

Needs Assessment Report

# Assessing Youth Mentoring Initiative's Funding Gap



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R621 Analysis for Instruction/Performance Improvement  
Indiana University School of Education

## Executive Summary

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The purpose of this needs assessment was to assist the Youth Mentoring Initiative (YMI) in understanding funding opportunities. This assessment will help them close the gap between their current funding and the funding needed to support the requested services of the Hamilton Southeastern Schools in Fishers, Indiana. This report offers the following findings and recommendations:

### Strengths

1. YMI's mission of serving local students-in-need resonates with donors.
2. YMI has a stable relationship with its two largest grant partners - HSE Schools and the city of Fishers, Indiana.
3. YMI has an established annual fundraiser at the beginning of the school year.
4. YMI has recently increased its reach by employing campus coordinators and more than doubled the number of its mentor-mentee matches.
5. School staff and students-in-need and their parents/guardians view YMI's impact positively.

### Areas for Improvement

1. Donations to nonprofit organizations increase when they receive agency certification.
2. YMI's funding is not keeping pace with its growth.
3. YMI does not retain its donor base.
4. YMI's donor communication strategy needs to be strengthened.
5. Stronger relationships with donors and the local business community need to be achieved.

### Recommendations

1. Engage with the local business community to increase awareness of YMI's impact and its partnership with the community.
2. Enhance communication strategy by providing transparency regarding operations and finances to assist in fostering donor relationships.
3. Foster relationships with donors to give them a sense of ownership by incentivizing them to commit to the mission, vision and values of YMI.
4. Improve fundraising strategy by improving existing fundraising efforts and increasing fundraising opportunities to meet the demand of YMI's growth.

## **Acknowledgments**

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The A-Team is very grateful to all those who provided their assistance during this project.

We are truly thankful that Alison Gatz, Executive Director of YMI, provided us with the opportunity to work with her and make our recommendations. Her continued assistance is greatly appreciated.

We would also like to thank Maggie Butcho, Grants and PR Manager at Girls Inc., and Scott Spillman, Executive Director of HSE S.P.O.R.T.S., for taking the time to speak with us and share their experiences and insights.

We appreciate those YMI donors as well who completed our survey and provide us with their feedback.

Finally, we would like to thank Dr. Yonjoo Cho for sharing her expertise and guidance throughout this project. We appreciate her commitment to learning and excellence.

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## **Introduction**

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The purpose of this needs assessment was to analyze the funding strategy of the Youth Mentoring Initiative (YMI) and to research and recommend funding opportunities that will help them close the gap between their current funding and the funding needed to support the requested services of the Hamilton Southeastern School District (HSE) in Fishers, Indiana.

## **Purpose & Scope**

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In order to manage the growing number of students in need of YMI's mentorship service, improvements to YMI's funding strategy is critical. The goal of this need assessment was to determine the gap in the current fundraising strategy and suggest recommendations. An increase in funding will allow YMI to provide additional staff to assist HSE and the volunteer mentors who partner with students. Recommendations will be based on research, interviews, and survey data.

## **Background**

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YMI was established in 2008 to bring the community of Fishers, Indiana, together with the HSE School Corporation to share in the responsibility of helping students-in-need. Since its inception, hundreds of community volunteers have provided these students positive adult relationships through this mentoring program.

Over the years, YMI has gone through organizational changes as they work to better serve the needs of the school system and the students. YMI currently has seven paid staff members including an executive director, director of mentor development, an administrator, and four campus coordinators. While all roles are critical, the campus coordinators are essential to fostering the relationship between the schools, students, and mentors.

During the 2018-19 school year, the amount of mentor-to-mentee matches more than doubled, resulting in an increase in the amount of hours campus coordinators worked. Additional coordinators are also needed as this growth continues into the 2019-20 school year. A gap now exists in the amount of funding needed to employ these coordinators.

## Frame Factors

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Internal and external frame factors needed to be identified for our team to take into account any real or possible restrictions in our analysis. The A-Team took the following internal and external factors into account:



### Time

The timeframe for the project completion was limited to just over two months, with a one-week disruption due to the HSE fall break, occurring during scheduling interviews and collecting survey data.



