


# Survey Says...

KNOW YOUR DONORS - IT PAYS TO ASK



**STELTER**

---

---

---

---

---

---

---

---

---

---

**Presenter:**

## Nathan Stelter

Vice President, The Stelter Company



- Responsibilities include product development, strategic partnerships, marketing consultation, client services and corporate marketing
- Primary concentration is overseeing Stelter's consulting and marketing teams
- Assists Stelter's regional marketing consultants in the development of distinct marketing solutions that meet each nonprofit's unique planned giving needs
- Lecturer at national and regional industry meetings on gift planning marketing trends, relationship building skills, and cutting-edge donor and fundraising research
- Elected to the 2019 Board of Directors for the National Association of Charitable Gift Planners
- Current member of the Mid-Iowa Planned Giving Council
- Graduate of the University of Iowa with a B.B.A. degree in marketing

**STELTER**

---

---

---

---

---

---

---

---

---

---



# Survey Evolution

American Association for Public Opinion Research, 2011

**STELTER**

---

---

---

---

---

---

---

---

---

---

# 1930-1940 launch of popular surveys in the U.S.

Agencies: Nielsen, Gallup

STELTER

---

---

---

---

---

---

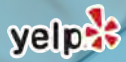
---

---

---

---

## TODAY'S SURVEYS



STELTER

---

---

---

---

---

---

---

---

---

---



STELTER

---

---

---

---

---

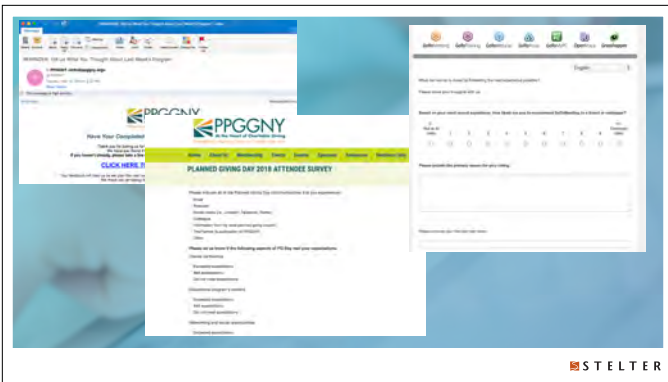
---

---

---

---

---



---

---

---

---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---



---

---

---

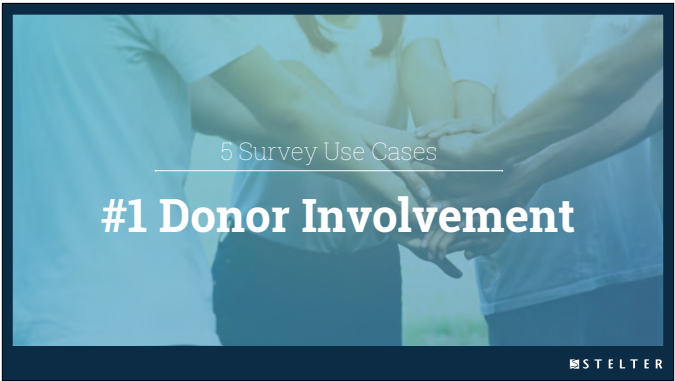
---

---

---

---

---



---

---

---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---

---

---



---

---

---

---

---

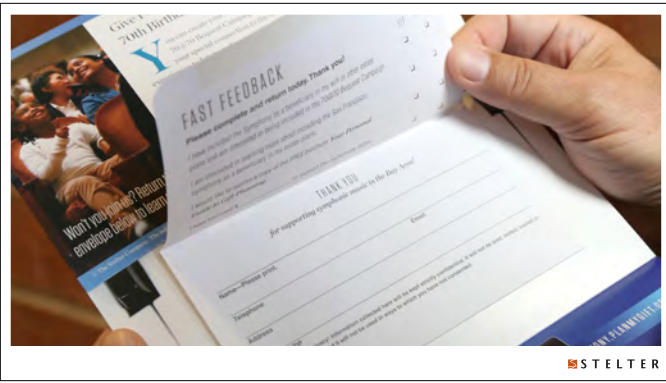
---

---

---

---

---



STELTER

---

---

---

---

---

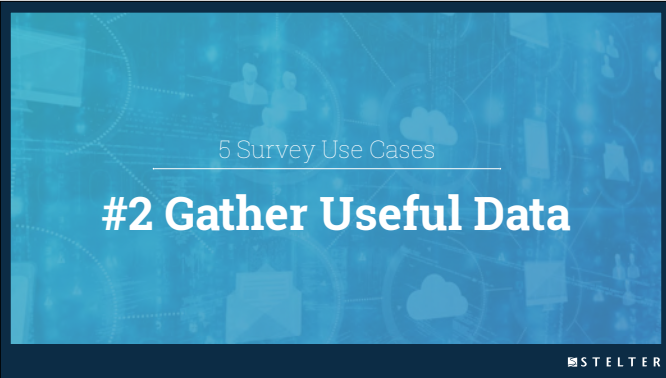
---

---

---

---

---



STELTER

---

---

---

---

---

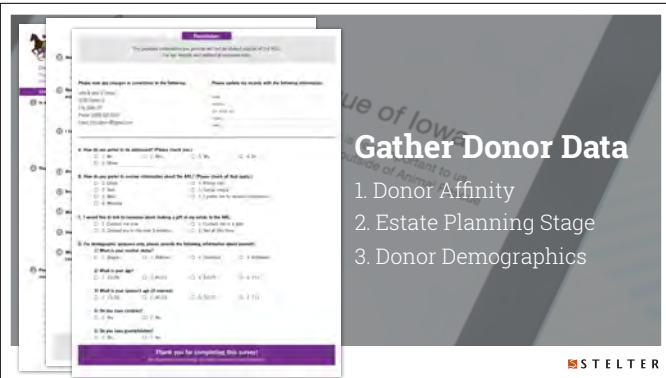
---

---

---

---

---



STELTER

---

---

---

---

---

---

---

---

---

---



---

---

---

---

---

---

---

---



---

---

---

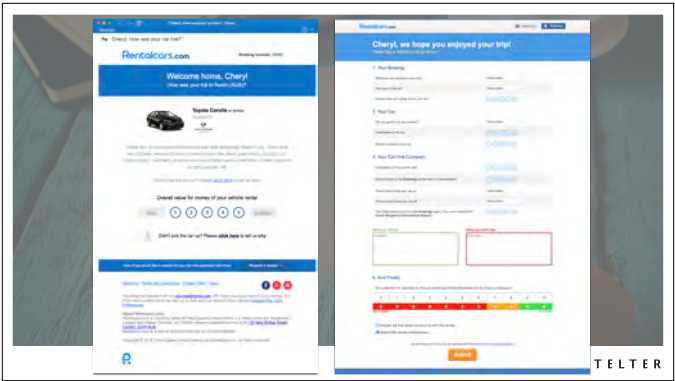
---

---

---

---

---



---

---

---

---

---

---

---

---







