

Donor Relations and Stewardship Metrics Program Planning

1. What tasks are accomplished under the heading “donor relations and stewardship” at your organization?
2. What are the objectives of this work and how do these objectives align with department, division and institutional goals?
3. How can success toward donor relations and stewardship objectives be measured?

What might be measured?	Possible method	Internal	External	Output	Input

4. Are there any similar processes for metrics already in place at your organization?

What is measured?	Method used	Database Used	Reporting Model

5. What impediments are likely? What are possible solutions?
6. What timeframe is anticipated for the project?
 - Vision-setting
 - Create data gathering, record keeping, analysis and reporting systems
 - Early data, analysis and reporting
 - Ongoing data, analysis and reporting
 - Change, if warranted
 - Reiteration
7. Who authorizes this work? Who are the stakeholders in this process? To whom will the findings be reported?
8. What are opportunities and limits for taking action relative to the findings?