### Availability

The availability of similar organizations to answer our questions was a concern. We were unable to secure a third interview with a local nonprofit organization to help compare fundraising strategies.



### Trust

Trust was an issue with speaking to other organizations who were unable to give us financial information.



### Donor Surveys

We were unable to secure a 30% response rate for our donor survey. YMI's executive director emailed our survey to over 500 current and past donors, resulting in 33 completed surveys. Two specific factors created challenges for reaching this threshold: the initial email was sent during the school system's week-long fall break, and many past donor email addresses were not current, resulting in emails returned as undeliverable.

## Validity & Reliability

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Designing and executing a needs assessment that deliver high-impact recommendations is challenging. As members of the A-team, we spent a lot of time thinking about how to ensure our work would provide the highest potential value to YMI, both at a project and a systemic level. In order to achieve this objective, we focused on ensuring the research strategy was grounded in strong assessment design and included focus of validity and reliability.

In order to ground our work in valid information, we first conducted a literature review to establish a common baseline of knowledge around fundraising in nonprofit organizations across the United States. This review ensured our needs assessment and subsequent recommendations were grounded in evidence, based on the literature, and designed with validity in mind. The literature review provided a foundation on which the rest of our assessment was based.

After the literature review, we ideated on how to best meet the needs of YMI through our needs assessment work. We identified and discussed the persistent challenges of fundraising in nonprofit organizations, collectively agreed on these ideas, and established a needs assessment goal which informed the rest of the assessment work.

After we established our assessment goal, we then articulated strategic research design outcomes. These outcomes focused and aligned our efforts on the information we wanted to capture. These outcomes would also help establish the reliability of our overall assessment by providing targets for the data we aimed to capture.

Once the outcomes were finalized, we strategically built our research design to support the outcomes on which we agreed. The design included multiple instruments that could be used in combination with the literature to support YMI in understanding their current and desired state. Through triangulation of the literature and the multiple data points included in our research design, validity and reliability became the cornerstone of our needs assessment.

# Project Methodology

Our project methodology included four distinct phases including initiation, data collection, analysis, and results (Figure 1).

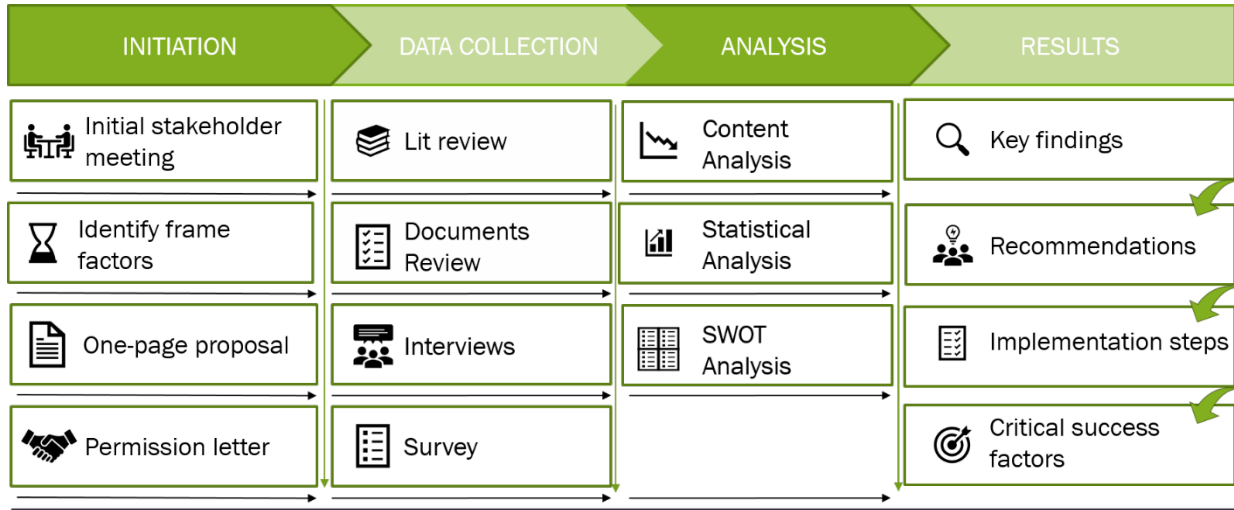


Figure 1. Project methodology.