**Strategically Grow Your Pipeline**

1. Focus on best prospects
2. Target your marketing
3. Increases program ROI
4. Saves time



**STELTER**

---

---

---

---

---

---

---

---

---

---

Learning Objective #2



## Setting Survey Objectives

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

**STELTER**

---

---

---

---

---

---

---

---

---

---

### 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 lagging program
- Build an ongoing pipeline of qualified leads for cultivation

**STELTER**

---

---

---

---

---

---

---

---

---

---



# Survey Benchmarking

Benchmarking is a means of setting a baseline or standard that you can use to find where you need to improve, set goals and measure your performance over time.

Survey.monkey.com

STELTER

---

---

---

---

---

---

---

---

---

---

## BENCHMARKING

# Internal vs External

STELTER

---

---

---

---

---

---

---

---

---

---

## BENCHMARKING

### Setting Internal Benchmarks

- After you note your initial benchmark, set goals
- Send the same survey to donors meeting your initial criteria at regular intervals
- Once you send the survey again, compare that measurement against your baseline
- Readjust your expectations and goals every time you collect data. If you dip below your initial benchmark, its time to make changes

### Setting External Benchmarks

- Compare your performance against others in your nonprofit sector
- Nationally
- By region
- Use comparisons to set strategy
- Measure likelihood of future gift intentions

STELTER

---

---

---

---

---

---

---

---

---

---

# Who Should I Survey?

---

---

---

---

---

---

---

---



## Who to Survey?

Database Preparation

---

---

---

---

---

---

---

---

## Planned Giving Prospecting Tools



---

---

---

---

---

---

---

---

Narrow Your Focus

# Who Should I Survey?

STELTER

---

---

---

---

---

---

---

---



The Terminology

# Sample Size

the potential of bias in the program's survey results to reflect the views of the overall population

STELTER

---

---

---

---

---

---

---

---

# Example

Nonprofit "A" has a population size of 2,000 donors that have been identified as best prospects

They would like a minimum confidence level of 90% with no more than a 5% margin of error.

