

QUESTIONNAIRE: EVALUATE YOUR DONOR RELATIONS

This survey is designed to help you evaluate your current donor relations program:

1. Have you written a personal thank you note to a donor in the past week?
 YES (1) NO (0)
2. Have you called a donor in the past week to say thank you?
 YES (1) NO (0)
3. Has your CEO/Executive Director called a donor in the past week to say thank you?
 YES (1) NO (0)
4. Has a member of your board called a donor in the past week to say thank you?
 BOARD CHAIR (2) OTHER BOARD MEMBER (1) NO (0)
5. Has anyone other than members of the development staff, the CEO/ED, or the board chair signed a thank you letter from your organization in the past week?
 YES (1) NO (0)
6. When your CEO/ED signs thanks you letters, how often are personal notes added to the letters?
 ALWAYS (2) SOMETIMES (1) SELDOM / NEVER (0)
7. How long after receiving a contribution is the respective thank you letter usually mailed?
 24 HOURS (3) 48 HOURS (2) 72 HOURS (1) 1 WEEK (0)
8. Do you have a special type of letter for first-time donors?
 YES (1) NO (0)
9. Do you have a special type of letter for those who have increased their gifts?
 YES (1) NO (0)
10. Do you have a special type of letter for second or third gifts in the same year?
 YES (1) NO (0)
11. Does your thank you letter include acknowledgment of receiving a matching gift form, if appropriate?
 YES (1) NO (0)

(continued)

12. When you receive a matching gift from a company or corporate foundation, do you let the donor know the match has been received?
 _____ YES (1) _____ NO (0)
13. Do you thank donors in more than one way for a gift?
 _____ YES (1) _____ NO (0)
14. Have you revised your standard acknowledgment/thank you letters in the past 30 days?
 _____ YES (1) _____ NO (0)
15. How often do you usually revise your standard acknowledgment/thank you letters?
 _____ MONTHLY OR MORE FREQUENTLY (3) _____ ANNUALLY (1)
 _____ QUARTERLY (2) _____ LESS FREQUENTLY THAN ANNUALLY (0)
16. Do you know what is required in the acknowledgment if the gift is more than \$250?
 _____ YES (1) _____ NO (0)
17. Do you develop stewardship plans for donors that indicate when a report on the impact of the gift will be given to the donor?
 _____ YES (1) _____ NO (0)
18. Are stewardship visits included in cultivation plans for major donors?
 _____ YES (1) _____ NO (0)
19. Do your board members participate in your acknowledgment, recognition, and/or stewardship activities?
 _____ YES (1) _____ NO (0)
20. If you have a planning session or a planning retreat for development staff, is donor relations (acknowledgment, recognition, and stewardship) included in your planning?
 _____ YES (1) _____ NO (0)

TOTAL SCORE _____

- | | |
|--|--|
| <input type="checkbox"/> EXCELLENT (25-28) | <input type="checkbox"/> FAIR (12-15) |
| <input type="checkbox"/> VERY GOOD (20- 24) | <input type="checkbox"/> NEEDS IMPROVEMENT (7-11) |
| <input type="checkbox"/> GOOD (16-19) | <input type="checkbox"/> NEEDS MUCH IMPROVEMENT (0-6) |

Adapted from Janet Hedrick's book, Effective Donor Relations