

CONFIDENTIAL

Donor Perception Report

prepared for

Omaha Community Foundation

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Preliminary Draft

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EFFECTIVE PHILANTHROPY

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Contents

I. Executive Summary	2
II. Introduction	4
III. Donor Perceptions	
a) Satisfaction	9
b) Impact on the Community	11
c) Impact on Donor Giving	16
IV. Donor Engagement	
a) Communications and Interactions	20
b) Donor Resources	22
V. Future Giving	30
VI. Suggestions for Improvement	37
VII. Review of Findings	40
VIII. Analysis and Discussion	42
<u>Appendix</u>	
A. Supplemental Donor, Foundation, and Fund Characteristics	47
B. List of Foundations in Dataset	57
C. About the Center for Effective Philanthropy	61

Executive Summary

OCF donors are generally satisfied with the Foundation, and say they are likely to recommend the Foundation to their friends and colleagues. One donor writes that the Foundation “encourages more philanthropy” in the area, and “provides an invaluable service to many charitable givers.”

Patterns of use of donor resources and interactions with OCF suggest a more independent and self-reliant donor base than is typical. When asked what resources they use for information on nonprofits, 71 percent of OCF donors, the largest proportion, say they use their own research, and 67 percent, a higher than typical proportion, of OCF donors says they want to be self-sufficient in their giving. When asked about the Foundation’s impact on their philanthropic giving, many donors note the efficiency and ease with which OCF allows them to make donations, rather than commenting on the Foundation’s knowledge and expertise of the community. The words most frequently used by donors to describe the Foundation include “helpful,” “efficient,” and “convenient.”

OCF donors rate the Foundation lower than is typical on measures related to the Foundation’s external impact and visibility in the community. Only 16 percent of donors rate the Foundation a six or seven on a seven point scale for its enhancement of donors’ knowledge of the community – a lower than typical proportion. Donors suggest the Foundation work to have “more visibility,” and try to “build market awareness.” Another suggests the Foundation “do more in terms of making their goals known and leading in the greater Omaha philanthropic community.”

A lower than typical proportion of OCF donors has communicated their charitable goals to the Foundation. One donor comments that they simply have not “taken advantage of [the Foundation’s] expertise,” while another uses resources to achieve their goals, commenting that the “charitable checkbook makes it easier to fulfill my philanthropic goals.” However, donors who report that they have communicated their charitable goals to the Foundation and donors who have used the advice and expertise of Foundation staff rate higher on many measures throughout the report.

Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

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 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

- ◆ The Center for Effective Philanthropy (CEP) surveyed donors of the Omaha Community Foundation (“OCF”) during September and October of 2011. The target population was selected by the Foundation. 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 the Foundation’s survey are:

Survey Period	Types of Funds Included	Number of Donors Surveyed	Number of Responses Received	Survey Response Rate ¹
September and October 2011	Charitable Checkbook, Designated, Donor-Advised, Field of Interest, Supporting Organization	731	275	38%

- ◆ OCF’s average and/or median ratings are compared to the average and/or median ratings from donors in CEP’s comparative dataset. This tool it is not meant to be a comprehensive benchmarking study. The foundations included are not representative of all community foundations. Please see the appendix (pp 57-60) for a full list of community foundations whose donors CEP has surveyed.

Characteristics of the Comparative Set	
Donor Responses	3,447 donors
Community Foundations	26 foundations

- ◆ 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. These selected comments over-represent negative comments about the Foundation in order to offer a wide range of perspectives.

1: The median response rate for foundations in the comparative dataset is 37 percent. CEP surveyed 583 Omaha donors electronically and received 223 completed responses for a 38 percent response rate. CEP surveyed 148 Omaha donors by mail and received 52 completed responses for a 35 percent response rate.

Key Donor and Fund Characteristics

- ◆ This table is intended to provide context to the Foundation in thinking about its DPR results relative to key characteristics of its donors and their funds.
- ◆ Compared to donors of the typical foundation, Omaha donors tend to be younger than donors at the typical foundation, and give less outside the foundation.

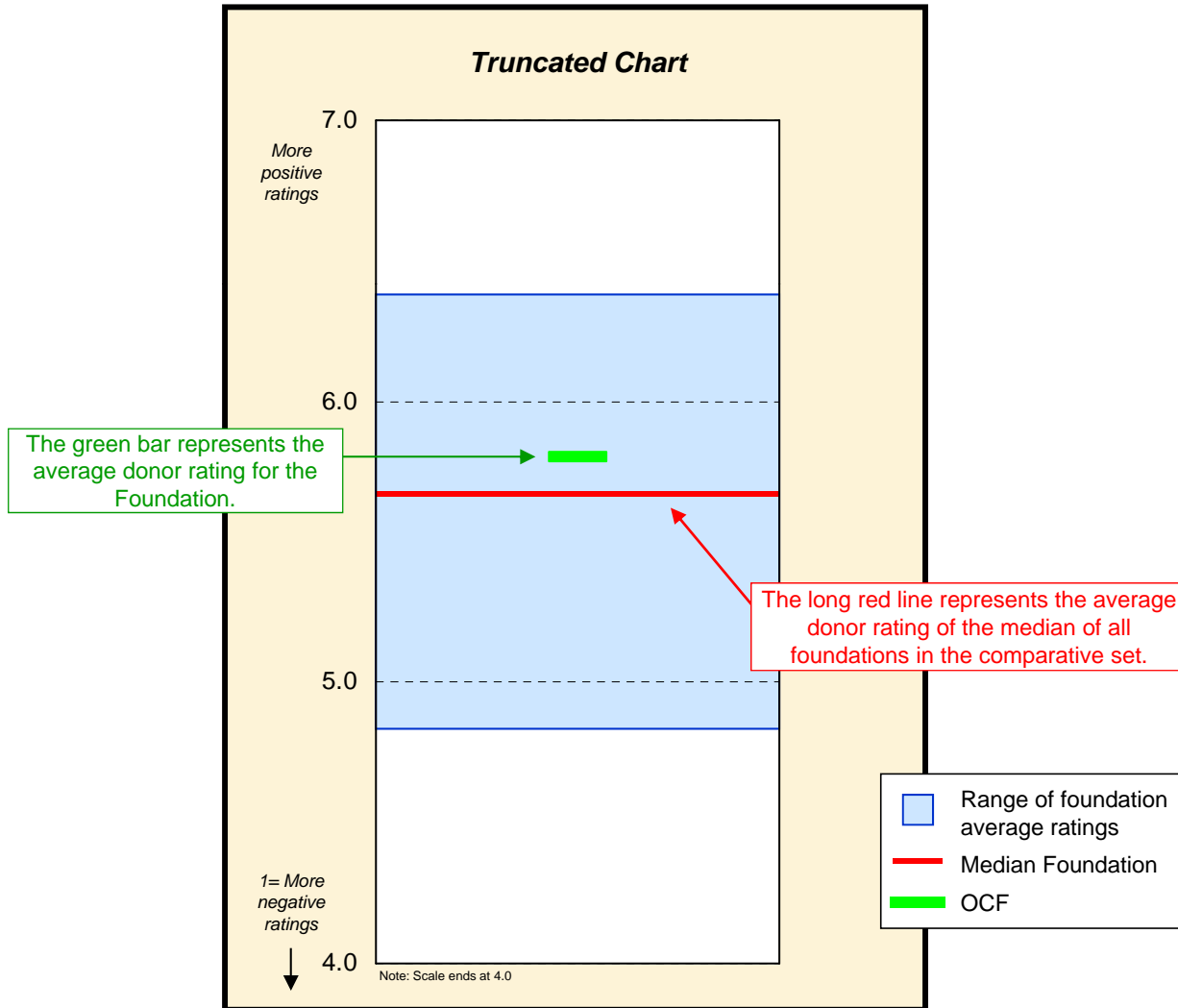
Measure	OCF	Typical Foundation
Donor Characteristics		
Percent of donors who are age 65 or older	42%	51%
Percent of donors whose annual giving outside the Foundation is \$50K or larger	16%	26%
Fund Characteristics		
Total donor advised funds per full-time donor designated staff	184 funds	75 funds
Average length of fund establishment	5.8 years	9.4 years
Median Fund Balance	\$4,740	N/A
Proportion Tier 1 Donors	21%	N/A

- ◆ CEP confirmed that OCF donors who responded to the survey are representative of all OCF donors surveyed in the following categories: fund type, donor tier, fund balance.

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 the Foundation and the range of foundation ratings in the comparative dataset.

Throughout the report, many charts in this format are truncated from the full scale because foundation averages fall within the top half of the absolute range.



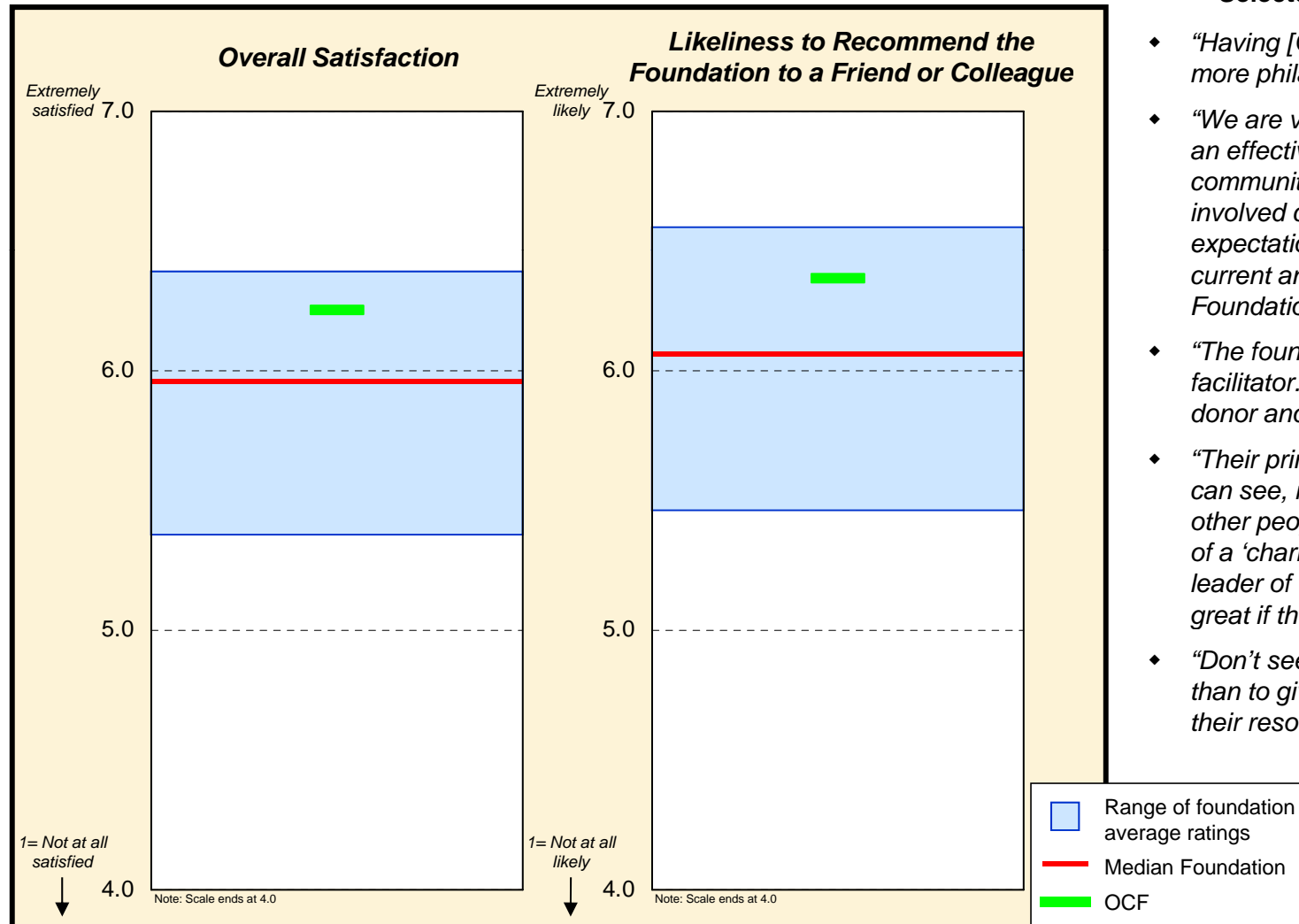
Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
a)	Satisfaction	9
b)	Impact on the Community	11
c)	Impact on Donor Giving	16
IV.	Donor Engagement	
a)	Communications and Interactions	20
b)	Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Satisfaction and Recommendations

