



Level Up | New Year, Retain Donors

Part 2: The New Donor Welcome Series

Level Up Training Session | February 19, 2024



ICE BREAKER

What's your favorite winter activity?

Chat it!

Housekeeping

What to expect from today's session

1

Able to develop a **cohesive New Donor Welcome Series** aimed at retaining new donors.

2

Equipped to assess the **data & technology needs** to deploy a new donor welcome series.

Action Item

Complete your New Donor Welcome Series framework.

Why are we talking about
retention?



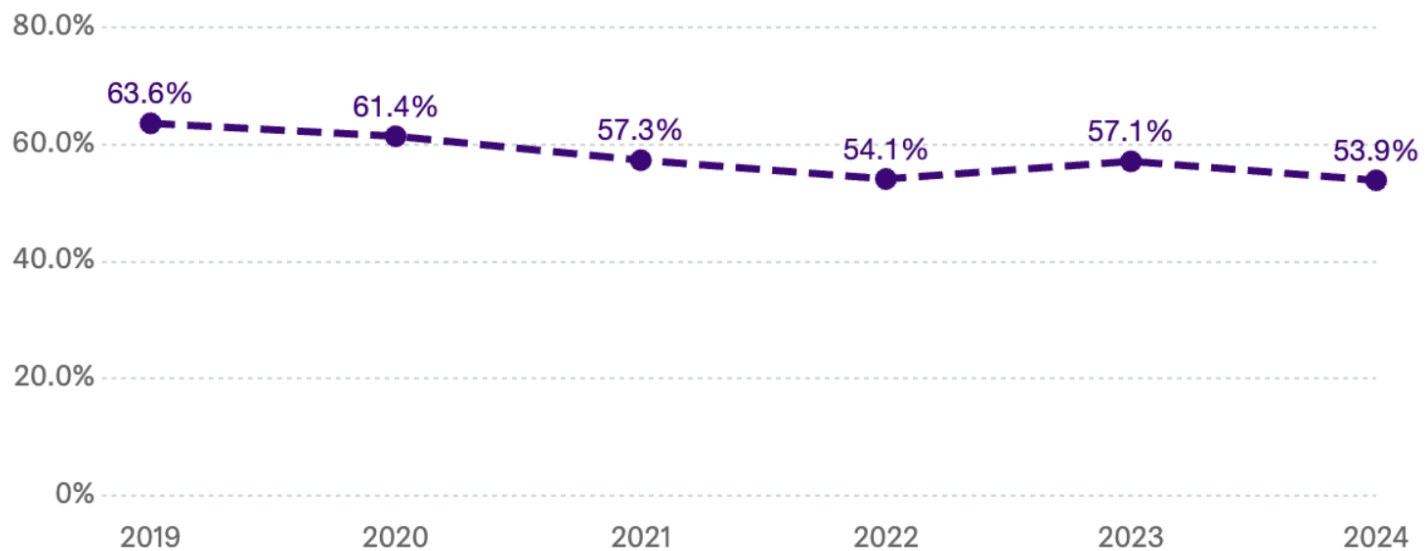
-15%

Individual Giving Since 2021 (Adjusted for Inflation)

KEY INSIGHT

Retention Rate [?]

What percentage of donors were retained from the previous period?



Retention is Not Declining

Data Powered By:





“Returning donors give at least
3X more than new donors on
Coloradogives.org”

8 NEW DONOR WELCOME SERIES EMAILS YOU COULD SEND



The Thank You
Email



The Welcome
Email

The Content Offer
Email

The Survey Email

The Impact/Story
Email

The Monthly Ask
Email

The Reply Back
Email

The Transition
Email



The Content Offer Email



Email or Promotion

HOOVER INSTITUTION

Get "Trickle Down" Theory and "Tax Cuts for the Rich"

by Thomas Sowell

This book examines the common idea that higher tax rates on the "rich" increase government revenues. Based on empirical and careful analysis, Sowell examines this hypothesis and revisits the origins of the ideas of "Trickle Down" Theory and "Tax Cuts for the Rich"—in his signature style that we've all come to love.

This is a critical area of economic thinking—yet another where Sowell has proven to be a formidable expert and clear thinker.

With the issue of taxes and government revenue set to be a central topic of debate in the coming months, this research and analysis is an indispensable resource.

Simply complete the form below to get your free digital copy, "Trickle Down" Theory and "Tax Cuts for the Rich" now:

First Name *

Last Name *

E-mail: *

Please also send me the Hoover Daily Report, an email newsletter featuring policy analysis, news, and more.

[Get your free copy now »](#)

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Email Acquisition Landing Page

Offer Delivered via Email

Hi Brady,

Thank you for requesting "Trickle Down" Theory and "Tax Cuts for the Rich" by Hoover Institution Rose and Milton Friedman Senior Fellow on Public Policy Thomas Sowell.

[You can download your copy here.](#)

We provide Americans with data-driven research on tax cuts vs. tax hikes because it's important that a free society knows the truth about how their money is spent.

We are able to give you this incredible commentary, loaded with Thomas Sowell's decades of wisdom, because of the support of donors who also believe that an educated citizenry is vital to America's economic well-being.

Thank you for sharing our vision of an informed and engaged public on economic issues here in America and around the world.

Sincerely,
Greg
Greg Stamps
Online Development
Hoover Institution

Instant Donation Page

HOOVER INSTITUTION

Thank you, friend!

"Trickle Down" Theory and "Tax Cuts for the Rich" is headed to your inbox now.

While you wait for it to arrive, we'd like to ask you just one more thing...
We provide Americans with data-driven research on tax cuts vs. tax hikes because it's important that a free society knows the truth about how their money is best spent. We are able to give you this incredible commentary, loaded with decades Thomas Sowell's wisdom, because of the support of donors who also share our belief that an educated citizenry is vital to America's economic well-being.

In fact, The Hoover Institution is 100% donor-funded – which enables us to offer free resources like this in the hopes that we can reach and teach Americans from all walks of life – especially the next generation – about the benefits of liberty, free-market economics, and national security.

Would you partner with us in this vital mission?

The Hoover Institution will wisely invest every dollar of your generous gift to promote ideas that encourage a free society. By helping to underwrite the work of the Hoover Institution, you'll put your mark on American and world history for generations to come.

Moreover, your support will allow Hoover's team of innovative, widely respected scholars like Thomas Sowell to continue to study history and then apply their knowledge to solving modern-day societal challenges.

Please make your most generous, tax-deductible gift to the Hoover Institution now.

Regardless of the exact amount of your gift, we'd be honored to have your friendship and support as we advance the principles of limited constitutional government, personal and economic liberty, and the American way of life.

Your Gift

Your Information

Title First Name Last Name

Email Address

Country

Street Address Street Address 2

City State Zip Code

This is a business address
 This is an anonymous gift

[Continue](#)

The Content Offer Email

Goals: Competency •
Autonomy • Commitment

Recommended Sender:
Executive Director, CEO, or
Chief Development Officer

Email #3

The Content Offer
Email



Email Checklist

- Share what the resource is.
- Share how the resource is connected to your work & mission.
- Share how the resource will benefit them when they get it.
- Use one call-to-action: download the content offer.

I have a unique opportunity for you ... I would like to give you a gift: our free eBook, *One at a Time*.

[Please take a moment to download it here.](#)

I hope that you will download it today because it offers a glimpse into the history of Food for the Hungry and the heart of our founder, Larry Ward.

I know that these stories will resonate with you ... they show you the passion we have for our work as we:

1. Help people see that they have a future.
2. Bring about long-term transformation in the neediest communities.
3. Lift people out of poverty.

SAMPLE EMAIL

FOOD FOR THE HUNGRY

One at a Time —
your free gift from
Food for the Hungry

Download Your eBook

Dear Edward,

If you have been in the shoes of those who are hurting, you know how hard it is to get back on your feet.

I have a unique opportunity for you. *One at a Time*.

[Please take a moment to download your free eBook.](#)

I hope that you will be inspired by the stories in the eBook. Food for the Hungry and the hungry people of the world.

I know that these stories will resonate with you ... they show you the passion we have for our work as we:

1. Help people see that they have a future.
2. Bring about long-term transformation in the neediest communities.
3. Lift people out of poverty.
4. Teach and help people grow their own healthy, self-sustaining farms and gardens.
5. Help impoverished children receive the food and education they need — which can lead to helping the whole community.