(If the survey were repeated 100 times, 90 times out of 100, the results will be the same with no more than a 5% deviation)

Sample size: 238 completed surveys = 11.9% response rate

STELTER

---

---

---

---

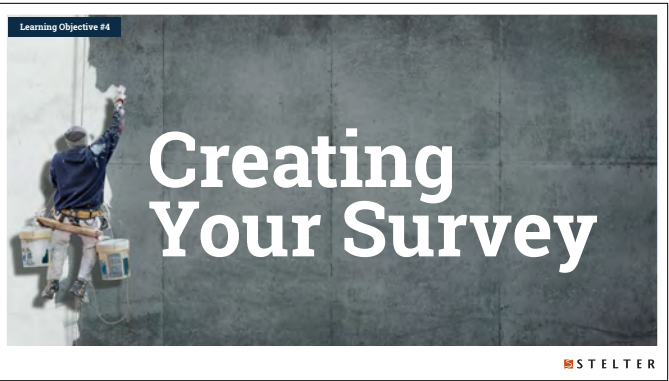
---

---

---

---

Learning Objective #4



# Creating Your Survey

STELTER

---

---

---

---

---

---

---

---



**BUILDING SUCCESSFUL SURVEYS**

## #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...)

Russell James, BI, Texas Tech University

STELTER

---

---

---

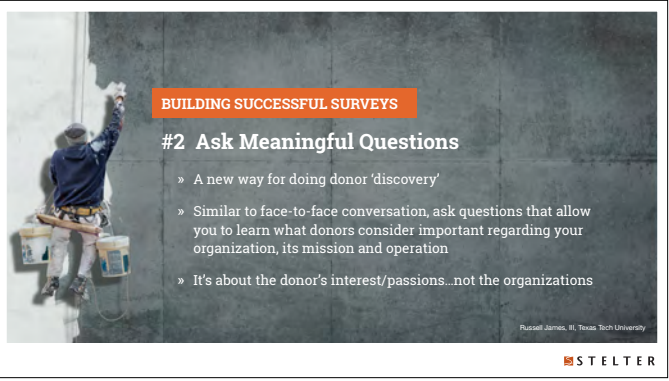
---

---

---

---

---



**BUILDING SUCCESSFUL SURVEYS**

## #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 interest/passions...not the organizations

Russell James, BI, Texas Tech University

STELTER

---

---

---

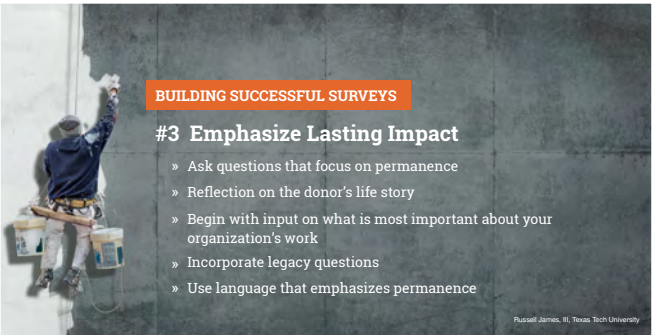
---

---

---

---

---



**BUILDING SUCCESSFUL SURVEYS**

### #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

Russell James, BI, Texas Tech University

**STELTER**

---

---

---

---

---

---

---

---

---

---



**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?"

Russell James, BI, Texas Tech University

**STELTER**

---

---

---

---

---

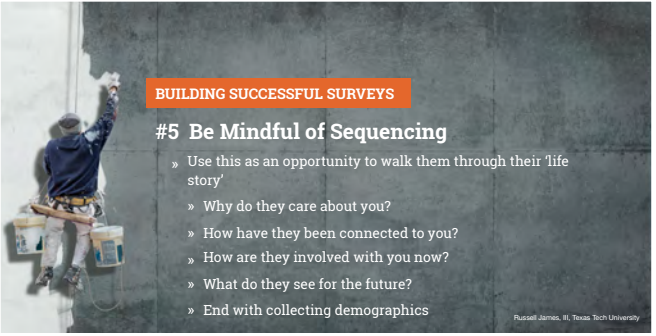
---

---

---

---

---



**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

Russell James, BI, Texas Tech University

**STELTER**

---

---

---

---

---

---

---

---

---

---

Tips & Tricks

# Selecting Survey Format

STELTER

---

---

---

---

---

---

---

---

---

---

Tips & Tricks

# Use Print Surveys if...

STELTER

---

---

---

---

---

---

---

---

---

---

Tips & Tricks

# Use Digital Surveys if...

STELTER

---

---

---

---

---

---

---

---

---

---



Tips & Tricks

# How Often Should I Survey My Donors?

STELTER

---

---

---

---

---

---

---

---

