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**How's my driving?  
Call 1-800-FEEDBACK**

Erin Moyer  
Executive Director of Stewardship and Gift & Donor Services  
University of Rochester

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**Overview**

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- Why? – know your objectives
- Who? – know your stakeholders
- What? – identify what method is right for you
- How? – make it effective

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**And the survey says.....**

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"Get the facts first, and then distort them as you please." ~Mark Twain

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**Quick Poll**

- How many of you have “something” you want to get feedback on or evaluate now?
- Have you done an evaluation or survey in the last year?
  - How many of you acted upon what you learned?
- How many of you have direct interaction with Donors?
  - If not, how many of your offices or someone in your office have direct interaction with the donors?

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**Why evaluate?**

- Improve quality
- Increase accountability and awareness
- Prioritize financial and human resources
- Measure programmatic effectiveness

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**Why evaluations are often on the backburner**

- We know everything
- Fear of evaluation impact
- We won't use the results...we never have
- No one is asking for it
- It takes too much time/too many resources
- Just one more thing to do

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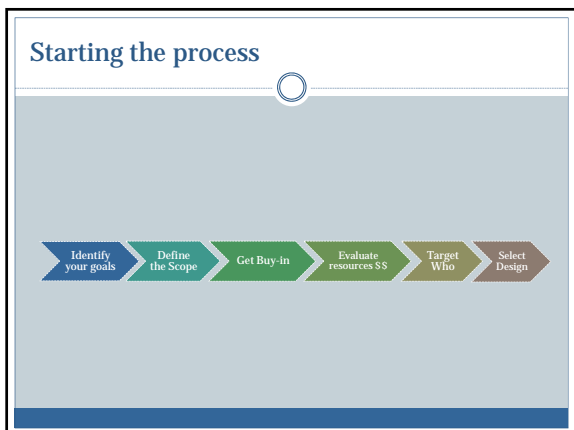
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### Starting the process

- **Determine your goals and scope ....3 easy questions**
  - Why are you doing this?
  - Who do you want to learn from?
  - What will you do with the results?

*"Collecting data is like collecting garbage: you must know in advance what you are going to do with the stuff before you collect it." ~ Mark Twain*



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### Get Buy-in

- **Support is key to success**
  - Organizational buy-in is critical to success
  - Check your budget...
  - Understand where this fits in to organizational and program priorities
- **Engage your stakeholders**
  - Make sure those that need to know....know
    - ✦ Policy and politics
    - ✦ Work function

The more buy-in you get, the easier it will be to take action from the results.

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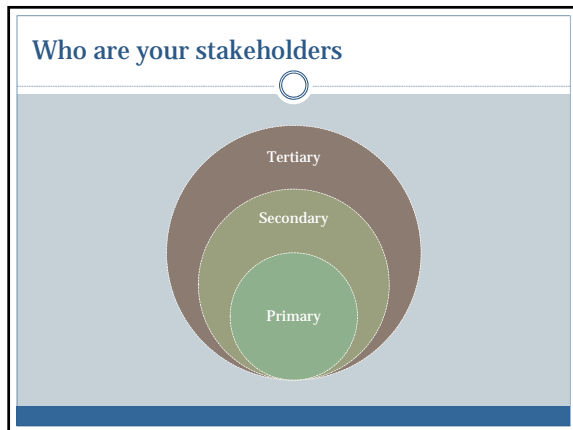
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### Evaluation Methods

- Documents and Records
- Surveys and Questionnaires
- Individual conversations
- Focus groups

*Don't automatically assume a traditional survey is the way to go*

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### Evaluation Methods

- Types
  - Post interaction/ immediate feedback
  - Face to face
  - Use assessment
- Delivery
  - E-methods:
    - × Email / Online/ Social media/ Pop-up window
  - Phone
  - Mail
    - × Surveys and comment cards
  - Face to face

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The Survey

- **Keep it....**

Easy Short Clear Neutral

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The Survey

- **Types of questions**
  - Free text....open ended
  - Multiple choice
  - Ranking Scales and Rating Scales
    - ✦ Great for examining attitudes, opinions, or knowledge

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The Survey

- **Tips on question construction**

- Avoid two questions in one
- Give an option to opt-out of a question
- Avoid leading questions – don't influence the response...just ask the question
- Avoid jargon...don't assume they know what you are talking about
- Its not a test...don't test their intelligence – just ask the question
- Keep it honest

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### The Survey

- **Layout**
  - Introduction and instructions
  - Carefully consider question order and design elements
  - Say....THANK YOU!



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### The Focus Group

- **Provides detailed and nuanced feedback**
- **Good method for gaining a better understanding**
  - Attitudes
  - Opinions
  - Perceptions
  - Assumptions
- **Pitfalls of focus groups**
  - Group dynamics
  - Sensitivity and confidentiality
  - Moderator bias
  - Question design



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### Quick Poll check-in



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### Talk to your donors....

- **A golden opportunity**
- **Stop...Look....LISTEN**
  - Watch for facial cues
  - Passing the concern off on someone else
- **Keep the dialogue open**
  - What did you mean by xyz....



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### Talk to your donors

- **Ask your frontline**
- **Take advantage of every interaction**
  - Ask probing questions?
  - Give them permission to speak
  - Make sure they know you are open to listening and learning....

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### What comes next?



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graph LR; A[Analyze your data] --> B[Report findings]; B --> C[Create an implementation plan]; C --> D[Evaluate resources SS]; D --> E[Follow up]
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**Wrapping it up**

- Information is key...use it
- Prioritize improvements (big and small)
  - Your priorities may not be your customer's priorities
- Make a plan
- Report back to your stakeholders...including your respondents

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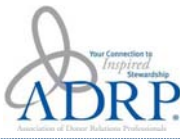
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**Questions?**

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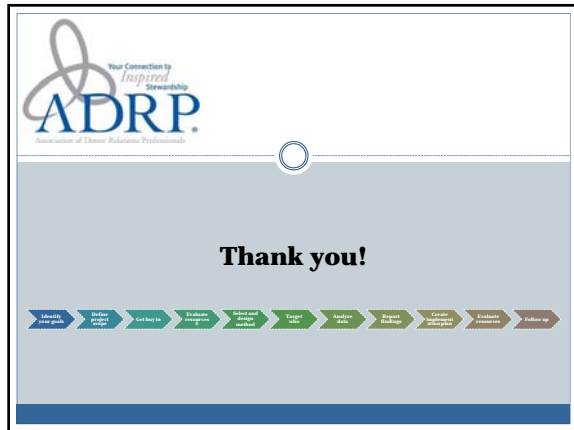
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