Food for the Hungry's desire is to end poverty by going into the hard places and closely walking with the world's most vulnerable people.

We actively partner with churches, leaders, and families to:

- build transformational relationships,
- usher in justice.

Offering a free, valuable resource

Email #3
The Content Offer
Email



SAMPLE EMAIL

I have a unique opportunity for you ... I would like to give you a gift: our free eBook, *One at a Time*.

[Please take a moment to download it here.](#)

I hope that you will download it today because it offers a glimpse into the history of Food for the Hungry and the heart of our founder, Larry Ward.

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1. Help people see that they have a future.
2. Bring about long-term transformation in the neediest communities.
3. Lift people out of poverty.
4. Teach and help people grow their own healthy, self-sustaining farms and gardens.
5. Help impoverished children receive the food and education they need — which can lead to helping the whole community.

Food for the Hungry ...

Showing the connection of the resource to the mission.

And our mission is to walk with churches, leaders and families in overcoming all forms of human poverty by living in healthy relationship with God and His creation.

[Please find out more — and discover how you can get involved — download *One at a Time* now. It's our free gift to you.](#)

Thank you for your interest in serving those in the most desperate situations, together with Food for the Hungry!

Serving together,

Gary Edmonds
President

P.S. [Please download your free eBook now.](#) I believe it will be a great blessing for you to see how you can be a part of helping the neediest people with God's love. Let's stay connected together on [Facebook](#), [Twitter](#), and [Instagram](#). You can also find us on [YouTube](#) too!

Email #3

The Content Offer
Email



Other Content Offer Types

- eBooks
- Quizzes
- Petitions
- Surveys
- Video Series
- Online Course

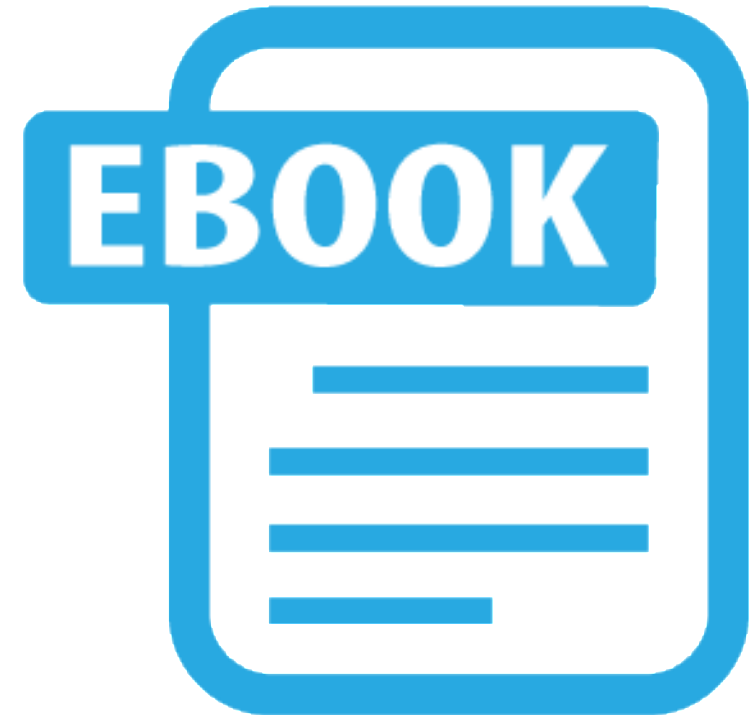
Blogs?

Videos?

Podcasts?

Stories of Impact?

News or Articles?



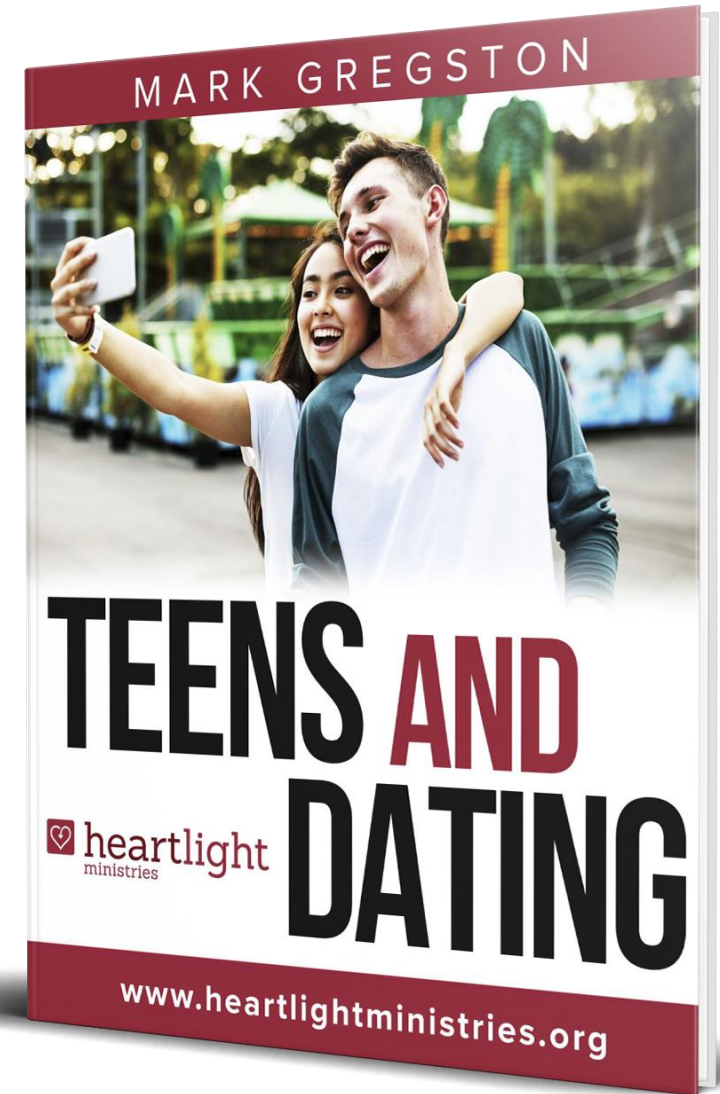
Blogs?

Videos?

Podcasts?

Stories of Impact?

News or Articles?






ColoradoGives.org Tools

Embedded Donation Pages

Embeds

 [Get the Wordpress plugin](#)

Generate code for donation forms and buttons powered by Mightycause. Paste code on any IFrame compatible website.

Embed Creator

Generate a new embed to add to your instances.

Button

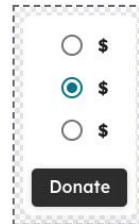
Customize a button that navigates to a Mightycause donation Flow.



[+ Create](#)

Mini Form

Complete a donation on your website in a mini inline form



[+ Create](#)

Full Form

Complete a donation on your website in a full page form



[+ Create](#)

⌵ Less

Copy your embed code to place on your website.

Customize your form.

Customize your Thank You message and Receipt.

Label

Embedded Donation Form

</> Copy Code Edit Mode

Donation Form Thank-you Message Donation Receipt

One-time donation Monthly donation

\$15 Provide food for a month	\$50 House a rescue for a month
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Some catalog features and new library card sign-up are temporarily unavailable. We are working to resolve the issues. Highlands Ranch library will be closed through January 26 due to a water main break.

DONATE

Supporting our community, protecting the future.

Douglas County Libraries Foundation supports the incredible work of our libraries, including premium programs and services for customers in Douglas County and across Colorado. [Your donation](#) helps support our community today, tomorrow, and for years to come!

One-time donation Monthly donation

- \$25
- \$50
- \$100
- \$200
- \$500

\$ Donation amount

Hide amount from public

Hide name from public

[Privacy info](#)

Add a dedication to your donation

Designation

Phone Number

Optional

dcl.org/donate/

The *Survey* Email

The Survey Email

Goals: Competency •
Autonomy • Commitment

Recommended Sender:
Executive Director, CEO, or
Chief Development Officer

Email #4
The Survey Email

Hi Courtney,

Sometimes it feels like every day brings another worrying news story about our planet. But **there's so much that gives me hope for nature**—from the

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Take care,

Jessica

Senior Director, Membership

World Wildlife Fund

Email Checklist

- Communicate the importance of the new donor in your work.
- Share how you value their input and perspective and desire to hear them.
- Give a sense of how long the survey will take (i.e. “just 10 questions” or “just a 3-4 minutes”).
- Use one call-to-action: take the survey.



SAMPLE EMAIL

Hi Courtney,

Some
plan
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wan

Stating that you value their input.

