

## Donor Loyalty Inventory

This assessment\* can be used to measure current donor stewardship efforts and to identify key areas for improvement and growth.

<b>Section 1: Being Strategic and Intentional</b>	<b>Yes</b>	<b>No</b>
Does your staff actively discuss stewardship activities and at least annually review stewardship plans and activities?	2	0
Does your fundraising staff actively plan for, and build into their plans, regular stewardship visits?	2	0
Are stewardship activities built into your budgeting process?	2	0

**SECTION 1 TOTAL = \_\_\_\_\_**

<b>Section 2: Knowing Your Donor</b>	<b>Yes</b>	<b>No</b>
Has your organization conducted a donor survey or held donor focus groups in the past 24 months?	2	0
Has your organization surveyed its lapsed donors in the past 24 months to determine the reasons they might have dropped out?	3	0
Do you track the names of spouses of your donors?	1	-2
Do you report outcomes and results to your donors on how important their gift was to those your organization serves?	2	0
Have you used an outside source, or some of your volunteers, to test the appropriateness, effectiveness, and personal touch of your letters?	2	0

**SECTION 2 TOTAL = \_\_\_\_\_**

<b>Section 3: Donor Acknowledgment</b>
<p>How long does it take your organization to send the acknowledgement letter after a gift is received?</p> <p>48 hours = <b>5</b>    72 hours = <b>4</b>    one week = <b>3</b>    more than one week = <b>0</b>            Don't know or don't do it = <b>-2</b></p>
<p>Do you include in letters a note or story of impact from program or organization beneficiaries?</p> <p>Yes = <b>3</b>    No = <b>0</b></p>
<p>Do staff members or volunteers systematically call and thank individuals who donate over a certain threshold amount?</p> <p>Call at \$100+ = <b>5</b>    Call at \$500+ = <b>3</b>    Call at \$1000+ = <b>1</b>    No calls = <b>0</b></p>
<p>Do staff members or volunteers thank donors over a certain threshold amount in a 1:1 in person visit?</p> <p>Yes = <b>3</b>    No = <b>0</b></p>

**SECTION 3 TOTAL = \_\_\_\_\_**

## Donor Loyalty Inventory *continued*

<b>Section 4: Recognizing Your Donor</b>	<b>Yes</b>	<b>No</b>
Do you have gift clubs or levels where you recognize your donors?	1	0
Does your organization publish an annual report which includes some sort of honor roll of donors?	1	0
Do you publish a newsletter of some sort that is sent to your donors?	1	0
Do you send a newsletter that includes a donor story and gives recognition for their gifts? Yes = <b>1 BONUS POINT</b>		
Do you send between two and four newsletters annually? Yes = <b>1 BONUS POINT</b>		

**SECTION 4 TOTAL = \_\_\_\_\_**

### Assessment Scoring

Section 1 Total	
Section 2 Total	
Section 3 Total	
Section 4 Total	
<b>Total Assessment Score</b>	

- 26+** Outstanding! Your efforts will undoubtedly create tremendous loyalty with your donors.
- 26-21** You are doing well but putting extra focus to donor stewardship could make you truly stand out.
- 20-15** Your donor stewardship could improve dramatically with some effort.
- Below 15** There is no time like the present to start implementing some of these activities. A little stewardship will go a long way.

*\*Adapted from the Loyalty Inventory tool created by Jerold Panas.*