

Donor surveys are a fantastic way to cultivate donors, deepen relationships, and uncover planned giving prospects. Donor surveys provide you with good data by allowing your donors to feel heard and draw you to learn more about their giving habits. Here's a quick guide that can help you build stronger relationships with your donors, boost loyalty, and raise more money.

BEFORE WE GET STARTED...

- This document simply provides you a high level overview of donor surveys.
- Effective fundraisers use survey results to connect with each prospect to learn more about what they have shared.
- The "flow" of questions is important. Lead with engagement first.

PLEASE KEEP THESE IN MIND:

- Be upfront on the time that it will take to complete the survey.
- Be strategic and know your stakeholders. Will you be segmenting?
- What exactly do you want to learn?
- Use simple words and short sentences.



QUESTIONS FOR ENGAGEMENT:

- What aspect of (your organization's) mission is most important to you?
- In what ways do you interact with (your organization)?
- What is your preferred method of communication?
- Would you be interested in a tour of (your organization)?



QUESTIONS REGARDING PHILANTHROPY:

- Where does (your organization) rank relative to other organizations you support?
- Many people like to include charitable gifts in their will to support important causes in their life. Would you consider making such a gift to (your organization) to benefit future generations?

MORE QUESTIONS REGARDING PHILANTHROPY:

- Is there anyone in your life who has inspired your giving to (your organization)?

- Yes
 No

If Yes, we'd be honored to hear your story. Please share how this person has inspired your giving.

LAST THING...

- Don't forget to update your CRM / Donor Database with the information that you receive.
- Honor your donor's requests.
- Follow-up with a thank you, call, handwritten note to address their time and/or concerns.