## Initiation

Our needs assessment began with an initial interview with Alison Gatz, Executive Director of YMI. Along with Alison, we determined the project would focus on the gap between YMI’s current funding and the funding needed to provide the requested services for students in the HSE district. We determined the scope of our project and developed a one-page proposal (Appendix A), defining the purpose, key stakeholders, frame factors, and timeline. We then received a permission letter from YMI (Appendix B) that enabled us to begin our assessment.



## Data Collection

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### Literature Review

We began our research with a literature review (see References). We focused our search on fundraising strategies (Alborough, L., 2017), donor retention (Bray, I., 2008), (Craver, R., 2019), and Shattuck, S., 2019), donor rights (Greenfield, J.M., 2013), and measuring funding impact (Heyman, D. R., 2016). The literature review imparted a better understanding of successful fundraising in nonprofit organizations.

- The key takeaway from the literature review was that donors to nonprofit organizations want to be inspired and involved, made to feel that their opinions matter and are solicited, heard and recognized (Greenfield, J.M., 2013).
- Providing donors with an emotional connection to the organization by showing them how their donation is making an impact through compelling success stories is important to donor retention (Heyman, D.R., 2016).
- A significant driver in fostering donor relationships is focusing on their experience. Donors want to feel like they are part of the solution, want to be appreciated, and want opportunities to make their views known (Craver, R., 2019).
- Donors want and rely on communication to keep them informed of the organizations progress and financial status and would like to be told of other ways to contribute like advocacy and volunteering. It is important to bring donors closer and closer into the circle until they feel like they are part of the organization and its decision-making influence (Bray, I., 2008).
- According to Waters (2011), “Dedicating more time to donor relations and stewardship can strengthen a donor’s loyalty to the organization” (p. 459).

The information gleaned from our literature review influenced the crafting of our interview and survey questions.

## Document Review

YMI invited an outside consultant in 2019 to analyze donor giving and funding impact from 2009 to 2019. The consulting firm provided YMI with an outcome report that looked at demographics, growth, and impact data. They provided a fundraising report card that covered trends in donor giving over the past 9 years.



### Mentor-to-Mentee Matches

YMI more than doubled the number of mentors with mentee matches during the 2018-2019 school year.



### Mentee Experience

YMI surveys mentees at the end of each school year. Most of the respondents gave ratings of between 90%-94% in having a good or excellent experience, feeling their mentor was a good match and feeling open to sharing feelings and emotions. 64% said they felt less stressed, and 62.5% felt better about their futures. Furthermore, 61% of surveyed parents and guardians reported noticeable improvements in behavior and attitude of their mentored students.



### School Staff Observations

Responses from a school staff survey regarding campus coordinators and mentoring benefit yielded positive opinions on the installation of campus coordinators and felt very positive about the change in emotional wellness, social interactions, and positive attitudes in mentored students.



### Donation Trends

Significant findings regarding trends in donations for YMI show the average donation amount increased by 125%, and the donor lifetime value – the prediction of how much money you can expect to receive from a donor during the lifetime of their giving to the organization – increased by 43%. However, total number of donors, recurring donors, and one-time donors all decreased. The number of donations a donor will make during a set period of time or donor frequency is 1.72 and decreased by 36%.

From this data, we were able to understand the strengths, weaknesses, threats, and opportunities related to donor giving and YMI's impact. We then crafted interview questions to gather data on how other nonprofit organizations ran successful funding campaigns (Appendix C).

## Interviews

We began our semi-structured interview (Appendix C) series with our client Alison Gatz, Executive Director of YMI, using a Google Hangouts meeting to determine what the greatest needs of the Youth Mentoring Initiative were. It was determined that the greatest need was to help YMI determine the gap between their current financial strategy and their need for more funding to provide the requested services due to their rapid growth.