On overall donor satisfaction, OCF is rated above the median foundation.

For donors' likeliness to recommend the Foundation to a friend or colleague, OCF is rated above the median foundation.



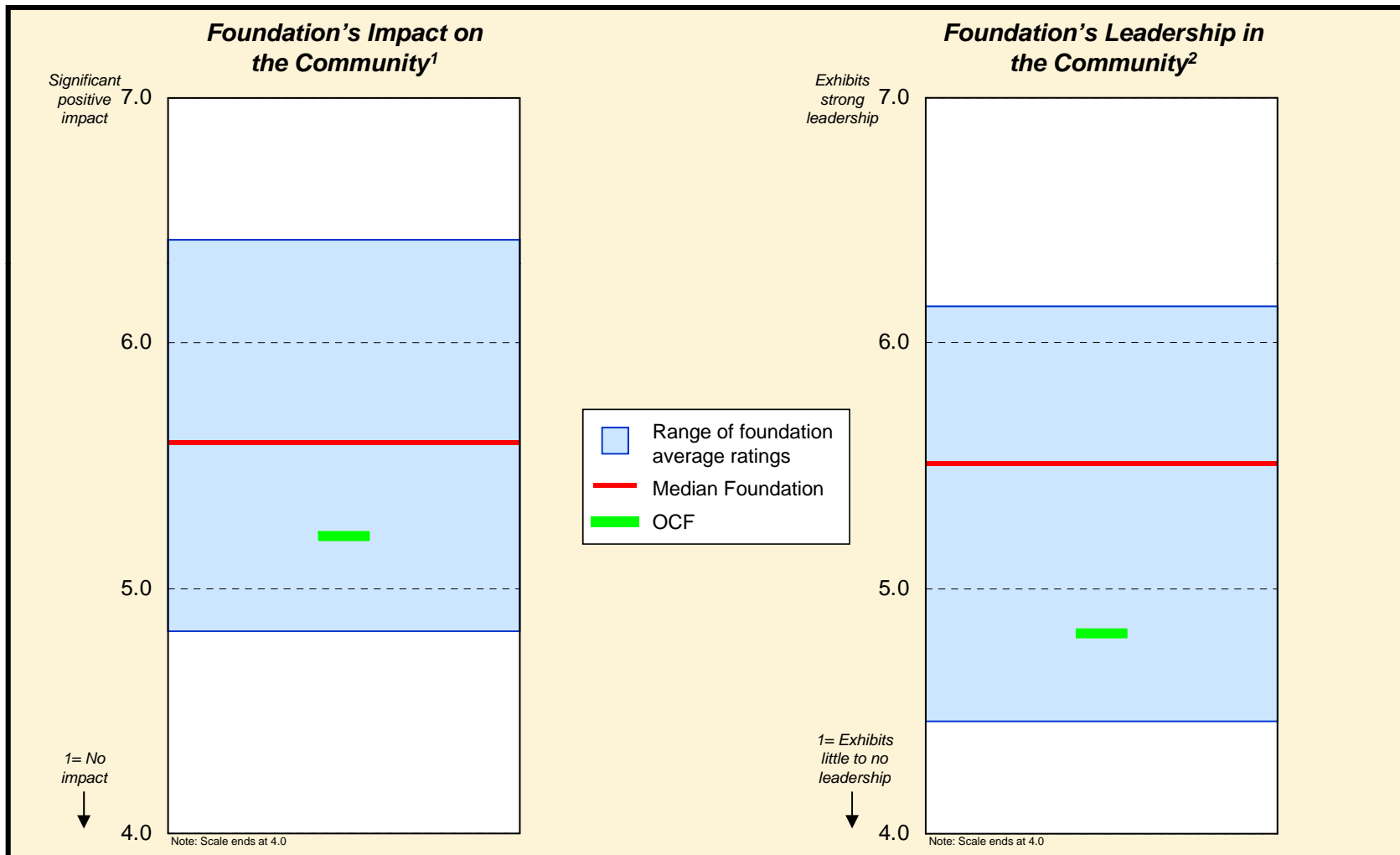
Selected Donor Comments

- ♦ "Having [OCF] here encourages more philanthropy."
- ♦ "We are very fortunate to have such an effective and meaningful community tool. The individuals involved continue to exceed expectations and are the key to the current and on-going success of the Foundation."
- ♦ "The foundation is an excellent facilitator. A terrific conduit between donor and charity."
- ♦ "Their primary purpose, from what I can see, is to serve as a way for other people to give their money, sort of a 'charitable bank,' but not as a leader of the community. It would be great if they could change that."
- ♦ "Don't see OCF having 'impact' other than to give donors a place to put their resources."

Impact on and Leadership in the Community

For the Foundation's impact on the greater OCF area and Southwest Iowa community, OCF is rated below the median foundation.

For the extent to which the Foundation exhibits a leadership role in the greater OCF area and Southwest Iowa community, OCF is rated below the median foundation.

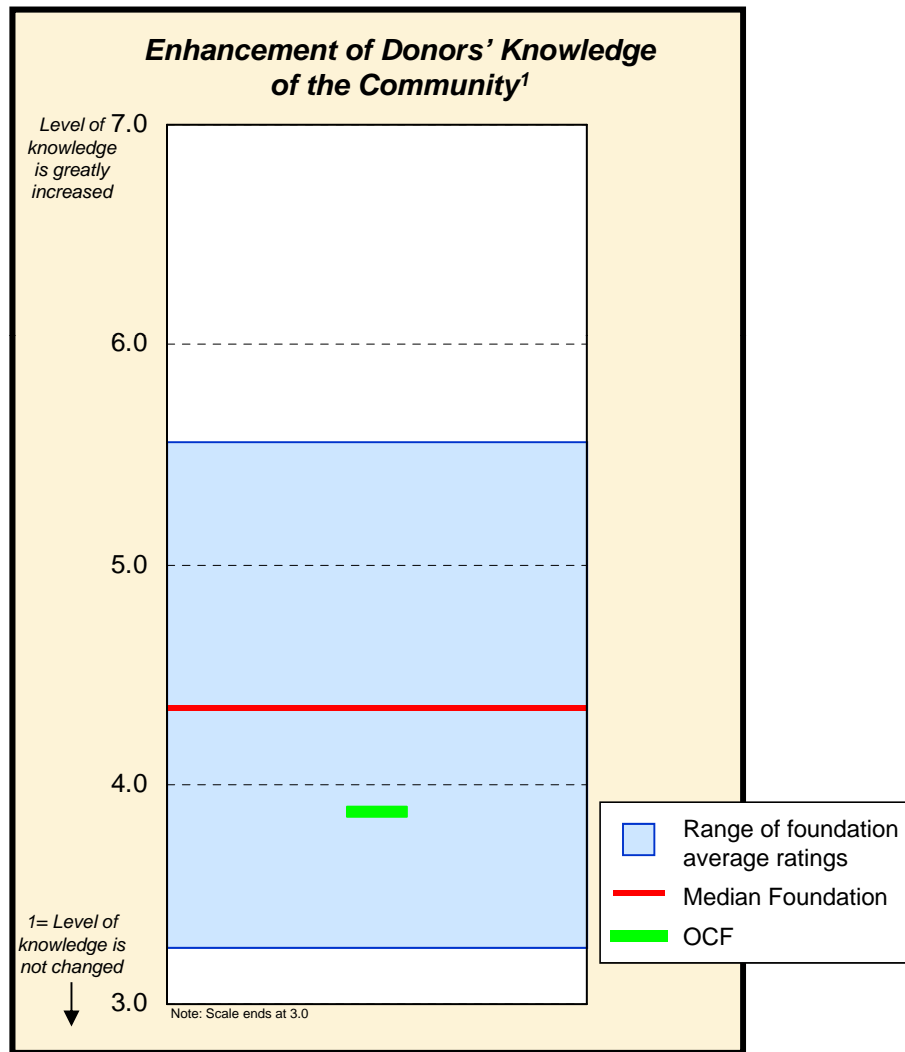


1: OCF donors were asked specifically about the Foundation's impact on the greater OCF area and Southwest Iowa community. This question includes a "Don't know" response option; 14 percent of OCF donors and 11 percent of donors at the median foundation answered "Don't know" for the Foundation's impact on the community.

2: OCF donors were asked specifically about the Foundation's leadership in the greater Omaha area and Southwest Iowa community.

Donors' Knowledge of the Community

For the Foundation's enhancement of donors' knowledge of the greater Omaha area and Southwest Iowa community, OCF is rated below the median foundation.



