

## 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*