

Showing some donor love *through surveys!*

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In today's session:

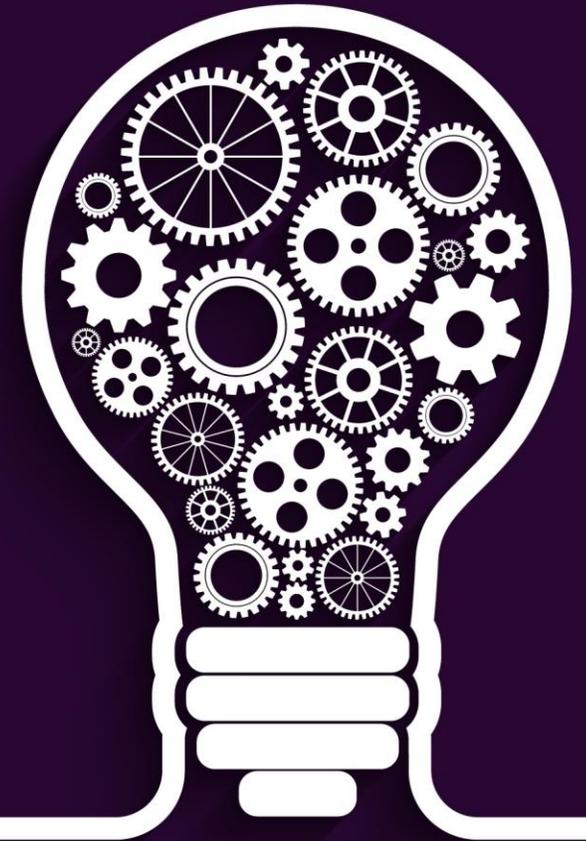
- Key elements of an effective donor survey: strategy, copy & design
- The importance of pre-planning, data capture & data analysis
- Why failing to do the above well can result in donor surveys harming donor relationships

**Are donor surveys about
capturing information
or
strengthening the donor
relationship?**



Recalibrate your thinking!

**A good survey should
be about both!**



Questions to ask yourself before you question your donors:

- What do I want to learn about my donors?
(Which will inform... *survey design*)
- Which donors will receive the survey?
(Which will inform... *data selection*)
- How will I record the information?
(Which will inform... *data capture*)
- What will I do with the information from the survey?
(Which will inform... *action steps*)
- How will I report back to donors who took the time to complete the survey?
(Which will inform... *donor care strategy*)



What do I want to learn about my donors?

- Demographic information e.g. GiW prospect
- Upgrading donors e.g. major donor leads / RG prospects
- Attitudes toward our cause/organisation e.g. brand awareness / trust
- Measuring beliefs and values e.g. encouraging donor self-reflection
- Data integrity e.g. confirming correct contact details / capture email addresses
- Donor preferences e.g. which channel/s and how often they like to consume information from you

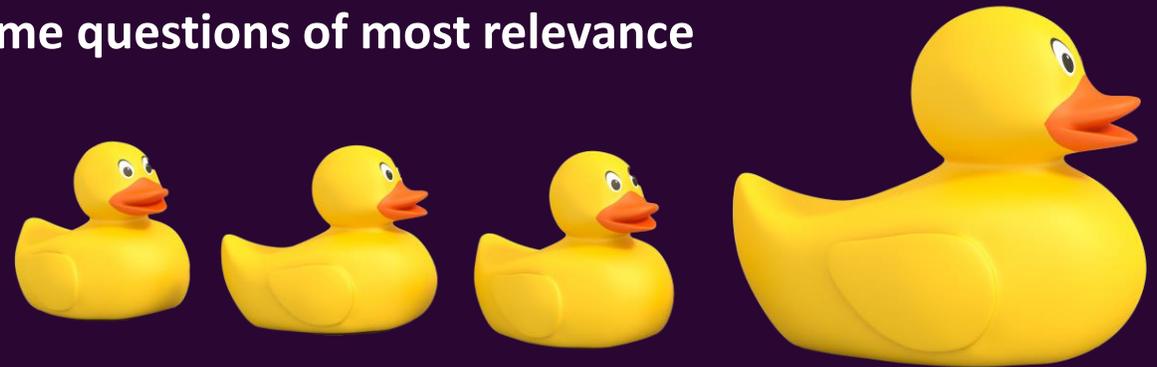
First things first!