How about you? **What do you hope for our planet? Since you're such a dedicated supporter, I'd love to hear what you think.**

[Take our quick survey, Courtney](#)

If you have a minute, [please take our six-question survey](#) and let me know what gives you hope for nature.

Thank you for being part of **WWF's** community, Courtney. And thank you for being another source of hope for the future of nature.

Take care,

Jessica
Senior Director, Membership
World Wildlife Fund

Email #4
The Survey Email



SAMPLE EMAIL

Hi Courtney,

Sometimes it feels like every day brings another worrying news story about our planet. But **there's so much that gives me hope for nature**—from the cheerful sound of birdsong to the heart-warming sight of a baby animal to the warmth of the sun.

How about you? You've dedicated support

Giving context for how much work the survey will take.

If you have a minute, [please take our six-question survey](#) and let me know what gives you hope for nature.

Thank you for being part of **WWF's** community, Courtney. And thank you for being another source of hope for the future of nature.

Take care,

Jessica
Senior Director, Membership
World Wildlife Fund

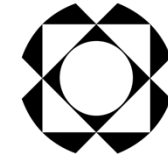
Email #4
The Survey Email



Tools to Build Your Survey



 Typeform



Paperform

 GRAVITY FORMS

 Jotform

Any web form tool!

Organization Centric Language

Dear Friend,

Our world is in turmoil, and Christians know the answer. We know an abundant life is found in faith in Jesus Christ. And we know the keys to a worthwhile life are found in God's Word.

In 2022, Dallas Theological Seminary's vision is to anchor as many souls as possible in the Word of God—the 66 books of the inerrant Bible.

Romans 12:2 states, "Do not be conformed to this world, but be transformed **by the renewing of your mind.**"

So at **DTS**, we're pursuing several strategic ways to anchor literally millions of souls in God's Word.

FIRST, **DTS** is continuing our training of graduate degree-seeking students. They are tomorrow's **pastors, teachers, preachers, evangelists, missionaries**, and more. And now **DTS** offers classes in four locations and at additional extension sites. Not only that, we are also training our graduate students remotely (some in closed countries), using live video technology. Our enrollment is at an all-time high!

SECOND, **DTS** is making plans to equip pastors around the globe online. The global church is growing, and we estimate that there will be a need for two million more trained pastors. **DTS** is committed to helping deal with this crisis.

Think of it! **DTS** wants to address the global theological famine in the church by giving **FREE** classes to church leaders—grounding them in God's Word. We want to expand our training, offering it in the most-spoken languages.

How did this come about? The answer is that this technology started with an

Donor Centric Language

Dear Friend,

Can **you** believe it is almost Christmas? The Advent season is filled with some of my favorite moments and holds some of my best memories.

And since the new year is right around the corner, I wanted to reach out today to share Dallas Theological Seminary's vision and some of our plans for 2022.

Our hope is to anchor as many souls as possible in the Word of God—the 66 books of the inerrant Bible.

How can DTS do that? We're training future pastors, teachers, preachers, evangelists, missionaries, and counselors every day at DTS who will go on to anchor souls in God's Word.

We're also committed to combating the global theological famine in the church by offering **FREE** online training to equip pastors and church leaders around the globe, grounding them in God's Word as they lead their churches and congregations.

And, of course, DTS will continue to produce and offer new free online courses for anyone interested in studying Scripture. God has opened the door for more than 450,000 people around the world to gain a better understanding of His Word through taking these free online courses.

Why am I so excited for what's to come in 2022?



more trained pastors. **DTS** is committed to helping deal with this crisis.

Think of it! **DTS** wants to address the global theological famine in the church by giving **FREE** classes to church leaders—grounding them in God’s Word. We want to expand our training, offering it in the most-spoken languages.

How did this come about? The answer is that this technology started with an outreach to anyone interested in studying Scripture—and then exploded as we tapped into a reservoir of pastors who wanted to know God’s Word better!

That original outreach is the **THIRD** strategy I’ll mention.

Not long ago, **DTS** began to offer free online courses. We had no idea that within five years we would have 450,000 people taking these online courses, which use excerpts from the same courses taught to **DTS** students.

But God knew. And He opened the door. Now people around the world are being trained by these courses.

There are more strategies **DTS** is using to help souls be anchored in the Word. Yet even these three alone are worth celebrating.

But don’t forget this truth:

When people are **anchored in the Word they are also rooted in the Word**. They not only survive life’s storms . . . they grow . . . they flourish. They scatter evangelistic seeds that spring up to eternal life in people around them.

In 2022 the storms will be raging. There’s never been a better, or more urgent, time to get Christians anchored, rooted, and growing in the Word.

If **you** want to help in this amazing vision, you can give at this link to **DTS** as we strive to reach our year-end goal of **\$3.25 million by December 31**. Simply use the secure link below to give now—and help make a mark on eternity!

age

And, of course, **DTS** will continue to produce and offer new free online courses for anyone interested in studying Scripture. God has opened the door for more than 450,000 people around the world to gain a better understanding of His Word through taking these free online courses.

Why am I so excited for what’s to come in 2022?

Because I believe that when people are anchored in the Word they are also rooted in the Word. They not only survive life’s storms . . . they grow . . . they flourish. They scatter evangelistic seeds that spring up to eternal life in people around them. Do **you** believe this as well?

If **you** do, I want **you** to know that **DTS** is preparing for the storms to continue raging. That’s why it’s such an urgent time to get Christians anchored, rooted, and growing in the Word. And that’s why I’m asking for **your** help today.

We have a goal to raise \$3.25 million by midnight on December 31 to support this vision for 2022. Will **you** make a gift to help us equip ministry leaders to reach souls for Christ, train church leaders who need access to theological training, and offer free online courses to thousands more people who are hungry to understand God’s Word?

I’m including a secure link below where **you** can make **your** gift today:

<https://secured.dts.edu/cye2021/>

Please keep in mind that **your** gift before midnight on December 31 will help us reach a generous \$500,000 Challenge Gift to carry out this vision. We’re counting on **you** to help us get there!



86%

In Clicks

The Impact / Story Email

The Impact/Story Email

Goals: Satisfaction •
Connectedness

Recommended Sender:
Head of programs • Someone
connected to the story

Email #5

The Impact/Story
Email

Thank You!

Andrew Reid <Andrew.reid@hopemission.com>
to Trent

Wed, Jul 8, 2020, 7:07 AM

Email Checklist

- Restate the problem your organization exists to solve.
- Restate how crucial the donor's gift is in helping solve the problem.
- Share an impact story that illustrates how the problem is being solved.
- Provide a link to read more, read another story, watch a related video, etc.

