

# NONPROFIT HOSPITALITY AUDIT

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*Five audits to evaluate how your organization treats the people who sustain it.*

A free resource from **Mission-Driven Momentum**  
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Organization \_\_\_\_\_  
Completed by \_\_\_\_\_  
Date \_\_\_\_\_ Role \_\_\_\_\_

## WHAT THIS IS

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This is not a strategic plan. It is not a values exercise. It is an inspection.

Hotels get inspected. Forbes Travel Guide evaluates properties against up to 900 criteria and weights service quality at 75% versus facilities at 25%. The Ritz-Carlton runs daily self-audits. Every serious hospitality operation submits itself to honest evaluation because the gap between what leadership thinks the experience is and what stakeholders actually experience is almost always wider than anyone expects.

This audit is structured the way a hotel inspection works: you walk through five areas of your organization's stakeholder experience, score what you find using specific criteria, and leave with a clear picture of where you stand and what to do first.

*Work through this with your team. Have each person complete the scoring independently first, then compare. Where your scores diverge most is where the real conversation needs to happen.*

### The Five Audits

**Audit 1: First Impressions** How people find you, contact you, and form their initial opinion.

**Audit 2: The Giving Experience** What happens when someone donates—from the moment of the gift through the first 90 days.

**Audit 3: Ongoing Engagement** How relationships deepen (or don't) over time—for donors, volunteers, and clients.

**Audit 4: When Things Go Wrong** How your organization responds to problems, complaints, and failures.

**Audit 5: Your Internal Engine** Whether your team is equipped, empowered, and trained to deliver hospitality.

### Scoring

Each criterion is rated 1–5. Score based on what actually happens—not what the policy says, not what leadership intends, not what you hope.

<b>1 = Nonexistent</b> This does not happen or barely exists.	<b>2 = Inconsistent</b> Happens sometimes, depends on who's working.	<b>3 = Functional</b> Happens reliably but feels routine, not personal.	<b>4 = Strong</b> Consistent, warm, and intentional.	<b>5 = Exceptional</b> People comment on it. It's a signature of who we are.
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AUDIT 1

## First Impressions

*Jan Carlzon, who turned SAS Airlines from a \$17 million loss to a \$54 million profit in one year, calculated that his airline was created in customers' minds 50 million times a year, 15 seconds at a time. Every first contact is a 15-second window where someone decides whether your organization feels like a place that values them.*

Criterion	What "5" Looks Like	Score	Notes
<b>Website clarity</b>	A first-time visitor can find how to donate, volunteer, or access programs within two clicks.		
<b>Website warmth</b>	The site feels like people, not an institution. Photos show real work. Language is welcoming, not jargon-heavy.		
<b>Phone experience</b>	Calls are answered within four rings by someone who sounds glad to hear from you. No voicemail maze.		
<b>Email responsiveness</b>	Emails receive a substantive, personal reply within one business day.		
<b>Physical space</b>	If someone walks in, they are greeted. Someone makes eye contact. There is no confusion about where to go.		
<b>Online reputation</b>	Your Google reviews, social media presence, and digital footprint create a positive first impression.		
<b>Referral story</b>	When someone recommends your organization, the story they tell is specific and compelling—not generic.		

**Audit 1 Total:** \_\_\_\_\_ / 35

### The Mystery Guest

Recruit someone who has never interacted with your organization. Ask them to: visit your website and try to find three key pages (donate, volunteer, programs). Call your office with a simple question. Send an email and time the response. If possible, attend an event or visit in person. Make a small donation and document everything that happens afterward.

Give them one instruction: notice everything. Where did you feel valued? Where did you feel like a transaction? Would you come back?

**Mystery guest:** \_\_\_\_\_ **Target date:** \_\_\_\_\_

**AUDIT 2**

# The Giving Experience

*The Fundraising Effectiveness Project’s 2024 report: first-time donor retention has fallen to just over 19%—the lowest ever recorded. But once someone makes a second gift, retention jumps to about 69%. The gap between 19 and 69 is where hospitality lives.*

Criterion	What “5” Looks Like	Score	Notes
<b>Donation process</b>	Making a gift is smooth, fast, and intuitive. No more than three steps from intent to completion.		
<b>Immediate acknowledgment</b>	Within 24 hours, the donor receives a personal thank-you—not an automated receipt. Their name is used. Their gift is referenced specifically.		
<b>30-day touchpoint</b>	Within one month, the donor hears a specific story about what their gift is making possible—a person, a program, a measurable outcome.		
<b>90-day impact</b>	Within three months, the donor receives a concrete impact metric connected to their gift.		
<b>6-month invitation</b>	Within six months, the donor is personally invited to see the work—a site visit, a program tour, a behind-the-scenes event.		
<b>Anniversary recognition</b>	On the anniversary of their first gift, the donor is acknowledged with a message that reflects their giving history and cumulative impact.		
<b>Lapsed donor outreach</b>	Before writing off a lapsed donor, someone makes personal contact—a phone call, not a form letter. A real conversation about what changed.		
<b>Repeat donor recognition</b>	Returning donors experience something different from first-time donors. Their history is acknowledged. They are not treated as if they are new.		