Selected Donor Comments

- ♦ *"They have created a clear focus to the giving community on the need for focused giving and they have enlightened the community to get involved and help make a difference."*
- ♦ *"The Foundation could do more to identify issues important to the local community, and connect donors to combine resources to support them."*
- ♦ *"I get mixed messages regarding the Foundation's purpose. I don't learn much about the conflicting and competing non-profit organizations in our community."*
- ♦ *"I am impressed by the Foundation's ability to both identify the philanthropic needs of the community and identify areas where duplication of services occurs."*
- ♦ *"I see the Foundation facilitating donation and thus stimulating more of it, which has a positive effect, but the creativity and leadership is coming from the donors rather than the Foundation."*

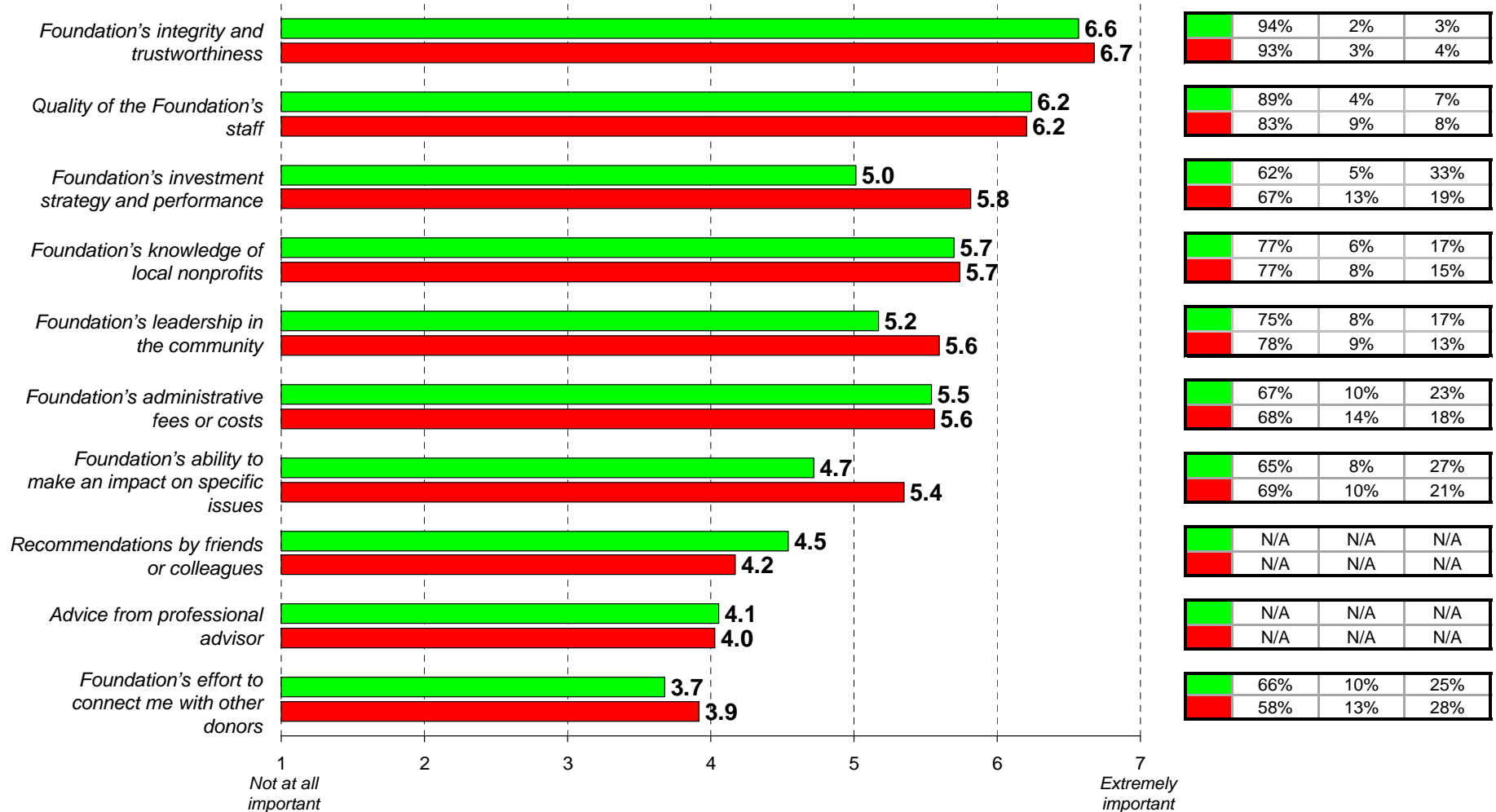
¹: OCF donors were asked specifically about the Foundation's enhancement of donors' knowledge of the greater Omaha area and Southwest Iowa community.

Valued Aspects of the Foundation (1)

When deciding to give to the Foundation over other charitable options, OCF donors most value trust and integrity. They value the Foundation's investment strategy and performance less than donors of the median foundation.



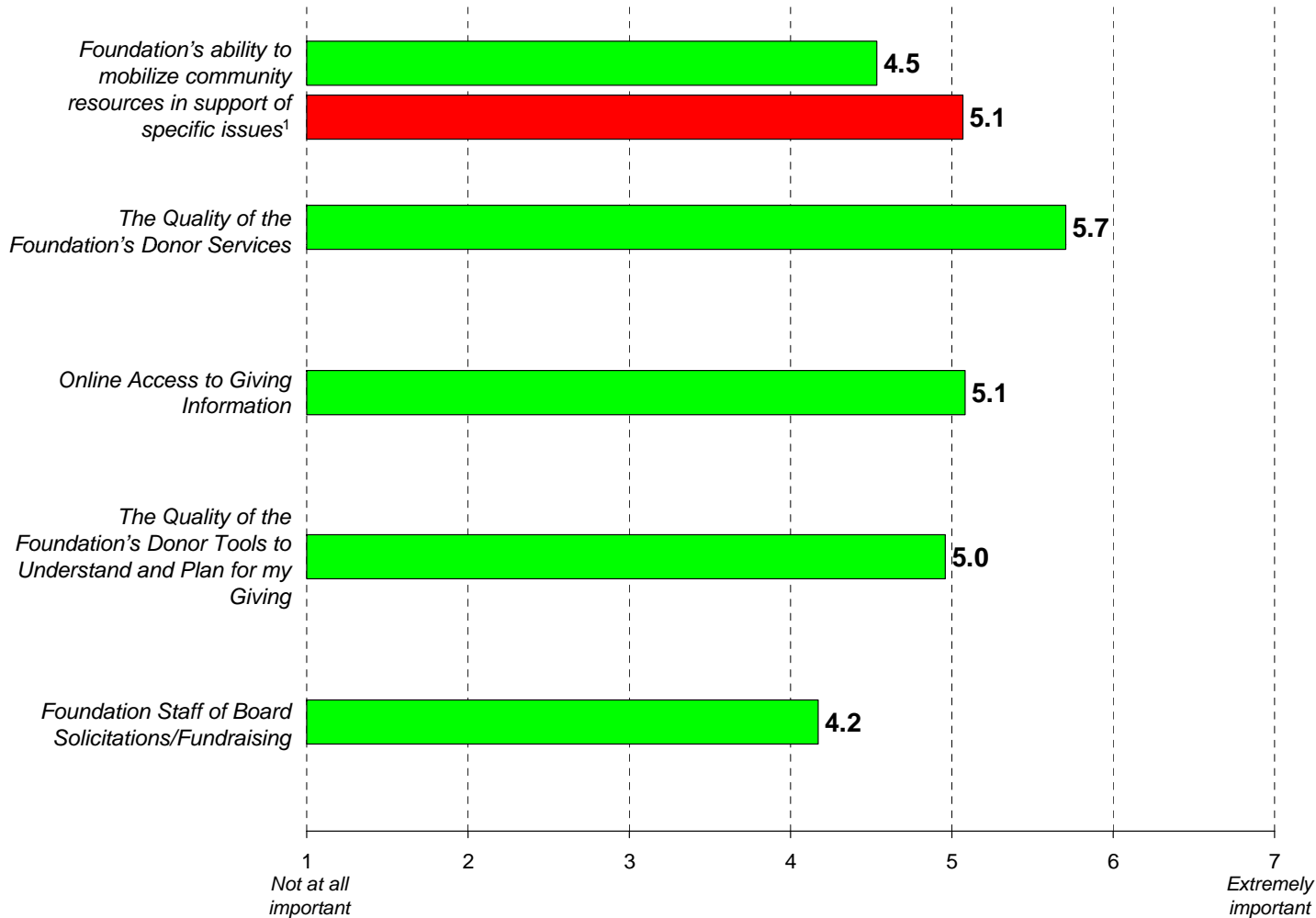
Importance of Factors in Donors' Decisions to Give to Foundation over Other Options (continued on next slide)



Valued Aspects of the Foundation (2)



Importance of Factors in Donors' Decisions to Give to Foundation over Other Options

