

STEWARDSHIP SURVEY QUESTIONS

The University of Georgia | Office of Donor Relations & Stewardship

Acknowledgements

- For what size gift (minimum) do you or your unit send an acknowledgement?
- What variances in your acknowledgements exist based on gift amount?
 - E-mails
 - i. For what level of giving would you send an e-mail to thank a donor?
 - ii. Under whose signature?
 - Post cards
 - i. For what level of giving would you send a post card to thank a donor?
 - ii. Under whose signature?
 - Letters
 - i. For what level of giving would you send a letter to thank a donor?
 - ii. Under whose signature?
 - Hand Written Notes
 - i. For what level of giving would you send a hand-written note to thank a donor?
 - ii. Under whose signature?
 - Phone Calls
 - i. For what level of giving would you make a personal phone call to thank a donor?
 - ii. Who makes the call?
- Do you include receipt information (fund name and dollar amount) in your acknowledgements?
- How often do you run your acknowledgement process?
- What's your average turnaround time for acknowledging gifts?
- How often do you update your acknowledgement template/text?
 - Are you comparing the current letter you are sending with the last letter sent?
- Are acknowledgments sent for planned gifts?
 - For what level of giving?
 - What form of acknowledgement (postcard/letter/handwritten note, etc.)?
 - Under whose signature?
- Does your unit make a personal call to thank a donor for making a planned gift?
- Do you acknowledge faculty/staff donors in a special way?

Cards

- Does your unit send holiday cards to donors?
 - To annual giving donors?
 - i. For what level of annual giving do donors qualify to make the holiday card list?

- To cumulative giving donors?
 - i. For what level of cumulative giving do donors qualify to make the holiday card list?
- To planned giving donors?
 - i. For what level of planned giving do donors qualify to make the holiday card list?
- Does your unit send birthday cards to donors?
 - To annual giving donors?
 - i. For what level of annual giving do donors qualify to make the birthday card list?
 - To cumulative giving donors?
 - i. For what level of cumulative giving do donors qualify to make the birthday card list?
 - To planned giving donors?
 - i. For what level of planned giving do donors qualify to make the birthday card list?
- Does your unit send cards to donors for any other occasions?
 - For what occasions?
 - i. For what level of giving do donors qualify to make the list?
- Does your unit send cards to planned giving donors for other occasions?
 - For what occasions?
 - i. For what level of planned giving (i.e. planned gifts over \$10,000, irrevocable planned gifts only, etc.) do donors qualify to make the list?

Phone-A-Thons

- Do you utilize phone-a-thons to specifically express appreciation to donors (completely separate from solicitations – callers are specifically expressing gratitude)?
 - Who makes calls (students/volunteers, etc.)?
 - How often/what time of year are calls made?

Gifts

- Does your unit send a holiday gift to donors?
 - At what level of giving do they qualify for a gift?
 - What types of gifts are you utilizing?
- Does your unit send a birthday gift to donors?
 - At what level of giving do they qualify for a gift?
 - What types of gifts are you utilizing?
- Does your unit send stewardship gifts where premiums are of insubstantial value?
 - At what level of giving does a donor qualify to receive this gift?
 - What types of gifts are you utilizing?

Tributes

- Does your unit acknowledge donors making gifts in honor or in memory of someone?
- Does your unit mark these gifts as tributes on the transmittal form so that central can properly set these gifts up in the system, and central DR&S can notify the Honoree/Next of kin?
- Does your unit send notification to the Honoree/Next of kin when a tribute gift is made?

Giving Societies & Special Donor Groups

- Do you utilize giving societies?
 - Do you have an annual giving society specific to your unit (outside of UGA's Presidents Club)?
 - i. What is your annual giving society's name?
 - ii. What are the levels and amounts required for membership?
 - iii. What are the benefits received for each level of membership?
 - Do you have a cumulative giving society specific to your unit (outside of UGA's Cumulative Giving Societies)?
 - i. What is the name your unit's cumulative giving society?
 - ii. What are the levels and amounts required for membership?
 - iii. What is the criteria for counting planned gifts in your unit's cumulative giving totals (are all planned gifts counted at face value, only donors with irrevocable gifts, etc.)?
 - iv. What are the benefits received for each level of membership?
 - Do you have a planned giving society specific to your unit (outside of UGA's Heritage Society)?
 - i. What is your planned giving society's name?
 - ii. What is the criteria for inclusion (i.e. planned gifts over a certain level, all planned gift donors, etc.)?
 - iii. What are the benefits of membership?
- Do you have a first-time donor recognition program specific to your unit (outside of UGA's first-time donor program)?
 - How do you recognize first-time donors?
 - How often do you recognize first-time donors?
- Do you have a loyalty donor program specific to your unit (outside of UGA's Third Pillar)?
 - What is your loyalty donor program's name?
 - What is the criteria for inclusion (i.e. three-five years of consecutive giving)?
 - How do you recognize?
 - What are the benefits?
 - How often do you recognize?

