



## **SURVEYING PLANNED GIVING PROSPECTS**

### **PG CALC WEBINAR**

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## **I. INTRODUCTION**

*“We're not in an information age anymore.  
We're in the information management age.”*

~ Chris Hardwick

We live in the age of information. The stage of human civilization characterized by an explosion of opportunities to not only access, but to create vast amounts of information. From the invention of the printing press to radio and television, and now the computer and the Internet, this evolution has made the collection of information and information sharing a part of our daily lives. It is a phenomenon that presents a new set of challenges and opportunities to marketers for both the for-profit and non-profit worlds alike.

It is no longer simply what you know, and how much you know about your audience or donor class, but also how well you can use what you know to create something that achieves your objectives. Surveys are one of the primary vehicles for collecting such information. The for-profit sector understands that they need to continuously collect and act on feedback in order to retain customers and improve their offerings. That is why so many businesses today send surveys.

It is no different in planned giving. For stewardship, lead generation, and/or simple relationship building, surveys will help your program find out what is important to donors.

This discussion will focus primarily on the use and creation of planned giving donor surveys. It is essential to the success of your program to understand the needs and wants of your donors and surveys can give you the feedback required to make better decisions within your planned giving program. Your program—and your marketing strategy—is only as good as the information you have on your donors.

## **II. WHY DONORS LIKE SURVEYS**

*“It is a capital mistake to theorize before one has data.”*

~ Sherlock Holmes

Do you know why your donors give? Or what they expect from you?

Do you know how they feel about the marketing material you're sending them?

Unless you ask, you'll never know.

A donor survey can provide answers to these and many other questions you need to make smarter fundraising and marketing decisions going forward. And most donors actually like it when they are asked questions. The best way to build a relationship with a donor is to find out more about them, and the two-way dialogue created by a donor survey makes for a more involved donor.

A survey empowers donors by letting them have impact on the future of the institution they support, and even though the survey is really a discovery tool, to involved donors it is an opportunity to make their voices heard. Often donors give because they want to change something they don't like about the world, or they want your mission to continue, and the survey gives them an additional opportunity to express those feelings in other ways besides a gift. It allows them to provide feedback on the organizations they've chosen to support year after year. They get the satisfaction of helping by answering and the institution is able to measure a donor's satisfaction, commitment, intimacy and trust. Survey feedback helps your program alter course, as needed. You'll be able to tell who's engaged, who isn't, and clean up your list of donor prospects. And it gives the donor another avenue to support your mission.

### III. WHAT WE LEARN FROM SURVEYS

*“The learning process continues until the day you die.”*

~ Kirk Douglas

Surveys can have a major impact on the direction of your planned giving program. The feedback received can help shape future decision making, and it allows for strategic planning based not on “gut feelings” but on the unbiased data collected and analyzed.

Surveys results provide a snapshot of the attitudes and behaviors – including thoughts, opinions, and comments – about your target survey audience. This valuable feedback is your baseline to measure and establish a benchmark from which to compare results over time. There are three important “take-aways” you can achieve with a planned giving survey.

#### A. Discovery for the Donors Benefit

Donor surveys allow you to collect information and as a result get to know your donors better. The more data we have from this group the better you can serve them as planned giving officers and marketers. A survey is an extension of the relationship that is built face-to-face. But this additional discovery process allows some donors the privacy to open up more, at least initially.

You can learn details such as their involvement of your institution, how interested they are in volunteering, and their opinion on funding issues. A survey allows insight into their point of view and passion regarding your institution. It allows you to understand what motivates them as donors. Not just from a mission standpoint but also as to their giving behavior. What motivates their giving? Tax benefits? The future of the institution? Their desire to create a legacy? Something else?

This additional insight will not just help with data mining of your donor list but will also help as to stewardship. The feedback mechanism by itself shows donors you value their opinion and it lets them have a say as to your institution's strengths and identify areas for improvement.

By checking the pulse of your donors, you can learn how they perceive the organization and how you perceive them – mutual respect.

## **Shifting the Conversation from Cash to Assets**

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As a marketer, you can use surveys to develop a profile or “persona” of your typical donor – which will help you target your marketing communications much more directly. However, be careful not to make it all about your organization. Write the survey and introductory letter about your donor needs and invite them to participate in a way that makes them feel valued.

