New Donor Welcome Packet
Checklist & Toolkit

giant squid group
Your New Donor Welcome Packet

Your new donor welcome packet keeps donors involved and engaged after they’ve made their first gift and gives you an opportunity to strengthen your relationship with them, converting them into long-time supporters.

You can customize your new donor welcome packet as much or as little as you’d like, but here’s one way to get started.

What to include in your new donor welcome packet

- **WELCOME LETTER**
  Your welcome letter should be a heartfelt, conversational letter from your Executive Director or Board Chair detailing why and how a donor’s gift will be used and the impact it will have.

- **CONSTITUENT STORY**
  Bring your work to life by sharing a story about a person you helped or a project you completed. A short story, complete with photos, gives new donors a real opportunity to connect with your work.

- **ORGANIZATIONAL OVERVIEW**
  If a new donor gave at an event or because a friend asked, they might not fully understand your mission and work. A one-page fact sheet gives them the opportunity to learn more about what you do.

- **INVITATION TO CONNECT**
  Include an invitation to connect with your organization every step of the way. Your email, phone number, and social media links should be included often so donors know who to reach out to if and when they have questions.
Welcome Letter

Your welcome letter should be a conversational, heartfelt letter about the impact of your work and why the support of your donors is so critical.

This doesn’t have to be length: a sincere one-page letter with a hand-written thank you note goes a long way. You can also send your welcome letter digitally as a PDF or as a postcard.

- **INTRODUCTION AND THANK YOU**
  Open your letter by reiterating your gratitude for your new donor's investment in your organization, and introduce yourself.

- **MISSION AND WORK**
  Remind donors what you do and why it’s important. Share a brief story about your work (one or two sentences is fine) and remind them how their support that makes it all possible.

- **GOALS AND GROWTH**
  Now is a good time to remind donors that you’ll need their support again in the future. What are your strategic goals for the year, and how will their support help you reach them?

- **HOW YOU’LL STAY IN TOUCH**
  Remind donors that their relationship with you is just starting! Share how you’ll follow up - newsletters, events, invitations to site visits, and more - and then make sure to reach out to them as promised.

- **SAY THANK YOU**
  Say thank you again! Include your email and phone number, and a direct invitation to sit down over coffee or chat on the phone so you can say thank you in person and share more about your work.

If you want to keep your Welcome Packet simple, consider a postcard with a welcome letter. Short and sweet, but still effective!
Constituent Story

Bring your work to life by telling a real story about a person you helped or a project you completed. A one to two page story, complete with photos, will give new donors a real opportunity to connect with your work.

- **GATHER YOUR STORIES**
  Get a compelling story about the work you’ve recently done. Perhaps it’s a narrative about one of the constituents with whom you work, or the success of a new program.

- **BE DONOR-CENTERED IN YOUR STORYTELLING**
  As you are drafting your story into a narrative to share with your donors, remember that the focus should be on how the donor has helped your organization make this positive impact and on the success of your constituents. Avoid platitudes about how great your org is, and stick to the heartwarming success stories.

- **MAKE YOUR STORY EASY TO READ**
  This should be a one-page document that’s well-designed, eye-catching, and easy to skim. Work with a graphic designer or use a site like Canva.com to create an at-a-glance success story.

- **USE A PHOTO**
  It’s always wonderful to invest in photography of your programs. Get high-quality (and high-resolution) shots of your work in action. This isn’t the time for smartphone photography, so if a professional photographer isn’t in the cards right now, consider stock photography instead.
Organizational Overview

If a new donor gave at an event, or because a friend asked, or even because they fell in love with your work, they might still not fully understand what exactly you do. Your organizational fact sheet highlights your mission, program, and impact so donors can learn exactly who you are - and why they should keep supporting you.

- INCLUDE BASIC INFORMATION
  Your organizational overview should contain the key information about who you are and what you do, including:
  - Your mission statement.
  - A short summary of your key programs.
  - Who you serve, and why they need your help.
  - How new donors can get involved as volunteers, donors, or leaders.
  - Who to contact with questions, including email, phone, and website.

- KEEP IT EVERGREEN
  While you’ll want to update your organizational overview annually to make sure all the information is accurate, it’s not a document that should need frequent editing. Avoid cluttering it with time-sensitive events or one-off programs. Instead, stick to the core of who you are, and what you do.

- MAKE IT EASY TO READ
  Like with Your constituent story, your organizational overview should be visually appealing, skimmable, and easy to read. Since this can be used beyond just your new donor welcome packet, it’s worth investing the time and resources to create something professional and eye-catching.
I can’t wait to see your completed new donor welcome packet!

**WANT MORE HELP?**
Email me your New Donor Welcome Packet for a free 30-minute assessment of how you can really wow your donors.

**WANT TO SPREAD THE LOVE?**
Email me your New Donor Welcome Packet and how you’re using it, and I’ll share it on the Giant Squid Group blog.

**NEED DESIGN HELP?**
Check out canva.com for a great (free) design tool with tons of templates. If that’s not enough, or you want to hand the project off, email me for a quote and we’ll work on your new donor welcome packet together.

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