Donor Recognition Events

- Does your unit hold events specifically designed to recognize unit-specific annual giving donors (outside of UGA's Presidents Club Reception)?
 - At what levels?
 - What type of event (luncheon, cocktail reception, etc.)?
 - How often?
 - Who from leadership is involved?
- Does your unit hold events specifically designed to recognize unit-specific cumulative giving donors?
 - At what levels?
 - What type of event (dinner, luncheon, cocktail reception, etc.)?
 - How often?
 - Who from leadership is involved?
- Does your unit hold events specifically designed to recognize unit-specific planned giving donors (outside of UGA's Presidents Club Reception)?
 - What type of event (luncheon, cocktail reception, etc.)?
 - Who is invited to attend – at what level (i.e. all planned giving donors, planned giving donors over a certain level, etc.)?
 - How often?
 - Who from leadership is involved?
- Other than events listed under above question, please list any additional events hosted by your unit that donors/planned giving donors are invited to attend (even if the event is not planned giving specific).
 - Do you recognize donors/planned giving donors at these events in any way?
 - How (i.e. by inclusion of a special pin, special ribbon on nametag, hosting a pre-dinner cocktail reception exclusively for planned giving donors, hosting a pre-scholarship luncheon appetizer drop in for planned giving donors only, etc.)?
 - How often?

Communications & Publications

- Does your unit produce an annual report and/or honor roll of donors?
 - What giving levels qualify for listing?
 - Annual giving levels?
 - Cumulative giving levels?
 - Are planned giving donors included in listing?

- What is the criteria for inclusion (i.e. all planned giving donors, planned giving donors over a certain level, only donors with an irrevocable gift, etc.)?
 - Are planned giving donors listed alphabetically with all donors, alphabetically only with planned gift donors, grouped by giving level with all donors, etc.?
 - What levels qualify to receive mailing?
- Does your unit produce any printed publications/magazines that provide opportunities to recognize donors with articles, photos, etc.?
 - What are the names of the publications?
 - At what level does a donor qualify to receive publications?
 - How often are the publications produced?
 - Are planned giving donors recognized?
 - At what level of giving does a donor typically qualify for a recognition article, photo, etc. in your publications?
 - How are they recognized (articles, ads, photos, etc.)?
- Do you send any other special (stewardship-related) e-communications to donors?
 - E-Newsletters?
 - For what level of giving?
 - Specialized e-mails?
 - For what level of giving?
 - Specialized videos?
 - For what level of giving?
 - How often do you send special e-communications?

Endowed Fund Stewardship

- Do you do anything special when a new endowment is established/funded?
 - What do you do?
- How do you steward your scholarship endowment donors?
 - Student thank you letters/notes?
 - Scholarship event?
 - Please explain the event.
 - How often?
- Who is responsible for awarding scholarships? Is there a process in place for ensuring they are awarded?
- How do you steward your Chair/Professorship endowment donors?
 - Yearly updates/impact reports from holders?
 - Events?
 - Please explain the event.
 - How often?

- How do you steward donors of your other endowed funds?
 - Impact reports?
 - How often?
- How do you steward donors of planned gifts that will ultimately be used to establish an endowed fund?
- Do you communicate with donors around the time their endowment reports are being sent (sent November 15th from central Donor Relations & Stewardship)?
 - Communication pre-mailing?
 - Communication post-mailing?

Commemorative Plaques & Signage

- Does your unit recognize donors with specialized signage/donor walls?
 - At what levels?
 - Planned Giving?
 - Locations?

Other Stewardship Activities

- Are there any other stewardship-related activities going on within your unit that we have not asked about, and if so, what are they?
 - For what level of giving are you utilizing these activities?
 - How often?
- Does your unit have a customized Statement of Future Gifts (standard form for your unit to document planned gifts)?

