

Chapter

# 05

REVIEW

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## 1. Overview

A review of the various stages of the donor management framework allows learning of what has worked and what has not. The review results can be used to improve fundraising and donor management. The review of these stages should include the following:

- ◆ Review of the results or ends i.e. the desired outcomes of the various activities.
- ◆ Evaluation of the means, i.e. ways of achieving the NPO's goals through fundraising
- ◆ Understand and document the lessons learnt so that the NPO can improve its ability to raise resources and build donor satisfaction

☞ **If it is difficult to find answers to the major questions, it means the ability to keep track of information needs major improvement.**

An in depth-review will help you answer major questions such as:

- ◆ What is our confidence level with regard to the fundraising potential of our NPO this year? Is it higher or lower than last year? What hard evidence do we have one way or other?
- ◆ How well did we do in our communications and public relations effort? Did we communicate the need and how the audience can help through the communications materials (vision, mission, case for support)?
- ◆ How did we use external connections with networks and umbrella organisations to benefit our NPO?
- ◆ How did we use internal resources such as board members, fundraising or communications committees and other volunteers? Did these resources do what they said they would? Do we need more volunteers? Who are the “star” volunteers for the year and how should we recognise them? How can they be given more responsibilities? Did any of the volunteers perform poorly? How can volunteers that performed poorly be replaced or redirected?
- ◆ What fundraising programmes of last year were repeated this year?
- ◆ If we look at the cost vs revenue of each programme, which is the most cost effective?

- ◆ What new fundraising and donor development programmes were piloted for this year?
- ◆ Which of these should be repeated next year? Why? How can these be improved further?
- ◆ Which resource development and communications activities / programme should be re-evaluated or terminated? Why?
- ◆ How did the *gift-in-kind* programme fare? Why? What were some of the savings that were made? Were they at the cost of the fundraising and donor management results? How can this be rectified next year?

## 2. Checklists

Below are checklists to help you review the various stages, document the lessons learnt and develop recommendations.

### I. Concept stage

Item	Review	Lessons	Recommendations
a. Sector research and analysis	<ul style="list-style-type: none"> <li>◆ External factors</li> <li>◆ Internal factors</li> </ul>		
b. Fundraising mission, vision and goals	<ul style="list-style-type: none"> <li>◆ Clarity</li> <li>◆ Inspiration</li> </ul>		
c. Case statements	<ul style="list-style-type: none"> <li>◆ Based on donor point of view</li> <li>◆ Effectiveness</li> </ul>		
d. Budget, resources <ul style="list-style-type: none"> <li>❶ Board</li> <li>❷ Staff</li> <li>❸ Volunteers</li> </ul>	<ul style="list-style-type: none"> <li>◆ Structure and number</li> <li>◆ Involvement: effectiveness, efficiency</li> <li>◆ Budget vs actual</li> </ul>		

**II. Planning stage**

	<b>Total funds, resources raised (\$)</b>	<b>Total # of donors</b>
<b>a. By source</b>		
◆ Individual donors		
◆ Large and/or family foundations		
◆ Large businesses		
◆ Small businesses		
◆ Religious and civic organisations		
<b>b. By method</b>		
◆ Capital campaign		
◆ Endowment campaign		
◆ Grants		
◆ Mass marketing		
◆ Planned giving		
◆ Regular or annual giving		
◆ Special event		
◆ Sponsorship		
◆ Gift-in-kind		
◆ Fee for service		
◆ Merchandising		

**III. Implementation stage**

Review		Lessons	Recommendations
<ul style="list-style-type: none"> <li>◆ Donor identification and research</li> </ul>	<ul style="list-style-type: none"> <li>◆ Did we attract new donors / supporters (e.g. individuals, corporates, grantmakers) in each category this year compared to last year?</li> </ul>		
<ul style="list-style-type: none"> <li>◆ Planning and cultivation</li> </ul>	<ul style="list-style-type: none"> <li>◆ Did we talk only of donations or did we talk of shared responsibilities, partnership and collaboration?</li> </ul>		
<ul style="list-style-type: none"> <li>◆ Soliciting</li> </ul>	<ul style="list-style-type: none"> <li>◆ Did we specifically ask for more this year?</li> <li>◆ Did donors that gave again this year, give more than last year?</li> <li>◆ Were donors who did not give this year given other alternatives of support, e.g. through volunteering?</li> </ul>		

Review		Lessons	Recommendations
◆ Stewardship	◆ How assured are donors that their donations have impacted the cause?		
◆ Renewal	<ul style="list-style-type: none"> <li>◆ Were all donors from last year asked to support again this year?</li> <li>◆ Did previous donors continue / stop giving this year? Why?</li> <li>◆ What did we learn about our donors?</li> <li>◆ What category of donors should we focus on more next year?</li> </ul>		
◆ Donor database	<ul style="list-style-type: none"> <li>◆ Accuracy</li> <li>◆ Frequency of update (timeliness)</li> <li>◆ Information relevance</li> </ul>		
◆ Communications, cost of fundraising	◆ Based on method, e.g. special events, direct mail		

#### **IV. Review donor relations (donor relations audit)**

Nothing helps the NPO understand its key stakeholders better than the stakeholders themselves. A donor relations review (sometimes called “donor relations audit”<sup>1</sup>) helps validate the NPO’s assessment of itself. Questions to ask of donors include:

- ◆ How effectively did we (i.e. the NPO) communicate its need and understand donor interest before asking for donations?
- ◆ Did we provide the information you needed to make a decision on making a donation?
- ◆ How satisfied are you with the way we asked for donations?
- ◆ How satisfied are you (i.e. the donor) with your ability to designate what your donation is to be used for? How assured are you that we will use your gift according to your donor intent?
- ◆ How satisfied are you with the recognition you receive for being a donor?
- ◆ Did we listen to your opinions and ideas?
- ◆ How satisfied are you with the relationship between the NPO and yourself as a donor?
- ◆ How often are you given an opportunity to visit / experience the work done through the NPO?

There are several ways to carry out the donor relations review.

<b>Evaluation methods</b>	<b>Action</b>
◆ Document review	Gather information from pre-existing materials.
◆ Observation	Gather information on how the donor management framework operates and documenting the visual changes that have resulted.
◆ Survey	Get information from individuals about their knowledge, attitude and behaviour towards the NPO and its cause.

<sup>1</sup> This “audit” is separate from the internal audit on controls or processes, e.g. for fundraising (basic tier, Code of Governance for Charities & Institutions of a Public Character).

<b>Evaluation methods</b>	<b>Action</b>
◆ Interview	Obtain information from individual donors and supporters about their experience or to learn more about their answers to surveys.
◆ Focus group discussion	Hold discussions with groups of people to understand in depth what they believe is their relationship with the NPO and how they saw the relationship going forward.