Introduction

The Goldie Company in association with Collis & Reed Research developed and administered a survey to query nonprofit and charitable organizations from across Canada on donor recognition and stewardship practices. The main objective of this project was to construct a profile of how these organizations go about thanking and stewarding their donors.

Specifically we looked at:

- The most common stewardship and donor recognition practices in use.
- Strategies that are perceived to be the most successful.
- Practices that have not been successful.
- The challenges that recognition programs face.
- The extent to which organizations with well-developed stewardship programs have been affected by the current economic situation.

Characteristics of the Survey

The survey was administered as an online questionnaire that could be accessed from March 1 to May 31 2010. Participants were informed about the survey via an e-mail that included a link that could be clicked on to directly access the survey.

The survey consisted of 20 questions, which included multiple-choice, check off, rating and open-ended questions. It began with questions about the characteristics of the organization's donor program in general: Do you have different programs in place to thank donors depending on their level of contribution? What are these levels and how do you thank your donors?

The survey then specifically focuses on major donors: Do you have a program in place to thank major donors? How long have you had this program in place? How many work in this program? What is your definition of a major donor? How do you thank major donors? How often do you contact them? What works particularly well and what has not worked well?

Next, the survey asks about challenges that major donor stewardship programs face, i.e., types of challenges are encountered, the nature of changes made, the motivation making changes, how success is measured, and resources used to learn about new fundraising approaches.

Respondents were then asked to rate their level of agreement as to whether their organization had:

- A strong and realistic Case For Support.
- A fundraising team that is seen as champions for their cause.

- An effective strategy in place to cultivate donors for future gifts.
- An up-to-date and well-utilized database.
- A system in place to inform and engage major donors.
- A well-run donor recognition program in place.
- A coordinated and active media communication strategy in place.

In addition, respondents were asked whether their organization increased or decreased in the number and amount of donations during 2009 in comparison to 2008. The final section of the survey queried respondents about the characteristics of organization (i.e., type of organization, type of fundraising they do, their size and approximate amount of annual revenue required.)

As a way to encourage participation, all respondents received a mini-summary of the results as well as a custom-generated report that shows how their organization compared to the survey sample in general and to their particular sector.

Survey Response

A total of 207 nonprofit and charitable organizations from across Canada took part in the survey. Sixty percent of participants were from organizations that were headquartered in Central Canada while 25% were located in Western Canada. The remaining 5% were from Eastern Canada.

Data Analyses

Statistical analyses were conducted to help summarize the results for each question on the survey. The type of analysis performed depended on the format of question asked.

For multiple-choice formats where respondents selected a single response option from a fixed list, the percentage of respondents that chose each option was calculated. In addition, for some questions of interest, the results were further broken down by a demographic variable (for example: location, type of organization, whether the organization experienced an increase or a decrease in donations, etc.)

When respondents were able to select **more than one response option** that applied to their situation, the percentage of respondents that chose each option and the average number of response options chosen were reported. In the case where respondents were given a small number of response options to choose from (for example, three options), a frequency chart of all combinations of responses selected was provided.

For **open-ended questions** that required respondents to provide **numeric estimates**, either the average or median is reported (the appropriate measure is selected depending on the characteristics of the distribution of data). In addition, the range of values received is also reported.

For **open-ended text questions**, the main themes of the responses are summarized in the report. In addition, the verbatim comments are presented in the report appendix.

For questions that required respondents to provide **scale ratings**, these analyses were conducted and reported:

The overall mean (average) rating for the question.

The percent of respondents that gave ratings below neutral, at neutral and above neutral.

Responses to each rating scale question were also divided by four key **demographic breakdowns**: type of organization, location of organization, size of organization and whether the organization reported an increase or decrease in the amount donated during the first quarter of 2009 compared to 2008. The average rating per question was then calculated for each of these demographic breakdowns.

When demographic breakdowns are provided, it is of interest to state whether there is a true or **significant difference** between the groups and that these observed differences would also apply to organizations that did not participate in the survey. Typically in research, inferential statistics are used to make these determinations. However, accuracy of these statistics is dependent upon specific criteria that survey data usually do not adhere to. The accuracy of these measures becomes even more of a problem when applying these statistics to survey data with less than 100 participants per group.

An alternative approach is to use a more descriptive-derived statistic called **Effect Size**. The accuracy of this statistic is not as strongly associated with the strict criteria required by inferential statistics. The Effect Size statistic is a measure of the strength of the difference between two variables. It is derived from the average difference between the two variables and the width of the distribution of ratings (standard deviation). Taking these two factors into consideration, the Effect Size statistic enables one to ascertain whether a difference is small, medium or large. In this report, effect size is used to ascertain whether ratings for demographic groupings are different from each other. The Effect Size criterion applied to this study is a Cohen D statistic of .5 or greater, which is equivalent to a medium or larger effect size difference.

With respect to identifying the demographic differences between frequency percentages, confidence intervals for both percentages are calculated; if these intervals do not overlap, the two percentages would be considered different. The narrower the intervals, smaller differences between the percentages would be needed in order to classify these as different. Two factors impact the width of interval: the number of responses that comprise the percentage and the extent to which the percentage deviates from 50%.

All demographic variables that meet either of these criteria are noted in the text and highlighted in the concluding remarks.

In this report **statistical differences** refers to deviation in ratings, scores or percentages between groups that meet a statistical criterion to suggest that a difference between groups likely exists in the population. **Trends** are strong patterns in the data that suggest a difference might be present but due to a small number of data points or high variability the magnitude of the difference is not large enough to state conclusively that a true difference exists.