For example:

“Our organization needs your input!”

This phrase will not motivate donors. It makes the survey sound like it is strictly about your organization’s needs and not about the donor’s voice. Instead, write a phrase more about them.

**“Tell us what you need!”**

**This emphasis on the donor makes all the difference and can lead to more responses.**

Your survey should also target the data that is absent in your database. It might be demographic data, such as age, sex and whether or not they have children. Some surveys put more of an emphasis on participation in the non-profit. Have the donors volunteered or attended certain events? Giving motivation is also important to inquire about, such as why they are giving, and asking about personal experiences related to your mission and/or institution. Personal questions show you care. I also like to include data collection on planned giving marketing. Do they like your print newsletter or prefer email? This data should influence future mail plans.

### **B. Gifts and Intentions**

Surveys are often called an untapped resource for planned gifts. They allow donors to self-identify as prospects and unrecognized legacy society members. Unlike any other communications sent to donors, the survey allows you to ask in a very direct fashion if a planned gift has already been given and/or if the donor would be interested in making such a gift. This direct questioning, which may make both parties uncomfortable at the beginning of any relationship, is acceptable as a survey question. It is asked and answered without reservation.

It is the nature of the survey that allows for the point-blank questioning that most people do not feel confident asking. Donors don’t take offense. In fact, many who have put you in their will have not had the opportunity to tell you before, or have even thought that it wouldn’t be something you would want to know before their passing. The donor survey is a good opportunity to bring up the issue and discuss it freely.

### **C. Lead Generation**

For-profits and non-profits alike need to attract prospects and move them through a qualification pipeline or funnel. Surveys, when used wisely, can be leveraged to generate qualified planned giving leads who just may be ready to take the next steps.

There are always donors who won't respond to surveys, and thus, the ones who do take the time to offer valuable feedback should be flagged as highly engaged prospects. In fact, when a donor fills out a survey, online or print, there is an argument to be made that this very fact alone is enough to justify reaching out to them immediately for a discussion on making a legacy gift. The time put into answering the questions, regardless of the data collected, shows interest enough.

For some smaller organizations this is certainly the case, but for larger entities that have multiple leads already in the pipeline, urgency to reach out to these new leads may not be present. To these programs this may be a lead, but not fully qualified yet.

But that is the point of surveys... to help identify and qualify leads. This can be aided by creating some scoring criteria for the data collected. The challenge is to design your questionnaire in a way that allows your most qualified prospects to rise to the top of the list for immediate follow-up. For example, learning that a donor is single and has no children may bring them to the top of the phone list, while those respondents who are less-qualified can be grouped into a lower priority. You still reach out to all and thank them, but the urgency to discuss planned giving is created only for a few.

Ideally, donors will complete the entire survey, but not necessarily. Another hierarchical grouping may be those who finished every section versus those who abandon the survey early. Those who complete the final page or questions are scored with higher prioritization. In effect, the more data respondents offer by completing multiple pages or questions, the higher prioritization with which they're scored.

#### IV. HOW TO DESIGN A DONOR SURVEY

*“USA Today has come out with a new survey - apparently, three out of every four people make up 75% of the population.”*  
~ David Letterman

##### A. Establish Objectives

Before creating a survey, it's important to think about its purpose. What are your objectives?

Think of it as a building project. You wouldn't start haphazardly pouring concrete right away. No, you need a blueprint of your end goal before ever picking up any tools. With a donor survey you need a plan that sets a clear directive so you can tailor your questions to get the answers you need.

I suggest writing down specifically what you'd like to gain from your survey, along with a couple of simple questions you think might answer your hypotheses. Is it lead generation? Or are you trying to see if donors are receptive to some type of program innovation, such as the launch of an annuity campaign. Or perhaps just gain some insight from your donors as to the marketing you have done.

For example:

Goal: What is the effectiveness of our planned giving marketing?

Assumption: The majority of our loyal donors prefer email over print newsletters.

Assumption: Very few donors filled out a print reply card, thus email will be just as effective.

