



Education  
Advisory  
Board

Advancement Forum

# Assessing Donor Satisfaction



Research Brief

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# Advancement Forum

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# 1) Executive Overview

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## Key Observations

**Alumni Relations, Annual Giving, and Donor Relations staff administer surveys to targeted donor groups to assess satisfaction levels with the overall giving process, identify motivations for giving, and solicit feedback on improving donor recognition efforts.** While contacts do not regularly survey donors, most profiled institutions have administered a survey to either alumni, annual fund donors, or major donors within the past five years. Satisfaction surveys capture the giving experience through open-ended questions that assess donor perspective on inspirations for giving, communication between donors and university staff, impact reports, and overall ease of giving. Most profiled institutions receive a response rate of between 10 and 15 percent, with the majority of responses from alumni donors. Advancement staff tailor the delivery method of surveys to the target population by administering electronic surveys to alumni, conducting phone calls with major donors, and sending paper surveys to annual fund donors. Some institutions include satisfaction surveys within mailed endowment reports.

**Advancement administrators apply survey feedback data to personalize recognition efforts, increase donor-student interaction and events, and ease the overall giving process.** Contacts analyze both quantitative and qualitative aspects of donor survey data to inform giving reforms. Most donors prefer simplistic personalized thank-you notes and regular meetings with scholarship students to extravagant recognition gifts and ceremonies. Donor surveys also reveal that donors favor restricted giving rather than unrestricted giving so that they can determine the final destination of their gift. Based on this feedback, one institution offers increased opportunities for donors to direct gifts to targeted areas of interest (e.g., business, education, communications, STEM).

**Contacts develop donor-centric websites so that prospective donors can easily navigate through impact reports, student success profiles, and online payment processes.** Contacts model giving websites on non-profit organization websites to increase donations from younger donor populations and offer expedited options for giving. Donor-centric websites include impact reports with stories of successful scholarship students, impassioned demonstrations of gift impact, and easily located “give now” links. One profiled institution monitors the number of clicks and the number of donations made through the giving website to inform longer-term decisions about website redesign and innovative advancement opportunities. Another profiled institution reorganized all online giving forms, making them more transparent, well-designed, and easily accessible on the institutional webpage.

**Administrators organize unique opportunities to customize relations with donors and link them to institutional values and campus life.** In addition to traditional donor signing parties and naming ceremonies, contacts invite donors to closely interact with students at stewardship meetings and homecoming dinners. Annual gatherings with students and faculty members allow donors to intimately connect with the institution and view the direct impact of their gift on campus life. Contacts also include personalized letters with student portfolio cards in endowment reports to recognize donors for their generosity and service to the institution. Donors increasingly prefer customized interactive events with students rather than formal recognition ceremonies.

## 2) Donor Satisfaction Surveys


### Surveys

#### ***Advancement Administrators Deliver Surveys to Alumni, Major Donors, and Endowment Donors***

No profiled institution conducts regular surveys of donors to measure satisfaction on a consistent and fixed timeline. However, most profiled institutions have issued at least one survey within the past five years. The Office of Annual Giving at **Institution C** coordinated an open and communicative survey development process by soliciting feedback and suggestions for survey questions from communications and marketing teams. Offices of Annual Giving, Alumni Relations, and Donor Relations commonly deliver and analyze survey results, depending on the targeted donor population group. Most institutions receive between a 10 and 15 percent response rate, with the majority of responses from alumni donors rather than alumni non-donors and non-alumni donors. Contacts report that including surveys in endowment reports encourages alumni and donors to engage with the material and submit thoughtful responses. Advancement staff at **Institution G** also organize focus groups with high-profile donors to solicit more direct and personal feedback.

