

Donor Loyalty Inventory

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

Being Strategic and Intentional

0 2

Does your staff actively discuss stewardship activities and at least annually review stewardship plans and activities?

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Does your fundraising staff actively plan for, and build into their plans, regular stewardship visits?

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Are stewardship activities built into your budgeting process?

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Total=

Knowing Your Donor

0 2

Has your organization conducted a donor survey or held donor focus groups in the past 24 months?

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Has your organization surveyed its lapsed donors in the past 24 months to determine the reasons they might have dropped out?

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Do you track the names of spouses of your donors?

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Do you report outcomes and results to your donors on how important their gift was to those your organization serves?

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Have you used an outside source, or some of your volunteers, to test the appropriateness, effectiveness, and personal touch of your letters?

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Total=

Donor Acknowledgement

When does your organization send an acknowledgement letter after a gift is received?

48 hours = 5 72 hours = 4 1 week = 3 >1 week = 0 Unsure/never = -2

Do letters include a note or story of impact from program or organization beneficiaries?

Yes = 3 No = 0

Do staff members or volunteers systematically call and thank individuals who donate over a certain threshold amount?

Call at \$100 = 5 Call at \$500 = 3 Call at \$1000+ = 1 No calls = 0

Do staff members or volunteers thank donors over a certain threshold amount in a one-on-one person visit?

Yes = 3 No = 0

Total=

Recognizing Your Donor

0 2

Do you have gift clubs or levels where you recognize your donors?	<input type="checkbox"/>	<input type="checkbox"/>
Does your organization publish an annual report which includes some sort of honor roll of donors?	<input type="checkbox"/>	<input type="checkbox"/>
Do you publish a newsletter of some sort that is sent to your donors?	<input type="checkbox"/>	<input type="checkbox"/>
Do you send a newsletter that includes a donor story and gives recognition for their gifts?	<input type="checkbox"/>	<input type="checkbox"/>

Bonus Point: Yes = 1

Do you send between two and four newsletters annually?

Bonus Point: Yes = 1

Total= _____

Assessment Scoring	
Being Strategic and Intentional	
Knowing Your Donor	
Donor Acknowledgement	
Recognizing Your Donor	
Total Assessment Score	

- 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.
- 14-0 There is no time like the present to start implementing some of these activities. A little stewardship will go a long way.