**Audit 2 Total:** \_\_\_\_ / 40

## Map Your Donor Journey

In the table above, every criterion you scored below 3 is a gap in your donor journey. For each gap, write the specific action you will take, who owns it, and when it will be in place:

Gap (scored below 3)	What We Will Do	Owner	By When

### AUDIT 3

## Ongoing Engagement

*Danny Meyer: “Service is what you do for someone. Hospitality is how you make them feel.” You can deliver flawless programs with zero hospitality. This audit measures whether your ongoing interactions feel personal or procedural.*

Criterion	What “5” Looks Like	Score	Notes
<b>Name recognition</b>	We use people’s names in interactions, correspondence, and greetings whenever possible.		
<b>Preference tracking</b>	We record and act on personal details people share—interests, milestones, family details, communication preferences.		
<b>Proactive outreach</b>	We reach out at key moments without being asked: birthdays, work anniversaries, life events, seasonal check-ins.		
<b>Volunteer experience</b>	Volunteers feel purposeful and appreciated—not confused, underutilized, or taken for granted.		
<b>Client dignity</b>	Clients and program participants feel like people first and case numbers second. Intake processes are warm, not clinical.		
<b>Event hospitality</b>	Events are designed from arrival through follow-up. Someone greets attendees. There is a warm welcome. Follow-up is personal.		
<b>Communication quality</b>	Newsletters, updates, and outreach are worth reading. They feel like a conversation, not a broadcast.		
<b>The last impression</b>	The final thing a departing donor, volunteer, or client experiences from us is intentional and warm—not silence.		

**Audit 3 Total:** \_\_\_\_\_ / 40

### The Peak-End Test

Daniel Kahneman’s research shows people judge experiences by the most intense moment and the very last moment—almost nothing else. For each group below, name those two moments as they currently exist in your organization:

Stakeholder	Peak Moment (highest intensity)	Last Moment (final contact)
<b>Donors</b>		
<b>Volunteers</b>		
<b>Clients</b>		
<b>Event attendees</b>		

***If your “last moment” column says “silence” or “nothing,” that is your most urgent finding.***

**AUDIT 4****When Things Go Wrong**

*The service recovery paradox: people who experience a failure followed by excellent recovery can become more loyal than if nothing went wrong. The Ritz-Carlton uses LEARN (Listen, Empathize, Apologize, Resolve, Notify). Disney uses HEARD (Hear, Empathize, Apologize, Resolve, Diagnose). Both prioritize speed, personal ownership, and follow-up.*

Criterion	What “5” Looks Like	Score	Notes
<b>Response speed</b>	When a stakeholder raises a concern, someone responds within 24 hours with personal attention—not a form reply.		
<b>Frontline authority</b>	The person closest to the problem can resolve it without escalating. They do not have to say “let me check with my supervisor.”		
<b>Genuine apology</b>	The response includes a specific, sincere apology: “I’m sorry that...” not “I’m sorry if...” or “I’m sorry you feel...”		
<b>Resolution ownership</b>	One person owns the issue from start to finish. The stakeholder does not have to re-explain to three different people.		
<b>Follow-up</b>	Within 48 hours of resolution, someone circles back to make sure the person feels whole. A call, not an email.		
<b>Learning loop</b>	What went wrong gets documented, discussed with the team, and used to change the process so it does not happen again.		

**Audit 4 Total:** \_\_\_\_\_ / 30

### Build Your Recovery Protocol

Use the six steps below to write your organization’s service recovery language. Then train every staff member to use it. Post it where people can see it.

**LISTEN** Let the person finish. Do not defend or explain. Take notes.

*Our language:*

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**EMPATHIZE** Acknowledge how the experience affected them. Specific empathy, not scripts.

*Our language:*

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**APOLOGIZE** A genuine, specific apology. “I’m sorry that...” Own it.

*Our language:*

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**RESOLVE** Fix it now. If you cannot, say exactly what you will do and by when.

*Our language:*

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**FOLLOW UP** Circle back within 48 hours. A phone call is better than email.

*Our language:*

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**LEARN** Document it. Share it with the team. Change the process.

*Our language:*

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### Safe Zones

Pre-authorize responses to common scenarios. When these situations occur, staff act immediately—no escalation.