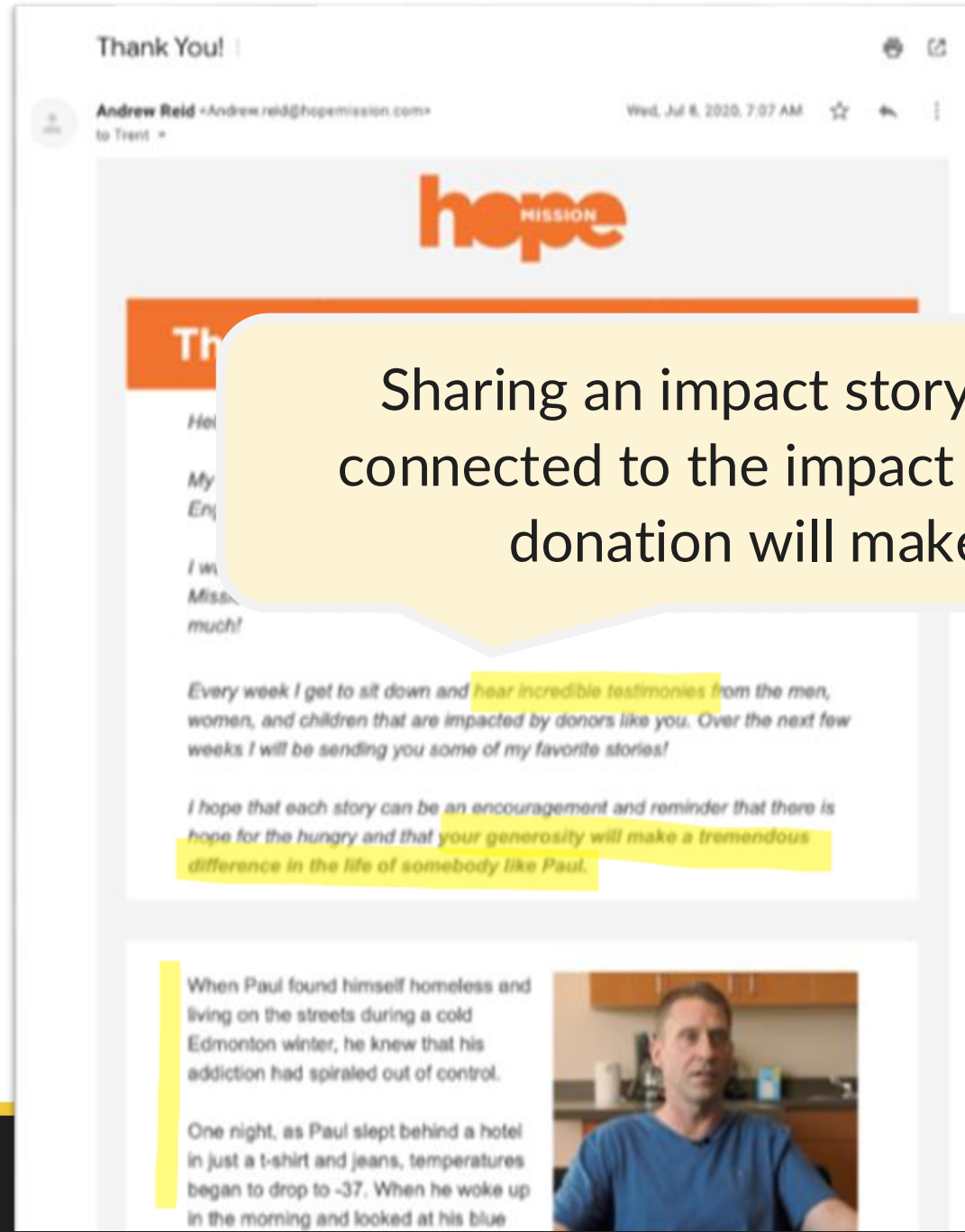
difference in the life of somebody like Paul.

When Paul found himself homeless and living on the streets during a cold Edmonton winter, he knew that his addiction had spiraled out of control.

One night, as Paul slept behind a hotel in just a t-shirt and jeans, temperatures began to drop to -37. When he woke up in the morning and looked at his blue



SAMPLE EMAIL



Sharing an impact story that's connected to the impact that the donation will make.

Email #5

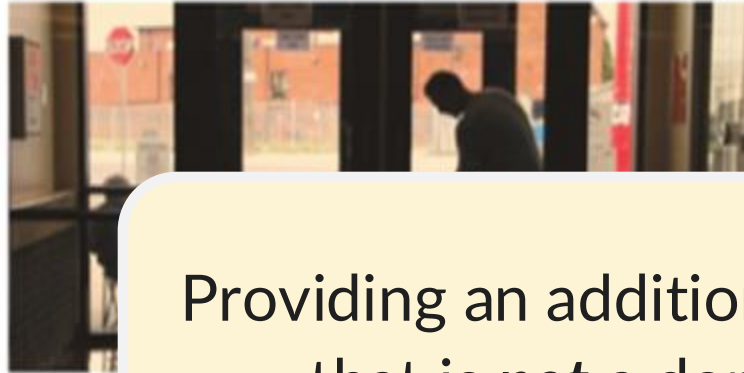
The Impact/Story Email



SAMPLE EMAIL

In his pursuit of shelter and safety, Paul found Hope Mission – and his life was changed forever. After completing the addictions recovery program, Paul began working here and found a new sense of hope.

"I have a purpose and I have a personal mission in life now."



All of this
who keep
compassion

Providing an additional way to engage that is *not* a donation appeal.

P.S. – I would love to hear more about what inspired your recent donation! Feel free to click [this link](#) or hit reply to send an email back to me.

Andrew Reid

hope
MISSION

Donate Monthly



Hope Mission, PO Box 953, Edmonton, AB T5J 2L8, Canada

Update your subscription — Unsubscribe

Email #5
The Impact/Story
Email



Branded



Hello First name,

When your world has been turned upside down, every connection counts. Every bit of strength. Every heart brought together.

Erica, whose 6-month-old son Graham was diagnosed with a serious cancer, says she couldn't imagine taking this long, sometimes scary journey without CaringBridge to share news and receive strength.

[You can make sure CaringBridge is here for them](#), and for everyone who needs calm seas in times of turbulence, with your donation today—a **donation that will go twice as far on March 16 with a \$15,000 matching gift opportunity** from our generous friend and donor, Rik Lalim.

Your compassion ensures that Erica's family can continue to rely on us for a safe, protected, ad-free space to share their successes and frustrations, hopes and fears—their journey. And family and friends can be there every step of the way.

[Yes! Match My Gift Now!](#)

Yours in hope,

Kelly Espy
CaringBridge Senior Development Specialist

P.S. There's no time like the present to bring hearts together. Together, we can be stronger. [Donate now and double your impact!](#)

Personal Tone

Hello First name,

I know you've been using CaringBridge recently to stay connected to your loved ones, and I hope it's been a source of strength for you.

Right now, we're in a short campaign to raise money to keep CaringBridge there for you, and those like you who need a safe, protected place to connect during life's most challenging times.

As a nonprofit, CaringBridge is supported by donations from the people who use and appreciate the site.

If you'd like to support this campaign right now, your gift will be doubled by a generous donor, up to \$15,000, if you use this link to make your gift by midnight, March 16.

[Click here to have your gift matched today >>](#)

It's the safest, most secure way to make sure CaringBridge will always be here when your loved ones need it most.

We appreciate your support – thank you!

Kelly Espy
CaringBridge Senior Development Specialist



146%

In Donor Conversion

The Monthly Ask Email

The Monthly Ask Email

Goals: Connectedness

- Autonomy • Commitment

Recommended Sender:

Executive Director, CEO, or
Chief Development Officer

Email #6

The Monthly Ask
Email

Dear Supporter,

A little while ago you made a very generous donation to the Canadian Taxpayers Federation. Your contribution helped make a real difference in our fight. Thank you for stepping up.

Email Checklist

- Reference and thank them for their past gift.
- Remind them of how their gift has helped.
- Explain the unique impact of a regular monthly donation.
- Let them know they can change, pause, and/or cancel at any time.
- Give a clear call-to-action to make a monthly recurring donation.
- Explain any unique benefits of being a monthly donor (i.e. special gift, unique invitations, exclusive content, etc.)

Would you consider making a recurring monthly donation? Even \$ 5 per month gives us the ongoing support we need to launch new campaigns and make them successful.

We greatly appreciate your last gift and it's great to have you on the team to fight

SAMPLE EMAIL

Dear Supporter,

A little while ago you made a very generous donation to the Canadian Taxpayers Federation. **Your contribution helped make a real difference in our fight.** Thank you for stepping up.

It's always v
fund an urge

But I can tel
over-tax and
year job. Th

digital specialists and even an investigative journalist on staff to **be the first line of defense every day of the year.**

You win when tens and hundreds of thousands of Canadians push back on their politicians. That is why we've invested heavily over the past three years to grow the taxpayer army. By making a donation to the CTF you are a leader in this army.

I can tell you that doing the behind the scenes work of building this army isn't as flashy as a national Debt Clock tour, or a high-profile court challenge, but it's how you win.

Over the next two weeks we are looking for 10 Canadians to step up and ensure the taxpayer army keeps getting bigger every day.

Would you consider making a recurring monthly donation? Even \$ 5 per month gives us the ongoing support we need to launch new campaigns and make them successful.

We greatly appreciate your last gift and it's great to have you on the team to fight

Reminding them of and thanking them for their previous donation.

Email #6

The Monthly Ask
Email



SAMPLE EMAIL

Dear Supporter,

A little while ago you made a very generous donation to the Canadian Taxpayers Federation. Your contribution helped make a real difference in our fight. Thank you for stepping up.

It's always very rewarding to see supporters like you step up when asked to help fund an urgent campaign. You are part of a growing taxpayer army in Canada.

But I can tell you that **fighting back** against money-hungry governments ready to over-tax and over-spend your money (too often on wasteful projects) **is a 365-day-a-year job.** That's why we have a talented team of sharp communicators, organizers, digital specialists and even an investigative journalist on staff to **be the first line of defense every day of the year.**

You are one of thousands of Canadians who believe that

Showing them that there is ongoing need on a daily and recurring basis.

