

# Donor Perception Report

prepared for

## **Napa Valley Community Foundation**

February 2010

**VERSION 2/10/2010**



THE CENTER FOR  
EFFECTIVE PHILANTHROPY

675 Massachusetts Avenue ♦ Seventh Floor ♦ Cambridge, MA 02139 ♦ Tel: (617) 492-0800 ♦ Fax: (617) 492-0888  
100 Montgomery Street ♦ Suite 1700 ♦ San Francisco, CA 94104 ♦ Tel: (415) 391-3070 ♦ Fax: (415) 956-9916  
[www.effectivephilanthropy.org](http://www.effectivephilanthropy.org)



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# Executive Summary

Overall, the Napa Valley Community Foundation (NVCF) is rated very highly by its donors. Among the eight funders in this dataset, NVCF is not rated below the median funder for any measure and it is the highest rated funder on several key measures. The Foundation and its staff are described by donors as “engaged” and “effective.” Although some donors express dissatisfaction in select areas of the Foundation’s performance—specifically its investment strategy and performance and its administrative fees—NVCF is rated very positively.

**NVCF is rated highly for its work in the community and with donors.** The Foundation is highly rated for its leadership in and impact on the community. When deciding to give to the Foundation over other charitable giving options, donors particularly value the Foundation’s knowledge of and experience working with local nonprofits, its leadership in the community, and its ability to make an impact on specific issues. The Foundation is rated higher than any other funder in the dataset of eight community foundations for its enhancement of donors’ knowledge of the community and its contribution to donors’ knowledge of and impact on issues they care about. The Foundation’s resources for donors are all highly rated, and donors who have communicated their goals to the Foundation perceive that Foundation staff understand their goals well.

**While donor resources are typically highly rated, some NVCF Donors are not satisfied with their quality.** About 25 percent of donors are dissatisfied with the quality of the Foundation’s donor advisory services or the quality of the Foundation’s donor tools to understand and plan for giving. These donors tend to rate the Foundation lower for its contribution to their knowledge of and impact on issues they care about. Despite having larger than typical funds at the Foundation, these donors also tend to have contributed less to their funds during 2007 and 2008 than other donors.

**Some NVCF donors report dissatisfaction with the Foundation’s investment strategy and performance or administrative fees.** Twenty-eight percent of NVCF donors report that the Foundation’s investment strategy and performance needs improvement; these donors tend to be less satisfied with the Foundation. Twenty-four percent of NVCF donors report that the Foundation’s administrative fees or costs need improvement; these donors tend to be less satisfied with the foundation and less likely to recommend it to a friend. Additionally, the Foundation is rated similarly to the median foundation in the dataset for its clarity in communicating its response to the current economic climate, a lower than typical result for NVCF.



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# Background

- ◆ In 2009, the Center for Effective Philanthropy began development of a new assessment tool designed to assist foundations in more effectively engaging their current donors and donor-advised fund holders. Based on research and guidance from a group of community foundation leaders, CEP developed the Donor Perception Report (DPR).
- ◆ **The DPR is a management tool that creates insight about donors' perceptions of the foundations to and through which they contribute or establish funds.**
- ◆ The DPR is based on a confidential survey covering aspects of the relationship between donors and foundations. Confidential and candid feedback from the donor population can:
  - ◆ Provide a better understanding of what donors value and which donor services and programs are most relevant and effective.
  - ◆ Provide a valuable perspective on the aspects of a foundation that most distinguish its work from other charitable giving options.
  - ◆ Help foundations identify patterns or trends in the philanthropic giving of their donors.
- ◆ Donor perceptions should be interpreted in light of the unique goals, strategy, and context of the community foundation.
  - ◆ Low ratings in an area that is not core to a foundation's strategy may not be concerning.



# Methodology (1)

- ♦ The Center for Effective Philanthropy (CEP) surveyed donors of Napa Valley Community Foundation (NVCF) during November and December of 2009. The target population was selected by NVCF. CEP used a confidential but not anonymous survey that allowed CEP to track whether each individual survey target responded. Surveys were distributed both electronically and via mail. The details of NVCF's survey are:

Type of Fund	Number of Donors Surveyed	Number of Responses Received	Survey Response Rate <sup>1</sup>
Donor Advised	53	25	47%
Donor Designated	9	2	22%
Scholarship	4	2	50%
Total	66	29	44%

- ♦ Donors also responded to open-ended questions requesting comments and suggestions. The selections of comments in this report highlight major themes and reflect trends in the data.

<sup>1</sup>: The median response rate for foundations in the comparative dataset is 33 percent.



## Methodology (2)

- ◆ NVCF’s average and/or median ratings are compared to the average and/or median ratings from donors in CEP’s pilot dataset. As this tool is still in a pilot stage, it is not meant to be a comprehensive benchmarking study. The foundations included are not representative of all community foundations.

Characteristics of the Comparative Set	
Donor Responses	742 donors
Community Foundations	8 foundations

- ◆ Foundations included in the comparative set:

Foundations in the Full Comparative Set	
The Chicago Community Trust	Sacramento Region Community Foundation
Gulf Coast Community Foundation of Venice (FL)	The San Diego Foundation
Napa Valley Community Foundation	The San Francisco Foundation
Orange County Community Foundation	San Luis Obispo County Community Foundation

# Structural Characteristics of Respondent Funds

- ♦ The following tables are intended to provide context to the Foundation in thinking about its DPR results with respect to the size, age, and activity of its funds. The information is based on data provided by the Foundation.

Measure	NVCF
<b>Size of Fund (2007 and 2008 average)</b>	
<i>Median Fund Balance</i>	\$51K
<\$40K	38%
\$40K – \$100K	33%
>=\$100K	29%
<b>History of Fund</b>	
<i>Average Length of Fund Establishment</i>	5.2 years
Fewer than 4 years	30%
4 – 6 years	44%
Over 6 years	26%
<b>Total Contributions During 2007 and 2008 Per Fund</b>	
<i>Median Total Contributions</i>	\$10K
\$0K	25%
>\$0K – \$49K	42%
\$50K – \$99K	16%
>=\$100K	17%
<b>Total Giving During 2007 and 2008 Per Fund</b>	
<i>Median Total Giving</i>	\$13K
\$0K	25%
>\$0K – \$19K	33%
\$20K – \$100K	19%
>=\$100K	13%





# Structural Characteristics of Foundations

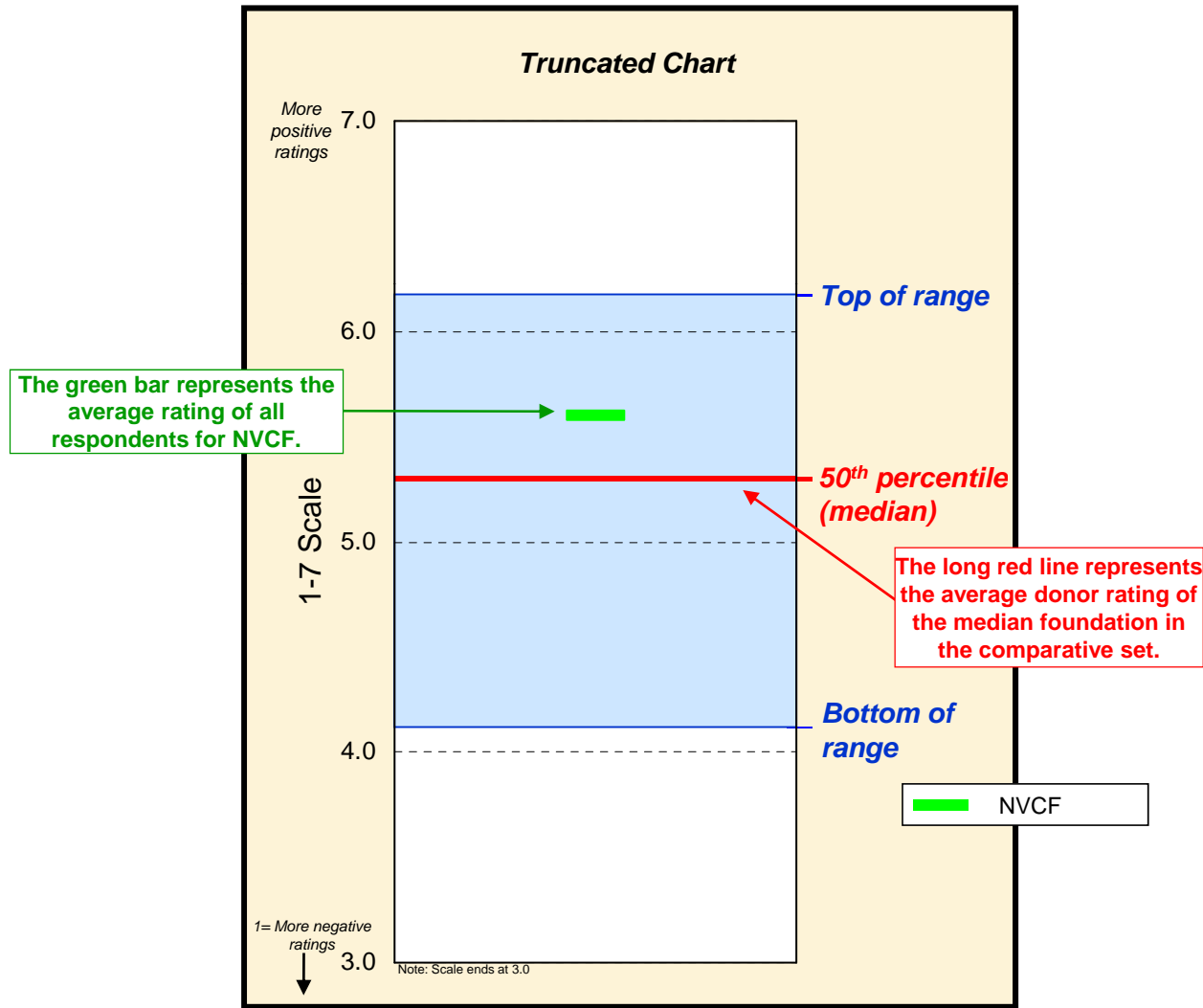
- ♦ The following tables are intended to provide context to the Foundation in thinking about its DPR results relative to information on its operations. The information is based on data provided by the Foundation.

Measure	NVCF	Median Foundation
<b>Funds to Staff Ratio</b>		
Total donor advised funds per full-time donor designated staff	37	133
<b>Assets</b>		
<i>Total assets</i>	\$18MM	\$88MM
Discretionary assets	6%	19%
Donor-advised assets	68%	44%
Other non-discretionary assets	26%	37%
<b>Giving</b>		
<i>Total giving</i>	\$2.1MM	\$8.2MM
Discretionary giving	22%	19%
Donor-advised giving	70%	57%
Other non-discretionary giving	8%	23%

# Reading DPR Charts – Sample Charts

Much of the donor perception data in the DPR is presented in the format below. These charts show average ratings of donor responses for NVCF and the range of foundation ratings in the comparative dataset.

**Throughout the report, charts in this format are truncated from the full scale because foundation averages do not fall below a value of 3 on the 1-7 scale.**





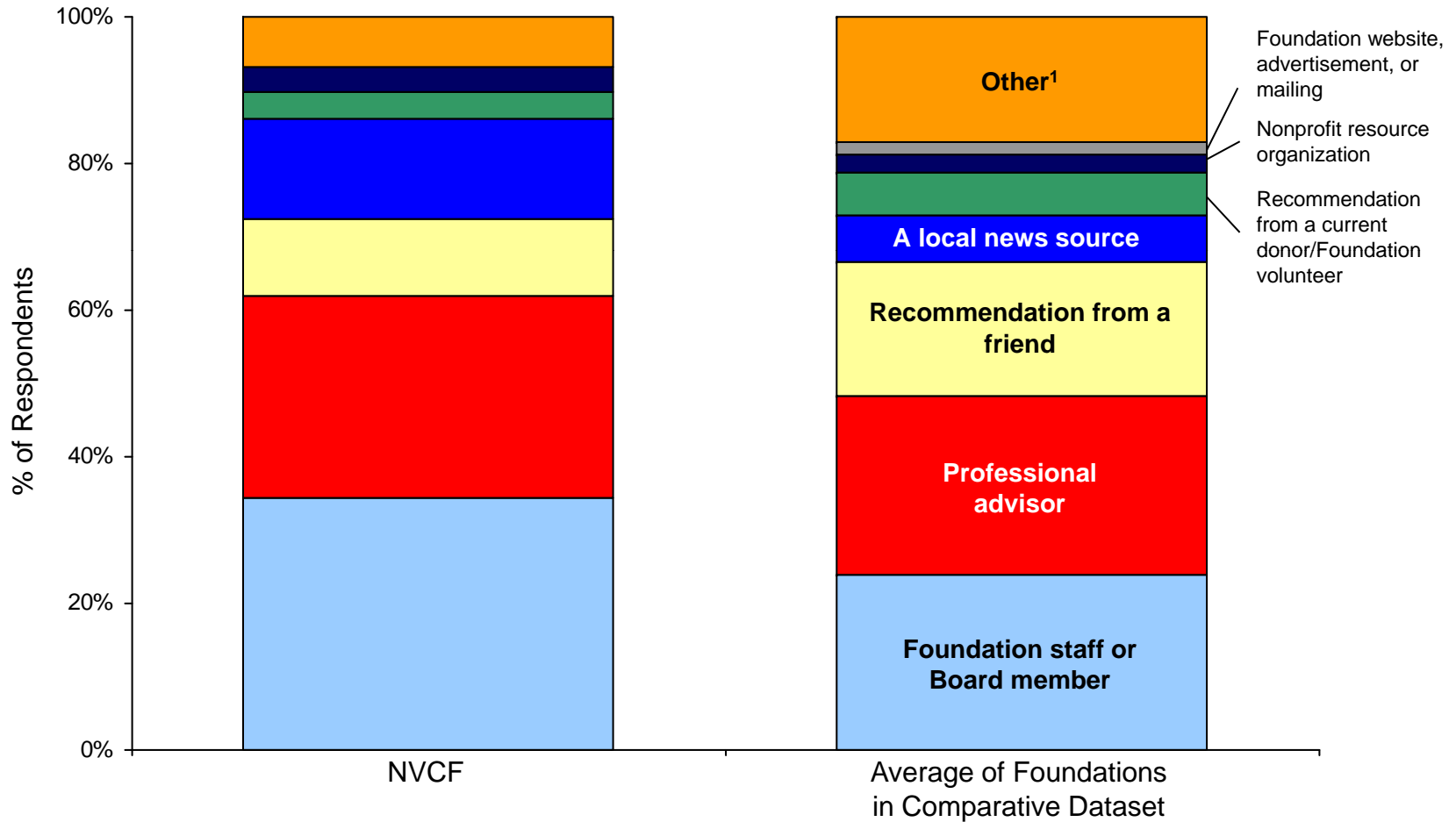
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# Donors' First Information Source

More so than at other community foundations in this study, most NVCF donors reported first hearing about the Foundation from a Foundation Board or staff member or a professional advisor.