#### **Donor Survey Administration at Profiled Institutions**

Institution	Type of Survey	Year of Administration	Offices Involved	Method of Delivery
Institution A	N/A	N/A	N/A	N/A
Institution B	Alumni Survey	Administered to alumni on 5-year rotational basis	Gift Processing Office	Paper
Institution C	Annual Giving and Alumni Surveys	2011	Annual Giving and Alumni Relations Offices	Electronic to 60,000 alumni
Institution D	Alumni Stewardship Survey	2010	Stewardship Office	Electronic to 500 alumni
Institution E	Major Donors	2014	Stewardship Office	Phone to 30 major donors
Institution F	Alumni Survey	2013	Donor Relations Office	Paper; part of endowment report to 110,000 alumni
Institution G	Endowment Fund Donors	2010	Office of Alumni Programs and Engagement	Paper; part of endowment report



**Response Rate**  
**11%**

Alumni Programs staff at **Institution G** administered the comprehensive alumni survey to about 110,000 alumni and received about 12,000 responses.

#### ***Surveys Evaluate Donor Motivations, the Giving Experience, and Satisfaction Levels***

Donor satisfaction surveys seek to understand the donor perspective on the ease of giving, degree of engagement with the institution, and feedback on gift recognition efforts. Surveys included in endowment reports also contain questions about how

donors perceive the presentation, display, and clarity of financial information. Contacts offer donors unique outlets to voice personal opinions and ideas by including open-ended questions that address ways to improve service and enhance donor relations. **Institution E** recently ended an annual campaign that raised \$535 million, exceeding the institutional target of \$500 million. Stewardship administrators selected an assortment of high-profile donors who serve on the institutional foundation board to call about 30 major donors to the campaign and assess satisfaction with campaign execution.

### Questions from *Institution E's* Major Donor Survey

1. What was your inspiration for giving a gift during the campaign?
2. How was your experience once you initiated your gift?
  - a. Gift agreement process
  - b. Ease of transferring assets
  - c. Receiving process
  - d. Endowment reports
3. Have we communicated to your satisfaction about how your funds have been used and the impact your funds have had on the institution?
4. Is the impact your contribution had on the institution consistent with the expectations you had for your gift?
5. What was your experience with university staff?
6. How does your experience with giving to the university compare to your experience with giving to other non-profit organizations that you have a relationship with?
7. If you fulfilled a volunteer role during the campaign, how would you rate that experience?
8. Do you have any other thoughts, recommendations, or considerations about your contribution or any other previous contributions?

## Reforms

### ***Contacts Reform Giving Processes and Recognition Tactics based on Donor Feedback***

Advancement administrators analyze both quantitative and qualitative aspects of donor survey results to inform longer-term adaptations to the giving process. Donors typically advise institutions to ease online giving options, increase the frequency of donor-student recognition events and meetings, and personalize appreciation efforts. The alumni relations office at **Institution C** employed survey data to inform a strategic plan for enhancing alumni engagement with the university. Annual giving staff at Institution C also reorganized online giving forms to make them more transparent, clearly designed, and easily accessible. Administrators at **Institution F** revamped their endowment summary to incorporate impact reports and student profiles alongside traditional financial information.

### **Strategies to Enhance Donor Satisfaction based on Survey Feedback**

#### **Create Opportunities for Student-Donor Interaction**



Feedback from donor surveys indicates that donors value opportunities to interact with the scholarship students they support. Advancement staff at **Institution D** organize an annual scholarship luncheon for donors and students that recognizes the impact of donor gifts. Contacts at **Institution G** diversified their donor recognition event portfolio to incorporate more family-friendly events.

### Personalize Donor Recognition Efforts



Donors articulate that they prefer smaller, personalized recognition methods rather than expensive, grandiose gifts. **Institution D** recently terminated the practice of awarding plaques for donors who contribute over \$1,000 annually. Donor surveys motivated advancement officers at **Institution F** to include a more personalized letter in endowment reports along with a student card that details the impact donor gifts have on individual students and the institution as a whole.

### Create New Outlets for Restricted Giving



The alumni survey at **Institution C** revealed a pervasive disinterest in unrestricted giving. Therefore, alumni relations staff reorganized the giving website to both explain the importance of unrestricted giving to facilitate institutional growth and offer increased opportunities for donors to restrict giving to particular areas of interest (e.g., business, education, communications, STEM, student life).

