

# How We Stack Up

At Napa Valley Community Foundation, our donors are our partners in addressing the most pressing challenges faced by our community. Therefore, we offer the highest level of service - even in comparison to our local peers.

But we aren't the only game in town. When starting a Donor Advised Fund (DAF) you have literally hundreds of partners from which to choose. Generally, these fall into two broad categories:

- Community Foundations like Napa Valley Community Foundation
- OR National Charities like Schwab Charitable

We believe that you should consider your options carefully before opening a fund. To weigh your choices, it may be helpful to focus on three factors that can be measured objectively:

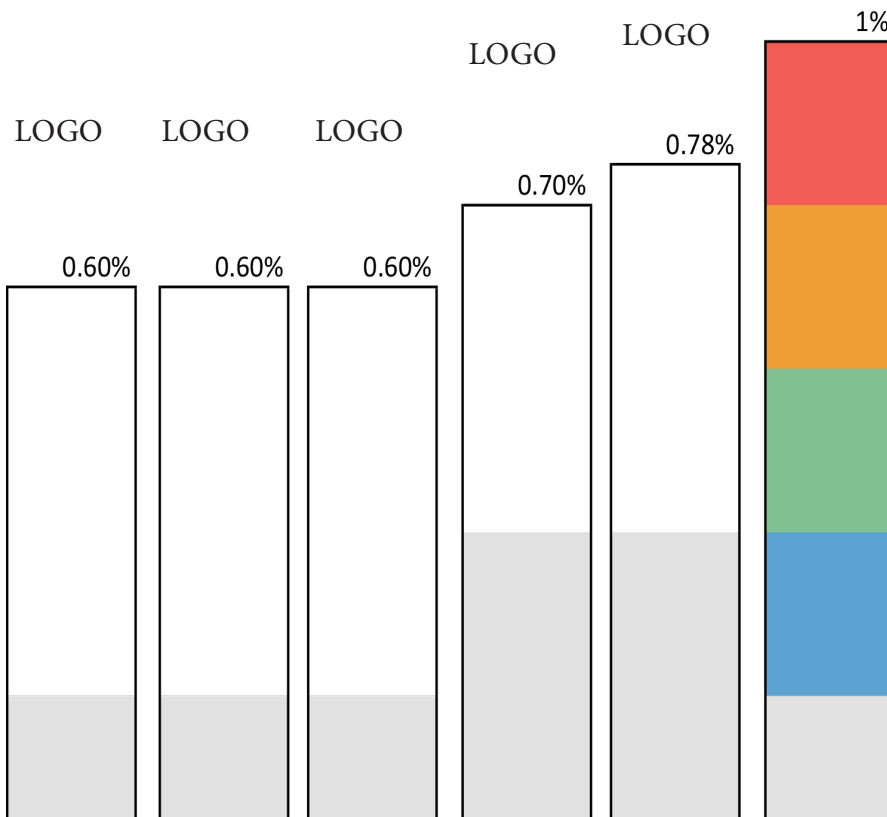
- price
- breadth of service
- quality

We rank

**98<sup>th</sup>**  
percentile

*of DAF holders would recommend the Napa Valley Community Foundation to friends & family*

Napa Valley  
Community  
FOUNDATION



### Personalized Philanthropic Services

A diverse menu of options from site visits to values exercises, tailored to the needs of each unique donor or multi-generational family.

### Investment Flexibility

Utilize the Foundation's investment options or keep management of assets or funds with your individual manager.

### Sound Philanthropic Advice & Engagement

Expertise on national issues and non-profits in our region helps donors make the greatest impact, driving community good.

### Knowledge of Community

Deep know-how and strong community relationships drive impactful local philanthropic investments.

### Administration

Reliable fund administration and efficient grant distribution.

ADD DATA SOURCE INFO

*Continued...*

We are the top-ranked community foundation in the country on more than half of the key measures of donor satisfaction and impact, according to a comprehensive survey conducted by the nonprofit Center for Effective Philanthropy. Taking exceptional care of your clients, and their plans for giving back, is what we are all about.

**PRICE:** Isn't the only consideration. The price you pay for your DAF includes the administrative fees paid to the organization to manage your DAF along with any additional services provided.

**BREADTH OF SERVICE:** Breadth of service is based on the diversity of offerings available to you and your family or company, beyond a baseline level of administration. The types of services offered are in direct relation to the management and benefits offered by your DAF provider.

**Minimum:** All DAFs include basic administration services like bookkeeping, legal compliance and charitable check-writing services. Some additional services may also include philanthropic advisory services, such as more rigorous due diligence on larger grant distributions.

**High Level:** At Napa Valley Community Foundation, our donors are our partners in addressing the most pressing challenges faced by our community. Therefore, we offer the highest level of service - even in comparison to our local peers. In addition to the above, we also offer:

- Assistance in measuring results and impact
- Pre-vetted charitable deal-flow in your areas of interest
- Networking opportunities with other philanthropists

### Let's Talk!

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- The option to join in larger projects with other donors
- Structured Program Related Investments for its DAF clients, in which low or zero-interest loans are made from DAFs instead of, or in addition to, grant distributions
- Facilitated intergenerational family giving conversations
- Prepares grant distribution ideas for DAF clients who also have a family foundation
- Conducts research on issue areas suggested by DAF clients
- And more!

**QUALITY:** Is measured solely by client testimonials about their perceptions and experience with their DAF provider. At Napa Valley Community Foundation, we measure the quality of our donor experience against the only nationwide data set that compares DAF providers to one another, based on the anonymous responses of more than 6,500 DAF clients across nearly 100 DAF providers.

On eight key measures of donor satisfaction and impact, Napa Valley Community Foundation's lowest score was in the 95th percentile; its highest score was in the 99th percentile; and its average score was 97.6.

[Click her to read the full report](#)

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