Source of Donors' First Information About the Foundation



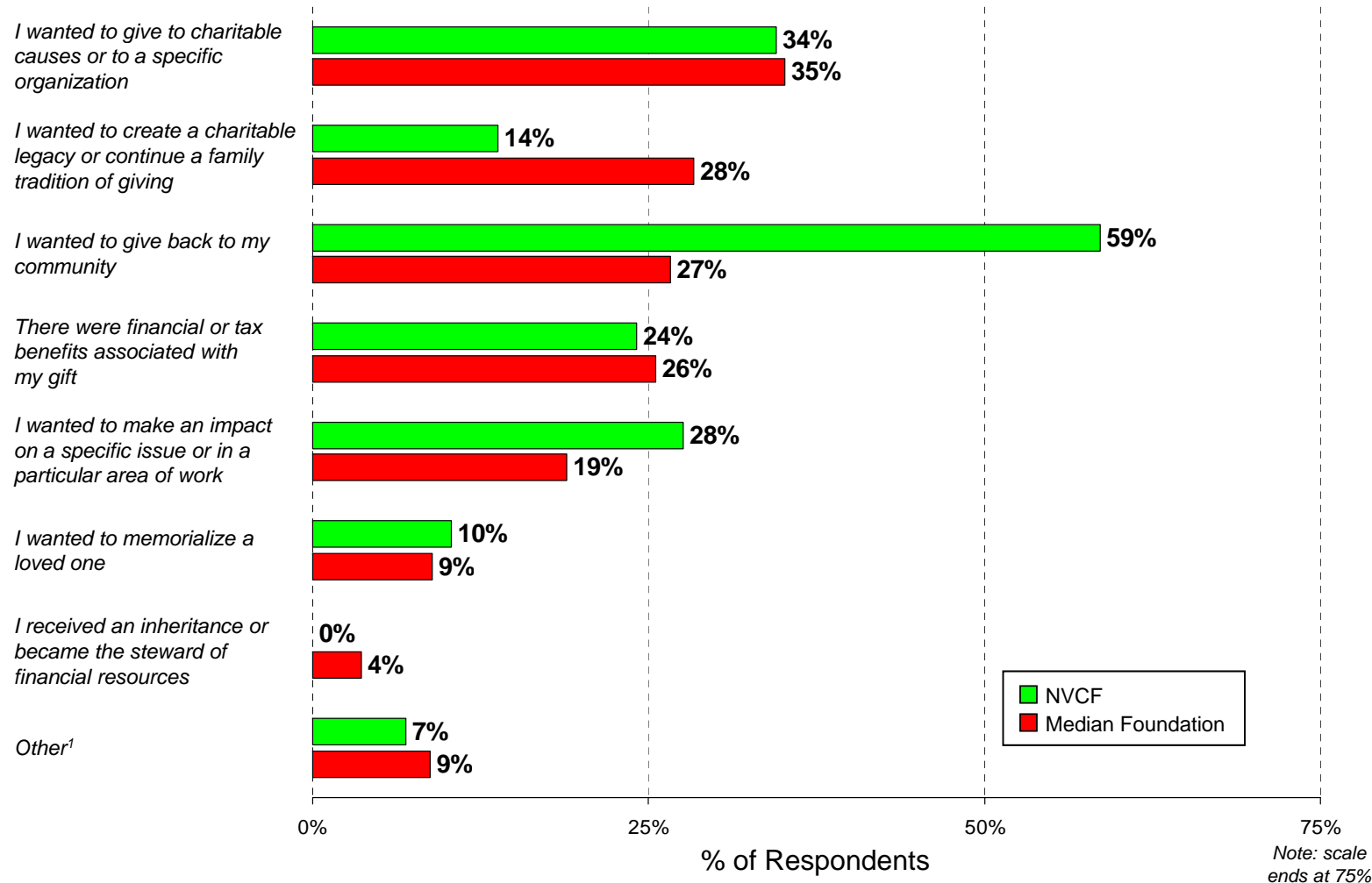
<sup>1</sup>: NVCF's "Other" responses are redacted to maintain confidentiality.



# Motivation for Initial Contribution

When asked to choose the **two** most important reasons why they first decided to establish a fund with the Foundation or make a donation to or through the Foundation, NVCF donors more frequently indicate that they wanted to give back to their communities than donors of the median foundation in the comparative dataset.

**Most Important Reasons Donors Initially Established Funds or Made Contributions to the Foundation**



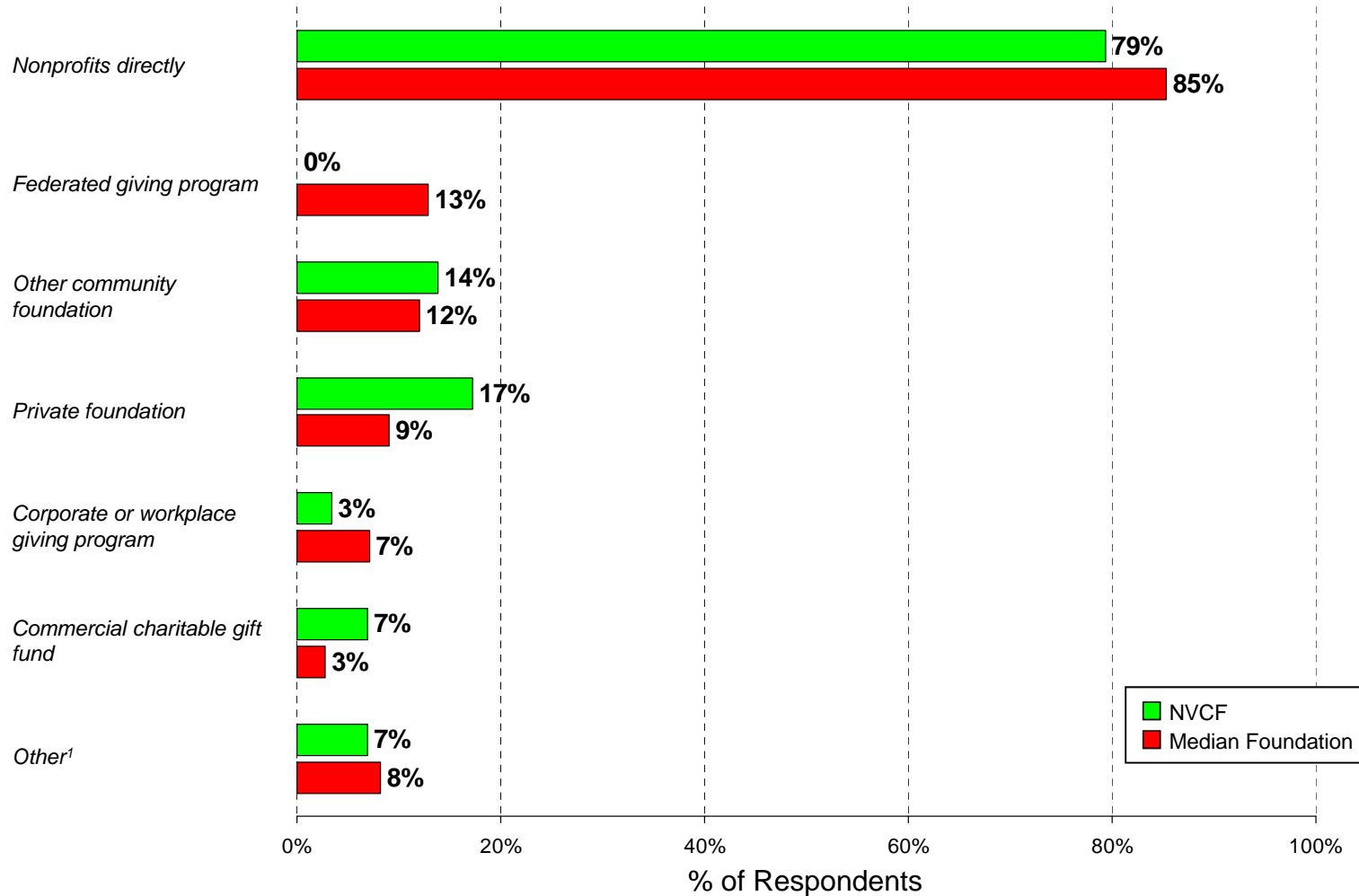
<sup>1</sup>: NVCF's only "Other" reason given for establishing a fund was "wanted to connect more with community needs."



# Giving Outside of the Foundation (1)

In addition to the gifts they make to or through the Foundation, a larger than typical proportion of NVCF donors give through a private foundation and a smaller than typical proportion give through a federated giving program.

*Use of Charitable Giving Vehicles*



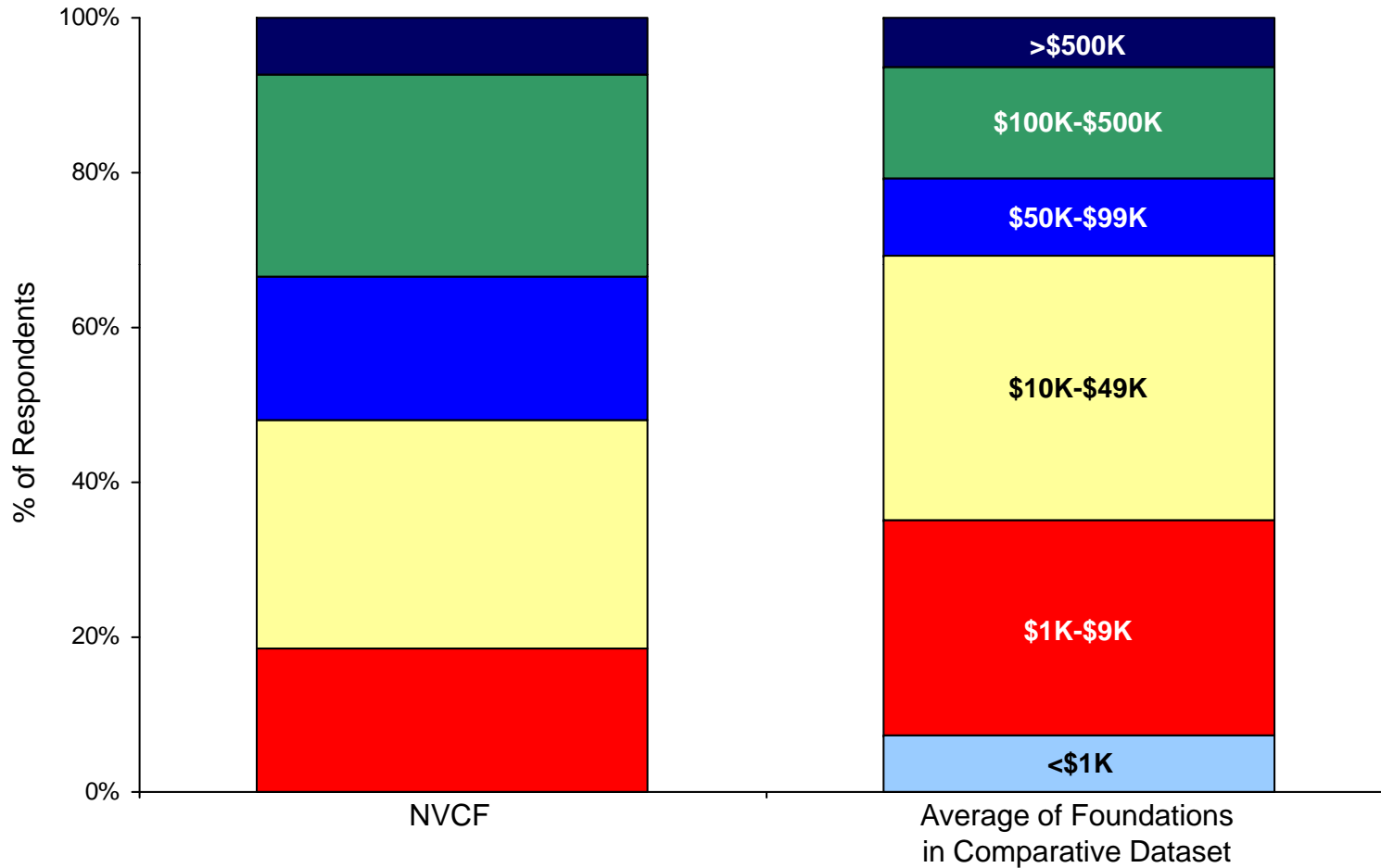
1: At NVCF, no "Other" charitable giving vehicle was listed.

Note: Three percent of donors at NVCF and four percent of donors at the median foundation indicate that their only charitable giving is to or through the Foundation.

# Giving Outside of the Foundation (2)

NVCF donors give more than typical outside of their gifts to or through the Foundation—a third of NVCF donors give more than \$100K annually outside of the Foundation.

*Total Annual Giving Excluding Gifts Made to or Through the Foundation*





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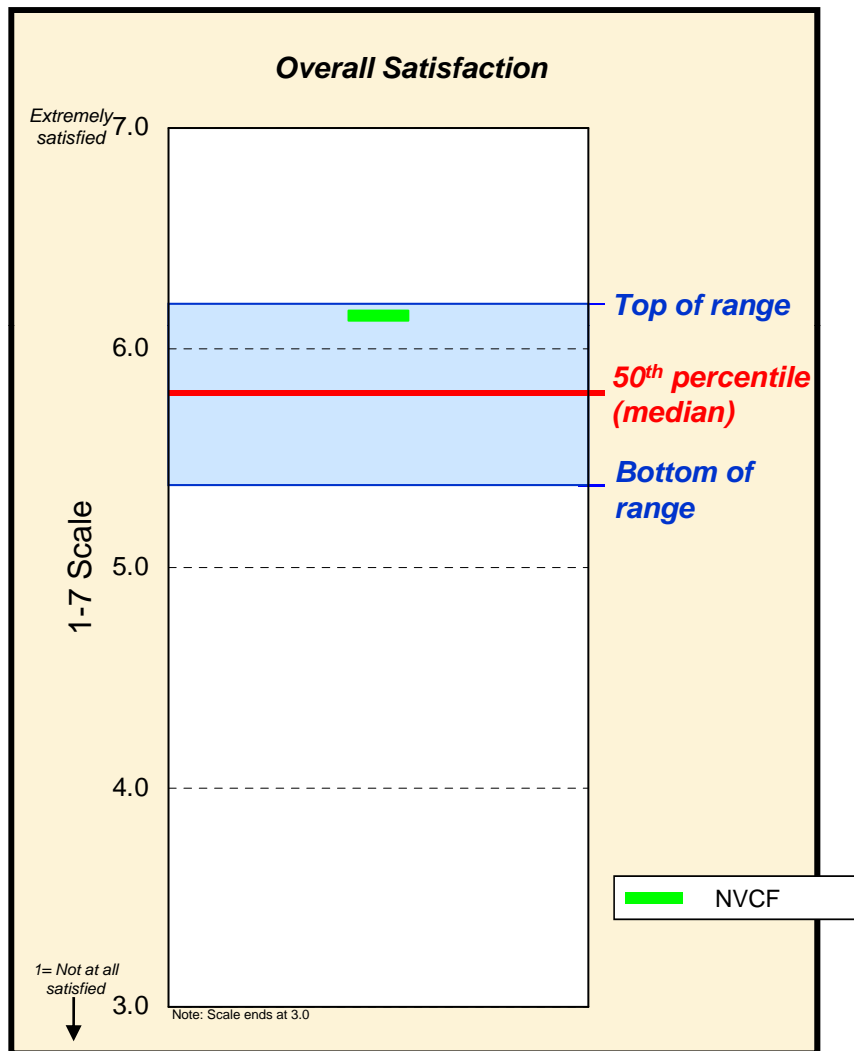
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# Satisfaction

For overall donor satisfaction, NVCF is rated above the median foundation in the comparative dataset.