<b>If This Happens...</b>	<b>The Pre-Approved Response Is...</b>
<i>Donor not acknowledged within 48 hours</i>	
<i>Donor asks how their gift was used</i>	
<i>Volunteer arrives and no one knows them</i>	
<i>Client frustrated during intake</i>	
<i>(Add your own)</i>	

## AUDIT 5

# Your Internal Engine

*Danny Meyer's priority order: employees first, then guests, then community, then suppliers, then investors. His logic: if your people do not feel valued, they cannot authentically make others feel valued. Hospitality that is mandated without being modeled from leadership is a performance, not genuine care.*

Criterion	What "5" Looks Like	Score	Notes
<b>Leadership modeling</b>	Leaders personally demonstrate hospitable behavior in their own interactions—with staff, donors, and community.		
<b>Empowerment culture</b>	Staff feel trusted to make decisions. They do not fear punishment for using good judgment in the moment.		
<b>Hospitality onboarding</b>	New staff and volunteers are trained in your hospitality standards during their first week—not left to figure it out.		
<b>Daily reinforcement</b>	There is a recurring practice—a huddle, a story share, a check-in—that keeps hospitality values present, not just posted.		
<b>Celebration of moments</b>	When a staff member creates a hospitality moment, it is recognized publicly. What you celebrate is what you get more of.		
<b>Feedback collection</b>	You regularly ask stakeholders about the quality of their experience—not just whether they liked the program.		
<b>Feedback action</b>	Survey results and stakeholder feedback lead to visible changes. Staff can name something that changed because of feedback.		
<b>Staff experience</b>	The internal culture—how staff treat each other, how leadership communicates, how problems are handled—mirrors the external hospitality you want to deliver.		

**Audit 5 Total:** \_\_\_\_\_ / 40

## Empowerment Policy

Define what staff at each level can do without asking permission:

Front-line Staff	Officers / Coordinators	Directors / Senior Leaders

## Your Stakeholder Satisfaction Question

The Net Promoter Score is one question: "On a scale of 0–10, how likely are you to recommend [Organization] to a friend?" Scores of 9–10 are Promoters, 7–8 are Passives, 0–6 are Detractors. NPS = % Promoters minus % Detractors. Start sending this to donors, volunteers, and event attendees within 48 hours of their interaction. When a Detractor responds, someone calls them within 48 hours. That single practice—calling back unhappy stakeholders—changes retention more than any other.

**Who will own sending surveys?** \_\_\_\_\_

**Who will call Detractors within 48 hours?**

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## YOUR RESULTS

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Audit	Score	Out Of	Pct.	Priority
<b>Audit 1: First Impressions</b>		35		
<b>Audit 2: The Giving Experience</b>		40		
<b>Audit 3: Ongoing Engagement</b>		40		
<b>Audit 4: When Things Go Wrong</b>		30		
<b>Audit 5: Your Internal Engine</b>		40		
<b>OVERALL</b>		185		

### Reading Your Score

150–185 (81–100%): Your organization operates with genuine hospitality culture. Protect it, refine it, teach it.

111–149 (60–80%): Solid foundation with real gaps. The gaps are costing you donors, volunteers, and trust.

74–110 (40–59%): Significant hospitality deficits. Stakeholders are experiencing your organization very differently than leadership believes.

Below 74 (under 40%): Your stakeholder experience needs urgent, visible attention from leadership. Start with Audit 4 and Audit 5.

### What Happens Next

1. Your lowest-scoring audit is your starting point. Do not try to fix everything. Fix the area that is costing you the most.
2. Within the next 7 days, run the Mystery Guest exercise from Audit 1. What you learn will either confirm or challenge your scores.
3. Within 30 days, build your recovery protocol and empowerment policy from Audit 4. These are the fastest wins with the most immediate impact.
4. Within 30 days, adopt a daily or weekly huddle. Five minutes. One hospitality topic, one real scenario, one commitment for the day. The Ritz-Carlton does this every shift at every property worldwide.
5. Within 60 days, implement the donor journey fixes from Audit 2 and send your first NPS survey from Audit 5.
6. Within 90 days, re-run this audit. Compare scores. Where did you move? Where did you stall? What needs to go into your next strategic plan?
7. Make this a six-month cycle. Hospitality is not a project. It is how you operate.

## BEFORE YOU CLOSE THIS AUDIT

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**What is the single most important thing you learned?**

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**What is one behavior you will personally model starting this week?**

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**Who needs to see these results?**

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**Podcast:** Episode 13 at [missiondrivenpod.com](https://missiondrivenpod.com)

**Blog:** Companion post with deeper frameworks, research, and real-world stories

**Consulting:** Donor stewardship, stakeholder engagement, and hospitality culture are exactly the kind of work The Scanland Group does.

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*Keep leading with heart, keep showing up with purpose, and keep creating a world where everyone belongs.*