After you write some simple questions also include some possible answers and write down how you think donors will respond to each answer. This will allow you to compare it to the actual results of the survey to show you how much you really know, or don't know, about your donors

For example:

How do you prefer to hear from us?

- a. Email (60%)
- b. Postal mail (40%)

This exercise will help you refine the objective and your expectations. Simplicity is probably the most important—and most under-appreciated—survey design feature. So, whether you are looking to re-launch a neglected planned giving program or build a pipeline of leads for cultivation, creating a clear objective will allow you to write clear and uncomplicated questions to achieve your goal.

### **B. Question and Answer Styles**

The formatting and structure of questions and answers will define the results. It is important to think about how you'll summarize the response to questions as you design them—not afterwards. You want to get as many responses as you can. The more data you have to analyze the more accurate will be your insights.

Here are six of the most commonly used styles of survey questions:

#### **1. Closed-ended questions**

Also known as a dichotomous question, these have two possible answers. They usually ask for Yes/No, True/False or Agree/Disagree answers. They are used to find out quick tidbits of information and to create a clear distinction of qualities, experiences or opinions. They are a popular choice for a quick and narrowly-focused survey.

For example:

Have you been to our new planned giving website?

- a. Yes
- b. No

#### **2. Open-ended questions**

These are used to illicit opinions in a narrative. Open-ended questions produce more meaningful responses than closed-ended questions since there are no limitations in how respondents answer. They use a text box which gives donors the opportunity to opine in any direction. These will not produce a yes or no answer, thus, use open-ended questions sparingly. Donors will skip these if you ask too many. They want to finish fast, and in most cases give a quick and simple response.

For example:

What do you like about our planned giving newsletter?

### **3. Rating questions**

Also known as ordinal questions, they display a scale of answer options from any range (0 to 100, 1 to 10, etc.). Instead of answering directly, the donor is asked to rate something. It's a useful style to use as you can gauge peoples' opinions across the board.

For example:

How likely is it that you would recommend our email newsletter to a friend or fellow alum?

Not at All Likely

Extremely Likely

0	1	2	3	4	5	6	7	8	9	10
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### **4. Likert scale questions**

A Likert scale is a rating scale that measures how people feel about complex questions. Each of these questions would then have a set number of responses for people to choose from.

For example:

I would recommend other members to join the Legacy Society:

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

Make sure what you want to measure can be scaled in terms of opinion, attitude, feeling, or experience, and with two clear extremes and a neutral midpoint. Some additional examples of things to measure include:

- **Agreement:** Strongly agree to strongly disagree.
- **Frequency:** Often to never.

- **Quality:** Very good to very bad.
- **Likelihood:** Definitely to never.
- **Importance:** Very important to unimportant.

The Likert scale works best when multiple factors can influence an answer and one question and answer probably will not be enough for an adequate response.

### 5. Multiple choice questions

These are quick and easy to answer questions that consist of three or more mutually exclusive categories. Donors are very familiar with the format. Online they can be bundled in a dropdown menu.

For example:

How do you prefer to be contacted?

- a. Home phone
- b. Cell phone
- b. Email
- c. Text
- d. Other: Please specify

For this type of question, it is important to consider including an "other" category as there may be other terms that you might have overlooked that better describe the answer. An "other" category will prevent false data from skewing results and may show you that your question as written is missing the mark. It should be listed at the end of all your choices.

### 6. Demographic questions

Demographic survey questions are used to find out personal information. Most ask details about age, gender, professions, incomes, education level, and ethnicity.

For example:

What is your gender?

- a. Female
- b. Male
- c. Non-binary/ third gender
- d. Prefer not to say

### C. Methods for data collection

Survey methods have evolved over time. What was once seen mostly as telephone or face-to-face surveys has moved to using the more affordable and intuitive online methods. The different survey methods have their pros and cons. Each method is affected by multiple factors such as time, donor interest, and costs. The four main survey data collection methods are:



### 1. Telephone surveys

Telephone surveys, which were once a preferred method, are now sharply in decline. Thank you, caller ID. In today's smart phone-oriented world, getting a donor to pick up a call is getting harder and harder. Cellphones are being used more for text messaging and browsing the internet and less for answering or making a traditional phone call. It was always difficult building a rapport over the phone, but now the problem is the target audience will not pick it up.