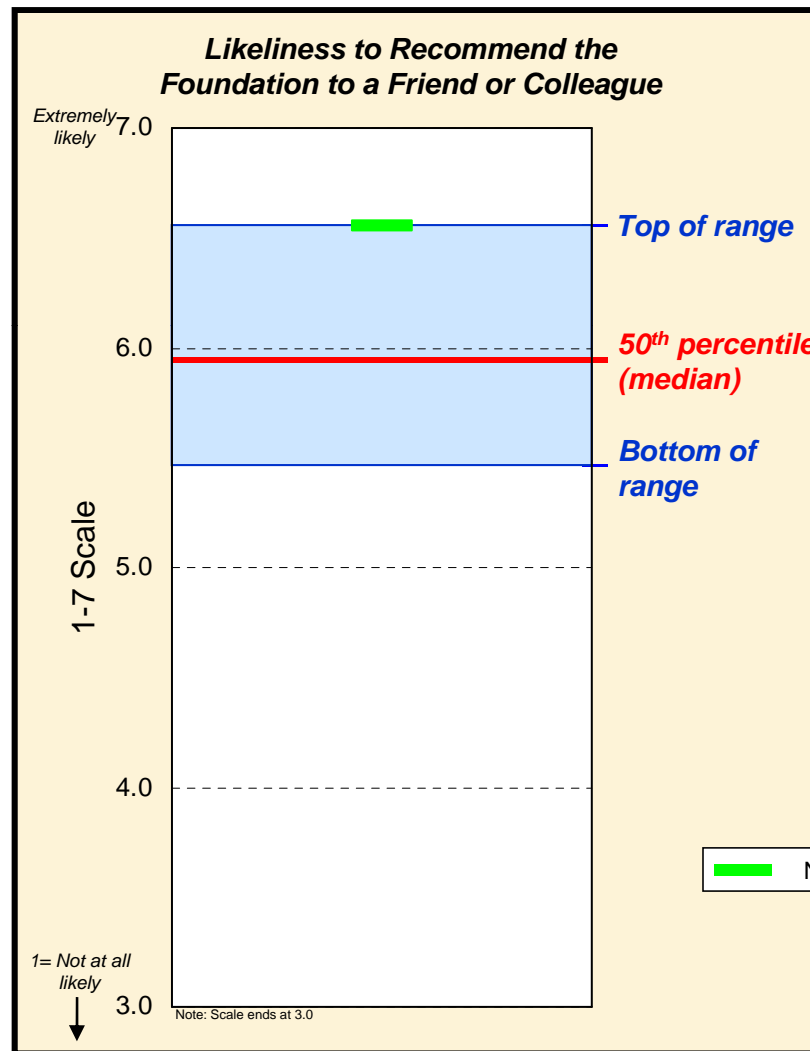


## Selected Donor Comments

- ◆ *“There is no other resource in our community that comes close to the Napa Valley Community Foundation.”*
- ◆ *“The Foundation collects the monthly fee regardless of what impact or interaction they have with me but I don’t feel like I get much of a return these past few years.”*
- ◆ *“I love this community foundation. I participate in others, but this one has the best leadership and ideas for furthering philanthropy in the Valley. They think out of the box and find ways to get around to the benefit of the greater good.”*

# Likeliness to Recommend the Foundation

For donors' likeliness to recommend the Foundation to a friend or colleague, NVCF is the highest rated foundation in the comparative dataset.





# Foundation Descriptors

*“What is the one word that best describes the Foundation today?”*

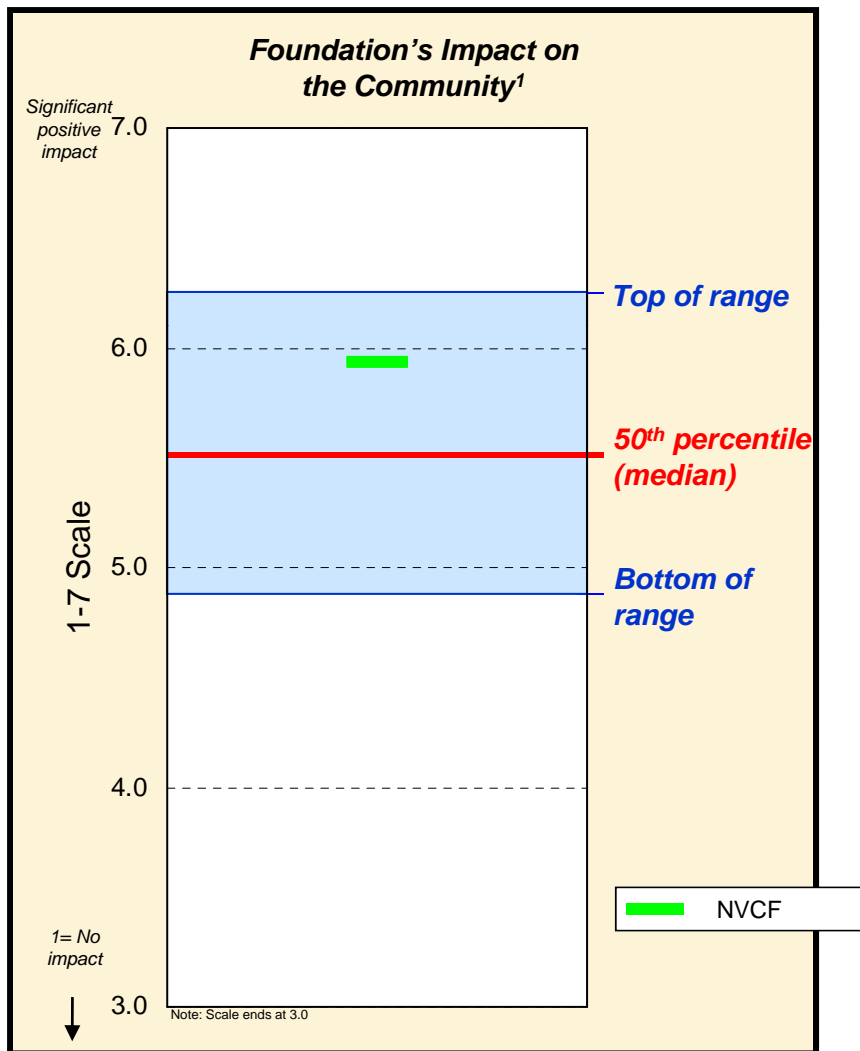
**Note:** The size of each word indicates the frequency with which it was written by donors.





# Impact on the Community

For the Foundation's impact on the Napa Valley community, NVCF is rated above the median foundation in the comparative dataset.



## Selected Donor Comments

- ♦ “The Foundation is young; it has seen a great growth during the recent years and now has staff and board able to efficiently coordinate charitable giving in the community.”
- ♦ “Good leadership and coordination with other foundations.... The Foundation has grown significantly since its inception, which is a positive indicator of trust.”
- ♦ “They do support very informative donor discussions but I do not feel these reach out to the normal or potential donor in our community. They have very little presence among the well-to-do but not quite wealthy.”
- ♦ “The Foundation, through Terence’s extraordinary leadership in community outreach, has laid the foundation for making a significant impact on the community. Now, the Foundation must reach out to the larger donors within the community so they understand and support the Foundation’s mission, versus trying to fill the void themselves.”

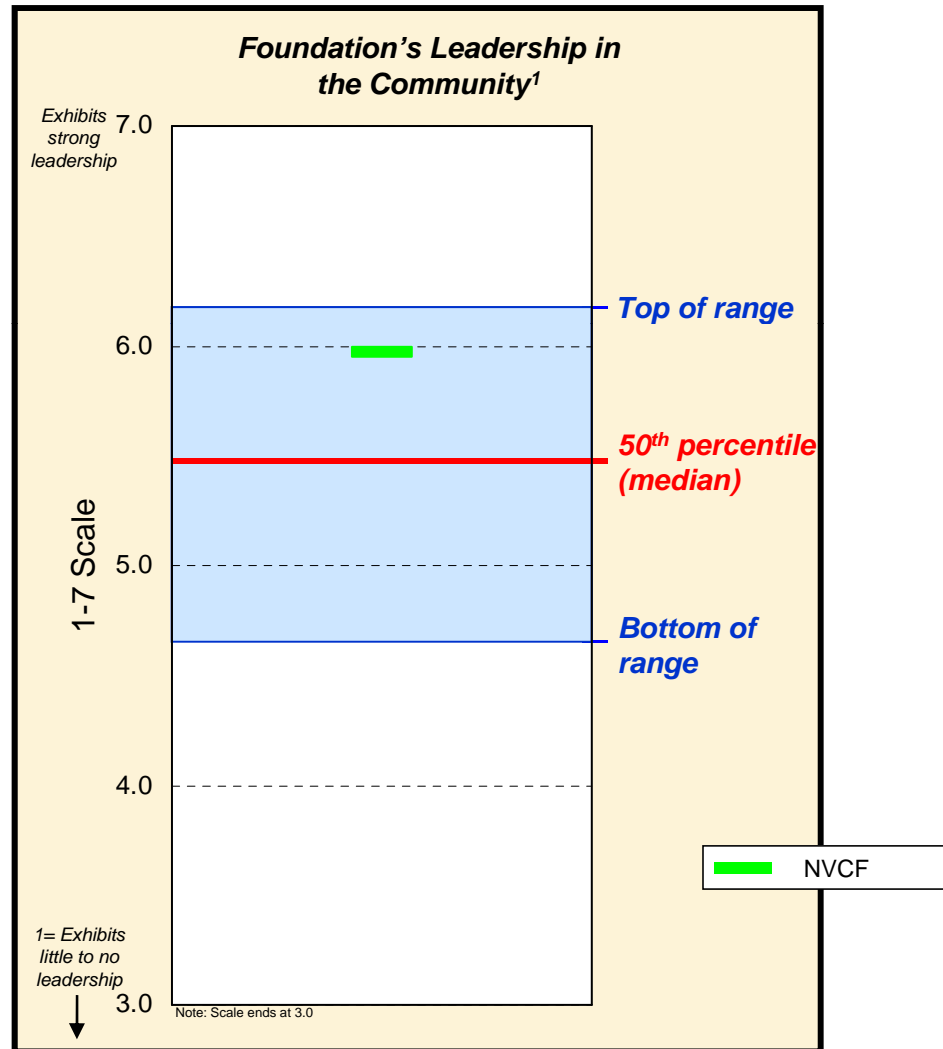
1: NVCF donors were asked specifically about the Foundation's impact on the Napa Valley community.

Note: Three percent of NVCF donors and nine percent of donors at the median foundation select “Don't know” for the Foundation's impact on the community.



# Leadership in the Community

For the extent to which the Foundation exhibits a leadership role in the Napa Valley community, NVCF is rated above the median foundation in the comparative dataset.

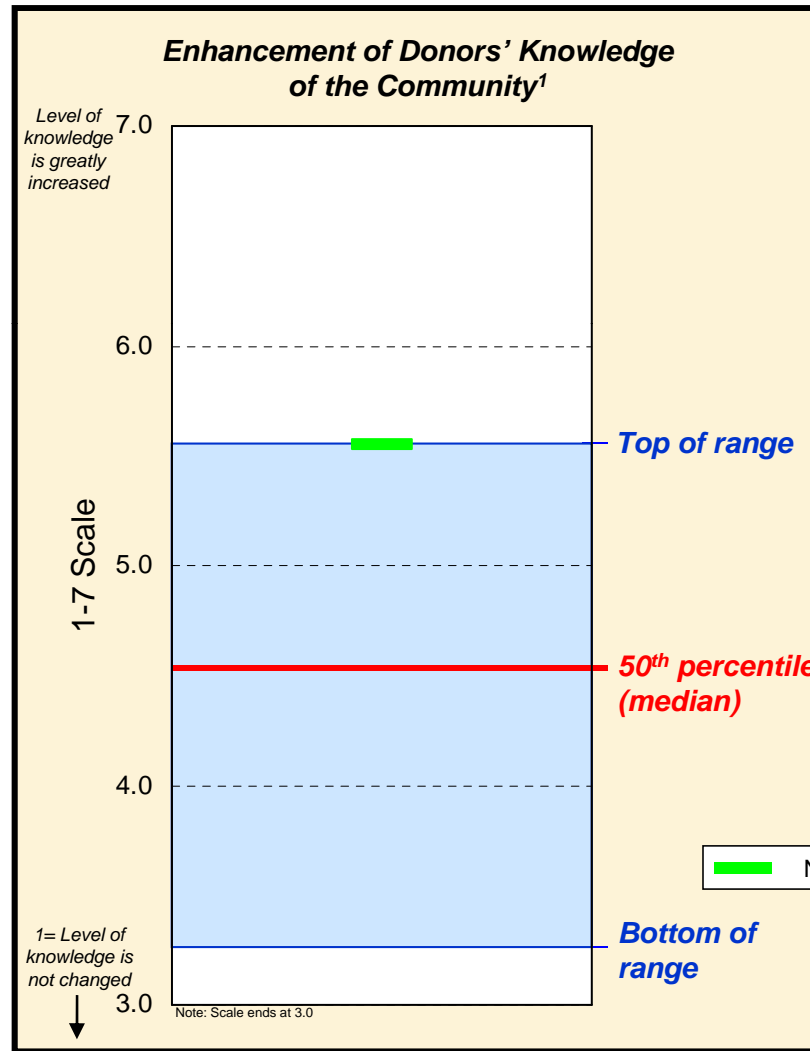


<sup>1</sup>: NVCF donors were asked specifically about the Foundation's leadership in the Napa Valley community.



# Donors' Knowledge of the Community

For the Foundation's enhancement of donors' knowledge of the Napa Valley community, NVCF is the highest rated foundation in the comparative dataset.



1: NVCF donors were asked specifically about the Foundation's enhancement of donors' knowledge of the Napa Valley community.

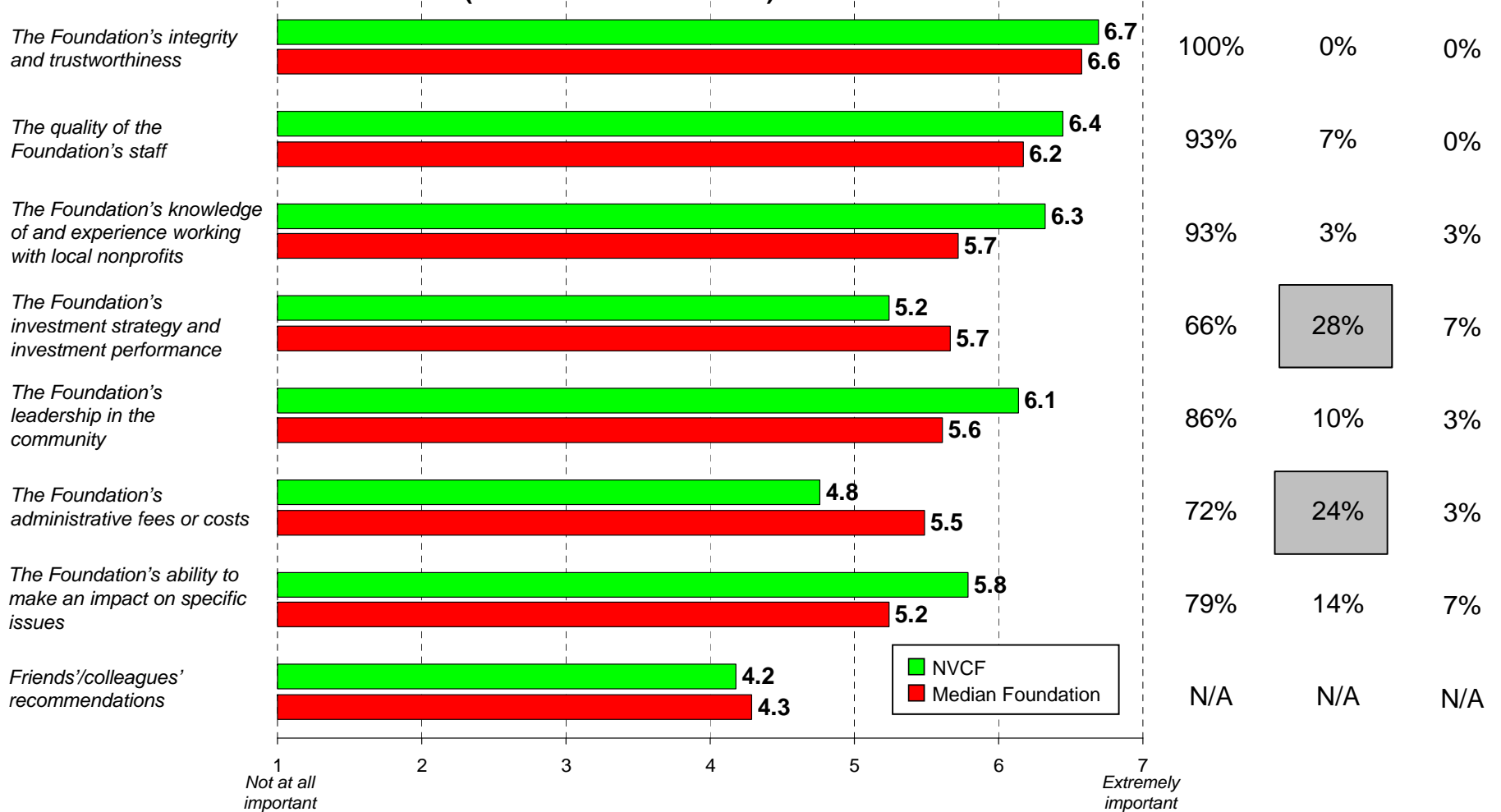
# Valued Aspects of Foundation's Work (1)

When deciding to give to the Foundation instead of other charitable giving options, NVCF donors—relative to donors of the median Foundation—particularly value the Foundation's knowledge of and experience working with local nonprofits, leadership in the community, ability to make an impact on specific issues, and the Foundation's efforts to connect donors to each other.