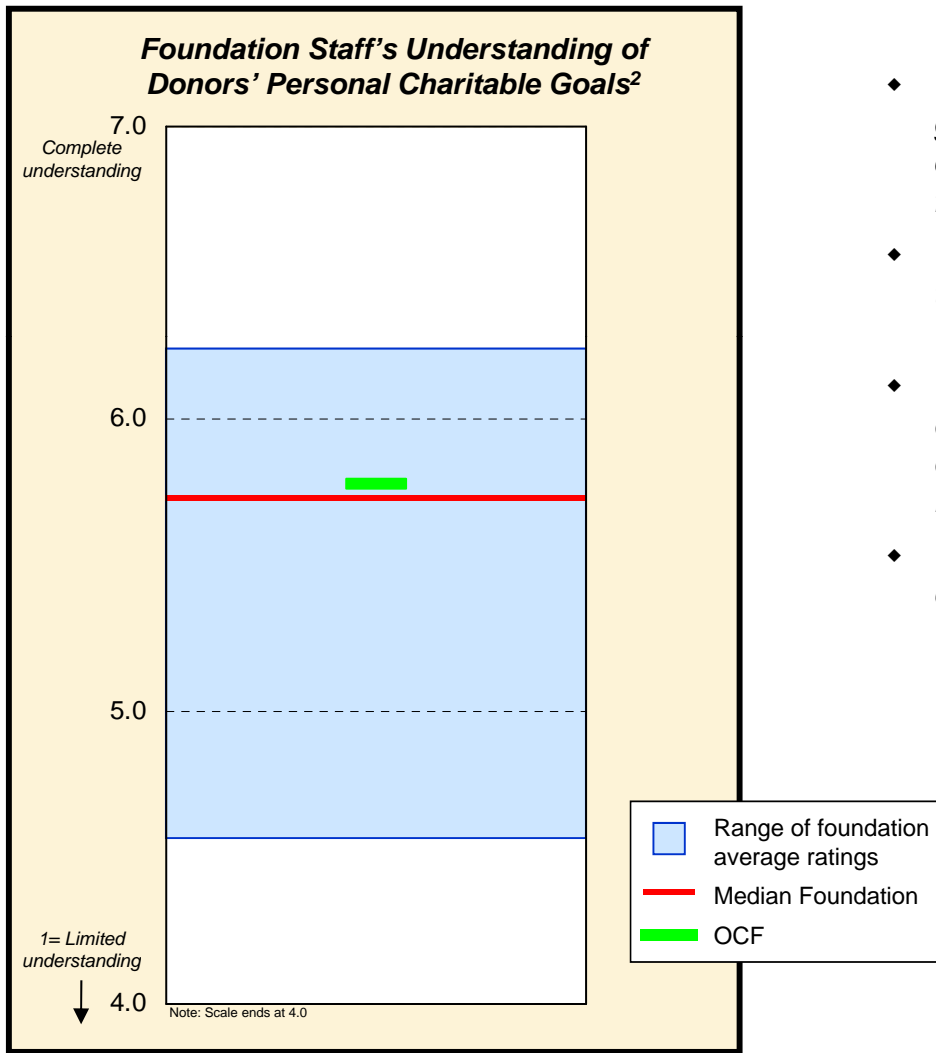


	Satisfied	Needs Improvement	Don't know/ N/A
Foundation's ability to mobilize community resources in support of specific issues ¹	56%	10%	33%
Foundation's ability to mobilize community resources in support of specific issues ¹	67%	8%	24%
The Quality of the Foundation's Donor Services	88%	3%	9%
Online Access to Giving Information	77%	3%	20%
The Quality of the Foundation's Donor Tools to Understand and Plan for my Giving	78%	5%	18%
Foundation Staff of Board Solicitations/Fundraising	61%	5%	33%

¹: Only includes data from 19 foundations due to customization of the survey instrument. For other categories, comparative data not available as the questions were asked only of the Foundation.

Alignment of Charitable Goals

Forty-three percent of donors at the Foundation have communicated their personal charitable goals to the Foundation – a smaller than typical proportion.¹ Foundation donors who have communicated their goals rate the Foundation staff’s understanding of their personal charitable goals similarly to that of the median foundation.



Selected Donor Comments

- ◆ “[The Foundation] facilitates the process of philanthropic giving. It allows me to access my giving history and the charts provide me with the information I need to insure that I follow my goals.”
- ◆ “I think the Omaha Community Foundation can do more in terms of making their goals known and leading in the greater Omaha philanthropic community.”
- ◆ “Given our ability to give, we’ve simply chosen the OCF to distribute the gifts we wish to make, and hope that in so doing our use is helpful to the broader goals of the Foundation.”
- ◆ “The Foundation makes it very simple to contribute to those organizations which we support.”

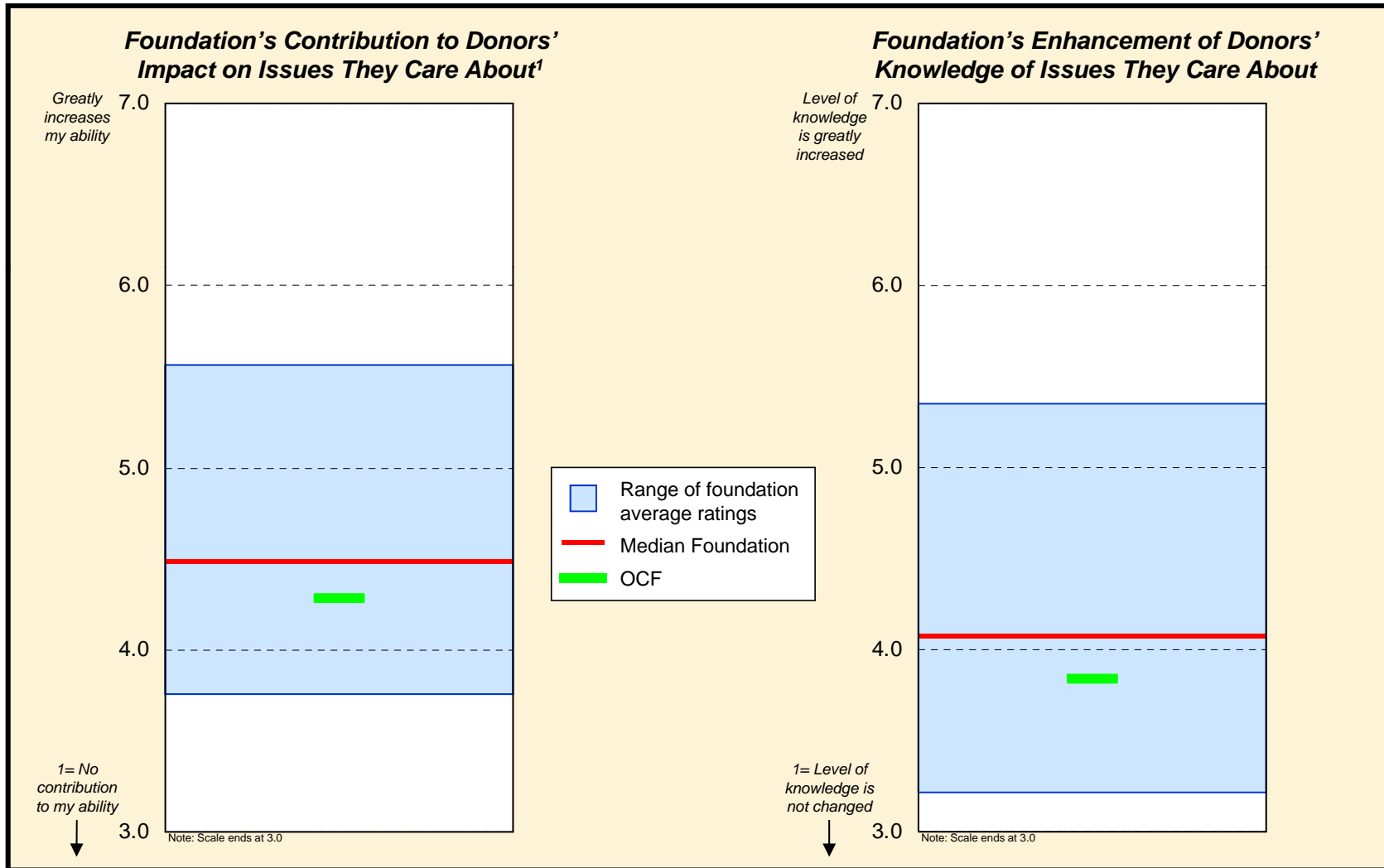
1: Fifty-six percent of donors at the median foundation have communicated their charitable goals.

2: 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.

Contributing to Donors' Impact and Knowledge

For the Foundation's contribution to donors' ability to make an impact on the issues they care about, OCF is rated similarly to the median foundation.

For the Foundation's enhancement of donors' knowledge of the issues they care about, OCF is rated similarly to the median foundation.

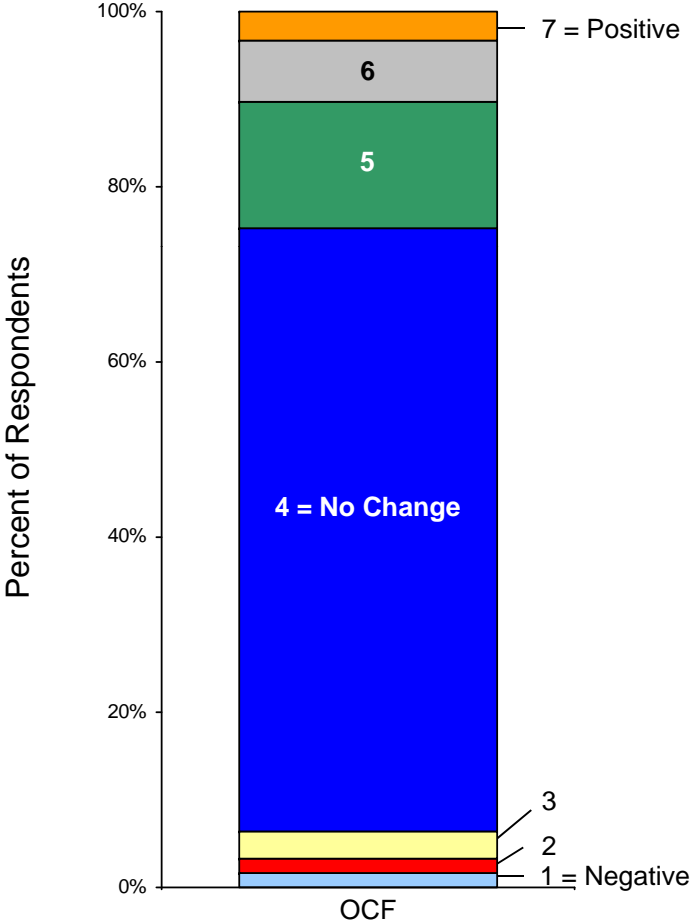


1: This question includes a "Don't know" response option; 9 percent of OCF donors and 10 percent of donors at the median foundation answered "Don't know" for the Foundation's contribution to their ability to make an impact on the issues they care about.

Let Good Grow Fund

Fifty-two percent of OCF donors are familiar with the *Let Good Grow Fund* Initiative. Donors who were aware of the initiative were asked how it has changed their opinion of the Foundation.

“How have OCF’s efforts to raise money for the *Let Good Grow Fund* changed your opinion of the Foundation?”