Over the next two weeks we are looking for 10 Canadians to step up and ensure the taxpayer army keeps getting bigger every day.

Would you consider making a recurring monthly donation? Even \$ 5 per month gives us the ongoing support we need to launch new campaigns and make them successful.

We greatly appreciate your last gift and it's great to have you on the team to fight

Email #6
The Monthly Ask
Email



SAMPLE EMAIL

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But I can tell you that fighting back against money-hungry governments ready to over-tax and over-spend your money (too often on wasteful projects) is a 365-day-a-year job. That's why we have a talented team of sharp communicators, organizers, digital specialists and even an investigative journalist on staff to be the first line of defense every day of the year.

You win with politicians and taxpayer army.

Providing a clear call-to-action paired with a specific goal.

I can tell you that it's not as flashy as a politician, but you win.

Over the next two weeks we are looking for 10 Canadians to step up and ensure the taxpayer army keeps getting bigger every day.

Would you consider making a recurring monthly donation? Even \$ 5 per month gives us the ongoing support we need to launch new campaigns and make them successful.

We greatly appreciate your last gift and it's great to have you on the team to fight for lower taxes, but if you want to supercharge your impact, would you consider being one of the 10 Canadians we are looking for to be a monthly donor?

You can sign up for a monthly donation here: [https://www.taxpayer.com/donate/protect-your-values-365-days-per-year-](https://www.taxpayer.com/donate/protect-your-values-365-days-per-year)

Thanks for all of your support and for being part of the fight.

Email #6

The Monthly Ask
Email



No Explanation of Benefits

Hello, Friend.

I'd like to share this story about Alfred, a Dallas Theological Seminary student from Kenya who has felt the economic impact of the coronavirus.

The economic impact of COVID-19 has been felt around the world, with job losses and pay cuts. It was no different for DTS students, including Alfred and his family. As an international student, his job opportunities in Dallas are limited. And he had an additional setback, as his home in Kenya was destroyed by a flood that affected almost a million residences. Alfred said, "I applied to DTS financial aid, which assisted greatly." He still has concerns about resources, but he concluded by saying, "As I struggle in prayers for God to move willing hearts, to come alongside and assist His purposes, I remain hopeful for the good work He began in us, He will accomplish in Christ Jesus (Philippians 1:6)."

Because of the prayers and financial support of friends of the Seminary, DTS has the opportunity not only to make a difference in the lives of students like Alfred but also in the countless lives that DTS students will reach with God's love. The exponential impact of your support of this ministry is phenomenal.

Because of this, I'd like to ask you to consider becoming a DTS Cornerstone Partner. When you give monthly, at any amount you choose, you allow DTS to have a solid base to work from in creating initiatives and resources to support our students.

If you partner with DTS today, you'll be helping us reach our important goal of 100 new Cornerstone Partners by North Texas Giving Day on September 17. Your gift will also be counted toward the \$50,000 Challenge Gift for North Texas Giving Day, put forth by a generous donor.

Will you partner with DTS? <https://secured.dts.edu/cornerstone-partner-ntgd/>

Thanks for considering this important partnership to help us equip students like Alfred to reach the world with the gospel of Jesus Christ.

In Him,
Mark M. Yarbrough, PhD

Monthly Recurring Benefits

Hello, Friend.

I'd like to share this story about Alfred, a Dallas Theological Seminary student from Kenya who has felt the economic impact of the coronavirus.

The economic impact of COVID-19 has been felt around the world, with job losses and pay cuts. It was no different for DTS students, including Alfred and his family. As an international student, his job opportunities in Dallas are limited. And he had an additional setback, as his home in Kenya was destroyed by a flood that affected almost a million residences. Alfred said, "I applied to DTS financial aid, which assisted greatly." He still has concerns about resources, but he concluded by saying, "As I struggle in prayers for God to move willing hearts, to come alongside and assist His purposes, I remain hopeful for the good work He began in us, He will accomplish in Christ Jesus (Philippians 1:6)."

Because of the prayers and financial support of friends of the Seminary, DTS has the opportunity not only to make a difference in the lives of students like Alfred but also in the countless lives that DTS students will reach with God's love. The exponential impact of your support of this ministry is phenomenal.

Because of this, I'd like to ask you to consider becoming a DTS Cornerstone Partner. When you give monthly, at any amount you choose, you allow DTS to have a solid base to work from in creating initiatives and resources to support our students.

If you partner with DTS today, you'll be helping us reach our important goal of 100 new Cornerstone Partners by North Texas Giving Day on September 17. Your gift will also be counted toward the \$50,000 Challenge Gift for North Texas Giving Day, put forth by a generous donor.

Will you partner with DTS? <https://secured.dts.edu/cornerstone-partner-ntgd/>

When you become a monthly supporter of DTS, you will have the option to receive monthly letters to keep you connected and informed.

In addition to the blessing of knowing that you are supporting this ministry work, you also receive these special benefits:

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In Him,
Mark M. Yarbrough, PhD
President



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- A copy of the Bible Knowledge Commentary: New Testament (for commitments of \$50 per month or more)
- A subscription to DTS Magazine
- Early access to new free online courses
- Semi-annual update emails

As a Cornerstone Partner, you will be able to suspend, stop, or alter your monthly gifts at any time, so no need to worry about the pressure to give if your budget changes.

Thanks for considering this important partnership to help us equip students like Alfred to reach the world with the gospel of Jesus Christ.