Donors were asked if they are satisfied with this area of NVCF's work:

Satisfied	Needs Improvement	Don't know/N/A
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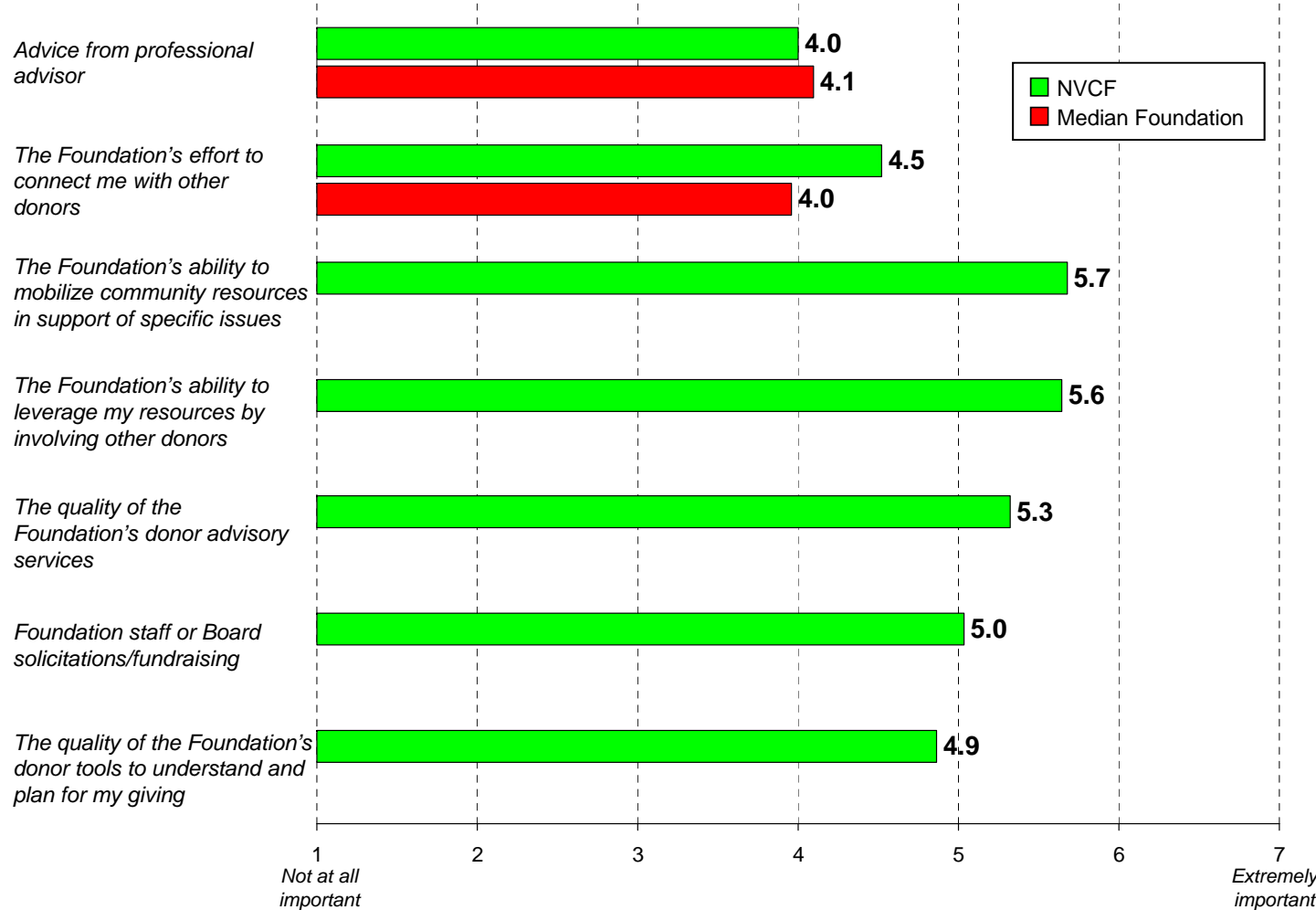
**Importance of Factors in Donors' Decisions to Give**  
(continued on next slide)



# Valued Aspects of Foundation's Work (2)



Importance of Factors in Donors' Decisions to Give



Donors were asked if they are satisfied with this area of NVCF's work:

Satisfied	Needs Improvement	Don't know/N/A
N/A	N/A	N/A
78%	11%	11%
83%	7%	10%
79%	11%	11%
69%	17%	14%
62%	17%	21%
61%	21%	18%

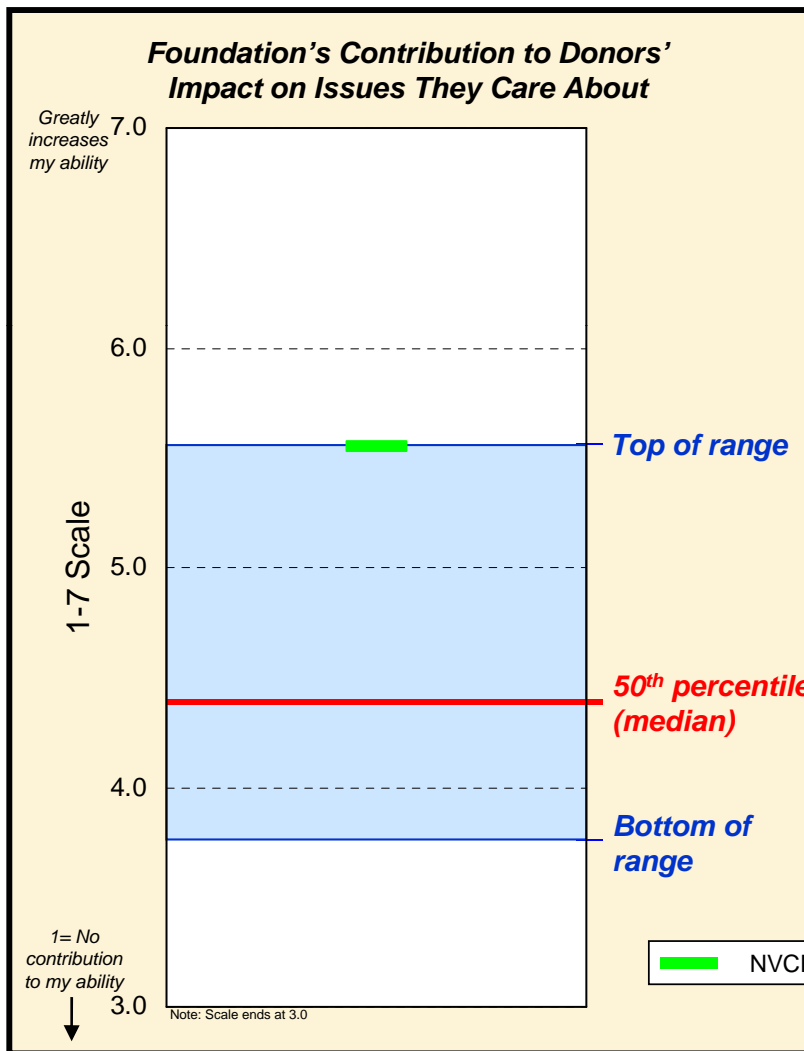
Note: "The quality of the Foundation's donor advisory services," "The quality of the Foundation's donor tools to understand and plan for my giving," "The Foundation's ability to mobilize community resources in support of specific issues," "Foundation staff or Board solicitations/fundraising," and "The Foundation's ability to leverage my resources by involving other donors" only include data from NVCF.





# Donor Impact

For the Foundation's contribution to donors' ability to make an impact on the issues they care about, NVCF is the highest rated foundation in the comparative dataset.



## Selected Donor Comments

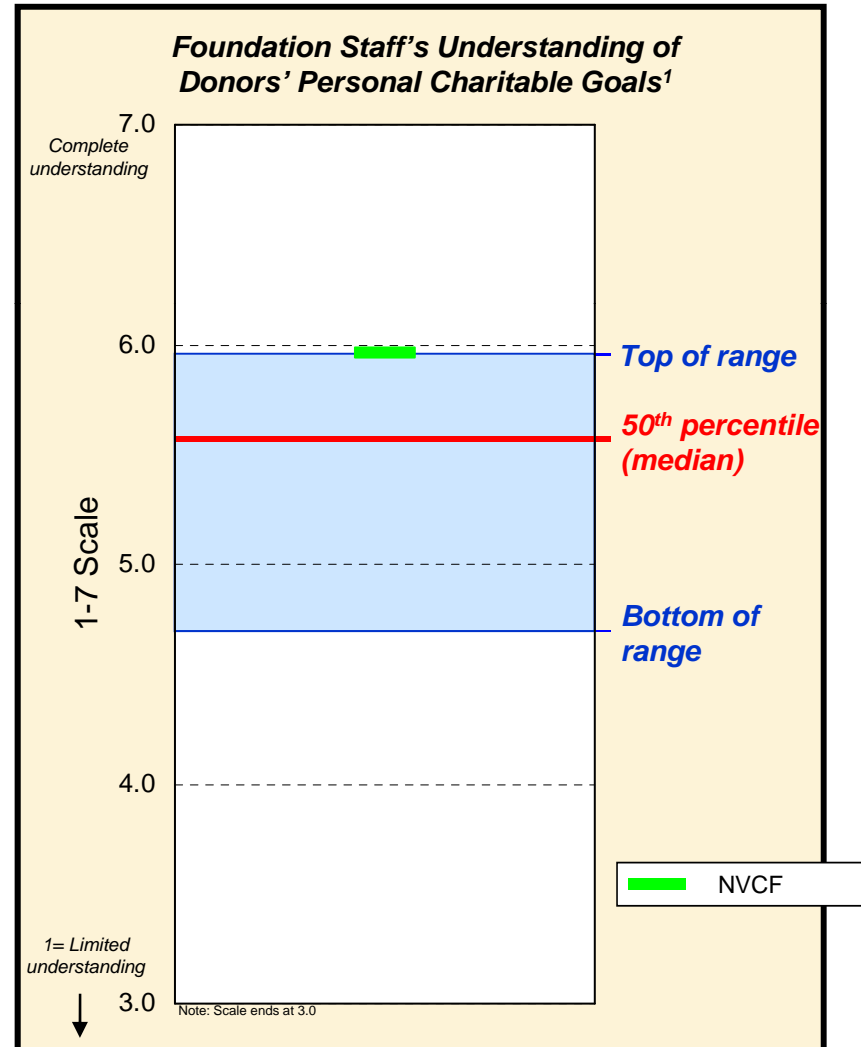
- ♦ "I was contacted about a fund-matching grant which I agreed to help sponsor. If it had not been for the Foundation, I would not have known of this program."
- ♦ "They don't have enough staff apparently to help donors as much as they should. They do not meet with donors to understand giving goals, projects or areas of interest, there is very little information given about all of the nonprofits in our community, etc.. If it wasn't for the small, brief, not very informative email, I'd be completely out of touch with the Foundation as far as programs needing help."
- ♦ "I have been able to have very useful in-person conversations with the director of the foundation, discussing my goals, and the best ways to achieve them. At the same time, I would like to be able to access more readily a library of nonprofit organizations who are doing the kind of work that I would like to support, so I can be better informed. I appreciate the fact that the Foundation lets me know when an opportunity comes up of pooling donor funds to have a higher impact on a specific situation."



# Alignment of Charitable Goals

The proportion of donors who have communicated their personal charitable goals to the Foundation is larger than at the median foundation in the comparative set. NVCF is the highest rated foundation in the comparative dataset for the Foundation staff's understanding of the personal charitable goals of those donors who have communicated their goals to the Foundation.

	Communicated Charitable Goals to the Foundation?	
	NVCF	Median Foundation
Yes	79%	63%
No	21%	37%

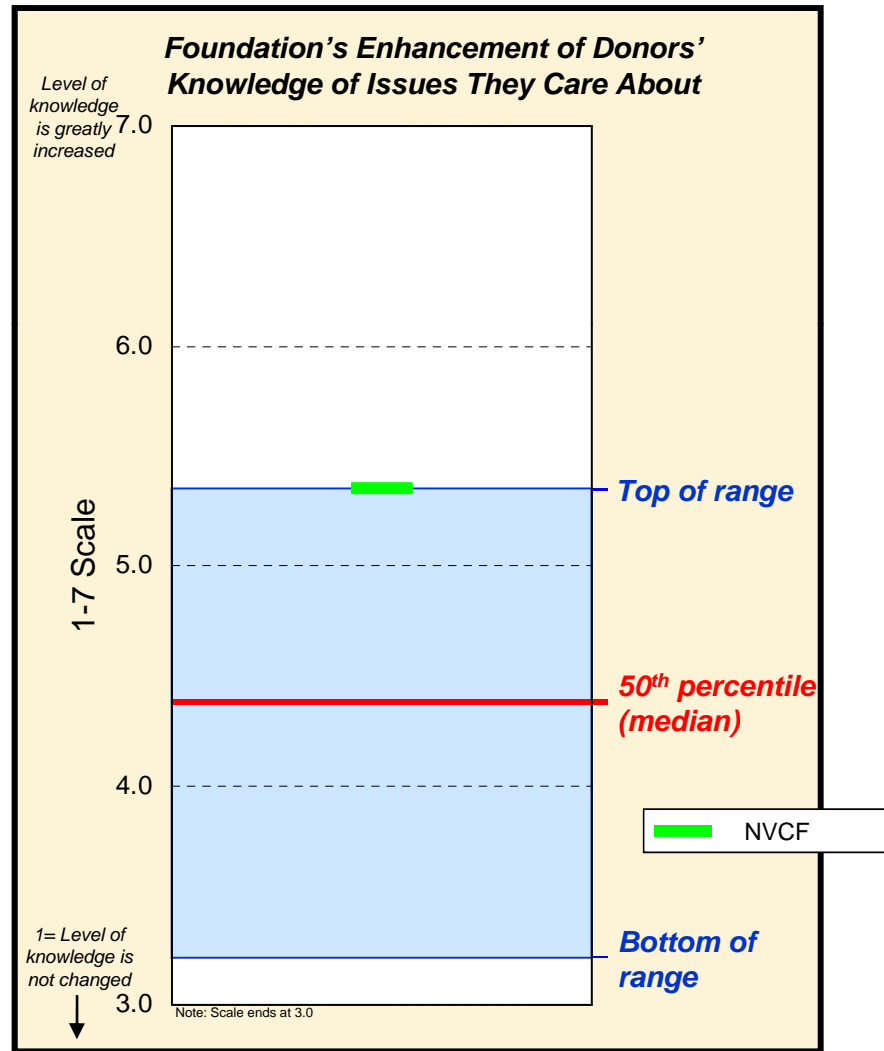


1: This chart only includes responses from donors who answered "Yes" to a question asking if they had communicated their personal charitable goals to the Foundation.