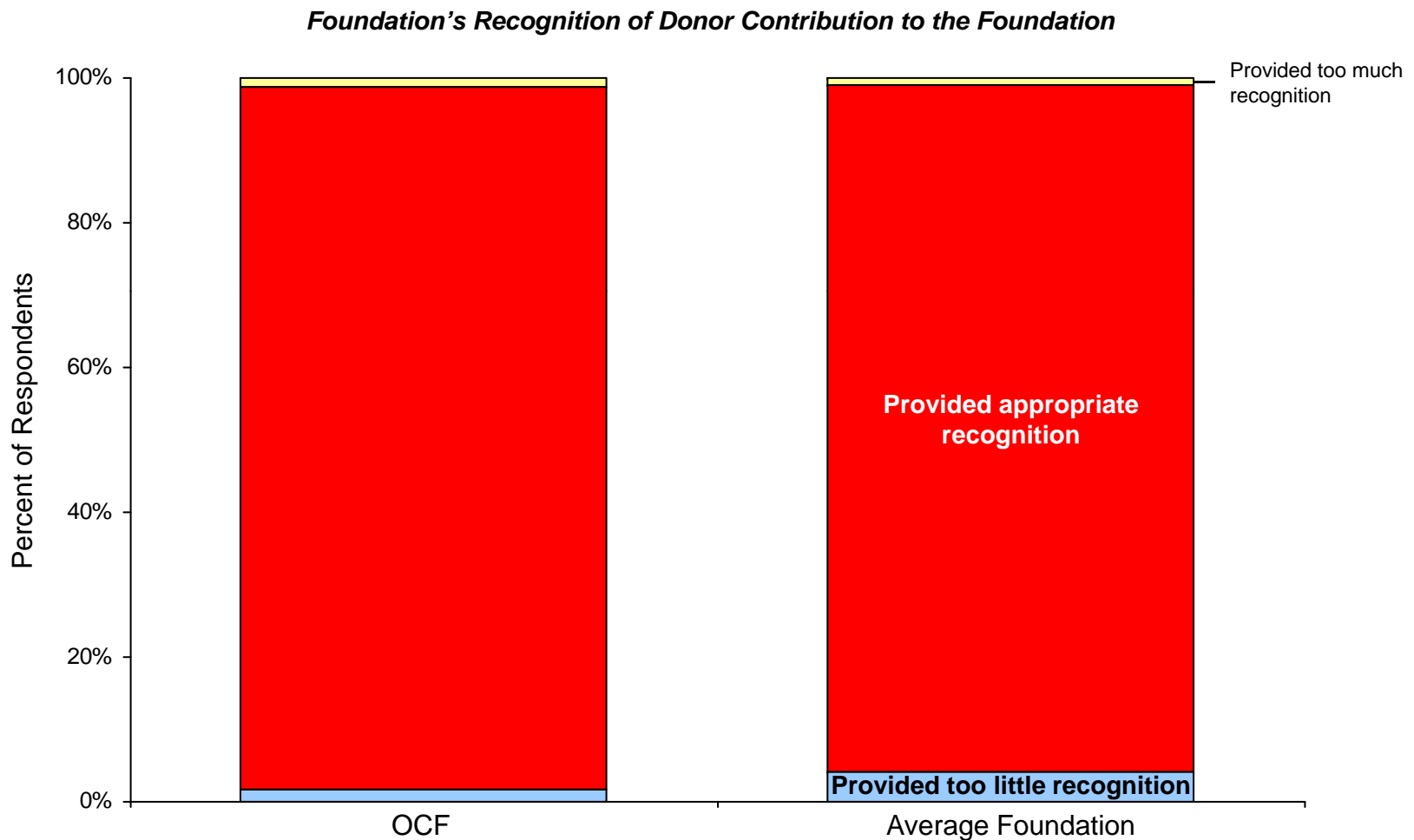
Behind the Numbers – Variation by Change in Primary Contact
 OCF donors who were familiar with the Foundation’s *Let Good Grow Fund* rate the Foundation significantly higher than other donors on:

- Overall satisfaction with the Foundation
- Enhancement of donors’ knowledge of the community
- Leadership in the community
- Impact on the community
- Clarity of Foundation goals
- Responsiveness of Foundation staff

Note: This question was only asked of OCF donors who were familiar with the initiative.

Recognition of Donor Contribution

When asked to indicate their feelings regarding the Foundation's recognition of their contribution to the Foundation, 97 percent of OCF donors report that the Foundation provided appropriate recognition.



Note: Chart only includes data from 13 foundations due to changes to the survey instrument. Six percent of OCF donors answered "N/A – I only give to the Foundation anonymously" compared to 5 percent at the median foundation.

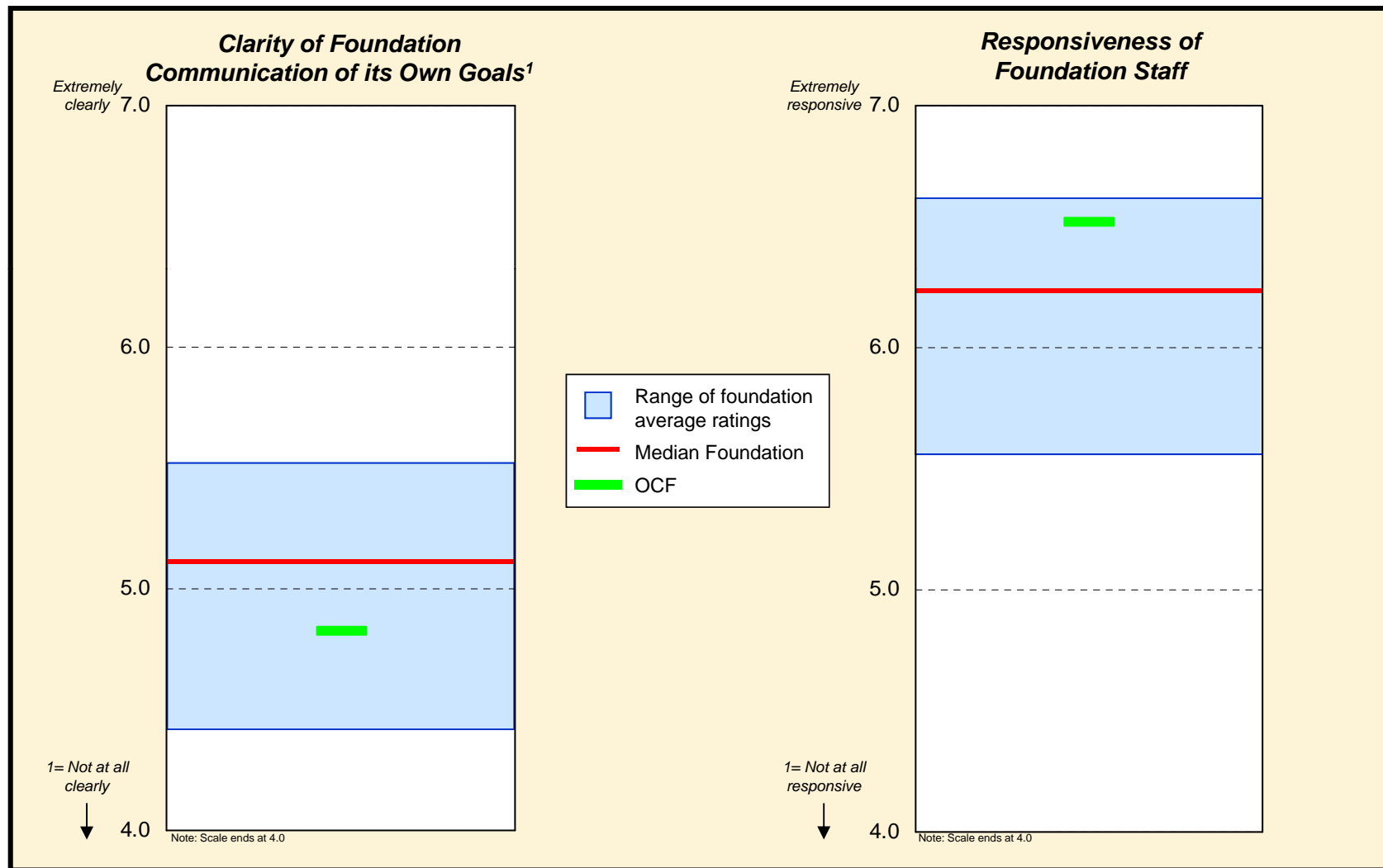
Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Clarity of Communication and Responsiveness

For the clarity with which the Foundation has communicated its own goals, OCF is rated below the median foundation.

For the responsiveness of Foundation staff, OCF is rated above the median foundation.

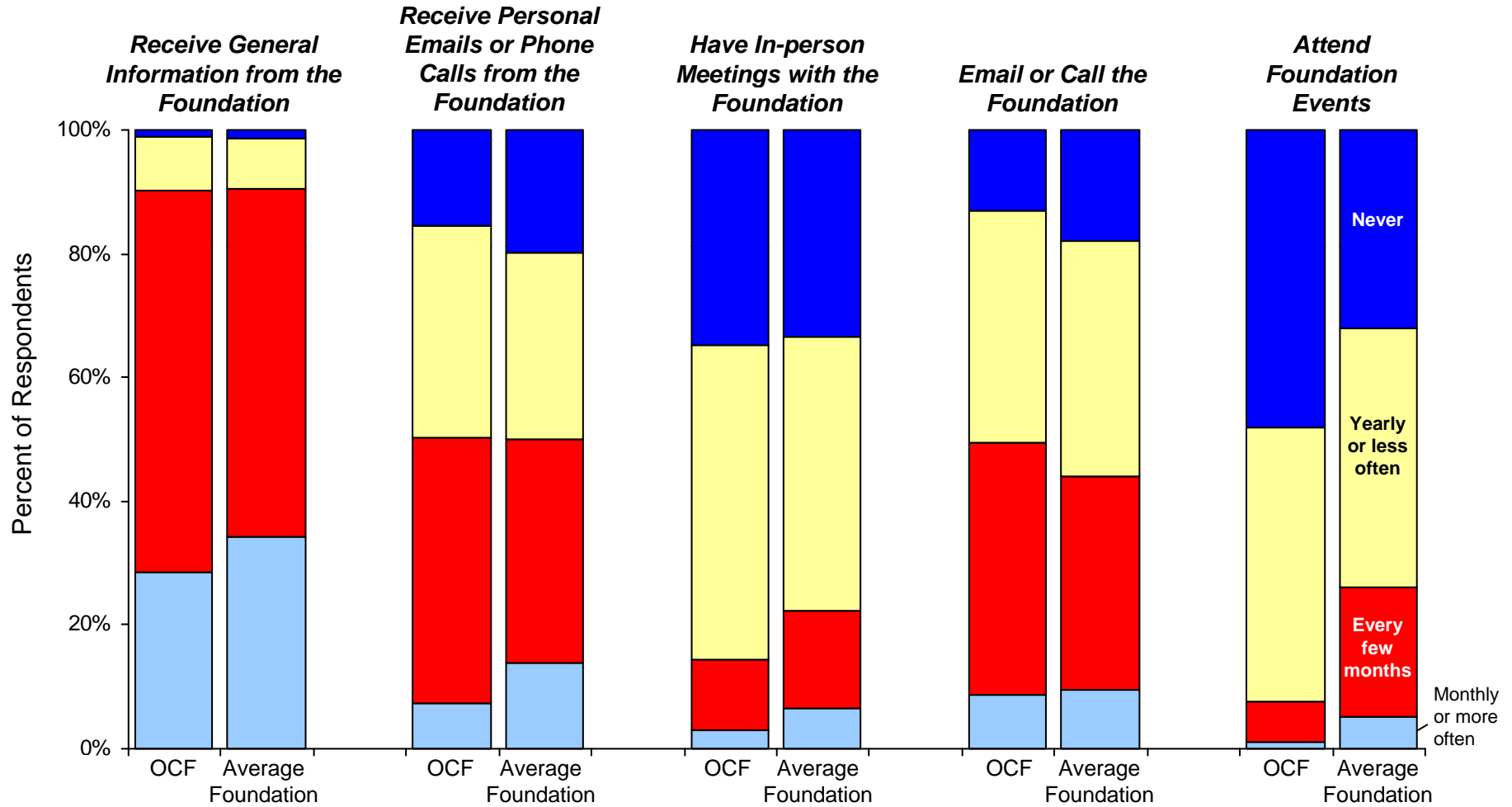


1: Chart only includes data from 18 foundations due to changes to the survey instrument.

