WHY SURVEY NOW?

It Pays to Ask

Agenda

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5 Survey Use Cases

#1 Donor Involvement
5 Survey Use Cases

#2 Gather Useful Data
Gather Donor Data
1. Donor Affinity
2. Estate Planning Stage
3. Donor Demographics

5 Survey Use Cases

#3 Solicit Stewardship Feedback

Thank you!

Organization Stewardship
1. Highlights strengths
2. Identifies areas for improvement
#4 Identify Bequests

Identify Bequests
1. Who's included you in their will?
2. What type of gift is it?
3. Is it split with multiple nonprofits?
5 Survey Use Cases

#5 Grow Your Pipeline

Strategically Grow Your Pipeline
1. Focus on best prospects
2. Target your marketing
3. Increases program RO1
4. Saves time

Setting Survey Objectives
Agreeing on clear objectives for what you want your survey to accomplish should always be the first step
Setting Survey Objectives

- Measure donor attitudes and obstacles prior to launching a campaign
- Measure donor receptiveness to future program innovation or direction
- Gather donor demographics and affinity prior to starting a planned giving program
- Freshen a laggard program
- Build an ongoing pipeline of qualified leads for cultivation

Who Should I Survey?

Who to Survey?
Database Preparation
Planned Giving Prospecting Tools

Narrow Your Focus
Who Should I Survey?

Creating Your Survey
#1 Making Your Case for Feedback
- Thank them for their support
- Share with them why their feedback is important and valued
- Reaffirm the importance of their 'privacy'
- Make it 'time-bound' (Please respond by...)

#2 Ask Meaningful Questions
- A new way for doing donor 'discovery'
- Similar to face-to-face conversation, ask questions that allow you to learn what donors consider important regarding your organization, its mission and operation
- It's about the donor's interests/passions, not the organizations

#3 Emphasize Lasting Impact
- Ask questions that focus on permanence
- Reflection on the donor's life story
- Begin with input on what is most important about your organization's work
- Incorporate legacy questions
- Use language that emphasizes permanence
BUILDING SUCCESSFUL SURVEYS

#4 Ask Questions That Bring to Mind Life and Family Connections

- Bring to mind the life relationship with the organization and the cause
- EXAMPLE: "Was there anyone in your life who was particularly influential in shaping your views on conservation?"

BUILDING SUCCESSFUL SURVEYS

#5 Be Mindful of Sequencing

- Use this as an opportunity to walk them through their 'life story'
  - Why do they care about you?
  - How have they been connected to you?
  - How are they involved with you now?
  - What do they see for the future?
- End with collecting demographics

Tips & Tricks

Selecting Survey Format
Use Print Surveys if...

Use Digital Surveys if...

Tips & Tricks

Avoiding Survey Fatigue

Survey fatigue is a problem that occurs when survey respondents become bored, tired, or uninterested in the survey and begin to perform at a substandard level.
Tips & Tricks

Avoiding Common Survey Bias

- Wording of Questions
- Question Type and Design
- Survey Structure
- Survey Style or Coloring

Survey Follow-up
Next Steps
Pick Up the Phone
Upload Your Results
Check Your Changes!

Next Steps
Schedule a Follow-up
Help Where You Can

Next Steps
Make a Determination
Send a Note