We had a goal of interviewing individuals at three local nonprofit organizations that concentrate their efforts on helping and inspiring students. However, due to the timing of HSE week-long fall break, most of our requests were denied because of unavailability. We were able to interview two nonprofit organization leaders, Maggie Butcho, Grants and PR Manager at Girls Inc., and Scott Spillman, Executive Director of HSE S.P.O.R.T.S. We conducted semi-structured interviews (Appendix C) via Zoom web conferencing, which allowed us to record the events and write transcripts.

We analyzed the interview data using qualitative analysis by coding themes and finding differences and similarities in the interviewees' answers that matched the themes. These interviews gave us insight into the challenges of fundraising and strategies these nonprofit organizations use to overcome their challenges.

From these interviews, literature reviews and document analysis, we created a survey to send to individual donors and business donors with the hope of understanding what their motivations are in donating and how they can be influenced to donate or continue their donating to YMI.

## Survey

We created a survey based on literature, document, and interview reviews (Appendix D). The Qualtrics survey we designed was submitted for pilot-testing to our R621 classmates, and feedback was solicited from our professor and three separate student groups. After making changes to our original survey based on this feedback, we revised the survey and emailed a link with a project introduction to 47 recent business donors, resulting in 10 completed surveys. A week later, our client emailed the same introduction and survey link to 500 past donors, which resulted in a total of 33 completed surveys. The low return amount may reflect inaccurate donor contact information. Our client told us she received a number of non-deliverable messages after sending the link.

The goal of the survey was to find the connection between what donors value and the values of YMI. We used descriptive statistics to analyze the data from the survey returned to us. The survey consisted of ten ranking, Likert, fill-in, and select one or all-that-apply questions. The aim of this survey was to gather donor demographics, factors that motivate donating to YMI, and open responses on how YMI can maintain a relationship with donors and suggestions for improvement.

### Donor Demographics



Of the 33 respondents the majority live in the Hamilton Southeastern School (HSE) district (39%) and have or have had children who attended HSE Schools (25%). The age range of respondents was 36-66+ and some have been or are currently mentors in YMI's program (24%).

### Donor Frequency



The majority of donors give a less than monthly to YMI. Only 8% of respondents say they give a recurring monthly donation. Most respondents give as individuals.

### Donor Reasoning



The most important reason for respondents giving is the impact on young people (90%) with impact on the community coming in as the second most important reason (51%). YMI success stories were also motivation for giving (36%). Few were influenced to give because of the annual fundraiser, tax strategy or because they were mentored as a child.

### Donor Retention



The majority (at 95% confidence) want to know how their donations are used (80%-98%), want to be informed of YMI's financial status (71%-94%), want to be informed of organizational changes (66%-92%), want to be shown appreciation for donating (61%-89%) and sent a consistent newsletter (44%-76%). When asked how a relationship with YMI can be strengthened, the majority of respondents want to be informed of the impact their donations are making.

## SWOT Analysis

We performed a SWOT assessment to determine the internal strengths and weaknesses of YMI and the external opportunities and threats to help understand the current state of funding.