## 3) Additional Strategies to Improve Donor Satisfaction

### Donor-Centric Websites

#### ***Donor-Centric Websites Ease Giving Processes and Connect Donors to Institutional Mission***

Donor relations staff collaborate with IT and computer programming staff to modernize and reconfigure giving websites in an attempt to increase donations from younger alumni populations. Administrators at **Institution C** conducted a website revamp last year to offer greater giving options for restricted donor gifts. Prospective donors can navigate through a series of tabs to view potential programs to support (e.g., business, education, communications, STEM, student life), gift impact, and additional giving options (e.g., planned gifts, securities, payroll deductions, real estate). The advancement unit at **Institution A** is currently conducting a rebranding exercise to investigate strategies to increase giving through innovative and modern marketing techniques.

#### **Common Website Problems that Merit Immediate Focus**

##### **Don't Make the Case for Giving**



Universities fail to explain to potential donors why the institution is a worthy cause for investment

##### **Hard to Locate the Donation Link**



Donation links are poorly labeled and not well placed on the advancement homepage

##### **Lack of Information on Gift Impact**



Universities do a poor job of communicating exactly how donor dollars are being used and who they're benefitting

##### **Too Many Clicks to Make a Donation**



Donors must click through several pages before being directed to the online giving form

Administrators at **Institution D** and **Institution G** incorporated additional student impact stories into webpages to help engage donors with contemporary campus life. **Institution F**'s giving website locates a "Give Now" button on every page to decrease the number of clicks in the payment process. Contacts model giving websites on non-profit organizations, which set the standard for navigable and transparent webpages.

### Keys to Building Effective Online Giving Pages



#### Issue a Clear Call to Action

Make a powerful call to action and provide a clear path to online giving



#### Make Giving Easy

Minimize the number of clicks needed to make a gift through the website



#### Demonstrate Gift Impact

Use student stories to demonstrate tangible gift impact



#### Analyze and Refine

Analyze website data to track visits and pinpoint areas for improvement



### Track Website Clicks and Donations

Advancement officers at **Institution G** modeled their giving website based on a well-regarded non-profit organization. The giving website immediately takes donors to a page in which they select the recipient of their gift and then enter the desired amount. Administrators then track the number of clicks and the amount of donations made on the website to inform decisions about future website redesign. Streamlining the online giving process encourages younger alumni populations to donate and eases the giving experience for all donors.

## Donor-Student Relations

### *Donors Engage with the University through Stewardship Meetings and Personalized Appreciation Notes*

The Donor Relations office at **Institution F** hosts stewardship meetings for donors, students, faculty, and staff to attend. Administrators present donors with impact reports that detail how their fund or donation has influenced and improved campus and student life. Advancement staff at **Institution D** organize an annual Founder's Day dinner over homecoming weekend for all major donors and annual fund donors that gave over \$1,000. The event recognizes donors for their support and invites professors and students to speak about how donations support the institution. Advancement administrators organize traditional recognition events including donor signing parties, naming ceremonies, and philanthropic gatherings. Contacts also engage donors by creating more personalized endowment packets and recognition letters. For example, annual fund donors at **Institution B** receive personalized thank you notes on the one-year anniversary of their gift.



## Personalized Stewardship Packets at *Institution A*



- **Letter from the Provost:**  
Scholarship donors receive a **personalized letter** from the Provost detailing the institutional mission and how donor gifts impact **experiential learning** for students.
- **Financial Information:**  
Advancement administrators enclose the **endowment report** and **annual fund** fiduciary information within the stewardship packet for donor review.
- **Student Biographies:**  
Stewardship packets also include biographical information about student beneficiaries (e.g., impact statement, **post-graduation plan**). The university invites all scholarship donors and students to an annual **celebratory spring brunch**.

## 4) Evaluation and Outcomes

### Outcomes

#### ***Donor Satisfaction Surveys Inform Strategic Decisions to Enhance Donor Relations***

While contacts do not regularly survey donors, all profiled institutions aspire to increase the frequency of survey administration and improve the strategic analysis of survey data to ensure that advancement offices tailor the giving experience to the needs and preferences of supporting donors. New executive leadership within the stewardship office at **Institution E** plan to devote more resources to donor relations and intend to increase donor interaction in the coming years. Because surveys require extensive financial backing and personnel support, most profiled institutions initially focus resources on surveying a select group of donors (e.g., major donors, annual fund donors) and expand the targeted population gradually.



