

## **Donor and Volunteer Satisfaction and Trust Survey or Accountability & Philanthropy Study or Survey©**

*“Customer Service is the New Marketing and Donor Retention is the New Acquisition.”*

*How happy your donor base is with your institution is key to long-term success and viral marketing. Trust is at the heart of your relationships with your donors. Feeling valued and appreciated strengthens a relationship. Knowing that their gifts of time, talent, treasure and contacts made a difference leads to retention and increased giving.*

*Understanding your donors and volunteers’ levels of trust and satisfaction, therefore, is important. It informs your fund development and stewardship plans, helps you tailor communications, lets you brag on your website, social media and in publications, offers quotes that serve as third party endorsements. These surveys are also a powerful engagement opportunity.*

### **Survey Uses & Guidelines**

- Have the study commissioned by a board committee – the Stewardship Committee; the Development Committee; the Executive Committee
  - Tailor the questions and the length of the survey to your institutional needs, issues you are facing and new initiatives you are testing.
  
- This survey can be used in many ways:
  - **In segments**, for example, new donors, re-acquired donors, donors who increased their gifts, donors over \$100/\$500/\$1,000, or all donors
  - **Delivery method**, for example, online, phone, email, email with phone follow-up, snail mail. Achieve a statistically significant random sample but also conduct some in-person with your Critical Few!
  - **Timing**, for example, for a set period of months, rolling forward for six months or a year, annually or continually
  
- Develop a plan that makes sense for your institution and is “doable” with your staff and financial resources:
  - How do you want to use this tool – primarily to engage donors? Mostly to “get in the door” with new names gathered through electronic screening or as a way to test the effectiveness of new stewardship initiatives?
  - Some institutions focus on in-person visits with only their top donors because they use it as an engagement tool; others use it to make “first contact” online, by mail and phone with newly screened names; others send it widely to all donors to gather statistical information on their program’s effectiveness.
  - You can use a “draft” of the survey to engage top donors seeking their input on the questions. You can involve donors in surveying others as part of an engagement strategy.

- **You can use it in all these ways and others we've not considered.**
- Identify ways to collect and analyze the data you gather. **Then, report to your donors on the results and how you intend to use the information!**
  - **For example, (89% of surveyed donors report they would give again... 94% consider us a great philanthropic investment...).** What terrific endorsements to gather!
- In advance, send a letter signed by the committee chair (or a person with leverage with the donor) asking for the donor's participation.
  - Explain why you are conducting this survey
  - Why you've chosen him or her or them to participate (*as a leader in our community*) (*as a longtime supporter*) (*as one of our most generous supporters*)
  - What you plan to do with the information
  - State who will be in touch, by when and how much time you anticipate needing, if you are conducting it in person or over the phone
  - Follow-up
  - **Like all other parts of building a relationship with our donors, connecting personally (in person or on a Zoom-like visit) will get the best results**

## Sample Questions

### GIFTS TO YOUR INSTITUTION

- 1) Over (your lifetime) (the last five years) (the last year) you have generously helped us (state intended purpose of gifts of time and money); how did those gifts and involvements come about?
- 2) Of all the initiatives (purposes) (outcomes) your gifts help support, which are the most important to you? How so? (or be specific about their gifts and then ask the question)
  - *List your core areas as a prompt*
  - *Mention specifics included in your leadership annual giving materials*
- 3) To what degree do you feel your gifts of (money and/or time, expertise, talent, connections) to us have made a difference (to our state, country, world) (in achieving our mission, vision)?
  - Great difference
  - Moderate difference
  - Little difference
 How so?
- 4) How have we demonstrated that difference to you?
- 5) To what extent have you found our communications (demonstrations of impact) (specific stewardship pieces that you mention, bring with you) to you: (very, somewhat, not very)
  - Helpful
  - Accurate
  - Illuminating
  - Responsible
  - Meaningful

### PERSONAL PHILANTHROPY & MOTIVATION

- 6) What are some of the guiding principles you use to make your philanthropic decisions?

- 7) In what ways are (your spouses') (your children's) (the members of your decision-making group's) guiding principles the same and in what ways are they different? How does that impact your philanthropic decisions?
- 8) To what extent does our mission (vision, values) dovetail with your beliefs?
  - Very much
  - Somewhat
  - Not very much
 How so?
- 9) As you consider giving and volunteering, is there a common thread or are there shared values among them?
  - Yes
  - No
  - Somewhat
 Can you say more about that?
- 10) What do you expect from the charitable institutions in which you invest?
- 11) To what extent are we meeting those expectations?
  - Very well
  - Moderately well
  - Not very well
  - How could we enhance that?

*ENGAGEMENT & INVOLVEMENT PREFERENCES*

- 12) What is your philosophy about volunteering?
- 13) How do you feel about the boards on which you serve? (How satisfied are you with your service to our institution (our board))?
  - Very satisfied
  - Moderately satisfied
  - Not very satisfied
 How so?
- 14) To what degree do you feel valued and appreciated for your service (to our institution, to (the organizations they mention))?

*TRUST*

- 15) How strongly do you trust our institution to manage the money you invest wisely?
  - Very strong
  - Somewhat
  - Not very strong
- 16) Transparency and accountability are important to us. How strongly do you believe we are fiscally transparent and accountable?
  - Very strong
  - Somewhat
  - Not very strong
- 17) Are we a trusted and trustworthy institution in the community (state, country)?
  - Alumni (yes, no, somewhat)
  - Parents (yes, no, somewhat)
  - Faculty (yes, no, somewhat)
  - Staff (yes, no, somewhat)

- Donors in general (yes, no, somewhat)
- Personally (yes, no, somewhat)

How so? Why is that the case?

*OVERALL IMPRESSIONS*

18) How well do you know members of our board and our (CEO, Head, President, Chancellor, Dean, senior staff)?

- Very well
- Somewhat
- Not well

If You know them very or somewhat well, what are your impressions?

If not known, what impact would knowing our leadership have on your relationship with us?

19) On a scale of one to five with five being very satisfied and one being not at all satisfied, how would you rank your level of satisfaction with your giving to our institution? (Satisfaction with volunteering) (Satisfaction with your level of engagement)?

20) Is there anything that we have not discussed that would increase your level of satisfaction as a donor to our institution?

*“Thank you very much for your time. We’ll get back to you with the overall results of our donor satisfaction study and seek your ideas about how we can continue to improve our score with all of our donors.”*

***If you would like help in developing an excellent stewardship program, or to learn more about stewardship, board transformation, capacity building, or strengthening or any other aspect of volunteer management and/or institutional advancement, contact us at 914 428 7777 or [mail@theosbornegroup.com](mailto:mail@theosbornegroup.com)***

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