S Strengths	Weaknesses W
<ul style="list-style-type: none"> <li>• YMI has an established annual fundraiser.</li> <li>• YMI’s mission of impacting young people matches the primary reason contributors donate.</li> <li>• YMI has a stable partnership with their two largest consistent donors: HSE Foundation and Fishers City Council.</li> <li>• YMI is the only organization that partners with the HSE school district for mentoring.</li> <li>• Average growth in number of mentor-to-mentee matches during the 2018/19 school year has significantly increased.</li> <li>• The majority of mentees rated their experience as good or excellent.</li> <li>• Over half of parents/guardians reported an improvement in student behaviors/attitudes.</li> </ul>	<ul style="list-style-type: none"> <li>• YMI lacks a measurable fundraising goal.</li> <li>• YMI lacks a donor management system making it difficult to track, survey, and communicate with donors.</li> <li>• YMI doesn’t produce an annual report.</li> <li>• YMI’s single fundraiser is insufficient in providing enough funding, networking and participant testimonials.</li> <li>• YMI has not been able to retain its donor base.</li> <li>• YMI’s grants are not dependable.</li> <li>• YMI needs staffing roles dedicated to building relationships with donors, local government, and business community.</li> </ul>
O Opportunities	Threats T
<ul style="list-style-type: none"> <li>• Nonprofits have models for future giving needs, communicate fundraising goals, share their mission and vision, and let donors choose how to give.</li> <li>• Giving by foundations and corporations has increased in the past two years.</li> <li>• Current strong economy may increase giving.</li> <li>• Grants are available through national retail chains in the community who make donations to local charities.</li> <li>• Digital strategies for donors are becoming easier.</li> <li>• Receiving agency certification increases donations.</li> <li>• More personal messaging increases giving.</li> </ul>	<ul style="list-style-type: none"> <li>• Competing with established local and national nonprofit organizations that also serve at-risk youth.</li> <li>• Donors’ inability to differentiate among nonprofit organizations.</li> <li>• Prospective donors are less likely to donate than existing donors.</li> <li>• Donors make giving decisions based on personal background, preferring charities that they can relate to and that promote their own interests.</li> <li>• Changes to tax laws may change donation deductions.</li> </ul>

# Key Findings

Using the data points included in our SWOT analysis, we determined the following:

<b>Strengths</b>	
Finding 1	YMI’s mission of serving local students-in-need resonates with donors.
Finding 2	YMI has a stable relationship with its two largest grant partners - HSE Schools and the city of Fishers.
Finding 3	YMI has an established annual fundraiser at the beginning of the school year.
Finding 4	YMI has increased its reach by employing campus coordinators and more than doubling the number of its mentor-mentee matches.
Finding 5	School staff and students-in-need and their parents/guardians view YMI’s impact positively.
<b>Areas for Improvement</b>	
Finding 6	Donations to nonprofit organizations increase when they receive agency certification.
Finding 7	YMI’s funding is not keeping pace with its growth.
Finding 8	YMI does not retain its donor base.
Finding 9	YMI’s donor communication strategy needs to be strengthened.
Finding 10	Stronger relationships need to be achieved with donors and the local business community.

## **Recommendations, Implementation Steps, and Critical Success Factors**

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Using the findings identified, we determined the following recommendations, implementation steps, and critical success factors.

### **Recommendation 1**

Engage with local business community to increase awareness of YMI's impact and its partnership with the community. (Findings 4, 7, 8, & 10)

### **Implementation Steps**

- Define the problems YMI solves for the community.
- Identify unique attributes that differentiate YMI from the other local nonprofit organizations.
- Develop messaging tools that articulate the differentiated value YMI brings to the community.
- Prioritize community outreach within YMI to establish a community outreach responsibility.

### **Critical Success Factors**

- Support from YMI leadership.
- Staff to implement and execute the above ideas.
- Design resources to execute differentiated messaging.
- Focus efforts of community outreach responsibility.

## **Recommendation 2**

Enhance communication strategy by providing transparency about operations and finances to assist in fostering donor relationships. (Findings 1, 2, & 9)

### **Implementation Steps**

- Ensure the database is up to date with current donor contact information.
- Conduct surveys to elicit feedback from YMI donor base.
- Provide quarterly newsletters via email with donor-preferred content:
  - affirmation of the organization's importance
  - proof of the organization's effectiveness
  - Staff spotlight
  - mentor-mentee success stories
  - impact of past and future financial gifts
  - appreciation for financial gifts
  - update of financial goals
  - update of financial status
  - organizational changes
  - requests for opinions and feedback
  - Opportunities for advocacy or volunteering

### **Critical Success Factors**

- Adequate tracking of donor information.
- Consistent quarterly newsletter to donors.