We'll look in detail at the anatomy of a good donor survey shortly, but first thing first.

Before you consider sending out a donor survey, you need your ducks in a row.

Let's start with answering the question: which donors will receive the survey?

This will inform data selection and help you frame questions of most relevance to donors who will receive the survey.



Ethics in fundraising research

- **The rules I was taught – Pat Auger’s rules:**
 - Be honest about the objectives of the research with the participants**
 - Maintain confidentiality when promised**
 - Supply approximate duration of the interview or survey**
 - Supply the source name – respondents have the right to know how you got their name**
 - Always ask for permission before recording an interview**
 - Respondents always have the right not to answer and/or stop participation**
 - Always ask for permission to follow-up if necessary**
 - Always behave professionally and courteously**

Which donors will receive the survey?



Data selection

- **Fundraising research is the key to understanding the environment**
 - It provides the information to alter the fundraising mix**
 - It identifies new opportunities**
 - It supports decision making**
- **There are four stages to developing good fundraising strategy:**
 - 1. Identifying and evaluating opportunities**
 - 2. Analysing fundraising segments and selecting target markets/audiences**
 - 3. Planning and implementing a fundraising mix that will satisfy donor needs and meet the objectives of the charity**
 - 4. Analysing fundraising performance**

The purposes of Fundraising Research

- **Descriptive**
 - Gathering and presenting statements and facts
 - EG: What are the attitudes of supporters towards our charity?
- **Diagnostic**
 - Explaining data and/or actions
 - EG: What was the impact of making a change in a fundraising program on revenue?
- **Predictive:**
 - How to use descriptive and diagnostic research to predict the results of a planned fundraising decision

Examples of segmentation research

- **Determine the basis of segmentation**
- **Establish market potential and responsiveness for various segments**
- **Select target markets**
- **Create segment profiles: demographics, behavioural, lifestyles, etc...**

Examples of fundraising promotion research

- **Optimal fundraising budget**
- **Optimal channel mix**
- **Copy and message testing**
- **Media selection**
- **Creative testing**
- **Donor promise substantiation**
- **Evaluation of fundraising effectiveness**

Key criteria for doing fundraising research

- Fundraising research can be extremely useful and improve the success rate of a fundraising strategy
 - Unfortunately, it is often conducted even when it is not required to do so (from a business perspective)
- The determination of the need for fundraising research centres on:
 - Time constraints
 - The availability of data
 - The nature of the decision
 - Benefits vs Costs

Fundraising research should not be conducted

- **When...**
 - Lack of funds**
 - **Not enough money to do the research properly or not enough money to implement the decisions**
 - The decision has already been made**
 - **This is common and a complete waste of money and resources**
 - Managers cannot agree on what they need to know to make a decision**
 - Costs outweigh the benefits**

Survey Design Elements

- Does each question have the most appropriate form (structured vs unstructured)?
- Is each question relevant and properly worded to obtain meaningful, valid responses?
- Is the sequencing of the questions likely to introduce bias?
- Are the layout and appearance of the survey questions conducive to accurate and easy data collection?

Writing good questions is critical

- **Double barrelled questions**
- **Leading or biased questions**
- **One-sided questions**
- **Questions with implicit assumptions**
- **Ambiguous questions**
- **Complex questions**

Putting it all together:

Anatomy of a donor survey



Survey basics:

1. Limit the number of questions – how many?
2. Only ask questions that are necessary – don't waste your donor's time
3. Write in donor centric tone
4. Use simple words and short sentences
5. Design it so it's easy to complete on all devices – online/tablet/laptop
6. Use personalisation where possible.