Frequency of Interactions

OCF donors report attending foundation events less frequently than do donors of the average foundation.

Frequency with which Donors:



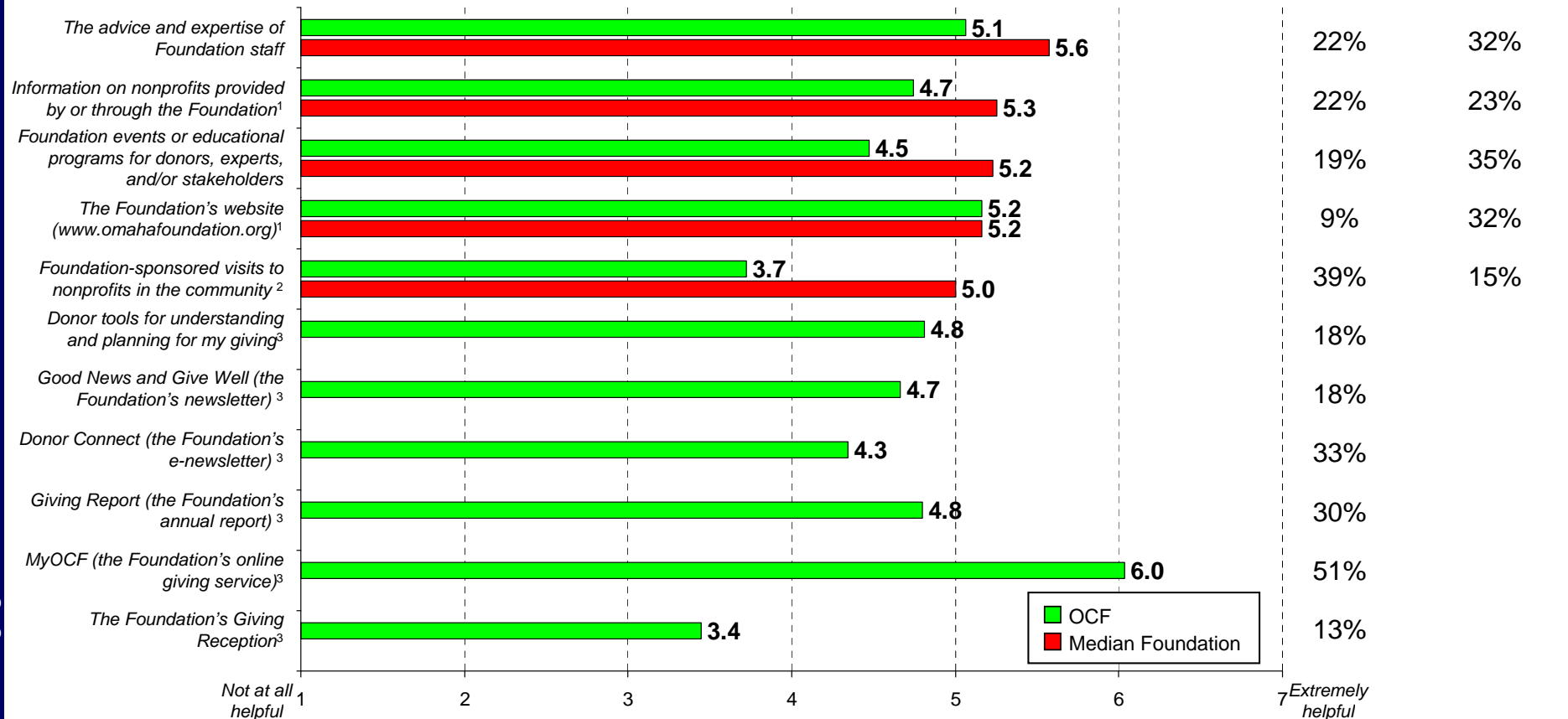
Note: Chart only includes data from 24 foundations due to changes to the survey instrument.

Resources for Donors

For the purposes of achieving their charitable giving goals, OCF donors rate the Foundation's MyOCF online giving service as most helpful.

Proportion of Donors Using This Resource for the Achievement of Goals

Helpfulness of Foundation Resources for the Achievement of Charitable Giving Goals



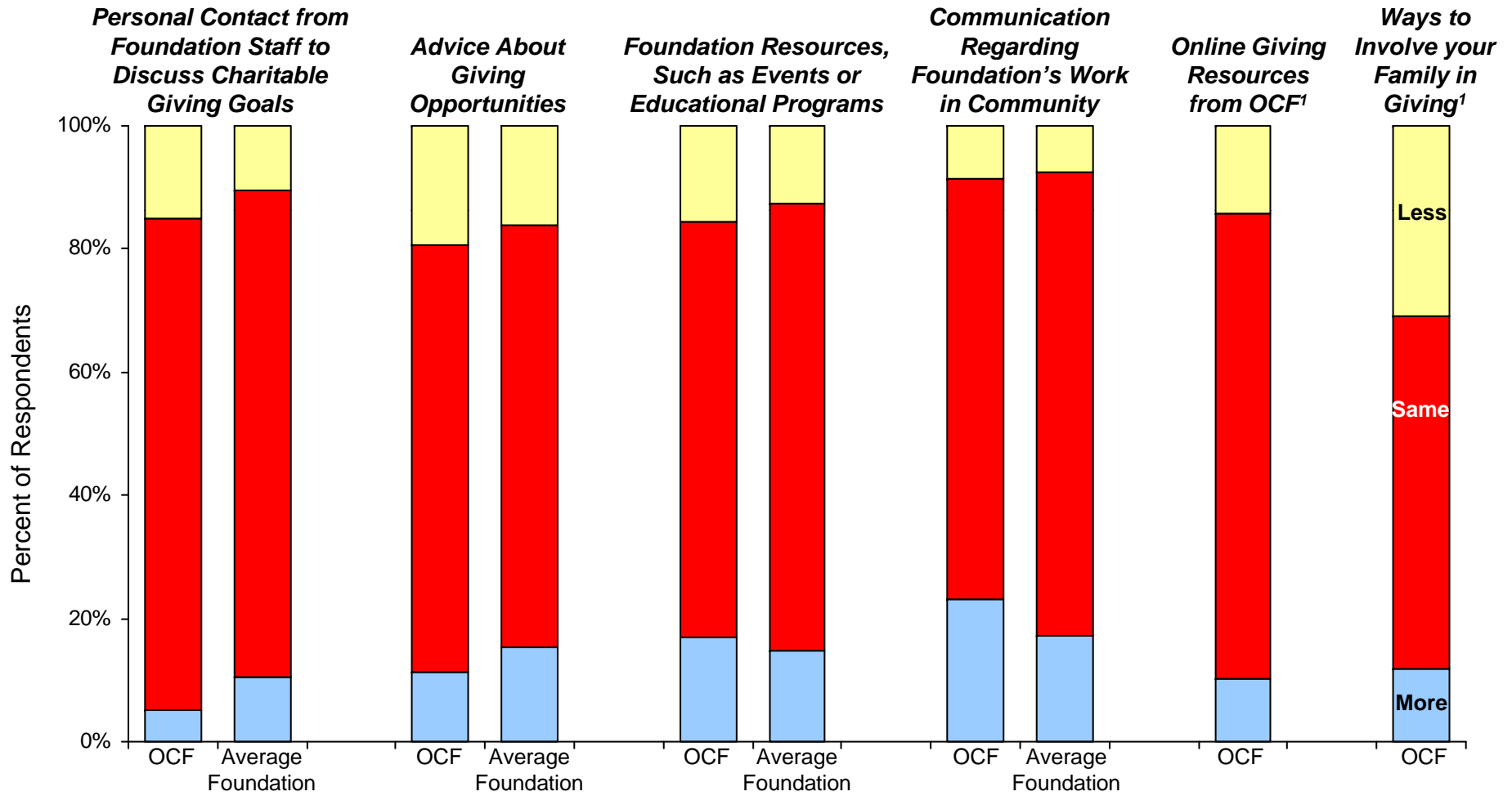
Nineteen percent of donors at the Foundation indicate that they do not use any of the Foundation's resources compared to 28 percent at the median foundation. These donors rate significantly lower on many measures across the survey than do other donors.

1: Only includes data from 25 foundations due to customization of the survey instrument.
 2: Only includes data from 21 foundations due to customization of the survey instrument.
 3: Comparative data not available as the questions were asked only of OCF donors.

Use of Foundation Services

The proportion of OCF donors that would like to receive more personal contact with staff is smaller than that of the average foundation.