### **Recommendation 3**

Foster relationships with donors to give them a sense of ownership incentivizing them to commit to the mission, vision and values of YMI. (Findings 1, 5, 8, 9, & 10)

#### **Implementation Steps**

- Provide dedicated employees/volunteers to work with donors. Take them to lunch. Invite them to the fundraiser.
- Stay in constant contact and let them know specific successes of their funding.
- Ensure donors feel that they belong to the organization by:
  - Immediate appreciation
  - Keeping them informed of changes, successes, and needs.
  - Considering them as members/clients of YMI.
  - Offering other ways to contribute like advocacy, promotion, and volunteering.
  - Providing opportunities for donors to help with decision making and other opportunities to influence YMI.
  - Affirming donor importance in the work of YMI.
  - Tying the donors' gifts to YMI's success in the community in every communication.
- Give donors a sense of personal identification with YMI's mission.
  - Provide inspiration and involvement through communication and program participation.
  - Give donors evidence that their opinions are wanted, heard and recognized.
- Build trust with prospective donors by adding YMI to registered charity sites like Gift USA.

#### **Critical Success Factors**

- Stay in constant contact with donors and let them know the specific success of their funding.
- Consistently provide evidence and inform donors of how YMI is progressing towards its goal.
- Incorporate opportunities for donor input.

#### **Recommendation 4**

Improve fundraising strategy by improving existing fundraising efforts and increasing fundraising opportunities to meet the demand of YMI's growth. (Findings 2, 3, 4, 6, & 7)

#### **Implementation Steps**

- Feature client success stories during any fundraising effort.
- Conduct a survey to elicit feedback after any major fundraiser.
- Add a celebration event in the spring.
- Develop a digital fundraising strategy.
- Enhance existing fundraiser:
  - Encourage business sponsors to invite employees.
  - Incorporate additional donation incentives such as a silent auction.
  - Offer explicit donor networking opportunities to help business donors connect.
  - Decrease emphasis on the mayor and increase emphasis on donors and mentors.
  - Add an inspirational guest speaker.
- Secure donations from retail corporate sponsors with local in-store programs.
- Donations to nonprofit organizations increase when they receive agency certification.

#### **Critical Success Factors**

- Support from YMI leadership for additional fundraising projects.
- Staff to implement and execute on the above ideas.
- Tools required to support the additional tasks.

## Appendix A: One Page Proposal

### Closing the Fundraising Gap in a Non-Profit Organization through Needs

**Purpose:** The purpose of this needs assessment is to assist the Youth Mentoring Initiative (YMI) in understanding funding opportunities that will help them close the gap between their current funding and the funding needed to support the requested services of the Hamilton Southeastern School District in Fishers, Indiana.

**Rationale:** YMI is not able to support the number of services needed in the community due to their current funding strategy. Currently, schools have more students requiring services, than available funding. YMI is understaffed and not able to provide enough site coordinators to manage the present need. Therefore, we will use an NA to help YMI meet their funding goals.

**Key Stakeholders:** Key stakeholders include the paid YMI staff, related non-profit organizations and current funding partners. Secondary stakeholders include the Hamilton Southeastern School District, volunteer mentors and mentees.

**Frame Factors:** We have a limited timeframe to complete the assessment. External factors may include gaining the trust of similar organizations and their availability to answer questions.

**Data Collection and Analysis:** The A-Team will complete the following activities:

- Conduct a literature review on fundraising in non-profit organizations.
- Conduct Interviews with 3-5 similar organizations, YMI Leadership, and YMI Staff to determine their fundraising strategies. Analyze the interview data using a content analysis.
- Survey current funding partners to determine what type of data they would need to increase financial support of YMI. Analyze the survey data using descriptive statistics.
- Conduct a SWOT assessment to identify the internal and external factors that may be found as attributing to the funding problem.