Include a mix of question types:

Leikert scale: a type of rating scale used to measure attitudes or opinions.

Leikert scale questions can be used to test:

Agreement:

- Strongly agree
- Agree
- Undecided
- Disagree
- Strongly disagree

Frequency:

- Very frequently
- Frequently
- Occasionally
- Rarely
- Very rarely
- Never

Importance:

- Very important
- Important
- Somewhat important
- Of little importance
- Not important

Quality:

- Extremely poor
- Below average
- Average
- Above average
- Excellent

Likelihood:

- Almost always Definitely
- Probably
- Possibly
- Probably not
- Highly unlikely

Sample:

Scale

4. On a scale of 0 to 10, please indicate how much you agree with each statement (10 being "strongly agree" and 0 being "strongly disagree")

I am a committed [redacted] donor

0 1 2 3 4 5 6 7 8 9 10

I feel a sense of loyalty to [redacted]

0 1 2 3 4 5 6 7 8 9 10

[redacted] is my favourite charitable organisation

0 1 2 3 4 5 6 7 8 9 10

Which of the following [redacted] programs are of most interest to you?

(Please tick one box for each statement)

	Not at all interested	Somewhat interested	Extremely interested
Funding and conducting cancer research	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support and information services for people affected by cancer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Raising awareness about ways to prevent cancer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advocacy to ensure that governments take action to reduce cancer risk and improve access to care and treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information about our sun protection products that reduce your cancer risk and fund cancer research, support and prevention	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sample:

Multiple choice

5 Which cancer is of most concern to you?

(Please select one)

- | | |
|--|--|
| <input type="checkbox"/> Prostate | <input type="checkbox"/> CUP (cancer of unknown primary) |
| <input type="checkbox"/> Breast | <input type="checkbox"/> Cervical |
| <input type="checkbox"/> Bowel | <input type="checkbox"/> Uterine |
| <input type="checkbox"/> Melanoma (skin) | <input type="checkbox"/> Brain |
| <input type="checkbox"/> Lung | <input type="checkbox"/> Other <input type="text"/> |

Samples:

Ranking

3. What is your biggest concern about the environment? *(Number 1-8)*

- a) ___ Poor government policy on environmental issues
- b) ___ Habitat loss
- c) ___ Climate change and increasing carbon emissions
- d) ___ Urban development
- e) ___ Impact on threatened species
- f) ___ Land management and sustainable agriculture
- g) ___ Water quality, wetland and river restoration
- h) ___ Other _____

Samples: (Depending on quantity, digital print can be a cost effective solution to have personalisation throughout.)

Personalisation

<Mrs Sample>
Your opinion matters

Dear <Salutation>,

Supporter ID: <XXXXXXXX>

Thank you so much for taking the time to complete the 2016 Supporter Survey.

All information you provide will be treated confidentially and only used by UNICEF to communicate more effectively with you in the future.

Please use black or blue pen to mark your answers and return this survey in the Reply Paid envelope by 31 October 2016.

Thank you again.

Samples:

Introduction/context

Your wonderful and generous support makes a difference to staff, patients and their families every day.

That is why we want to know what matters to you, why you have chosen to support Austin Health, and how we can make your experience as one of our caring donors even better.

This survey should take no more than 10 minutes of your time, but the information you provide will be invaluable to us. Your answers to this survey will be kept entirely confidential.

Samples:

Confidentiality

PRIVATE & CONFIDENTIAL:

Individual responses will not be shared with third party organisations

Samples:
Deadline

PLEASE COMPLETE AND RETURN YOUR SURVEY BY 3 MARCH

Samples:

Instructions



STEP 1:
Find a pen



STEP 2:
Tell me more about you



STEP 3:
Post you answers back to us

How to complete your survey:

Please use black or blue pen to mark your answers and write in CAPITAL LETTERS where required. Please return this survey the Reply Paid envelope.