Donor Satisfaction   Annual Giving   Major Giving   Planned Giving

STELTER

---

---

---

---

---

---

---

---

Tips & Tricks

# Timing Considerations for Sending Surveys

STELTER

---

---

---

---

---

---

---

---

Tips & Tricks

# Avoiding Common Survey Bias

STELTER

---

---

---

---

---

---

---

---

---

---

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

2013 [studysurvey.com/blog/author/iams](http://studysurvey.com/blog/author/iams)

STELTER

---

---

---

---

---

---

---

---

---

---

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.

2016 National Research Center

STELTER

---

---

---

---

---

---

---

---

---

---

Learning Objective #8

# Survey Follow-up



STELTER

---

---

---

---

---

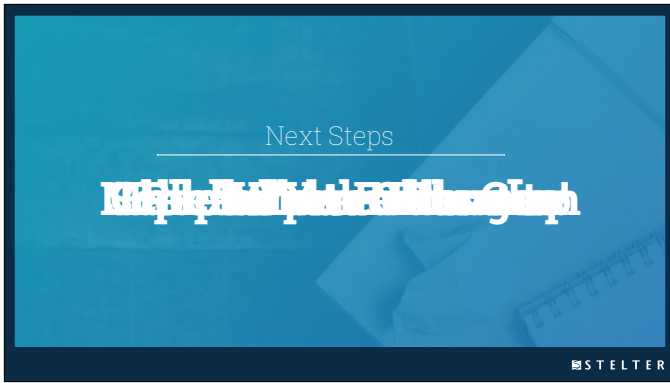
---

---

---

## Next Steps

# Write Follow-up Letters



STELTER

---

---

---

---

---

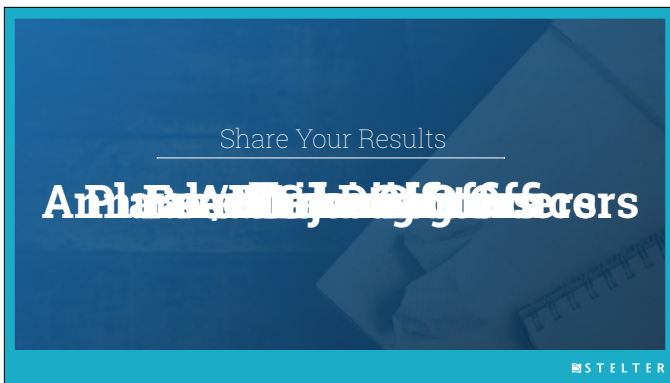
---

---

---

## Share Your Results

# Present Findings to Officers



STELTER

---

---

---

---

---

---

---

---

# Wrap Up

Learning Objective #1   Learning Objective #2   Learning Objective #3   Learning Objective #4   Learning Objective #5

Ideas of  
How to use  
Surveys

Identify  
Appropriate  
Objectives

Who You  
Should  
Survey

Best  
Practices  
for Creating  
a Survey

Next Steps

STELTER

---

---

---

---

---

---

---

---

---

---



## Questions?

**Nathan Stelter**

Vice President / [nathan.stelter@stelter.com](mailto:nathan.stelter@stelter.com)

STELTER

---

---

---

---

---

---

---

---

---

---

## Webinar Resources

In a few days you will receive an email letting you know that the recording and presentation slides are available to access.

[www.stelter.com/webinars](http://www.stelter.com/webinars)

STELTER

---

---

---

---

---

---

---

---

---

---

**Thank  
You!**



 **STELTER**

---

---

---

---

---

---

---

---

---