line



Other Ideas

- Welcome new donors in your communications
 - New Donor Segment in Newsletter
- Welcoming event (something simple)
- Social Media shout outs
- Welcome packet (strategic plan/annual report, bumper sticker, t-shirt)



Next Steps

- Write your first time donor thank you
- Set up a welcome email series in the Automated Task Manager
- Build a new donor survey with responsive forms
- Explore reporting tools in DonorSnap to track progress
- Start building lasting relationships with new donors
- Email support@donorsnap.com if you need help!



Resources

- [Automated Task Manager](#)
- [DonorSnap Analytics](#)
- [New Donors Report](#)
- [Nonpayment and Interaction Forms Training Webinar](#)
- [Donor Acknowledgments/Batch Codes Training Webinar](#)