#### Project Plan and Division of Labor

Tasks	Deadlines	Key Person
Initial meeting with client	September 5	Jeff
One-page proposal	September 16	Linda
Permission letter	September 30	Linda
Data collection: Literature/Document reviews	September 23	Sara
Interviews: Director/Staff/Two Similar Organizations in adjacent school districts	October 1-14	Linda
Survey Questionnaire Funding Partners	October 1-14	Jeff
Data analysis: Survey data assessment using descriptive statistics	October 14-25	Jeff
Interview data assessment using a content analysis	October 14-25	Linda
SWOT Assessment (Draft)	October 25-27, due October 28	Sara, Jeff, Linda
Submit progress report	October 21	Linda
Submit draft report and presentation	Nov 18 & Nov 20	Linda
Solicit client feedback	Week of November 18	Sara
Final report to Dr. Cho and client	December 2	Linda
Final presentation to the client	Week of December 2	Jeff

## Appendix B: One Page Permission Letter



September 24, 2019

A-Team  
Wendell W. Wright Education  
Building 201 N. Rose Ave.  
Bloomington, IN 47405

Dear A-Team,

I am writing to request a needs assessment for Youth Mentoring Initiative (YMI). YMI, which serves Hamilton Southeastern Schools in Fishers, Indiana, strives to match students-in-need with adult mentors. In order to manage the growing number of students in need of our service, a funding increase is required. With funding to provide additional site coordinators, YMI will be able to assist additional volunteer mentors in partnering with students.

YMI would like to work with you to identify opportunities to support a fundraising strategy to meet our goal. Specifically, we would like to understand:

- How other similar non-profit agencies obtain funding.
- How similar local organizations determine their fundraising strategies.
- How area for-profit businesses determine their charity strategy.
- How internal and external factors attribute to YMI's funding opportunities.

With your final report, we give the A-Team permission to use the name of our organization. Please deliver this report to me by Monday, December 2.

I look forward to collaborating with you during this process.

Sincerely,

A handwritten signature in black ink that reads "Alison Gatz". The signature is fluid and cursive, with the first name "Alison" being more prominent than the last name "Gatz".

**Alison Gatz**

*Executive Director*  
PO Box 743 | Fishers, IN  
46038 M: 317-289-8990  
[www.ymionline.org](http://www.ymionline.org)

## Appendix C: Interview Protocol

### YMI Interview Questions

The purpose of this needs assessment is to assist the Youth Mentoring Initiative (YMI) in understanding funding opportunities that will help them close the gap between their current funding and the funding needed to support the requested services of the Hamilton Southeastern School District in Fishers, Indiana. This interview will take less than 30 minutes. You may stop the interview whenever you want. Any information you supply will be kept confidential. We would like permission to audio-record this session to ensure the validity of our data collecting.

<b>Objective</b>	Determine how YMI creates relationships with donors
	<ul style="list-style-type: none"> <li>• What is the process YMI uses to obtain donors?</li> <li>• How do you engage feedback from your supporters?</li> <li>• Do you send surveys to supporters to get their input on a fundraising event or campaign?</li> </ul>
<b>Objective</b>	Clarify how YMI accomplishes return donor giving
	<ul style="list-style-type: none"> <li>• What information do you have on your current donor database?</li> <li>• May we have access to donor data?</li> <li>• Do YMI donors receive information on how their contribution was used? How often?</li> <li>• Do donors get appreciation for giving?</li> </ul>
<b>Objective</b>	Identify how YMI motivates businesses to give
	<ul style="list-style-type: none"> <li>• How do you let businesses who donate to YMI see the result of their donations?</li> </ul>
<b>Objective</b>	Understand <u>YMI's</u> current financial strategy
	<ul style="list-style-type: none"> <li>• What percentage of your income is spent on your mission?</li> </ul>

## Similar Non-profit Organizations Interview Questions

The purpose of this needs assessment is to assist the Youth Mentoring Initiative (YMI) in understanding funding opportunities that will help them close the gap between their current funding and the funding needed to support the requested services of the Hamilton Southeastern School District in Fishers, Indiana. This interview will take less than 30 minutes. We would like permission to audio-record this session to ensure the validity of our data collecting.