Samples:

Managing expectations

THINGS TO KNOW BEFORE YOU START YOUR SURVEY

Please use a blue or black ink pen to cross or tick the boxes and write clearly where a full answer is needed. The survey takes most people about five minutes, and helps make a lifetime of difference to children in need.

Samples: Questions that remind donor of their connection to your cause

Opening Questions

3. Is your interest due to:

- personal experience with the disease?
 - a family member's experience?
 - a friend's experience?
 - general interest?
 - professional interest?
-

Samples: Drilling down on donor's areas of interest

Donors interests

6 What do you think are the 3 most pressing humanitarian issues facing the world today? (Please tick up to 3 options)

- | | |
|---|---|
| <input type="checkbox"/> Natural disasters | <input type="checkbox"/> Economic disparity and poverty |
| <input type="checkbox"/> Civil war in Syria and other countries | <input type="checkbox"/> Inadequate access to basic resources |
| <input type="checkbox"/> Global warming | <input type="checkbox"/> Terrorism |
| <input type="checkbox"/> Refugees and displacement | <input type="checkbox"/> Immigration and border control |
| <input type="checkbox"/> The welfare of children | |

2. Which of the following are of interest to you?

- Type 1 diabetes
- Heart disease
- Bone diseases such as arthritis and osteoporosis
- Cancer
- Type 2 diabetes
- Alzheimer's and other disorders of the brain
- Other

Samples:

Gift in Will prospects

13 After you have provided for your family and friends, would you consider leaving [REDACTED] gift in your Will?

- Yes, I have already included [REDACTED] in my Will
- Yes I intend to leave [REDACTED] a gift when I write/update my Will
- I would like more information on how to leave a gift to [REDACTED] in my Will
- No thank you

Samples:

Identifying major donor prospects

9. Later this year, [REDACTED] will be running a [REDACTED] to raise funds to ensure our volunteers can continue to receive the training, equipment and resources they need to save lives this summer.

Do you think you could be in a position to make a special donation of \$1,000 or more to this campaign?

- Yes, I'd like to consider a proposal in more detail
- Maybe. It depends on when, and what campaign
- Not this year, but maybe a little later or next year
- Not now, thank you

Samples:

Testing appetite for engagement opportunities

14. Would you be interested in attending an event at the : [Institute for Health Systems Research](#)

Yes No

If yes, what sort of events would be of interest?

Tour the Institute [\(see here\)](#)

Guest speaker ie. Meet the scientist, public health information

Community challenge events, ie. [\(see here\)](#)

Other: (please specify)

Samples:

Communication channel preferences

10 Which of the following communication/social media platforms do you use?

- Email (please provide your email so we can provide you with updates)
- Facebook
- LinkedIn
- Instagram
- Twitter

Samples:

What do you donors want to hear about?

8. What would you like to see more of in our newsletter/website/Facebook/Twitter updates?

- Stories of people affected by disease
- Updates on appeals
- Research updates
- Equipment and funding needs
- Research and medical advances
- Researcher profiles
- Grant and award successes
- Prof Tom Kay's perspective, "Tom Says"

Other

Samples:

Identifying Potential Case Studies

Q1: Have you or a loved one been a patient at [REDACTED]

- Yes, I have been
- Yes, a loved one has been
- No, I have not been (go to Q3)
- I do not wish to answer (go to Q3)

4. Have you or your family ever used the services of the [REDACTED]

- Yes No

5. If 'Yes', would you be willing to share your story?

- Yes (please feel free to enclose details on a separate piece of paper or in the feedback section at the end)
 No, I would rather not

3. Is your interest due to:

- personal experience with the disease?
- a family member's experience?
- a friend's experience?
- general interest?
- professional interest?

4. Would you be prepared to share your experience to encourage others to support [REDACTED]

- Yes
- No

(If yes, we will contact you to discuss.)

