

***Sample Donor Satisfaction Survey or  
Accountability and Philanthropy Study or Survey®  
A Resource of The Osborne Group, Inc.***

*Stewardship is one of the most important components of a development operation. For today's donors, accountability, impact, and outcomes are huge giving motivators. The promise of outstanding stewardship results in many new gifts. The delivery on the promise by sharing the significance, impact, and joy of gifts results in donor retention and increased giving.*

*We are defining "stewardship" as far more than saying, "thank you," and providing recognition. Stewardship is spending gift dollars as agreed, managing them prudently, saying thank you within 24 to 72 hours of receiving the gift, providing appropriate recognition and then months after receiving the gift, and **creatively sharing the significance and impact of the gift**, engendering joy in the donor.*

***We are also speaking about stewardship beyond endowment gifts and scholarship events. In fact, every donor, including annual fund donors, should experience the difference their investments are making.***

### **Survey Guidelines**

- Consider having the study commissioned by a Board committee (Foundation Board, Dean's Advisory Board, Governing Board) – the Stewardship Committee; The Development Committee; The Executive Committee
- In advance, send a letter:
  - Signed by the committee chair (or a person with leverage with the donor)
  - Asking for the donor's participation
  - Explaining why you are conducting this survey (we know accountability and the return on philanthropic investments are very important to many of our donors; we want to hear your views on this important topic and improve our communications with our donors)
  - Why you've chosen him or her or them to participate (as a leader in our community) (as a long time supporter) (as one of our most generous supporters) and
  - What you plan to do with the information (compile, use to revamp, will share the results with you).
  - State who will be in touch and by when
  - State how much time you anticipate needing (40 to 50 minutes)
- Follow-up when you said you would (thank you right away; results by anticipated date)

### **Questions**

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. To what degree do you feel your gifts of (time and money) to us have made a difference (to our students, faculty, and alumni) (to the community you serve, or state, or region, or the country) (in achieving our mission)?
  - (Great difference) (Moderate difference), (Little difference) – how so?
3. How have we demonstrated that difference?
4. To what extent have you found our reports to you: (very, somewhat, not very)
  - Helpful
  - Accurate
  - Illuminating
  - Responsible
  - Meaningful
5. How could we enhance our efforts?
6. What are some of the guiding principals 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 principals the same and in what ways are they different? How does that influence your philanthropic decisions?
8. To what extent does our mission (vision, work) dovetail with your beliefs?
  - Very much, Somewhat, not very much
  - How so?
9. If you could pass along a lesson to our students, what would that be?
10. What do you expect from the charitable organizations in which you are involved?
11. To what extent are we meeting those expectations?
  - Very well, moderately well, not very well
  - How could we enhance that?
12. What do you value most about the impact education institutions achieve in our community (state, region, country)?
13. Of the organizations to which you give, which ones do the best jobs in sharing the significance and impact of your gifts? How so?
14. Of all the gifts you have given, which have given you the most joy? How so?
15. Where on your list of philanthropies are we? Is the list different for (your spouse) (your children) (the giving committee members)? In what ways?
16. What is your philosophy about volunteering?

17. 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?
18. 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?
19. As you consider giving and volunteering, is there a common thread or are there shared values among those you support?
- Yes, no, somewhat
  - How so
20. Please rank each of the following actions on a scale of one to five with five being exceptional, three being good, and one being needs work.
- Timeliness and appropriateness of thank you notes and receipt
  - Spending your gifts in the manner agreed
  - Managing donated funds prudently and effectively
  - Recognizing your contributions in appropriate public and private ways
  - Sharing with you the impact and outcomes resulting from your philanthropic investments
  - Connecting you with the recipients and beneficiaries of your philanthropy
21. 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 to learn more about using this survey, developing a stewardship committee, using a shorter version for phone interviews and even a shorter version for direct response donors and members, stewardship for major gifts donors or creating (or enhancing) a powerful stewardship program visit us at [www.theosbornegroup.com](http://www.theosbornegroup.com) or call us at 914 428-7777***

***The Osborne Group is a full service management, consulting, and training firm specializing in philanthropy, organizational management and opinion research.***