<b>Objective</b>	Determine how similar non-profit agencies create relationships with donors
	<ul style="list-style-type: none"> <li>• What is the process your organization uses to obtain donors?</li> <li>• How do you engage feedback from your supporters?</li> <li>• Do you send surveys to supporters to get their input on a fundraising event or campaign?</li> </ul>
<b>Objective</b>	Clarify how similar non-profit agencies accomplishes return donor giving
	<ul style="list-style-type: none"> <li>• What information do you have on your current donor database?</li> <li>• Do donors receive information on how their contribution was used? How often?</li> <li>• Do donors get appreciation for giving?</li> </ul>
<b>Objective</b>	Identify how similar non-profit agencies motivates businesses to give
	<ul style="list-style-type: none"> <li>• How do you let businesses who donate see the result of their donations?</li> <li>• Why do individuals and businesses donate?</li> <li>• What stands out about or distinguishes your org from other similar nonprofits?</li> <li>• How do you help donors feel they are part of an important cause?</li> <li>• What do you do that creates a positive attitude with donors?</li> </ul>
<b>Objective</b>	Understand similar non-profit agencies current financial strategy
	<ul style="list-style-type: none"> <li>• How does your organization evaluate its effectiveness?</li> <li>• What benchmarks do you set?</li> <li>• What are your main sources of funding?</li> <li>• What percentage is strictly from donations?</li> <li>• Do you receive any grants?</li> <li>• How do you encourage repeat donors?</li> </ul>

## Appendix D: Survey Questionnaire

### Closing the Fundraising Gap in a Non-Profit Organization Through Needs Assessment

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The purpose of this survey is to better understand what is important to you as a donor to Youth Mentoring Initiative (YMI). A graduate student team from Indiana University is conducting this survey as part of a course project to analyze nonprofit fundraising strategies to make suggestions for YMI. All survey information you share will be kept confidential, and the survey should take less than 15 minutes to complete. YMI and the IU student team both appreciate your participation. If you have any problems or questions, please contact Jeff Gastineau at [jpgastin@iu.edu](mailto:jpgastin@iu.edu).

#### DEMOGRAPHICS

Select all that apply to you:

- I live in the Hamilton Southeastern (HSE) school district.
- I was a student in the HSE school district.
- I am or have been an HSE parent.
- I am or have been a YMI mentor.
- I have a child who is or was a YMI mentee.
- I work or have worked on the YMI staff or served on the board of directors.

Your age fits into which of the following ranges?

- 18-25
- 26-35
- 36-45
- 46-55
- 56-65
- 66+

#### GIVING CHARACTERISTICS

Which of the following describes your support of YMI? Select all that apply.

- I have donated this year as an individual.
- I have donated this year as a business.
- I have donated in the past as an individual.
- I have donated in the past as a business.
- I donate monthly as an individual.
- I donate monthly as a business.

## **GIVING MOTIVATION**

**What motivates you to donate to YMI?** Rank the following statements in order of importance. Move the statements by dragging and dropping them within the list. The top of the list will show your first choice, and the bottom of the list will show your last choice.

- The impact on young people.
- The impact on my local community.
- My experience with an adult mentor when I was younger.
- My child's experience as a YMI mentee.
- YMI student success stories.
- My annual tax strategy.
- The Mayor's Breakfast fundraiser.
- Other \_\_\_\_\_

## **RELATIONSHIP**

**What can YMI do to maintain its relationship with you?**

- Show appreciation for my donation(s). **Strongly Agree – Agree – Disagree – Strongly Disagree**
- Show how it uses my donation(s). **Strongly Agree – Agree – Disagree – Strongly Disagree**
- Inform me of its financial status. **Strongly Agree – Agree – Disagree – Strongly Disagree**
- Tell me about organizational changes. **Strongly Agree – Agree – Disagree – Strongly Disagree**
- Send me a monthly newsletter. **Strongly Agree – Agree – Disagree – Strongly Disagree**

**Is there something else YMI can do to ensure its relationship with you?**

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## **COMMUNICATION PREFERENCES**

**What is your communication preference from YMI?** Rank the following choices in order of importance. Move the choices by dragging and dropping them within the list. The top of the list will show your first choice, and the bottom of the list will show your last choice.

- Email
- Direct mail
- Social media
- Text
- Phone call
- Other \_\_\_\_\_



**OPEN RESPONSES**

**How did you first become aware of YMI?**

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**How can YMI's fundraising efforts be improved?**

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**Is there anything else you would like to share with YMI?**

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