Frequency with Which Donors Would Like to Receive Foundation Services



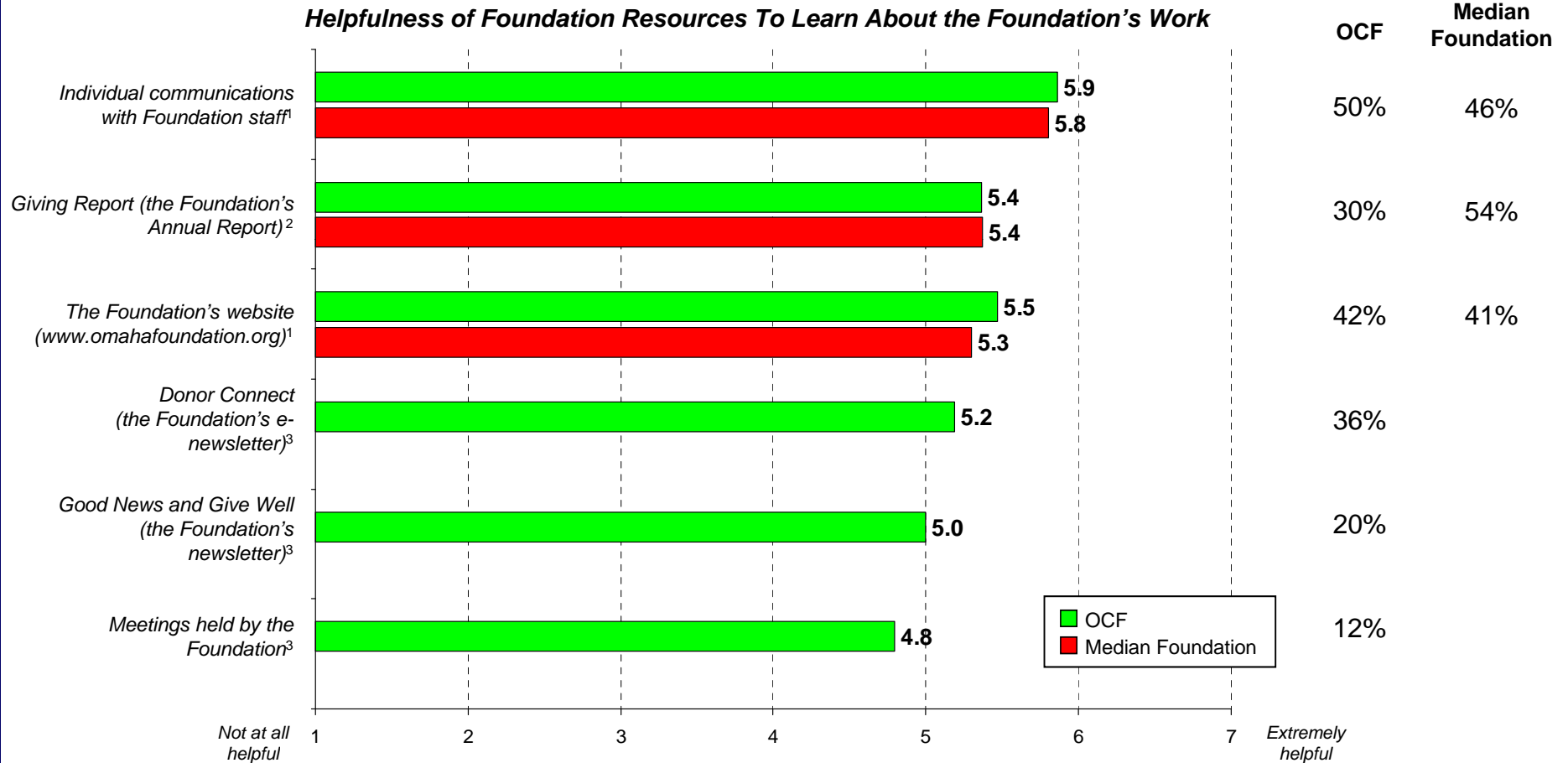
Note: Chart only includes data from 18 foundations due to changes to the survey instrument. "Foundation Resources" only includes data from 17 foundations.

1: Comparative data not available because this question was only asked of OCF donors

Resources to Learn About the Foundation's Work

For the purposes of learning about the Foundation's work, OCF donors most frequently use individual communications with Foundation staff, and least frequently attend meetings held by the Foundation.

Proportion of Donors Using Resources to Learn About the Foundation's Work



1: Only includes data from 16 foundations due to customization of the survey instrument.

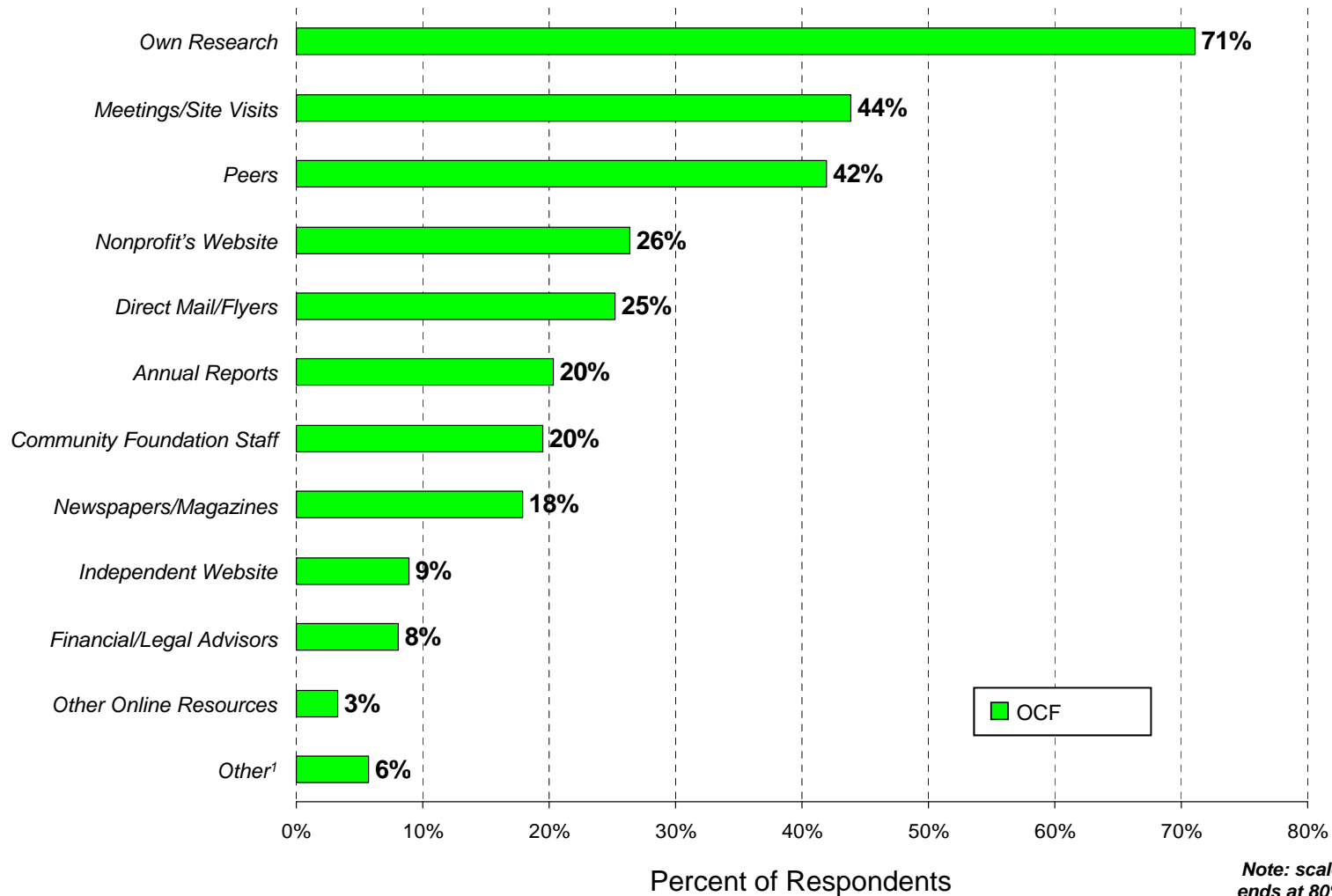
2: Only includes data from 8 foundations due to customization of the survey instrument.

3: Comparative data not available as the questions were asked only of OCF donors.

Nonprofit Information Resources

When asked to indicate which primary resources they use to get information on nonprofit organizations that they support, 71 percent of donors report using their own research.

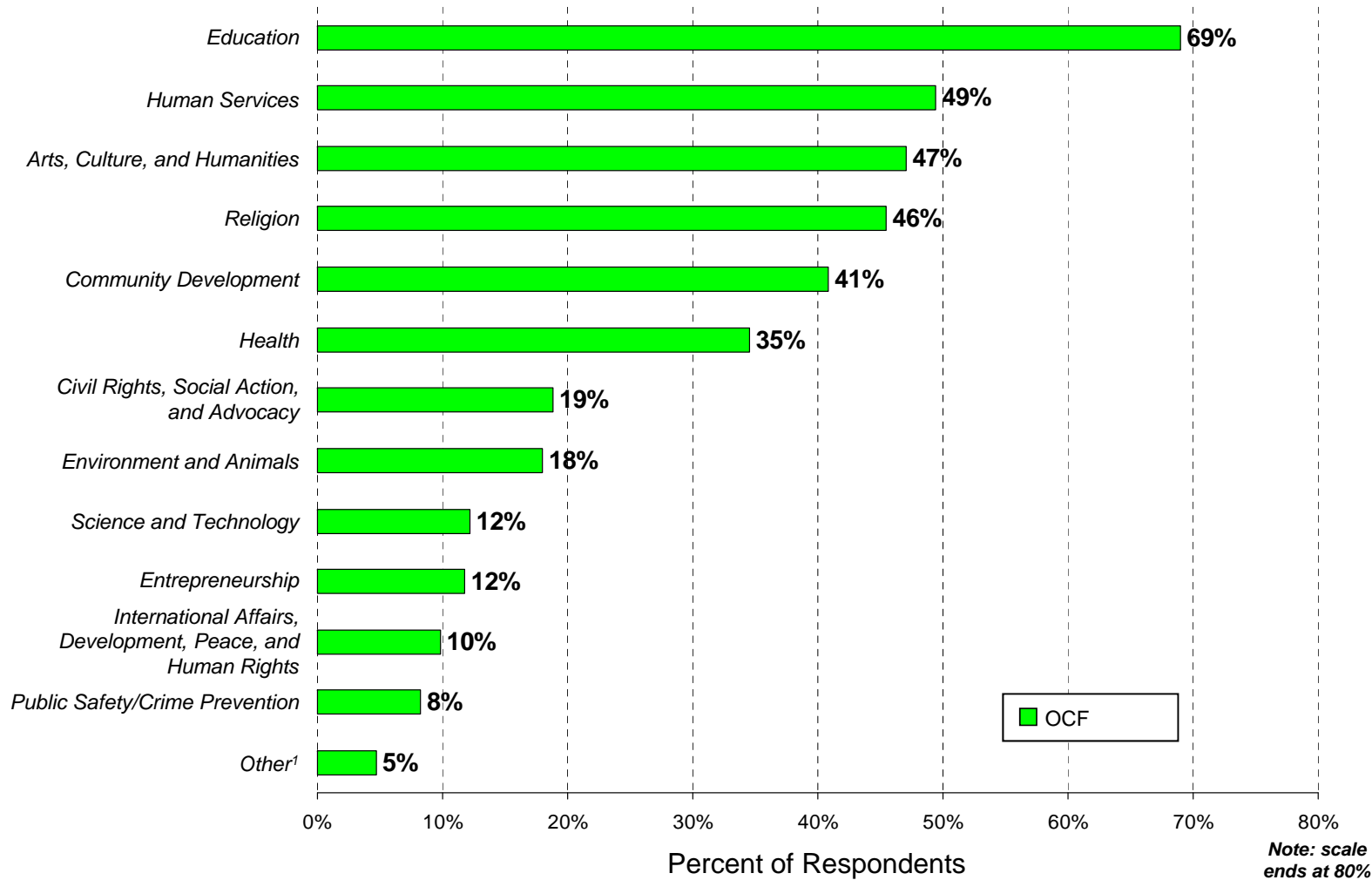
Primary Resources Used for Information on Nonprofits



Issue Areas of Interest

When asked to indicate which issue areas they are most interested in, 69 percent of OCF donors report Education.