Although nearly all U.S. adults now have access to a telephone and/or cell phone, phone surveys (for-profit and non-profit) have response rates in decline. For example, the Gallup Poll Social Series (GPSS) surveys achieved a 7% response rate, on average, in 2017, compared with 28% in 1997. The ability to block phone numbers on cellphones present a growing challenge to telephone surveys. Also, mobile applications that allow the reporting of unwanted calls and blocking of them have become more popular due to a rise in unwanted sales calls and robocalls.

Lower response rates themselves are not a measure of poor survey quality. Telephone surveys with low response rates are still able to collect data from their audience accurately. However, since more calling is now required to get statistically valid data, the costs are skyrocketing. The telephone remains an effective option for some traditional surveys, but it would not be my first choice for a donor survey.

### 2. Face-to-face surveys

Face-to-face surveys are still widely used for data collection in the for-profit world. Response rate is high because questioning is in-person. Trust is also higher in this interaction and the results produce honest and clear feedback. However, this interaction comes at a much higher cost than other channels. It requires training and a location. This method, in most cases, is not used in planned giving. Yet, it could be possible for a quick minute survey at Legacy Society events to gain introductory insights and opinions of your donors. This feedback may help with establishing the objectives for a more-detailed future donor survey.

### 3. Online surveys

Online surveys have become the most widely-used method. They are the most cost-effective and can reach a larger number of people compared to other methods. There is no limit to the types of questions that can be asked. Online surveys are quick and easy for the donor and can also use technology to tabulate results, creating more accurate data collection. And results are collected in real-time for quicker analysis. The survey response rate of online surveys is also very high compared to other survey mediums.

There are multiple online survey vendors that you can use to help craft a donor survey. They are easy to use and some offer a free version. And for a small survey, the free versions are reasonably good.

Paid online versions give you tools such as conditional logic which allows you to build interactive forms that let you collect the data you need *without* straining the user experience. Conditional logic allows you to create online forms that change based on input. It is the typical "if this, then that" process. You can configure fields to display or hide based on a user's response. This allows you to tailor your survey to your users' specific needs. It may sound technical, but it's really quite easy to use.

For example:

Are you on social media? If the user answers yes, the next question might ask what social accounts (listing several social media networks to choose from)? If the donor answers no, the social media accounts question would be skipped.

Some vendors won't let you export your data unless you use the paid version or won't let you add a logo and insist that you include theirs. Some of the most popular online survey vendors include Google Forms, Survey Monkey, SoGoSurvey, Typeform, Client Heartbeat, Zoho Survey, Survey Gizmo and Survey Planet.

Whichever online survey tool you chose, make sure it is intuitive for donors and easy to complete. If the interface looks too complicated or there are too many clicks to start, your donors will leave without answering. Most importantly, it must be mobile compatible. You need to anticipate that the majority of your donors will take the survey on their phones. It must be as easy for them to complete on the phone as on a desktop.

#### **4. Paper Surveys**

Paper surveys are an old-school approach that requires a donor to put pen to paper and then mail back the answers. Seems like too much work today. Plus, with the costs of paper, printing, and postage all on the rise, you would think more for-profit and non-profits are shifting to online surveys. The cost savings alone is reason enough to go online. Not to mention the difficulty of entering the results into a database, whereas an online version will do this automatically.

Don't discredit this option.

If direct mail works with your donors, then so may paper surveys. Plus, your database may have postal addresses of your sample audience, but do you have a current email address for that targeted list? You may just have a fraction of the sample emails you want to survey.

But even with an email address, will it be delivered and opened? Or will it bounce or end up in the junk/spam file? The best written emails in the non-profit industry receive only a 24% open rate. That's three-fourths of the list you are right to assume will never respond. These are all concerns that you don't have with a paper survey.

An online survey may seem cheaper at first blush, but your online survey delivered via email, even if it arrives in the inbox may be lost in the electronic clutter of the day. A paper survey delivered by the postal carrier may be more noticeable. Your mailed letter may also show the donor more effort and become more likely to gain the attention of the donor. Not to mention the designed look of a personal correspondence, which even the best email does not carry.

What gets a better response rate, paper or online? The results vary based on the non-profit and the list. My suggestion... send both.