Samples:

At end of survey – not near GiW question

- 10 Providing your date of birth helps us to identify you when you contact us.
My date of birth is:

D	D	-	M	M	-	Y	Y	Y	Y
---	---	---	---	---	---	---	---	---	---

5. Your date of birth (dd/mm/yyyy):

		/			/				
--	--	---	--	--	---	--	--	--	--

~~_____~~ is privacy compliant. By providing your date of birth you will help us in ensuring your privacy is protected.

12. **Before you return your survey, may we ask your date of birth?**
(We ask for your date of birth as verification of your identity, in the event you request access to your record under the Privacy Act 1988.)

_____/_____/_____ dd/mm/yyyy

Samples: (examples of intrusive questions)

Demographic data: the pros & cons

ABOUT YOU

15. Do you have any:

Children? Yes No
Grandchildren? Yes No

16. Do you:

Have a mortgage? Rent?
 Own home outright?

17. Which of the following best describes your status?

Single Married
 Partner Divorced
 Widow / Widower

20. **Date of Birth:**
DD / MM / YYYY: / /

21. **Your gender:**
a) Male b) Female

22. **Do you have:**
a) Children 10 or under b) Children 11 - 17
c) Children 18 and over d) Grandchildren
e) No children

23. **Which of the following best describes your relationship status?**
a) Single (never married) b) Married
c) De facto d) Divorced / separated
e) Widowed

24. **What best describes your current employment?**
a) Working full-time b) Working part-time
c) Stay-at-home parent d) Student
e) Semi-retired f) Fully-retired
g) Unemployed

Be careful what you ask for - and how you use that information

Tell us about the animals in your life

4. Do you have any pets at home? *(Please tick all that apply)*

Dogs / names:

Cats / names:

Birds / names:

Rabbits / names:

Guinea pigs / names:

Horses / names:

Other / names:

Samples:

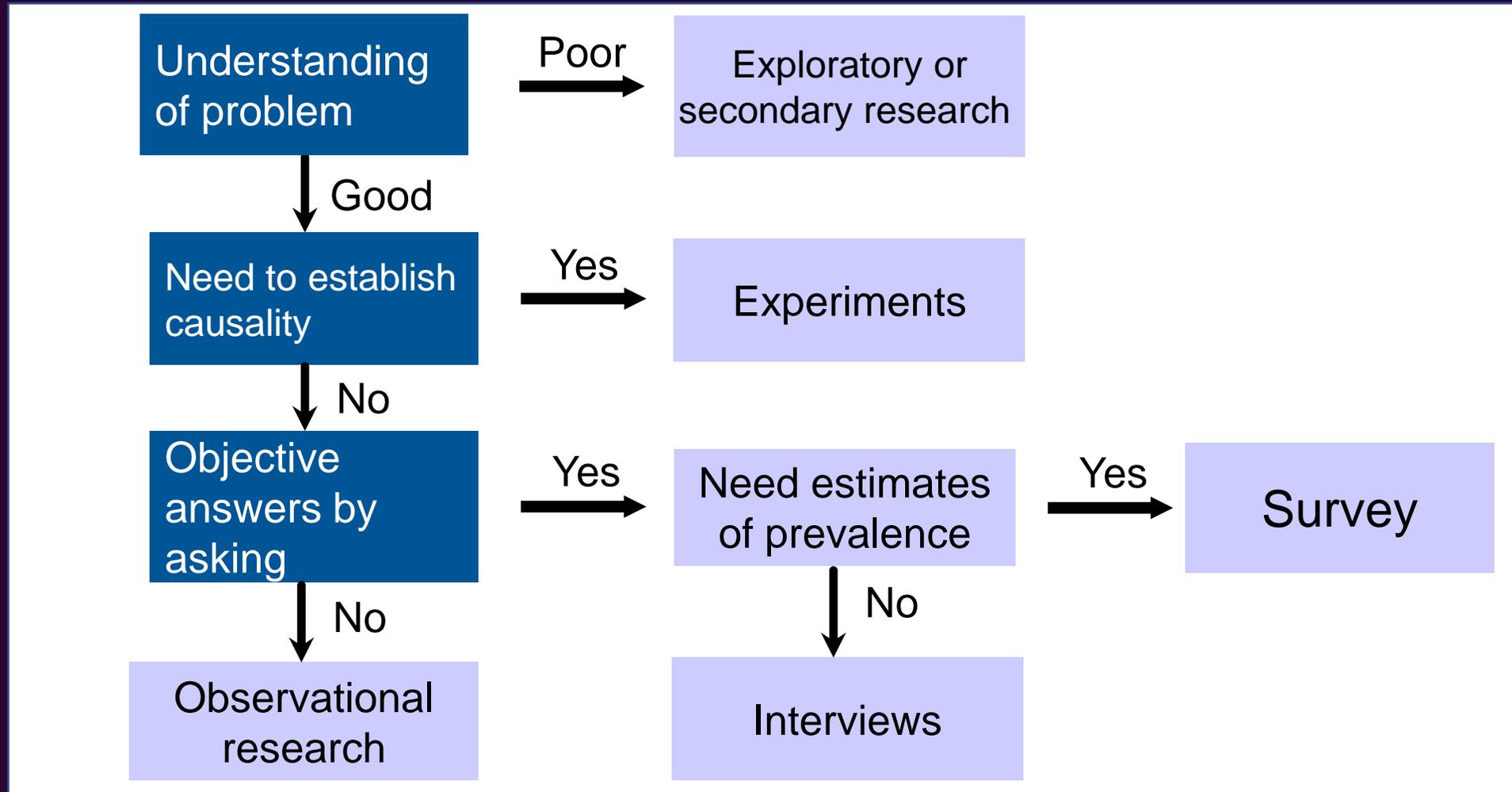
What will you do with the info?