In Him,
Mark M. Yarbrough, PhD
President



123%
In Donations

The Reply-Back Email

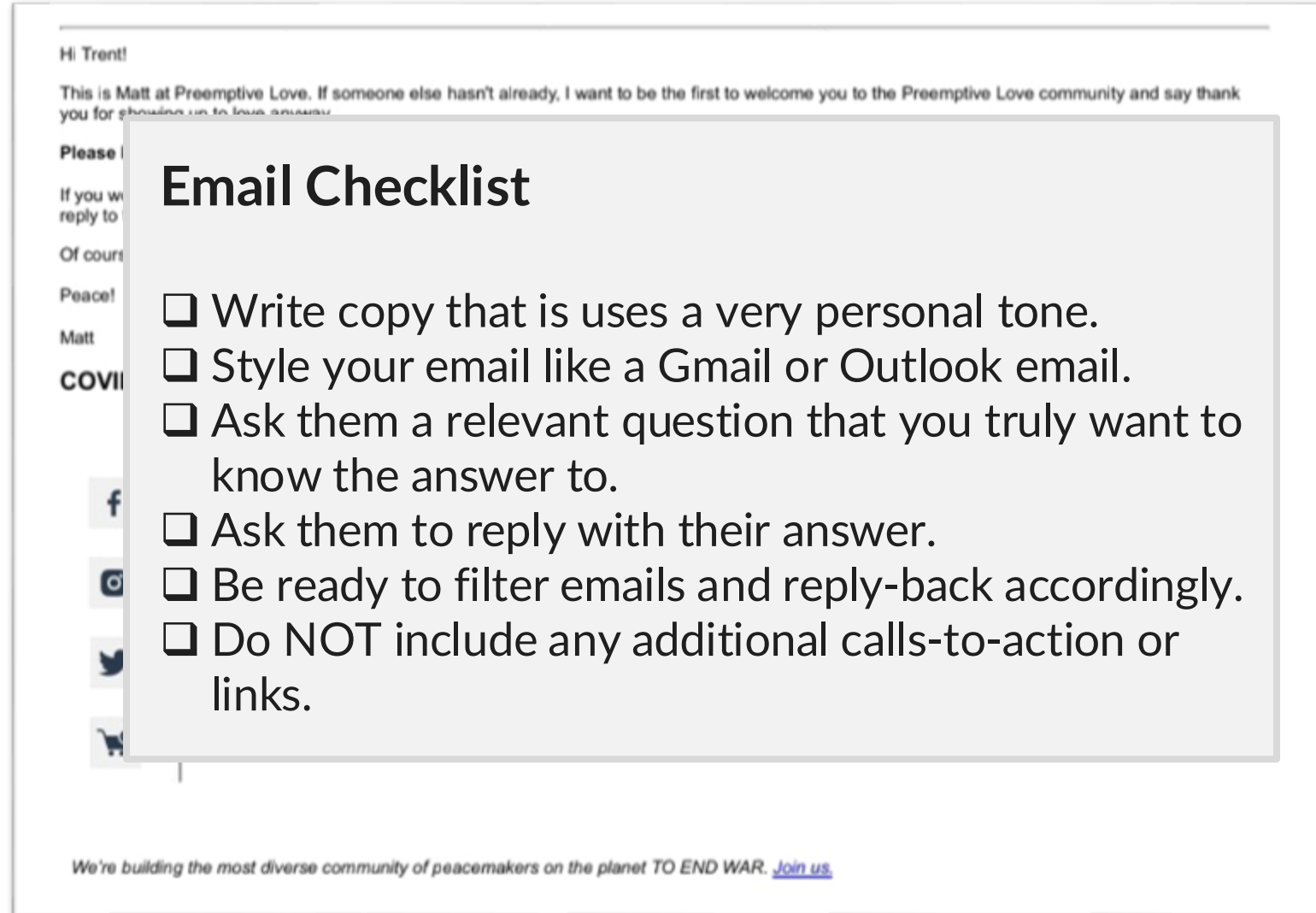
The Reply-Back Email

Goals: Trust • Satisfaction

Recommended Sender:
Executive Director, CEO, or
Chief Development Officer

Email #7

The Reply Back
Email



The image shows a screenshot of an email from Matt at Preemptive Love. The email text is partially visible on the left side of the image. Overlaid on the right side of the email is a grey box titled "Email Checklist" containing five items, each with a checkbox.

Hi Trent!

This is Matt at Preemptive Love. If someone else hasn't already, I want to be the first to welcome you to the Preemptive Love community and say thank you for showing up to love anyway.

Please

If you w
reply to

Of cours

Peace!

Matt

COVI

f

o

t

o

Email Checklist

- Write copy that is uses a very personal tone.
- Style your email like a Gmail or Outlook email.
- Ask them a relevant question that you truly want to know the answer to.
- Ask them to reply with their answer.
- Be ready to filter emails and reply-back accordingly.
- Do NOT include any additional calls-to-action or links.

We're building the most diverse community of peacemakers on the planet TO END WAR. [Join us.](#)



SAMPLE EMAIL

Hi Trent!

This is Matt at Preemptive Love. If someone else hasn't already, I want to be the first to welcome you to the Preemptive Love community and say thank you for showing up to love anyway.

Please know you always have a seat at our table. We value you. Your story and voice matter to us.

Preemptive Love and what inspires you to love anyway. You can

Design looks just like an authentic email that Matt would send from Gmail.

[Order](#) by Charity Navigator



Matt Malcom

Donor Relations Coordinator

US Cell: (254) 236-8814

US Office: (254) 400-2033



We're building the most diverse community of peacemakers on the planet TO END WAR. [Join us.](#)

Email #7

The Reply Back
Email



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If you wouldn't mind, I'd love to hear back from you! **Feel free to share why you support Preemptive Love and what inspires you to love anyway.** You can reply to this email or send me a text anytime.

Of course, if there is anything else on your mind, please feel free to call!

Peace!

Matt

COVID-19 UPDATE: [Preempt](#)

Asking for a reply and reinforcing that their voice is valuable.



Matt Malcom

Donor Relations Coordinator

US Cell: (254) 236-8814

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Of course, if there is anything else on your mind, please feel free to reach out as well!

Peace!

Matt

Charity Navigator

No other calls-to-action!



We're building the most diverse community of peacemakers on the planet TO END WAR. [Join us.](#)

Email #7

The Reply Back
Email



Standard CTA

Hi fellow optimizer,

I sent you an email last week about the Canadian Online Fundraising Scorecard that I'll be previewing in a free webinar next week. I'll share some of what I learned by signing up for emails from and making donations to 152 organizations.

If you can't make it to the live webinar, I'd be happy to send you the slides and a recording once it's over so you can watch it back at a time that works better for you.

Just register on the page below as normal, even if you can't attend. That way I'll know to send the recording to you afterwards: <https://www.nextafter.com/canadian-online-fundraising-scorecard-webinar>

Best,

B

From: Brady Josephson <brady@nextafter.com>

Sent: Thursday, June 14, 9:08 AM

To:

Subject: What can you learn from 152 Canadian charities?

Hi fellow optimizer,

There are three things I like to think Americans have learned a little from Canadians — basketball, hockey, and comedy.

- Dr. James Naismith invented basketball: *Canadian*.
- 50% of all NHL'ers: *Canadian*.
- Mike Myers, Jim Carrey, John Candy, Dan Akroyd, and Catherine O'Hara: *all Canucks*.

I'm hoping we can add one more to the list: online fundraising.

In January, without knowing what I was getting into, I took the lead on the Canadian Online Fundraising Scorecard to see what was being done (or not done) by Canadian charities. I wanted to see what the donor experience was like from email signup and communications through online giving and gift acknowledgement.

After hours of signing up, giving, data collecting, and analyzing I'm excited to share with you what we discovered. Overall...how do I say this positively...there is **a lot** of opportunity for growth. For example:

Ask for a reply (No Link)

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I didn't see your name on the registration list when I checked it today. Do you want me to send you a recording of it instead?

Just let me know so I can add you to the list.

Best,

B

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- Only 6% of organizations had an email offer with significant appeal
- Only 8% had an email offer that was actually unique
- Only 7% had a donation ask on their confirmation pages

I'll unpack everything I learned in a free webinar on June 27th at 1pm CT. Plus, I've got a slew of experiments that show what we've seen actually works to increase both email acquisition and donation conversion.

Do you think you'll be able to make it?

You can learn more and reserve your spot here: <https://www.nextafter.com/canadian-online-fundraising-scorecard-webinar/>

Hope to see you there!

Best,

B

P.S. Even if you can't make it, sign up as I'll send out the slides, recording, and pass along a free copy of the full and final research once it's done.

--

Brady Josephson

NextAfter

Vice President of Innovation & Optimization

brady@nextafter.com

778-994-9311

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Hope to see you there!

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B

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--

Brady Josephson

NextAfter

Vice President of Innovation & Optimization

brady@nextafter.com

778-994-9311



25%
In Emails Acquired*



The Transition Email

The Transition Email

Goals: Trust • Satisfaction

Recommended Sender:
Executive Director, CEO, or
Chief Development Officer

Email #8

The Transition
Email

Dear Trent,

As the President of TFAS, I'm exposed to great and uplifting news every day

Email Checklist

- Thank them again for the donation re-articulate how it is helping.
- Tell them what they can expect with email communication next (weekly/monthly newsletter, event invitations, critical campaign communication, etc.)
- Let them know they can change their preferences and unsubscribe at any time.
- Allow replies and provide contact information for if they have any questions.

Roger Ream
President



SAMPLE EMAIL

Dear Trent,

As the President of TFAS, I'm exposed to great and uplifting news every day about how our alumni are making a generational impact to preserve American values here and abroad.

Since you've become such an important supporter and friend to me, I've asked my team to make sure that you are kept up to date on how we are defending your values.

Thank you again for your continued support. Without you, we would have lost America decades ago. With you, we have a fighting chance to preserve our values.

As always, please let me know if you have any questions, OK? I value your opinion and will do my best to respond quickly.

Thank you for your support!

Sincerely,

Roger Ream
President

Email #8
The Transition
Email



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Thank you again
America decade
values.

As always, please
opinion and will do

Thank you for your support!

Sincerely,

Roger Ream
President

Setting expectations for future communication.

Email #8
The Transition
Email



SAMPLE EMAIL

Dear Trent,

As the President of TFAS, I'm exposed to great and uplifting news every day about how our alumni are making a generational impact to preserve American values here and abroad.

Since you've become such an important member of my team to make sure that you are preserving your values.

Thank you again for your continued support of America decades ago. With your values.

As always, please let me know if you have any questions, OK? I value your opinion and will do my best to respond quickly.

Thank you for your support!

Sincerely,

Roger Ream
President










Open door for an ongoing relationship
and communication.

Email #8
The Transition
Email



When should you send all
these emails?

March 2025

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3  	4 	5	6	7 	8
9	10	11	12 	13	14	15
16	17 	18	19	20 	21	22
23	24	25 	26	27	28 	29
30	31					

© BlankCalendarPages.com

Sample Calendar

- **March 3:** Donation
- **March 3:** Thank You
- **March 4:** Welcome
- **March 7:** Content Offer
- **March 12:** Survey
- **March 17:** Story / Testimonial
- **March 20:** Monthly Upgrade
- **March 25:** Reply—Back
- **March 28:** Transition

Get Your Copy of the Framework Worksheet

New Donor Welcome Series Framework

The purpose of the New Donor Welcome Series framework is to help you think through all the details you'll need to address in your email and copywriting. These questions won't write your copy for you, but they should bring to mind all the key details that you'll need to write about and include as you develop your New Donor Welcome Series.