### **D. Who should I survey?**

When conducting a donor survey, your results can get skewed very easily if you do not include the right donors. For example, if you send a planned giving donor survey to millennials, the results aren't likely to be very helpful. It is also best not to send your donor survey to everyone in your donor database, or to such a very small group that a few unusual responses could skew results.

You should target a specific subset that is based on your survey's goals and objectives. The grouping should consist of donors with either the required demographic, wealth or loyalty characteristics, who can best answer your survey questions. The better the quality of your survey list pull, the better will be your response quality and your insights. These should be the donors who are truly passionate about your organization and its mission.

There are multiple ways to segment your audience. Some additional criteria for your list pull could include top prospects, total donation amount, frequency of donations, when they give, how they give, etc. And don't forget your legacy society. These are your best donors and their insight and stewardship is instrumental. If you look at this as a direct mail list pull for a general bequest self-mailer, or something similar, you're probably going to get the results you seek.

## **V. WRITING YOUR SURVEY**

*“Writing means sharing. It's part of the human condition to want to share things - thoughts, ideas, opinions.”*

~ Paulo Coelho

### **A. Survey Story Arc**

The structure of a short story follows a pattern with a beginning, middle, and end. Each of the three parts of the story fulfills a distinct purpose. The beginning hooks the reader, introduces the main characters and mood and tone of the journey. The middle is where complications occur, characters change and grow as the story continues to the climax. And finally, in the end the main conflict is resolved. The same goes for a survey.

A donor survey should start with a welcoming introduction that explains what the survey is and why donors should participate. It lets them know why their feedback is important and valued. Some may want to express how each donor response is private and will be kept in confidence. A thank you in advance will set the tone for the “story” ahead.

For example:

*“Thank you for spending ten minutes answering this survey. As one of our key supporters, we want to learn more about what you think and value, what we can do to serve you better, and how we can best implement a legacy giving program for the XXX. “*

## Shifting the Conversation from Cash to Assets

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The middle of the survey is the meat. This may start off slow with some simple demographic questions and quickly get to the questions that go directly to your objectives. From questions on starting an annuity program to bequest intention questions. Or from loyalty and trust questions to “customer service” concerns. Again, we are soliciting answers based on your objectives.

For example:

*“Many people like to make a gift to charity and receive guaranteed fixed income for life (a charitable gift annuity).*

- *I have not heard of a charitable gift annuity before*
- *I have heard of a charitable gift annuity but have not created one*
- *I have heard of charitable gift annuities and have created one for another charity*

At the end of our survey, there may be a final open-ended question that lets the donor express an opinion about your mission or the fundraising operation in general, good or bad. You can also ask donors in one of the last questions if they want to be contacted about making a gift. Regardless, the end calls for appreciation and an opportunity for a call to action to learn more.

For example:

*“Thank you for your time. As part of our mission to bring an end to XX disease, we are asking donors to consider leaving a bequest to XXX in their will. If you’d like to receive more information about this, or have any gift planning questions, please contact XXX.”*

### **B. Donor Survey Quick Tips**

Here are some additional points to consider when creating your survey:

#### **1. Keep it short.**

Shorter surveys are more likely to produce higher response rates. Try not to include more than 10-15 questions. It should only take between 5 and 10 minutes. If it takes longer your questions may be too complicated or too numerous. Closed-ended and multiple-choice questions help donors quickly submit. And no more than one open-ended question is recommended.

But what if you came up with 20 great questions that address your objectives perfectly?

Review them and edit down as every question above your tenth question will cause an incremental drop-off in response. It's better to have more donors take the survey, finish it, and be willing to take the time to do it again sometime, than have a donor start, stop, and be annoyed that the survey is too long. If donors start and don't finish, the likelihood that this donor will open another survey from you is very low.

#### **2. Be simple and specific.**

Don't use legalese, jargon, acronyms or internal references. Use simple, familiar words whenever

possible. Define technical or unfamiliar terms. Use donor-centric language by connecting with donors' sense of giving and their commitment to your mission. Write survey questions that emphasize your donor's lasting impact. Your language can be friendly, supportive, and fulfill your objectives.