5. Which other charities/causes are close to your heart?

Survey gold!

**11. If you could have 5 minutes with our Director, [REDACTED]
[REDACTED] what would you say?**

Decision Aid for Research Design



Characteristics of Descriptive Research

- **Build on previous information**
- **Show relationships between variables**
- **Representative samples often required**
- **Structured research plans**
- **Conclusive findings**

Survey Response Styles

Type	Definition	7-point scale	Consequences
ARS	Tendency to agree with items regardless of content, only the highest response categories are used	○ ○ ○ ○ ● ● ●	Increases observed means, increases magnitude of multivariate relationships
DARS	Tendency to disagree with items regardless of content, only the lowest response categories are used	● ● ● ○ ○ ○ ○	Deflates observed means, increases magnitude of multivariate relationships
MRS	Tendency to use the middle response category of a rating scale, regardless of content	○ ○ ○ ● ○ ○ ○	Brings observed means closer to the mid-point, deflates variance, increase magnitude of multivariate relationships
ERS	Tendency to use the lowest and highest response categories of a rating scale	● ○ ○ ○ ○ ○ ●	Inflates (deflates) observed means, and variance, decreases magnitude of multivariate relationships
MLRS	Tendency to avoid the lowest and highest response categories of a rating scale	○ ● ● ● ● ○	Brings observed means closer to the mid-point, deflates variance, increase magnitude of multivariate relationships

Rules to sequence by

- **Introductory questions**
- **Sensitive questions**
- **Related questions (clustering)**
- **Logical sequence (funnelling)**
- **Filter or screening questions**
- **Reliability checks**
- **Order biases (priming effects)**

The last word

“Intelligently crafted donor surveys speak truth to delusions. Donor surveys are the thermometers of fundraising. Surveys can tell us whether donor sentiment is running hot or cold, positive or negative.”

Tom Ahern

Fundraising Author, Speaker, and Consultant

Thank you.

Have a lovely day ahead!