Key Questions for Developing Your Copy

Step 1: Outline the Known Motivations of New Donors	
What specific initiatives or appeals are currently generating new donors?	
What are the primary motivators that drive donors to give?	
Step 2: Outline How the Donation Connects to Impact	
What problems has the donors' gift helped to solve?	
How has the donor specifically had an impact?	
How will the donor's gift be used?	



Scan this to get a copy of the *New Donor Welcome Series* framework.

These key questions will help you think through all the details you'll want to include in your copywriting.

Key Questions for Developing Your Copy

Step 1: Outline the Known Motivations of New Donors	
What specific initiatives or appeals are currently generating new donors?	
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Step 2: Outline How the Donation Connects to Impact	
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How has the donor specifically had an impact?	
How will the donor's gift be used?	



Scan this to get a copy of the *New Donor Welcome Series* framework.

Your Messaging Timeline

Use the space below to decide exactly which emails you will send, when you will send them, who will be the sender on each one, and what the strategic focus is of each email. An example framework has been provided for you.

Time Delay	Corrn #	Sender	Email Topic	Strategic Focus
1 days	1		Thank You / Acknowledgement	Acknowledgement / Personal Connection
2 days	2		Welcome Email	The WHY you exist
6 days	3		Content Offer Email	Giving BACK to the donor
10 days	4		Survey Email	Learning the Donor's "Why"
15 days	5		Impact/Story Email	Connecting gift to impact
18 days	6		Recurring Ask	Gift Followup
21 days	7		Reply Back email	Deepening the relationship
23 days	8		Transition Email	What comes next?



Scan this to get a copy of the *New Donor Welcome Series* framework.



Your Messaging Timeline

Use the space below to decide exactly which emails you will send, who will be the sender on each one, and what the strategic focus framework has been provided for you.

This timeline will help you plan exactly which emails you'll send at what times.

Time Delay	Comm #	Sender	Email Topic	Strategic Focus
1 days	1		Thank You / Acknowledgement	Acknowledgement / Personal Connection
2 days	2		Welcome Email	The WHY you exist
6 days	3		Content Offer Email	Giving BACK to the donor
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18 days	6		Recurring Ask	Gift Followup
21 days	7		Reply Back email	Deepening the relationship
23 days	8		Transition Email	Gift Followup



Scan this to get a copy of the *New Donor Welcome Series* framework.





10 Minutes

ACTIVITY

Begin filling out the New Donor Welcome Series Framework worksheet.



New Donor Welcome Series Framework

The purpose of the New Donor Welcome Series framework is to help you think through all the details you'll need to address in your email and copywriting. These questions won't write your copy for you, but they should bring to mind all the key details that you'll need to write about and include as you develop your New Donor Welcome Series.

Key Questions

Step 1: Outline the process

What specific initiatives are you planning to generate new donors?

What are the primary goals you want to achieve to give?

Step 2: Outline the donor experience

What problems has the donor solved?

How has the donor benefited?

How will the donor benefit from your organization?

What outcomes will the donor see?

Who will benefit from the donor's gift?

Why should the donor give? What experience will they have through that decision?

Step 3: Bring the donor on board

How can the donor be reassured that their gift was a good decision?

What initiatives should the donor know about?

Step 4: Develop a Personal Connection

Are there specific members of the team that the donor should connect with?

Is there a reply device or survey to learn more about what the donor cares about?

Will there be a personal phone call or voicemail?

Other Questions: Follow Ups from a Donation

Is there a recurring ask?

Is there an employer match?

Is there a "free gift" available?



Email Platforms

Minimum Requirements to Setup an
Automated New Donor Welcome Series

Email Platforms

Minimum Requirements

Trigger-based Automations • Ability to Personalize Emails Based on the Contact Record • Receive New Donor Data from Your CRM (via native or 3rd-party integration) • No Limits on Number of Emails in an Automation



Standard or Premium Plan



Professional or Higher Plan

Data

Data Needs for Triggering Your Campaign

Trigger

(Enroll if...)

Suppressions

(Do Not Enroll If...)

Action

(i.e. Send this email)

Delay

(Wait for...)

Trigger
(Enroll if...)

Suppressions
(Do Not Enroll If...)

Action
(i.e. Send this email)

Delay
(Wait for...)

Who do you want to enroll?

A typical New Donor Welcome Series is sent to new online donors starting after the desired launch date.

Data Needs:

First Gift Date • Donor Type (Online Vs Offline)

Trigger

(Enroll if...)

Suppressions

(Do Not Enroll If...)

Action

(i.e. Send this email)

Delay

(Wait for...)

Who do you want to suppress?

Common suppressions include:

Offline Donors • Mid/Major Donors (*if you already have dedicated communications*) • Board Members • New Imports • Universal Suppression Flag

Trigger

(Enroll if...)

Suppressions

(Do Not Enroll If...)

Action

(i.e. Send this email)

Delay

(Wait for...)

What personalization data do you need for your copy?

Common copy personalizations include:
First Name • Gift Amount • Gift Date

Audiences

Suppressions, Exclusions, and Versioning

One Time VS Recurring Donors

One-Time Donors

Send them the “Monthly Donation” appeal in Email 6.

Recurring Donors

Ask them for an additional one-time donation in Email 6 instead.

Mids and Majors

Recommendation

Your main goal is to keep these donors **subscribed** and **engaged**.

Consider limiting the amount of content offers, removing instant donation pages from their content-offer funnels, and removing the additional donation ask email.

Other Audiences

Recommendation

Consider how / if you want to communicate with or version your emails for the following common audience segments:

Event attendees • Volunteers • eCommerce Purchasers • Peer-to-Peer Campaign Donors • Program Beneficiaries

Other Notes

and Considerations for Your Campaign

Other Considerations

- **Send Times**

If possible, customize the send time of your campaign to send during working hours only (*6am to 6pm*).

- **Tracking**

Ensure that all your links use proper UTM Tracking, and a single UTM Campaign name to track all web analytics from the welcome series.

- **Don't Set It and Forget It!**

Check on your campaign at least every 6 months to ensure it's running as intended and the content is still relevant.

- **Manual Import/Export**

If you can't automate your new donor data into your email tool, make sure you are manually importing data weekly at a minimum.



10 Minutes

ACTIVITY

Complete your New Donor Welcome Series “Database & Technology Assessment.”

The screenshot shows a Google Sheet with two sections: 'Email Platform Requirements' and 'Data Requirements'. Each section has a table with columns for 'Question', 'Answer', and 'Anything specific to note?'. The 'Email Platform Requirements' section contains five questions about email marketing capabilities. The 'Data Requirements' section contains five questions about CRM data integration.

Question	Answer	Anything specific to note?
Do you currently have an email marketing platform for sending newsletters, appeals, etc?		
Does your platform allow you to send emails automatically based on a user's action?		
Can you personalize the copy in your emails based on contact record information?		
Do you currently have the means to push CRM data into your email platform automatically?		
Does your platform allow you to send at least 5 emails within a single automation campaign?		

Question	Answer	Anything specific to note?
Are you storing the first gift date of a new donor in your CRM?		
Are you flagging the channel by which a new donor gave? (Online or Offline)		
Do you automatically flag mid and major donors in your CRM based on their first gift?		
Are you able to identify new donors created by an Impact? (For potential major donors)		
Do you have a "Universal Suppressor" flag or list of contacts that do not want to be contacted?		
Are you passing the donor's first and last name to your email marketing platform?		
Are you passing the donor's most recent gift amount to your email platform?		
Are you passing the donor's most recent gift date to your email platform?		



GROUP SHARE

Any surprises or challenges to implementation that you've discovered?

Homework



Level Up Homework | Month 8, New Donor Welcome Series Framework

Your homework this month is to finish planning your New Donor Welcome Series. Complete the New Donor Welcome Series framework and share it with us using form below. This should serve as a handy guide while you work to implement this critical donor retention initiative.

When you're finished, share what you worked on in Slack!