For example:

When discussing an annuity don't say:

*"Have you ever done a CGA?"*

Or

*"Have you ever done a charitable gift annuity?"*

Not all donors will recognize the acronym, and some may not know what a charitable gift annuity is. But if you describe it and give the name at the same time it will help with understanding.

*"Many people like to make a gift to our charity and receive guaranteed fixed income for life (a charitable gift annuity). Would you be interested in making this kind of gift?"*

This form of question has the additional benefit of communicating to the donor that lots of other donors have made this sort of gift. It appeals to the donor's desire to be part of a group. That is, funding a gift annuity is a "social norm."

### **3. Avoid leading questions.**

You want unbiased responses so don't plant opinions in your donors' answers. It's easy to accidentally suggest a certain answer in your questions. The key is to avoid "presuppositions." To avoid this, before sending to donors send your survey to a test group for feedback. Ask them to look for any bias. You may also find you need to add a neutral choice in some questions. Otherwise, with a yes or no question you may force a donor to give an answer they don't believe in. Having a neutral choice like "I don't know" may seem to let your donor off the hook but doing so can improve the quality of your data.

### **4. Avoid compound questions.**

Ask one thing at a time. Separate questions get better answers. Split a question like *"Should spending be reduced for research and marketing?"* into separate questions, e.g., one about research and another about marketing. Your donor may have opposing views about both subjects. In that case, you're sure to collect misleading results unless you split them in two.

### **5. Write good subject lines**

The biggest mistake planned giving marketers make in online donor surveys is forgetting the importance of the subject line. If the email doesn't get opened, then the survey does not happen. The best survey questions that don't get read, don't produce results.

For example:

Subject line: “Take our survey!”

This does not speak to the donor personally. You can do better. Look at what works for your email marketing and follow suit. Copy the voice and messaging from the subject lines with the highest open rates you have tested. It could be “What do you think about XXX?” or “What is wrong XXX?” or “XXX needs your help!” Be creative and test thoroughly.

### **6. Follow-up strategy**

**Once the survey is complete you must be** prepared to follow up the results. This means, most importantly, connecting with your donors who asked for more information or to be contacted. Actually, you want to reach out to every respondent, first and foremost to thank them for their feedback. Not with email. Pick up the phone.

Make a plan to follow up before sending. If you won’t be able to follow up, then don’t send the survey.

Following up with the respondents gives you an opportunity to build a relationship with a valued community member. Legacy Society members specifically deserve attentive stewardship. Also set time aside to analyze the data and determine whether your survey helped you achieve your strategic objectives. If not, rewrite the questions or replace them with new ones so you can send the survey again the following year or to a different segment. The first survey results are your benchmark. Compare all future surveys to these results and improve on them by testing new ideas.

### **C. Sample Questions:**

Here are some topic and question ideas to ask your donors:

#### **Demographic data:**

Are you married?  
Do you have children?  
What is your income level?

#### **Participation:**

Have you volunteered?  
Attended events?  
Which ones?

#### **Why are they giving?**

How did you come to be a donor?  
Why do you give to our organization?  
What programs are of most interest to you?

**How do they like planned giving marketing?**

Do you like our print newsletter?  
Do you like our email newsletter?  
Do you know the impact of a gift to our organization?

**Bequest information:**

Have you included our organization in your will?  
Would you include our organization in your will?  
Would you like more information about bequest planning?

**Other gift information:**

Would you consider a life income gift?  
Is a tax benefit important to you when making a gift?  
Would you like a free estate planning guide?

**VI. CONCLUSION**

*“Let our advance worrying become  
advance thinking and planning.”*

~Winston Churchill

A donor survey is the best way to ask your most generous donors in bulk, “What do you think?”

This can be a conversation starter, and perhaps a connection between you and donors you don’t have a relationship with yet. It’s an additional discovery process for your program that may just lead to a deeper planned giving conversation. And perhaps a few gift intentions you did not know about.

Donor surveys are perceived differently from the other marketing you send out. Donors actually like them. They provide a vehicle for donors to make their voices heard, while also offering your organization invaluable information about how donors perceive you. Donors enjoy being asked their opinions and they appreciate when you listen and empower them to help guide the future of an institution they love.

It’s a win-win.

But only if you ask.