# Advancing Knowledge

For the Foundation's enhancement of donors' knowledge of the issues they care about, NVCF is the highest rated foundation in the comparative dataset.





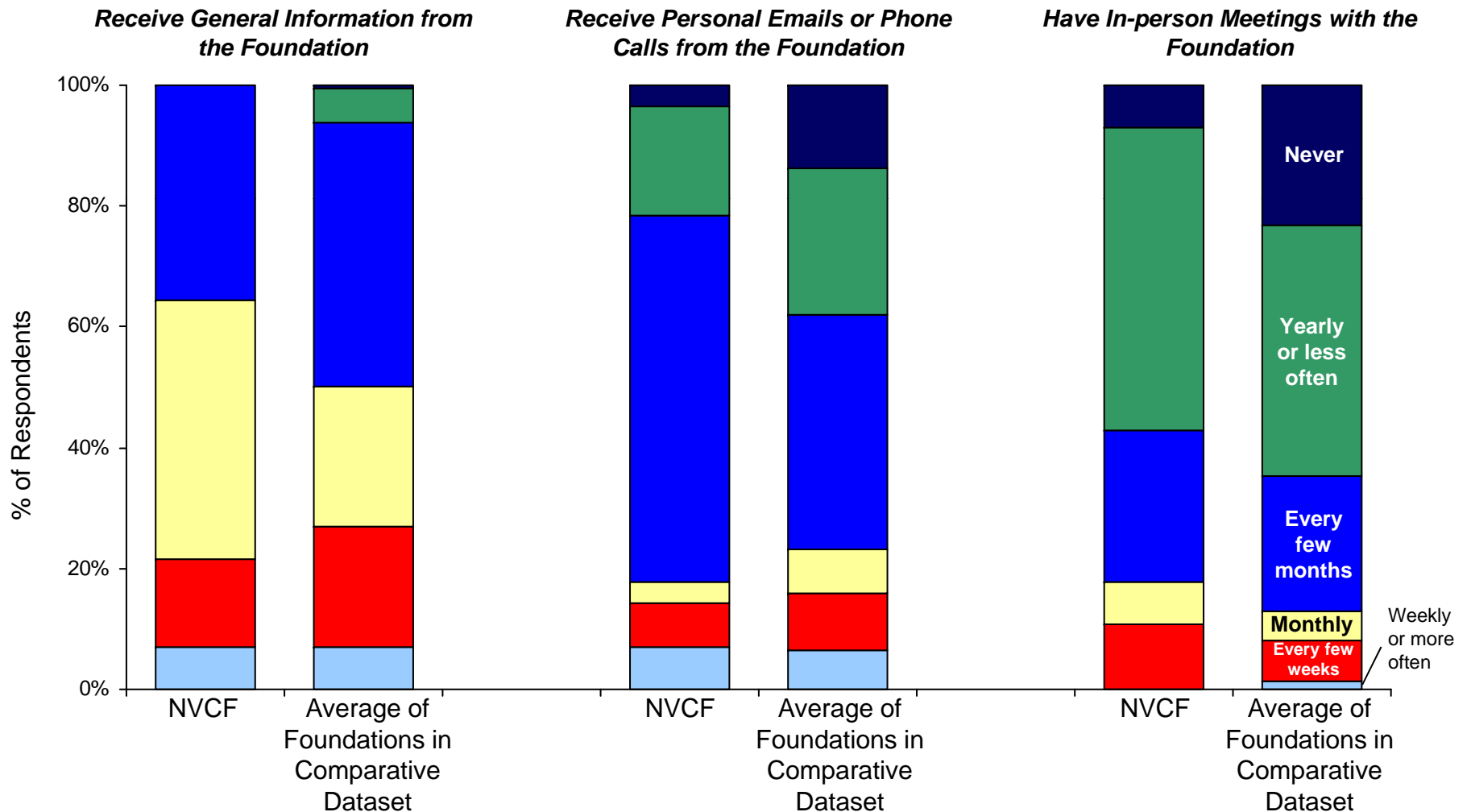
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# Frequency of Interactions – Foundation to Donor

NVCF donors tend to receive personal emails or phone calls from and have in-person meetings with the Foundation more frequently than donors of the average foundation in the comparative dataset.

## Frequency with Which Donors:

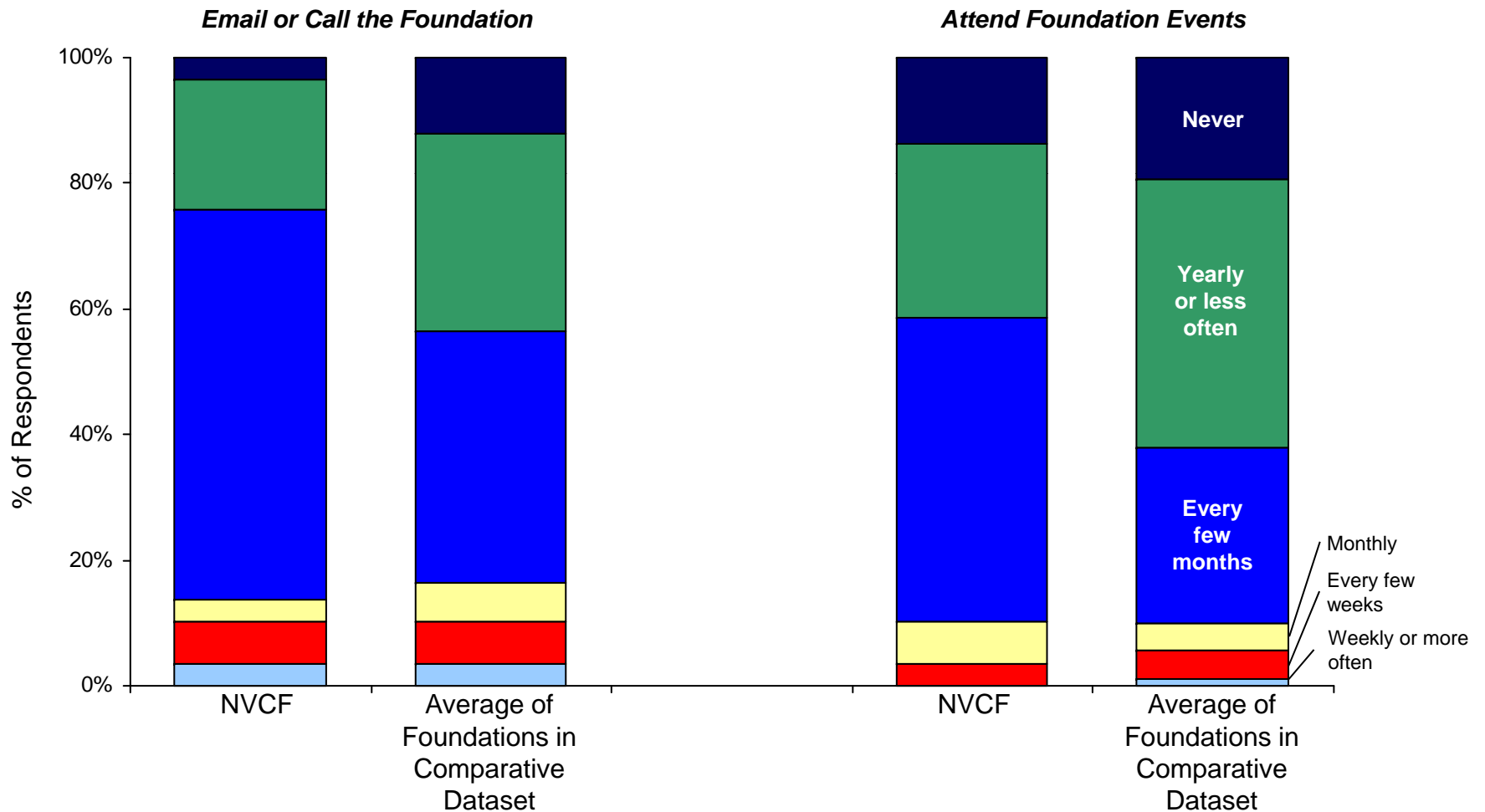




# Frequency of Interactions – Donor to Foundation

NVCF donors tend to email or call the Foundation and attend Foundation events more frequently than donors of the average Foundation in the comparative dataset.

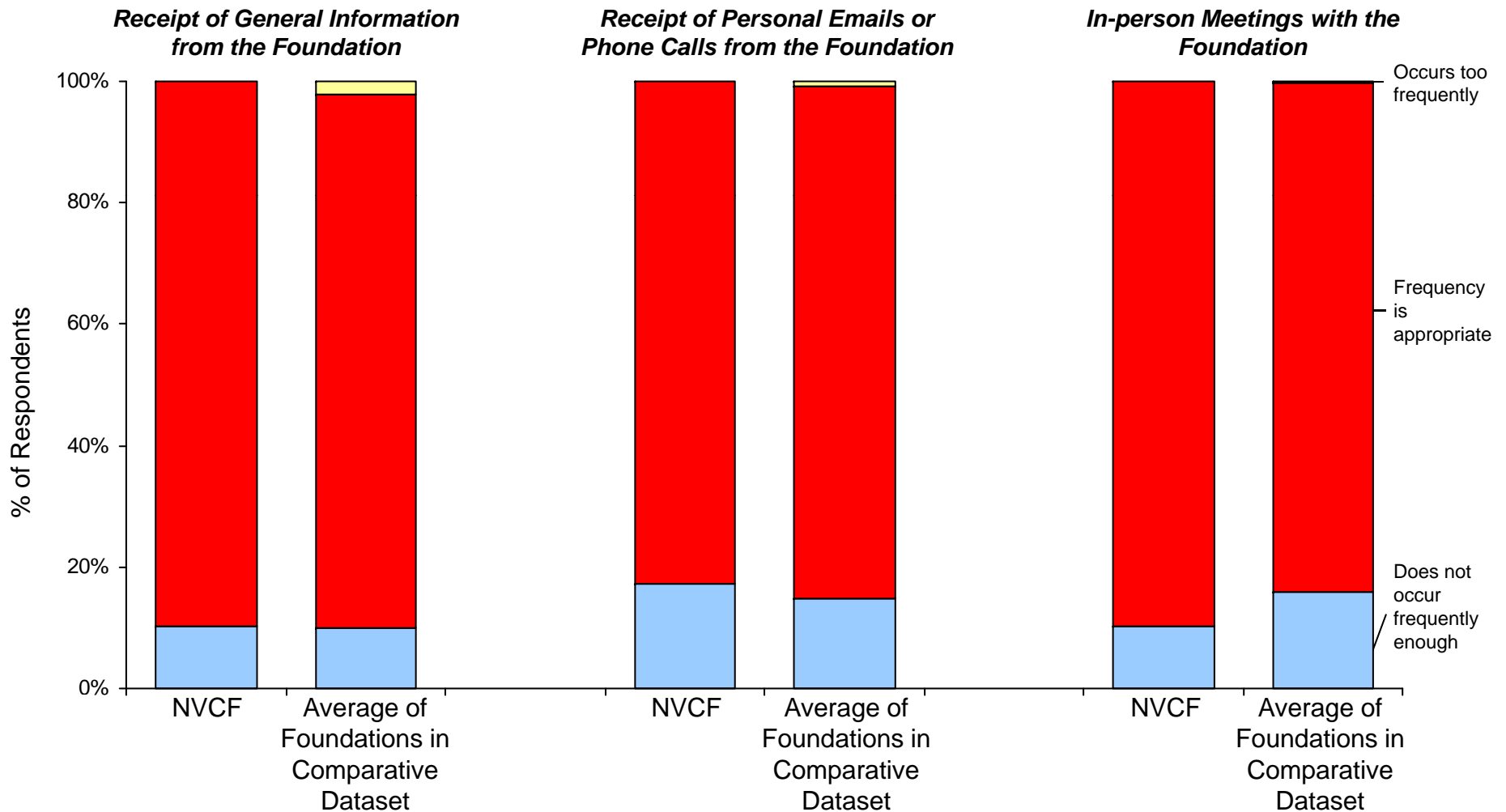
*Frequency with Which Donors:*



# Feelings Regarding Frequency of Interactions

Most NVCF donors, like most donors of the average foundation, are content with the frequency of their contact with the Foundation. A minority of donors report that contact is not frequent enough.

Donors' Feelings Regarding the Frequency of:

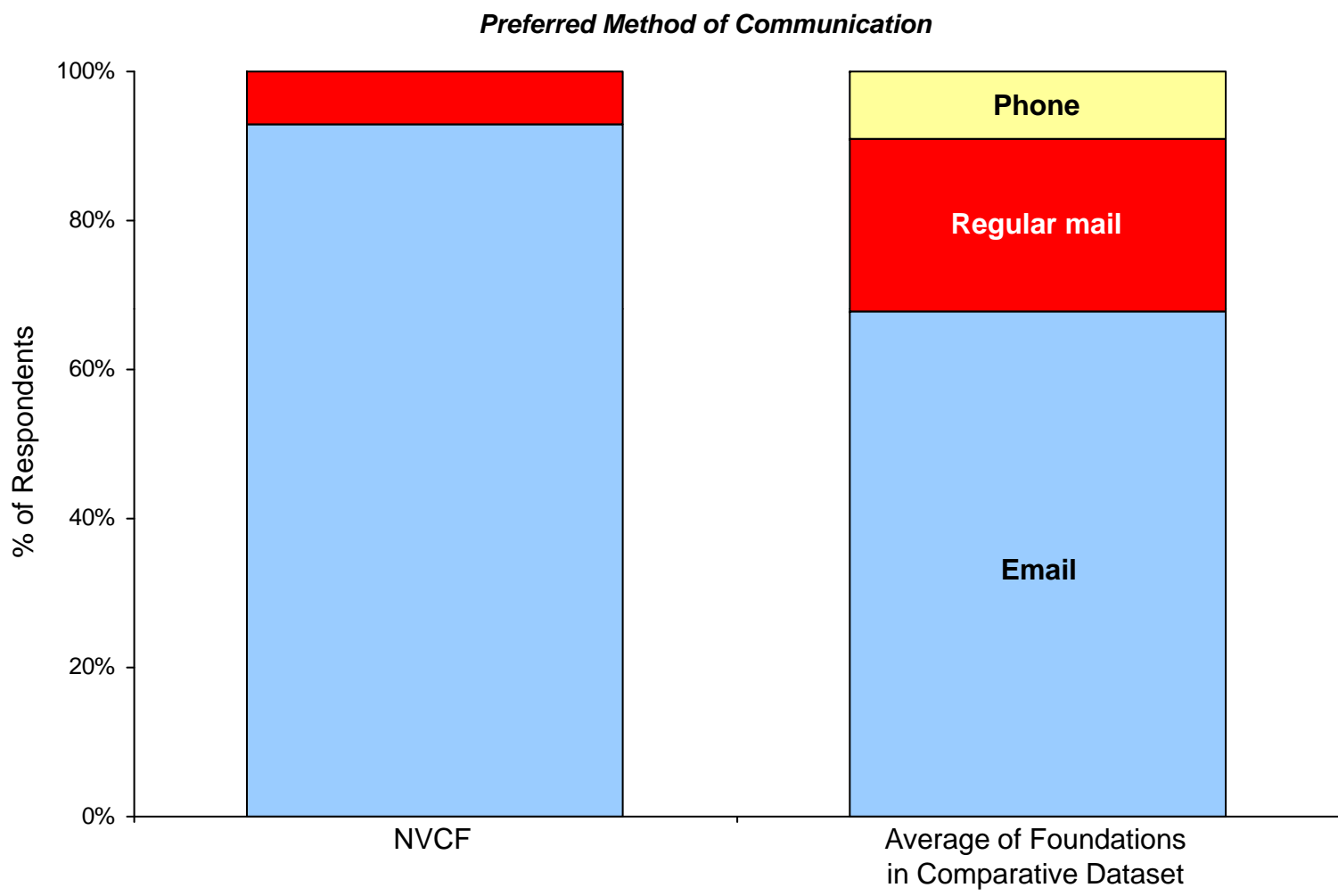






# Method of Communication

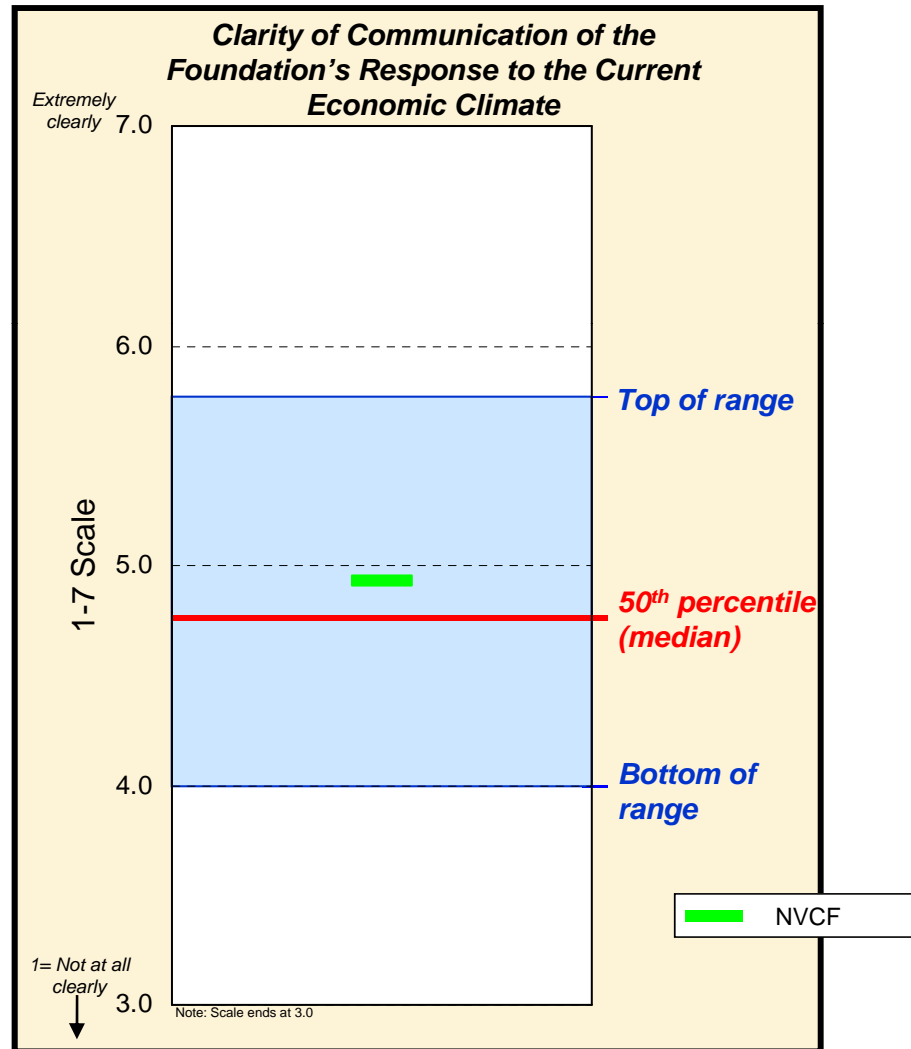
The proportion of NVCF donors who indicate that they prefer email when being contacted by the Foundation is larger than at the average foundation in the comparative dataset.



# Communication About Current Economic Climate



For the clarity with which the Foundation has communicated its response to the current economic climate, NVCF is rated similarly to the median foundation in the comparative dataset.



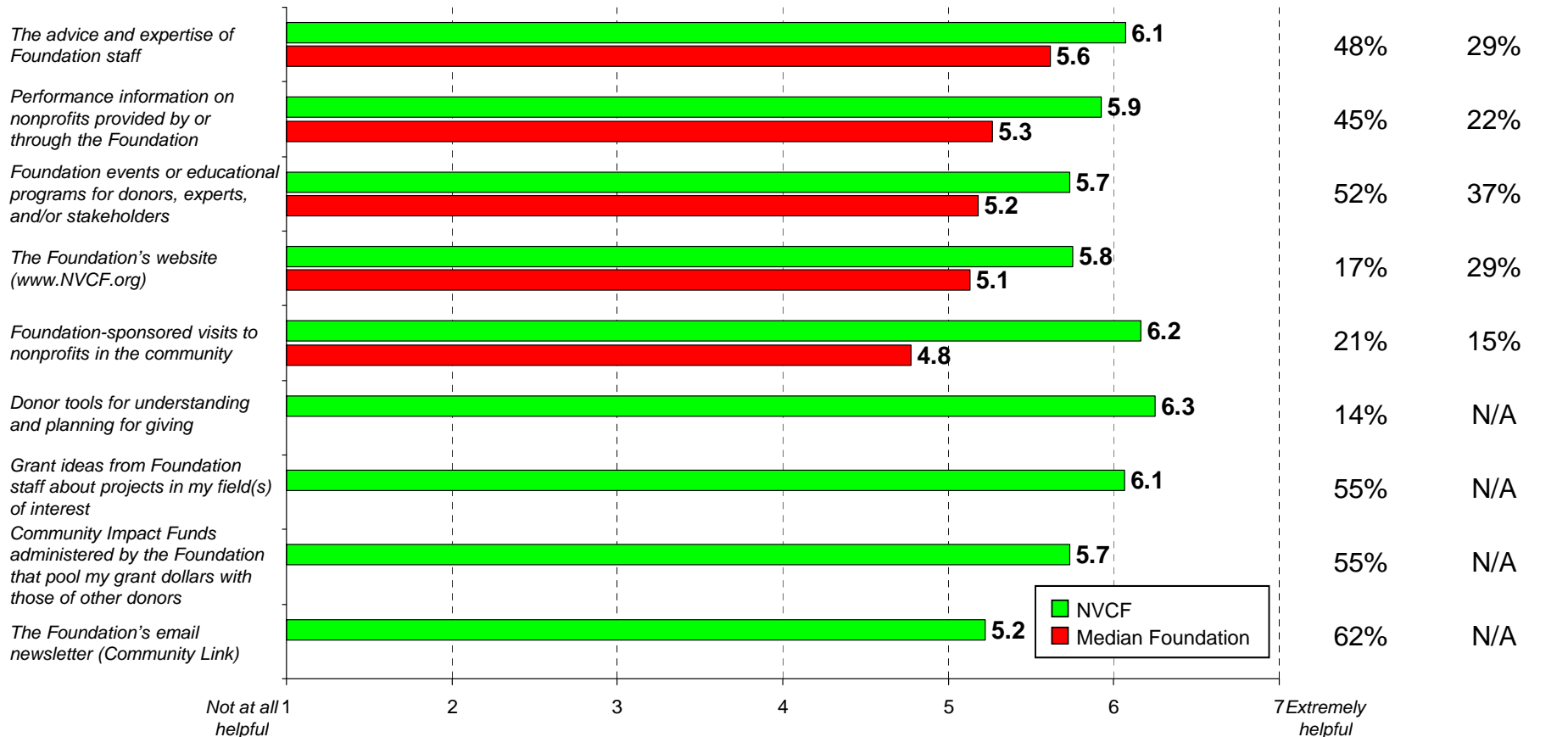


# Resources for Donors (1)

For those resources for which comparative data is available, NVCF donors rate the Foundation's resources to be more helpful than typical for the purposes of achieving their charitable giving goals.

## Proportion of Donors Using This Resource for the Achievement of Goals

### Helpfulness of Foundation Resources for the Achievement of Charitable Giving Goals



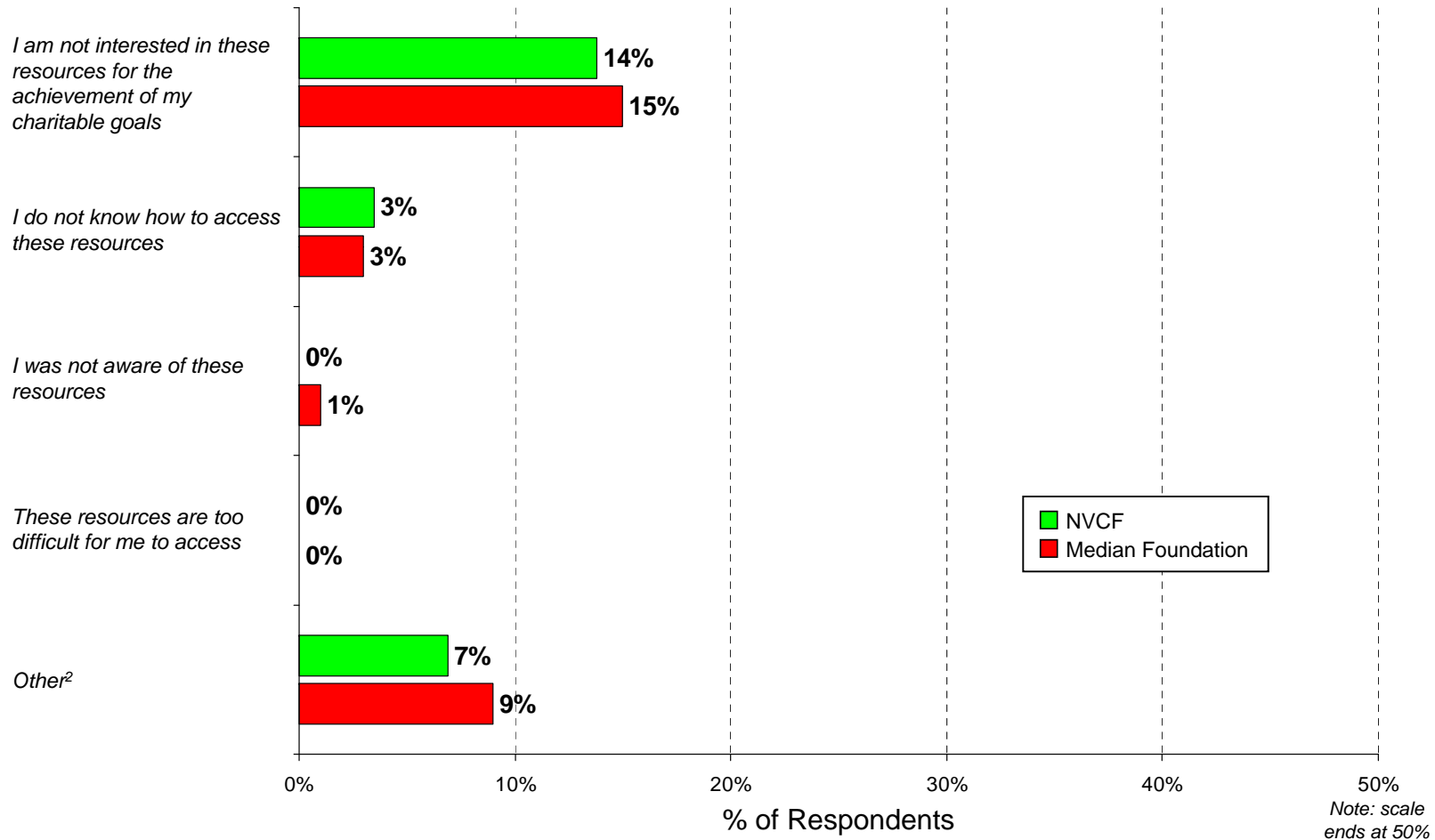
Twenty-one percent of donors at NVCF indicate that they do not use any of the Foundation's resources, compared to 29 percent at the median foundation.

Note: "Information on nonprofits" and "The Foundation's website" only include data from seven foundations, and "Foundation-sponsored visits" only includes data from six foundations due to changes in the survey instrument. "Donor tools for understanding and planning for giving," "The Foundation's email newsletter (Community Link)," "Grant ideas from Foundation staff about projects in my field(s) of interest," and "Community Impact Funds administered by the Foundation that pool my grant dollars with those of other donors" only include data from NVCF.

# Resources for Donors (2)

When asked why they have not used the Foundation's resources for the achievement of their goals, most NVCF donors who have not used the Foundation's resources indicate that they are not interested in doing so.

**Reasons for Not Using Resources<sup>1</sup>**



Note: Chart on this page only includes comparative data from six foundations due to changes in the survey instrument.

1: This chart only includes responses from the donors who indicated that they have not used any of the Foundation's resources for the achievement of their goals.

2: NVCF's only "Other" reason listed was redacted to maintain confidentiality.