The name, email, and photo associated with your Google account will be recorded when you upload files and submit this form

* Indicates required question

Email *

Your email

Save your worksheet as a PDF or .doc and upload it here. *

Upload 1 supported file: PDF, document, or image. Max 10 MB.

 Add file

Submit



Instructions

1. Finish filling out the New Donor Welcome Series framework.
2. Share your outline with us using the Google Form.

Let's Keep in Touch!



Nathan Hill
Vice President of Training
Avid

nathan@avidai.com



Nathan Hill
[linkedin.com/in/nathan-peter-hill/](https://www.linkedin.com/in/nathan-peter-hill/)




Meet Your New NextAfter Trainer



Ardee Coolidge
Senior Optimization Director
NextAfter

Dive Deeper



The New Donor Welcome Series

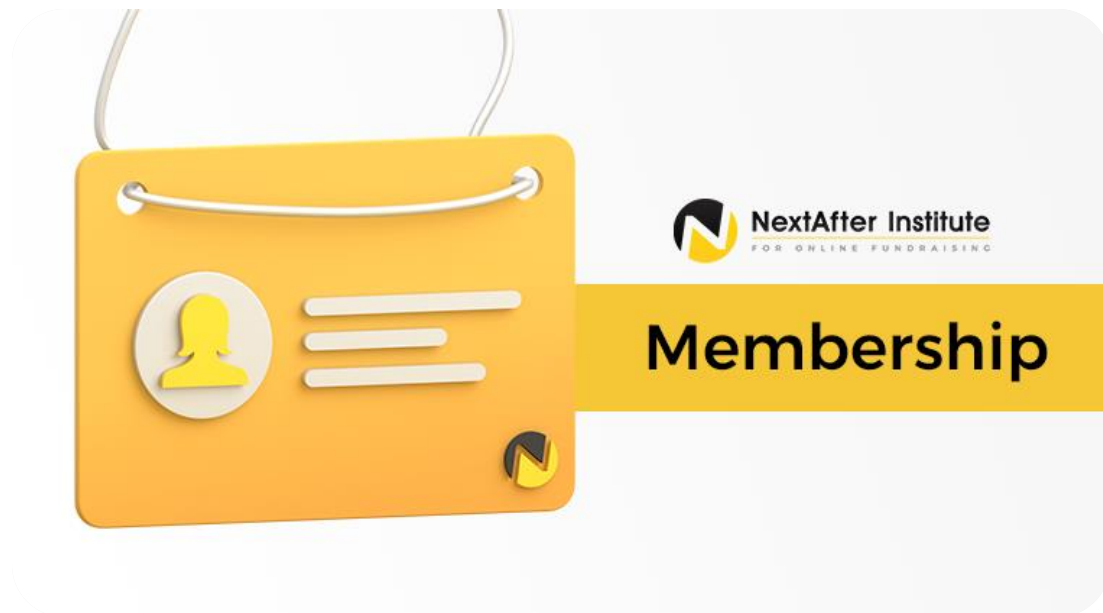
\$299.00

New Donor Welcome Series

In this 5-session course, you will discover a proven framework for building an effective new donor welcome series. You'll dig in to how to build the...

16 Lessons

Included in your NextAfter Institute membership!



<https://nextafter.com/level-up-membership>

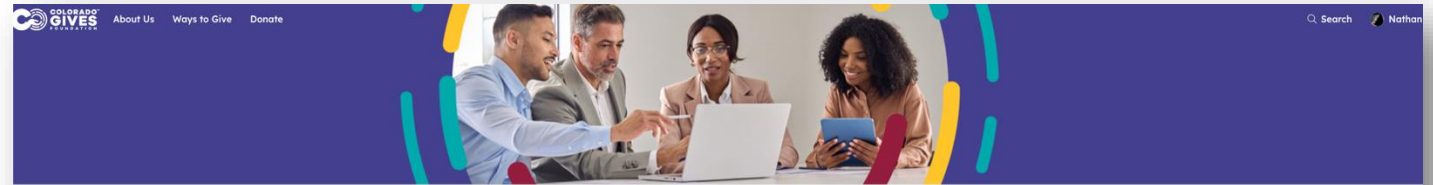
Dive Deeper with Digital Fundraising Courses

from the NextAfter Institute





Level Up Resources



Level Up Digital Fundraising Resources

Made possible by Schlessman Family Foundation

Onboarding Resources

As part of the Level Up program, we encourage your team to watch these instructional videos for utilizing this giving platform year-round. Explore the complete ColoradoGives.org digital fundraising webinar library for comprehensive guidance.

Still have questions? Explore our [support FAQs](#) for additional information.

ColoradoGives.org |
The Basics



ColoradoGives.org |
Beyond The Basics



ColoradoGives.org |
Embedable Donation Forms 101



Fundraising Strategy Courses

NextAfter Institute™

Participants at NextAfter Institute™ will facilitate monthly one-hour webinars designed to elevate your nonprofit's digital fundraising strategy. Through these sessions, you will learn practical takeaways and actionable insights that you can apply right away to enhance your fundraising efforts.

NextAfter™ Training Webinars

If Level Up, all organizational admins will be automatically enrolled via Zoom for these webinars. No further action is needed for registration.

Level Up & NextAfter™ Orientation



September 11 | WEBINAR 1 | Goals & Metrics: Your Data-Driven Guide to Colorado Gives Day 2024

September 18 | WEBINAR 2 | Crafting Compelling Appeals: Mastering the Art of Value Propositions

September 25 | MILESTONE | Copywriting Courses 1.0 & 2.0 Begin

September 25 | WEBINAR 3 | Inbox Impact: Defining Your Colorado Gives Day Email Strategy

October 23 | WEBINAR 4 | Strategic Countdown: Mapping Your Year-End Campaign Strategy

November 1 | MILESTONE | Early Giving Begins for Colorado Gives Day 2024!

November 27 | WEBINAR 5 | Click to Give: Optimizing Your Donation Page for Colorado Gives Day

Questions?



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2 Pinned Level Up Program Reso... +

<https://outlook.office365.com/book/ConnectwithJordanBrown@coloradogives.org/> Thursday, July 18th ▾ (edited)

1 reply 4 days ago

Pinned by Jordan Brown

Jordan Brown 4:03 PM

Please note the updates to the Level UP Copywriting Course schedule to provide participating nonprofits more details: <https://www.coloradogives.org/p/nonprofits/LevelUpYR2-Resources>

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Copywriting Course

Presented by Institute for Sustainable Philanthropy™

Copywriting 1.0 (First-Year) Participants: At the end of this course, each staff member will receive a Certificate in Fundraising Copywriting. This will allow us to apply Philanthropic Psychology to your staff copywriting campaign content. You will have the opportunity to significantly enhance both immediate contributions and donor lifetime value.	Copywriting 2.0 (Returning) Participants: This advanced Copywriting 2.0 Course is tailored for organizations that have completed the Copywriting 1.0 Course. It serves as a capacity-building workshop aimed at embedding philanthropic psychology principles throughout your entire organization.
Copywriting Course 1.0 Program Details: This course is a four-module, four-week boot camp, delivered entirely online. You will have 2 main staff participant completion and become certified through the course. Please plan to commit to 5 hours per week to complete readings, listen to brief lectures, and complete assignments. This virtual, learn at your own pace course, begins on: ✓ Invited to Canvas Mid-August 2024 ✓ Course Access Begins September 3, 2024 ✓ Final Assignment Submitted Mid-October ✓ Colorado Gives Day is Nov 4 - Dec 30, 2024	Copywriting 2.0 Program Details: This course offers 3 x half-day virtual training sessions with breakfast for Sustainable Philanthropy. This virtual, multi-team member workshop begins on: ✓ September 13, 2024 @ 9:00 AM - 12:30 PM ✓ September 27, 2024 @ 9:00 AM - 12:30 PM ✓ October 4, 2024 @ 9:00 AM - 12:30 PM Zoom invites will be sent directly to participating nonprofits in August 2024. Please attempt to include at least a staff to members per participating nonprofit. Staff members attend for workshops to read the material, watch the recordings. • Consider inviting from your team: CEO, C-suite director of communications, C-suite director of programs and the Copywriting 1.0 graduate. • Please send all communication messages per participating nonprofit to: Support@coloradogives.org by July 31, 2024.

ColoradoGives.org

Level Up Your Digital Fundraising

LEVEL UP will help organizations that use Colorado Gives fundraising tool make the most out of the Colorado Gives features like CRM, application integration, text-to-give and more.

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