#### **Organize Unique Opportunities to Customize Donor Relations**

Advancement officers at **Institution A** channel resources and attention into developing a customized and diverse set of donor-student relations activities. For example, one scholarship student painted a picture depicting the impact of grant aid on his education and offered the painting to the donor. Donors greatly appreciate personalized efforts to recognize the effect of their gifts both on students and on the institution as a whole.

#### ***Deploy Resources to Customize Relations with Donors and Track Website Interaction***

Most profiled institutions restrict offerings of large recognition gifts (e.g., plaques, certificates, trophies) to donors both due to funding constraints and negative donor feedback. Donors prefer personalized and interactive networking events with scholarship beneficiaries over expensive and extravagant gifts. Administering donor surveys allows

advancement administrators to better understand donor preferences and develop strategies to enhance donor satisfaction with the giving process, gift recognition efforts, and overall perceptions of institutional development and growth.

## Strategies to Monitor and Improve Donor Satisfaction

### Track Online Donations and Website Interaction

While donor surveys reveal valuable information regarding donor satisfaction, survey administration and collection can be a time-consuming and expensive ordeal. Therefore, advancement administrators at **Institution G** also monitor website interaction and online giving amounts to determine how donors interact with online giving portals.

### Focus Resources on Donor Approved Recognition Tactics

Instead of spending donor money on recognition gifts (e.g., plaques, trophies), contacts organize meaningful meetings of donors and students to engage donors with the institution's mission and values. Donors increasingly appreciate stewardship meetings, personalized letters, and reports on scholarship student success.

### Investigate Strategies to Ease the Overall Giving Process

Contacts suggest incorporating open-ended questions in satisfaction surveys to allow donors to voice concerns, opinions, and ideas for improved giving processes. Advancement staff at **Institution F** administers paper surveys to endowment donors and online surveys for recent alumni to increase survey completion rates based on donor preference.

## 5) Research Methodology

### Project Challenge

Leadership at a member institution approached the Forum with the following questions:

- How do administrators at contact institutions evaluate and measure donor satisfaction with the overall giving experience?
- How do administrators at contact institutions collect feedback data from donors?
- What is the format of the satisfaction assessment? What questions do assessments include to measure donor satisfaction?
- What metrics do administrators employ to assess satisfaction levels? Do donor surveys capture both quantitative and qualitative aspects?
- What administrators are responsible for gathering and analyzing collected data related to donor satisfaction?
- What donor categories do administrators survey? Why?
- Do administrators at contact institutions also deliver donor satisfaction surveys to student, faculty, and staff donors?
- What trends do administrators at contact institutions observe in donor satisfaction levels over time?
- How do administrators respond to feedback gathered from donor satisfaction surveys?
- What changes do administrators implement to improve the overall giving experience based on donor suggestions? What outcomes do administrators at contact institutions attribute to reforms?
- What recommendations and advice do administrators at contact institutions offer to improve donor satisfaction and enhance the overall giving experience for donors?

### Project Sources

The Forum consulted the following sources for this report:

- EAB's internal and online research libraries (<http://eab.com>)
- The Chronicle of Higher Education (<http://chronicle.com>)
- National Center for Education Statistics (NCES) (<http://nces.ed.gov/>)

### Research Parameters

The Forum interviewed stewardship officers and directors of donor relations offices at institutions that administer surveys to donors to evaluate satisfaction levels.

#### A Guide to Institutions Profiled in this Brief

Institution	Location	Approximate Institutional Enrollment (Undergraduate/Total)	Classification
Institution A	Midwest	4,000/5,000	Master's Colleges and Universities (medium programs)
Institution B	Midwest	4,000/10,000	Research Universities (very high research activity)
Institution C	Mid-Atlantic	18,000/20,000	Master's Colleges and Universities (larger programs)

<b>Institution D</b>	South	1,000	Baccalaureate Colleges – Arts and Sciences
<b>Institution E</b>	Midwest	15,000/17,000	Research Universities (high research activity)
<b>Institution F</b>	Northeast	5,000/7,000	Master's Colleges and Universities (larger programs)
<b>Institution G</b>	South	21,000/27,000	Doctoral/Research Universities