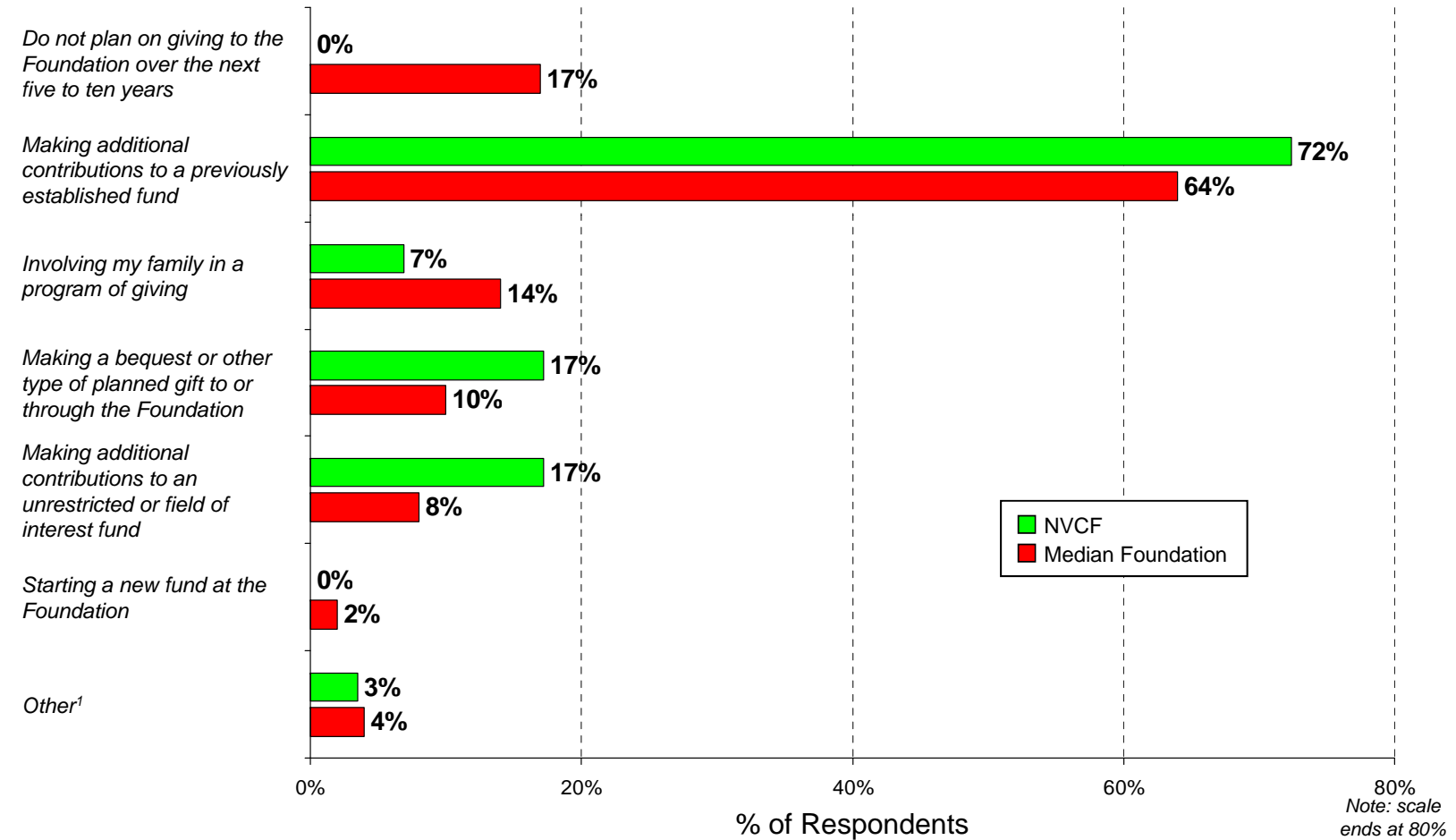
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# Future Giving Plans (1)

When asked about their future giving plans, almost seventy percent of NVCF donors indicate that they plan on making additional contributions to a previously established fund.

*Plans for Additional Giving to or Through the Foundation*



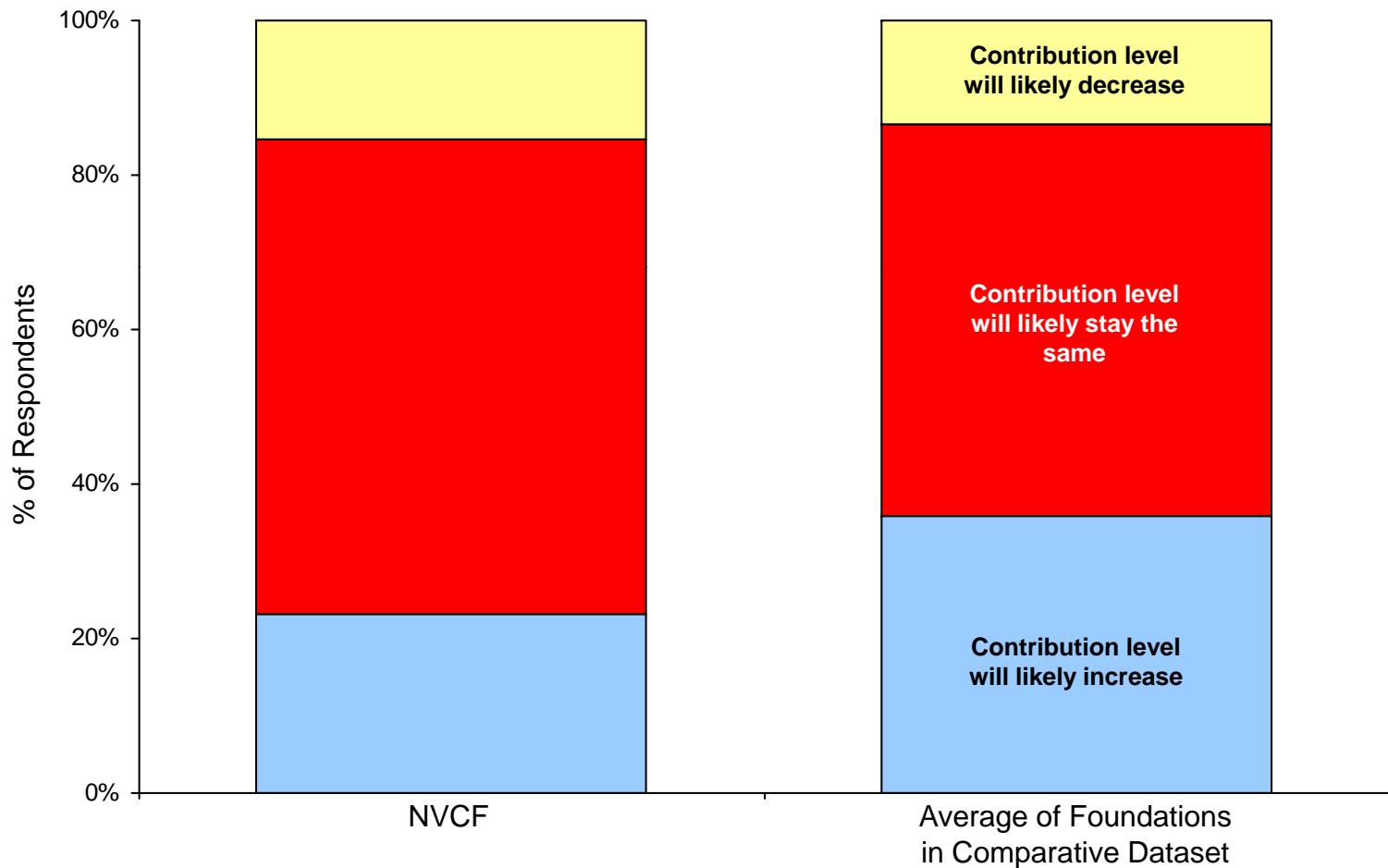
Note: "Additional contributions to an unrestricted or field of interest fund" only includes data from seven foundations due to changes in the survey instrument.

1: NVCF's "Other" response has been redacted to maintain confidentiality.

# Future Giving Plans (2)

The proportion of NVCF donors who indicate that their contribution level will likely increase is smaller than at the average foundation in the comparative dataset.

*Plans for Future Giving Relative to Past Contributions<sup>1</sup>*

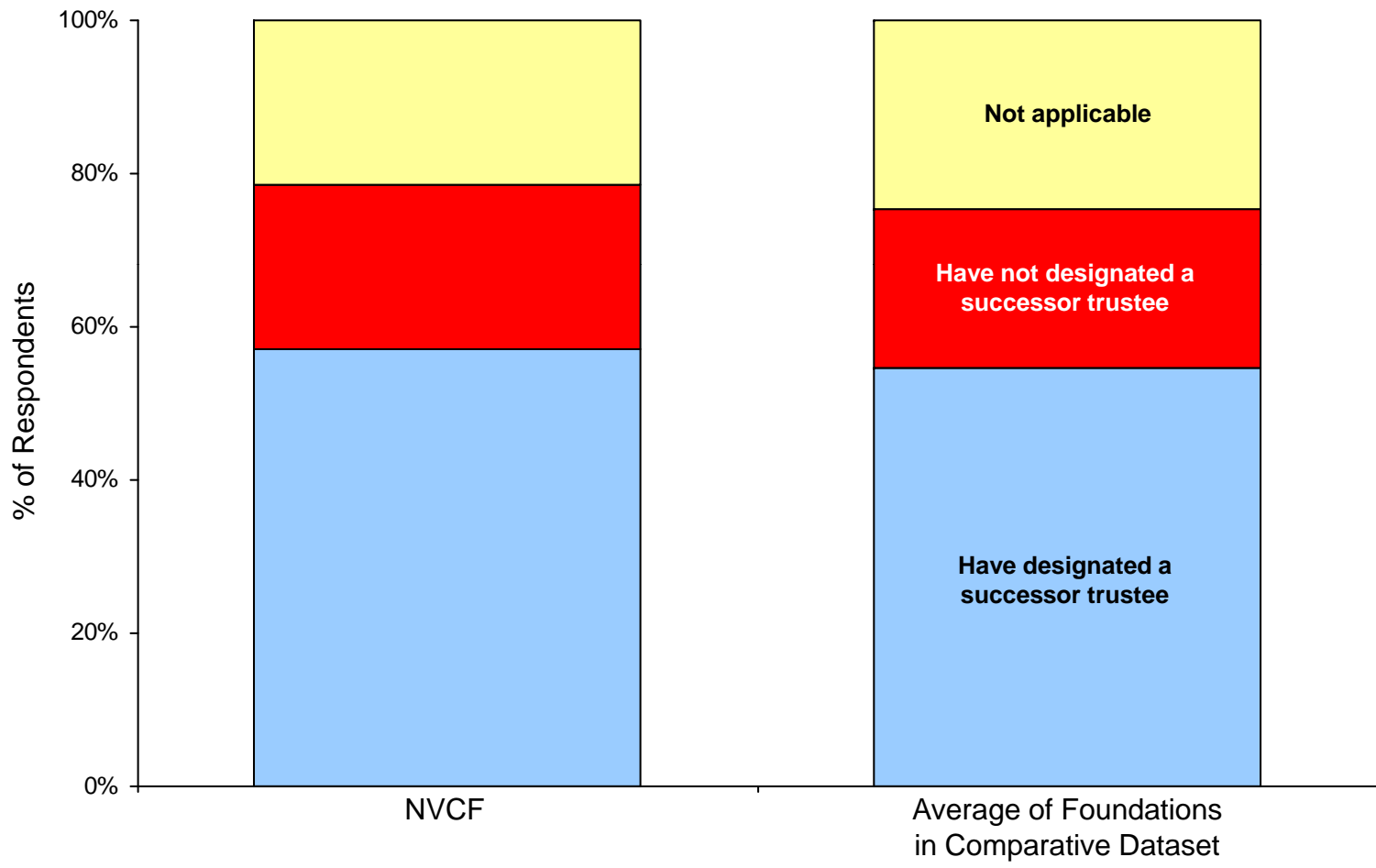


<sup>1</sup>: This chart only includes responses from the donors who indicated that they do plan on giving in the next five to ten years. **CONFIDENTIAL** | © The Center for Effective Philanthropy | 3/30/2010

# Future Giving Plans (3)

Similar to the average community foundation in the dataset, about 20 percent of NVCF donors indicate that they have not designated a successor trustee.

*Designation of a Successor Trustee*

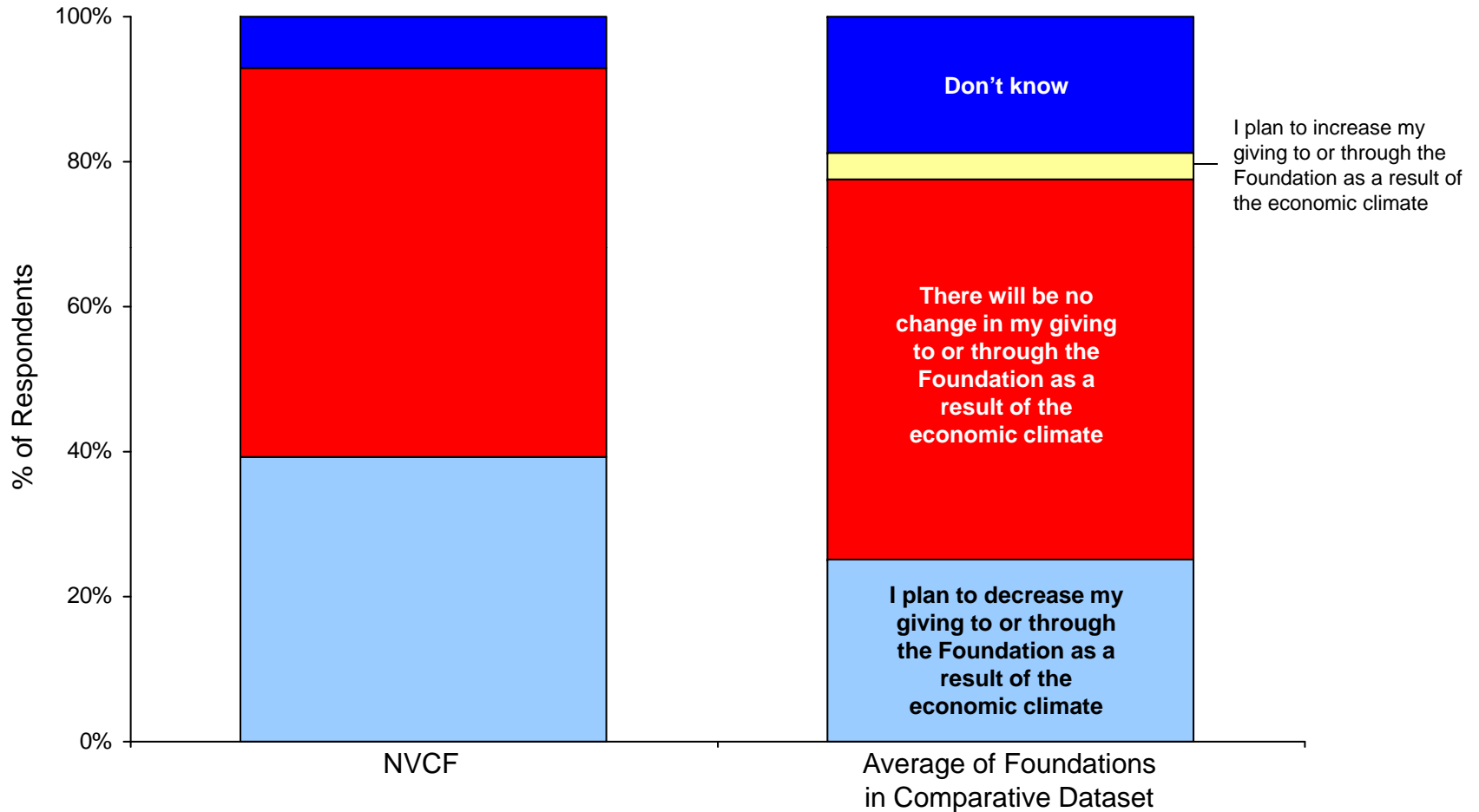




# Response to Current Economic Climate

The proportion of NVCF donors who indicate that they plan to decrease their giving to or through the Foundation as a result of the economic climate is larger than at the average foundation in the comparative dataset.

*Effect of Current Economic Climate on Future Giving*





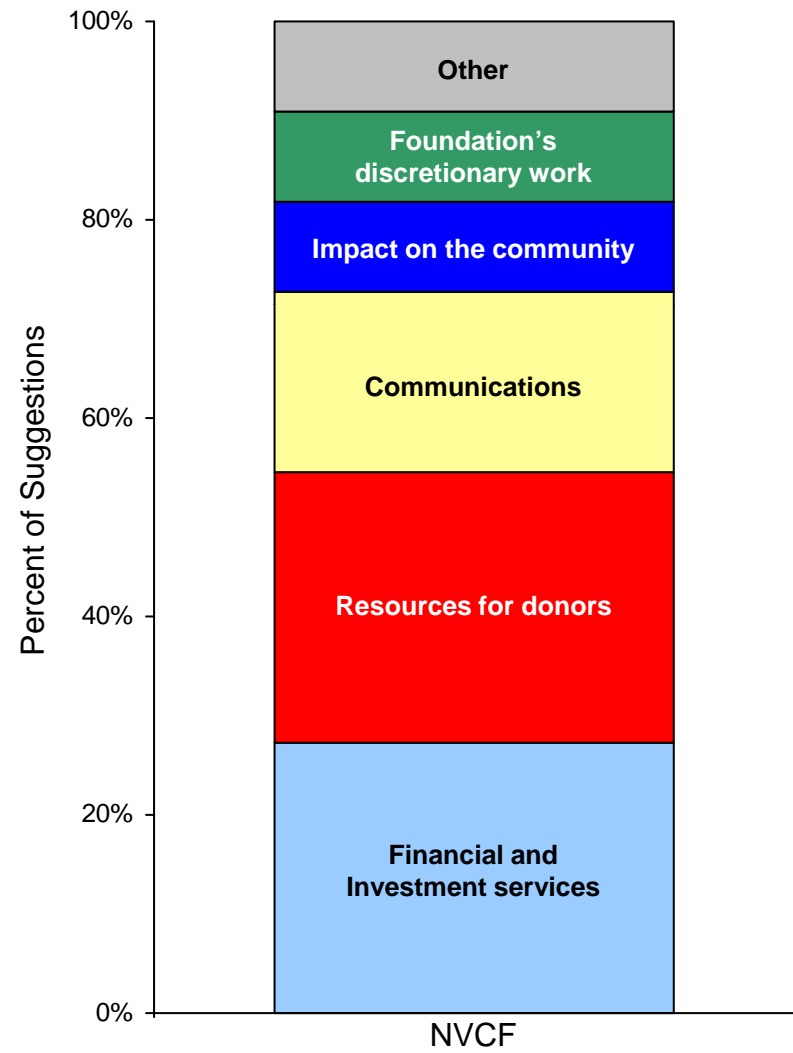
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# Donor Suggestions for the Foundation (1)

NVCF donors were asked to provide suggestions for how the Foundation could improve. CEP characterized the 11 suggestions provided by 10 donors.

*Topics of Donor Suggestions*



## Donor Suggestions for the Foundation (2)

NVCF donors made a total of 10 suggestions for the Foundation’s improvement. All are shown below.

Topic of Donor Suggestion	% Donor Suggestions	NVCF Donor Suggestions
Financial and Investment Services	27%	<p>“More information on how the Foundation’s assets are being invested.”</p> <p>“More flexibility in managing financial assets.”</p> <p>“Investment philosophy.”</p>
Resources for Donors	27%	<p>“I think an annual sit down meeting to discuss our interests and possible funds to watch by a knowledgeable staff member would be a service that would help impact giving.”</p> <p>“Bringing together like-thinking donors is a powerful way of getting things resolved or addressed in the community – it creates an environment of teamwork and encourages people to give. There needs to be more of this happening.”</p> <p>“Putting donor accounts online for review by the donor in question.”</p>
Communications	18%	<p>“Improvement in PR/Marketing/Press.”</p> <p>“Expanding awareness within Napa County of the strengths and positioning of the Foundation’s services.”</p>
Impact on the Community	9%	<p>“Larger, more active community board members.”</p>
Foundation’s Discretionary Work	9%	<p>“I know what the Foundation targets to support. I do not normally see actual impact (as opposed to output). What has really changed for good?”</p>
Other	9%	<p>“Involve more businesses/companies in the work of the Foundation.”</p>



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# Review of Findings



Chart shows NVCF's (◆) average rating and the average rating of the median foundation (◆) on a 1 to 7 scale, truncated to show only 3 to 7.

Key Items	More negative 3 ← 4 5 Rating 6 → 7 More positive	Questions
Satisfaction		"Please rate your overall satisfaction with the Foundation"
Likeliness to Recommend the Foundation		"How likely is it that you would recommend the Foundation to a friend or colleague?"
Impact on the Napa Valley Community		"In your opinion, to what extent is the Foundation making an impact on the Napa Valley community?"
Leadership in the Napa Valley Community		"To what extent does the Foundation exhibit a leadership role in the Napa Valley community?"
Enhancement of Donors' Knowledge of the Napa Valley Community		"To what extent does working with the Foundation enhance your knowledge of the Napa Valley Community?"
Contribution to Donors' Impact		"To what extent does working with the Foundation contribute to your ability to make an impact on the issues you care about?"
Understanding of Donors' Goals		"In your opinion, how well does the Foundation understand your personal charitable goals?"
Enhancement of Donors' Knowledge of Issues		"To what extent does working with the Foundation enhance your knowledge of the issues you care about?"
Responsiveness of Foundation Staff		"How responsive is the Foundation staff when you have a question or need assistance?"



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# Analysis and Discussion (1)

## Generally positive ratings of NVCF

- NVCF is rated very highly for donors' overall satisfaction and more highly than any other foundation in this dataset of eight community foundations for donors' likeliness to recommend the Foundation to a friend. Donors describe the Foundation as "engaged" and "effective."
- The Foundation is highly rated for its leadership in and impact on the community. When deciding to give to the Foundation over other charitable giving options, donors particularly value the Foundation's knowledge of and experience working with local nonprofits, its leadership in the community, and its ability to make an impact on specific issues. NVCF donors are particularly community-oriented, with a much higher than typical proportion of them selecting "I wanted to give back to my community" when asked why they initially contributed to the Foundation. One donor comments, "There is no other resource in our community that comes close to the Napa Valley Community Foundation."
- Donors rate the Foundation highly for its impact on their giving. The Foundation is rated higher than any other funder the dataset of eight community foundations for its enhancement of donors' knowledge of the community and its contribution to donors' knowledge of and impact on issues they care about. The Foundation's resources for donors are all highly rated, and donors who have communicated their goals to the Foundation perceive that Foundation staff understand their goals well.
  - *How can the staff and board identify those specific practices of the Foundation that lead to these successes so that the quality of the Foundation's work can be sustained and strengthened?*





## Analysis and Discussion (2)

### Donor Resources

- Donors rate the Foundation highly for its impact on their giving. The Foundation's resources for donors are all highly rated by those who use them, and donors who have communicated their goals to the Foundation perceive that Foundation staff understand their goals well.
- Yet twenty-five percent of donors indicate that the Foundation needs to improve either the quality of the Foundation's donor advisory services or the quality of the Foundation's donor tools to understand and plan for giving. One such donor comments, "I would like to be able to access more readily a library of nonprofit organizations who are doing the kind of work that I would like to support, so I can be better informed." Another suggests, "I think an annual sit down meeting to discuss our interests and possible funds to watch by a knowledgeable staff member would be a service that would help impact giving."
- Donors who express dissatisfaction with the Foundation's advisory services or donor tools tend to rate the Foundation lower for its understanding of their goals and its enhancement of donors' knowledge of and impact on issues they care about.<sup>1</sup>
- These donors also tend to have contributed less to their funds during 2007 and 2008 than other donors, despite having larger than typical funds at the Foundation. In most other respects these donors appear similar to other NVCF donors.
  - *Does the existence of a group of donors who are dissatisfied with the Foundation's tools and services concern the Foundation?*
  - *Can the Foundation identify and extend extra services to those donors are unsatisfied with the Foundation's resources?*



## Analysis and Discussion (3)

### Administrative Expenses, Investment Strategy, and the Economic Climate

- Twenty-eight percent of NVCF donors report that the Foundation's investment strategy and performance needs improvement; these donors tend to be less satisfied with the Foundation. The most frequent subject of donor suggestions for the Foundation's improvement is financial and investment services. Donors ask for "more information on" and "more flexibility in managing" assets.
- Twenty-four percent of NVCF donors report that the Foundation's administrative fees or costs need improvement; these donors tend to be less satisfied with the Foundation and less likely to recommend it to a friend.
  - *Has the Foundation benchmarked its administrative fees and investment strategy and performance relative to its peers or other competitive options in order to assess their appropriateness? Are there opportunities to provide more information to donors on the Foundation's investment strategy and performance and use of administrative fees?*
  - *Can the Foundation take advantage of high impact ratings and personal service to better communicate its use of administrative fees?*



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# Donor Demographics



Measure	NVCF	Average of Foundations in Comparative Dataset
<b>Age of Respondents</b>		
25 – 34	1%	1%
35 – 44	7%	7%
45 – 54	28%	19%
55 – 64	28%	28%
65 – 74	34%	30%
75 and above	3%	16%
<b>Gender of Respondents</b>		
Female	45%	47%
Male	55%	53%
<b>Race/Ethnicity of Respondents</b>		
Caucasian/White	93%	92%
Asian (including the Indian subcontinent)	4%	3%
Hispanic/Latino	0%	2%
Multi-racial	0%	1%
African-American/Black	0%	1%
Pacific Islander	0%	0.2%
American Indian/Alaskan Native	0%	0%
Other	4%	1%

Note: Zero percent of NVCF donors and two percent of donors at the average foundation answered “Prefer not to say” for their age, Zero percent of NVCF donors and two percent of donors at the average foundation answered “Prefer not to say” for their gender, and seven percent of NVCF donors and five percent of donors at the average foundation answered “Prefer not to say” for their race/ethnicity.



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# Profiles of Foundations in Dataset

Foundation	Description
The Chicago Community Trust	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$1,591,487,286 and giving of \$101,796,647 (as of 2008)</li> <li>Established in 1915 in the city of Chicago, IL</li> <li>The Trust is dedicated to the Chicago region and to endowing its future. Together with its donors, the Trust continues to address the region's pressing challenges and most promising opportunities.</li> </ul>
Gulf Coast Community Foundation of Venice (FL)	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$178,500,000 and giving of \$11,300,000 (as of 2009)</li> <li>Established in 1995, the Foundation focuses on Venice, FL and surrounding communities</li> <li>Gulf Coast Community Foundation builds strong communities through leadership, partnership, and endowed philanthropy.</li> </ul>
Napa Valley Community Foundation	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$18,000,000 and giving of \$2,100,000 (as of 2009)</li> <li>Established in 1994 in Napa County, CA</li> <li>The Foundation mobilizes resources, promotes philanthropy, and provides leadership on vital issues in Napa County.</li> </ul>
Orange County Community Foundation	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$123,197,949 and giving of \$20,327,221 (as of 2008)</li> <li>Established in 1989 in CA</li> <li>The Foundation was established to foster a culture of giving, improve the quality of life in Orange County, and provide an enduring source of support for the community.</li> </ul>
Sacramento Region Community Foundation	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$74,501,263 and giving of \$5,154,087 (as of 2008)</li> <li>Established in 1983, the Foundation focuses on Yolo, Placer, and El Dorado counties</li> <li>The Sacramento Region Community Foundation is an advocate for quality of life, dedicated to connecting people who care with charitable causes.</li> </ul>
The San Diego Foundation	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$511,213,000 and giving of \$52,906,000 (as of 2008)</li> <li>Established in 1975 in CA</li> <li>The San Diego Foundation encourages and supports meaningful dialogue on issues affecting each of its communities and works with philanthropists to develop creative solutions to meet critical community needs.</li> </ul>
The San Francisco Foundation	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$1,017,024,000 and giving of \$96,511,000 (as of 2008)</li> <li>Established in 1948, with a focus on the Bay Area community</li> <li>The San Francisco Foundation mobilizes resources and acts as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy.</li> </ul>
San Luis Obispo Community Foundation	<ul style="list-style-type: none"> <li>Community Foundation with assets of \$18,568,561 and giving of \$1,851,832 (as of 2008)</li> <li>Established in 1998 in CA</li> <li>The Foundation provides excellent service to donors, grantees, and the community.</li> </ul>



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# About the Center for Effective Philanthropy (CEP)



## Mission

**To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness and impact.**

## Vision

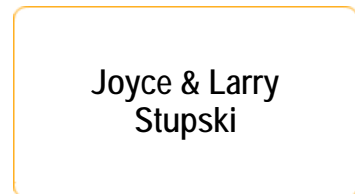
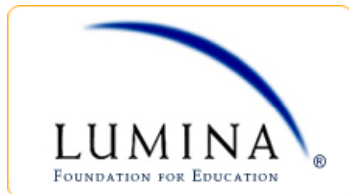
**We seek a world in which pressing social needs are more effectively addressed. We believe improved effectiveness of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.**





# CEP Funders

CEP is funded through a combination of foundation grants and revenue earned from management tools and seminars. Funders providing support for CEP's work include:





# CEP Research

CEP’s research and creation of comparative data sets leads to the development of assessment tools, publications serving the philanthropic funder field, and programming. CEP’s research initiatives focus on several subjects, including:

Research Focus	CEP Publication
Performance Assessment	<i>Toward a Common Language: Listening to Foundation CEOs and Other Experts Talk About Performance Measurement in Philanthropy</i> (2002)
	<i>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
Funder Strategy	<i>Beyond the Rhetoric: Foundation Strategy</i> (2007)
	<i>Lessons from the Field: Becoming Strategic: The Evolution of the Flinn Foundation</i> (2009)
	<i>The Essentials of Foundation Strategy</i> (2009)
	<i>Lessons from the Field: Striving for Transformative Change at the Stuart Foundation</i> (2009)
Funder Governance	<i>Foundation Governance: The CEO Viewpoint</i> (2004)
	<i>Beyond Compliance: The Trustee Viewpoint on Effective Foundation Governance</i> (2005)
Funder-Grantee Relationships	<i>Listening to Grantees: What Nonprofits Value in Their Foundation Funders</i> (2004)
	<i>Foundation Communications: The Grantee Perspective</i> (2006)
	<i>In Search of Impact: Practices and Perceptions in Foundations’ Provision of Program and Operating Grants to Nonprofits</i> (2006)
	<i>Luck of the Draw</i> (2007)
Managing Operations	<i>Lessons from the Field: Improving the Experience at the David and Lucile Packard Foundation</i> (2008)
	<i>Lessons from the Field: Aiming for Excellence at the Wallace Foundation</i> (2008)
Non-Monetary Assistance	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)



# CEP Assessment Tools

CEP provides funder leaders with assessment tools – utilizing comparative data – that inform performance assessment:

- **Grantee Perception Report® (GPR):** provides CEOs, boards, and staff with comparative data on grantee perceptions of funder performance on a variety of dimensions
- **Applicant Perception Report (APR):** a companion to the GPR that provides comparative data from surveys of declined grant applicants
- **Comparative Board Report (CBR):** provides data on board structure and trustee perceptions of board effectiveness on a comparative basis
- **Staff Perception Report (SPR):** explores philanthropic funder staff members' perceptions of funder effectiveness and job satisfaction on a comparative basis
- **Operational Benchmarking Report (OBR):** provides comparative data, relative to a selected peer group of funders, on aspects of philanthropic funder operations – including organization staffing, program officer workload, grant processing times, and administrative costs
- **Stakeholder Assessment Report (STAR):** delivers insight about a funder's effectiveness by surveying stakeholders a funder seeks to influence as part of its strategy
- **Multidimensional Assessment Process (MAP):** provides an integrated assessment of performance, assimilating results and data from all of CEP's assessment tools into Executive Summary, implications, and recommended action steps for greater effectiveness
- **Donor Perception Report (DPR):** creates insight, on a comparative basis, about donors' perceptions of the community foundations to and through which they contribute or establish funds
- **Beneficiary Perception Report (BPR):** informs the work of funders and grantees by providing comparative feedback from those whose lives funders seek to improve – the ultimate beneficiaries of funders' philanthropic efforts

## Contact Information

- This report was produced for the Napa Valley Community Foundation by the Center for Effective Philanthropy in February, 2010.
- Please contact CEP if you have any questions:
  - Sindhu Knotz, Manager  
(415) 391-3070 x129  
sindhus@effectivephilanthropy.org
  - Sally Smyth, Senior Research Analyst  
(415) 391-3070 x127  
sallys@effectivephilanthropy.org