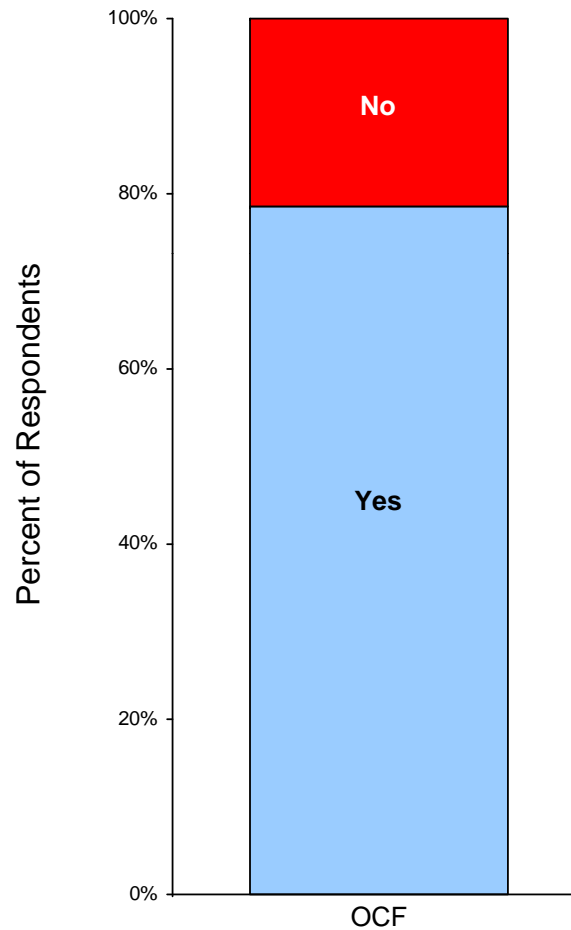
“Which issues areas are you most interested in?”



Impact of Foundation Information

Seventy-nine percent of OCF donors report that they have made a donation to a nonprofit because of information provided to them by the Foundation.

“Have you made a donation to a nonprofit because of information received from OCF?”

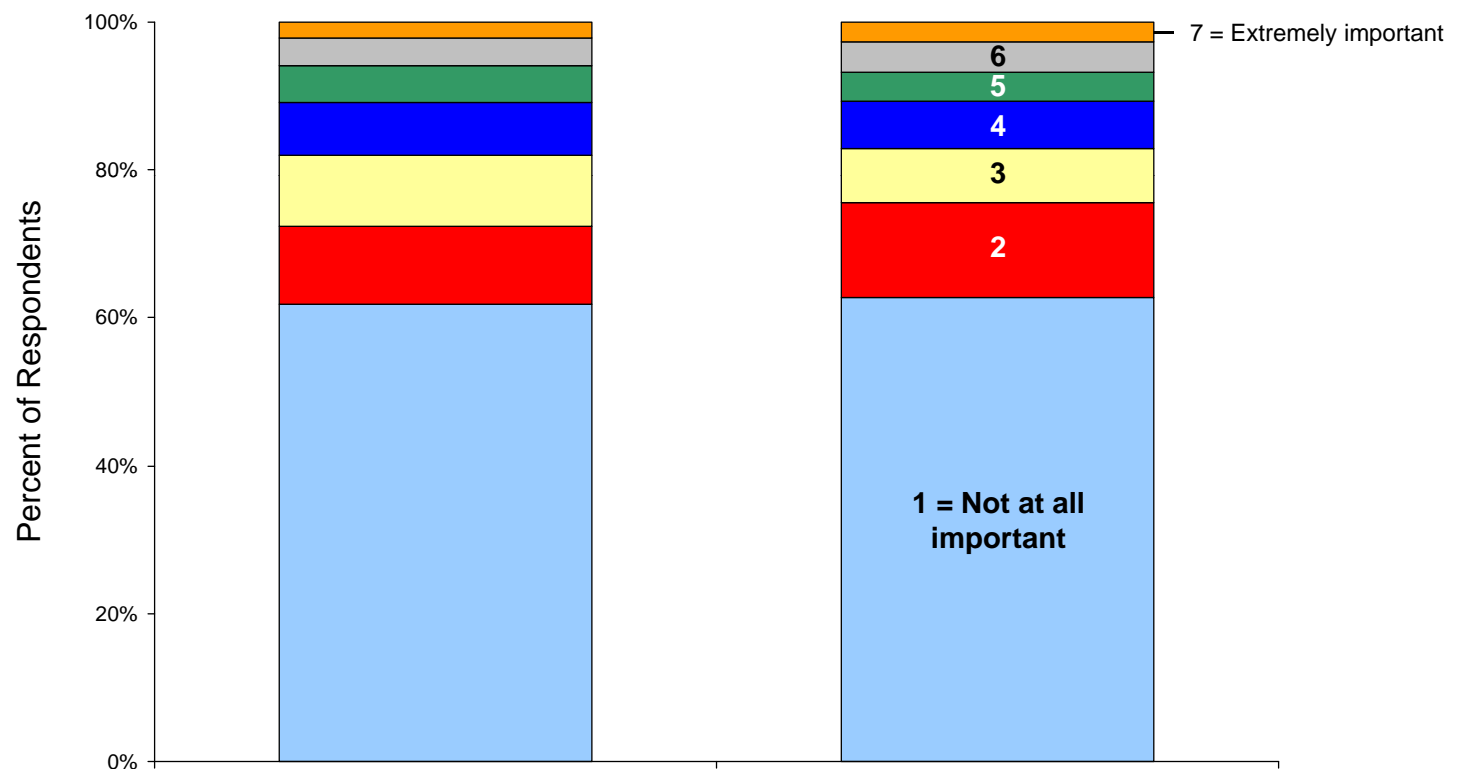


Note: This question was only asked of OCF donors.

Importance of Online Social Networks

OCF donors were asked to think about their use of online social networks (e.g., Facebook, Twitter). OCF donors rate the importance of these online networks low – a typical finding. Ten percent of OCF donors, the same proportion of donors as the average foundation, indicate that they would like to receive information over these online networks about the Foundation’s work.

*“Please think about your use of online social networks (e.g., Facebook, Twitter).
How important to you are these online networks?”*



	OCF	Average Foundation
Average Rating	2.0	2.0
% Don't Know	7%	7%

Note: Only includes data from 13 foundations due to customization of the survey instrument.

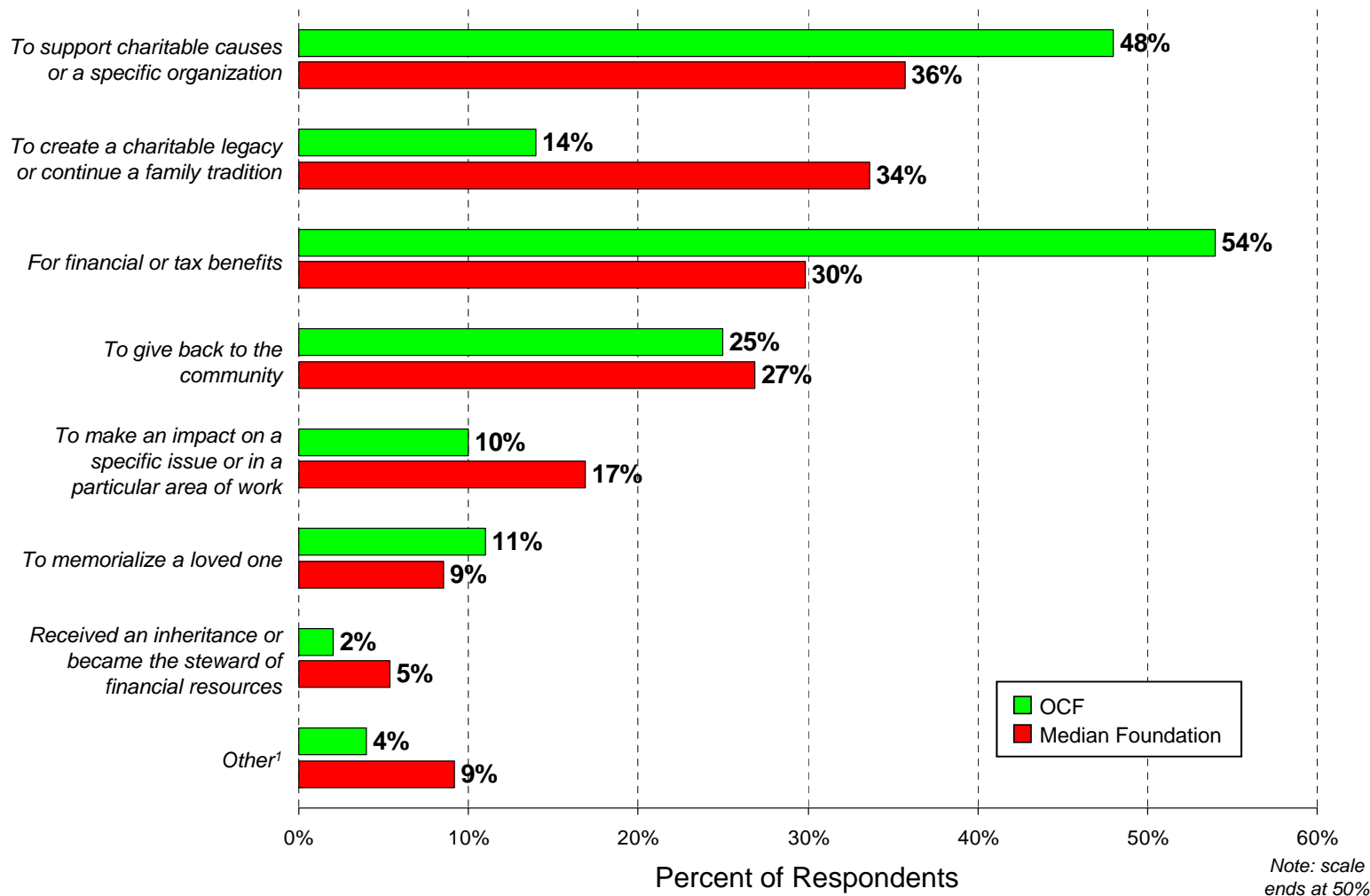
Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

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, OCF donors more frequently indicate that they initially gave for financial or tax benefits than at the median foundation.

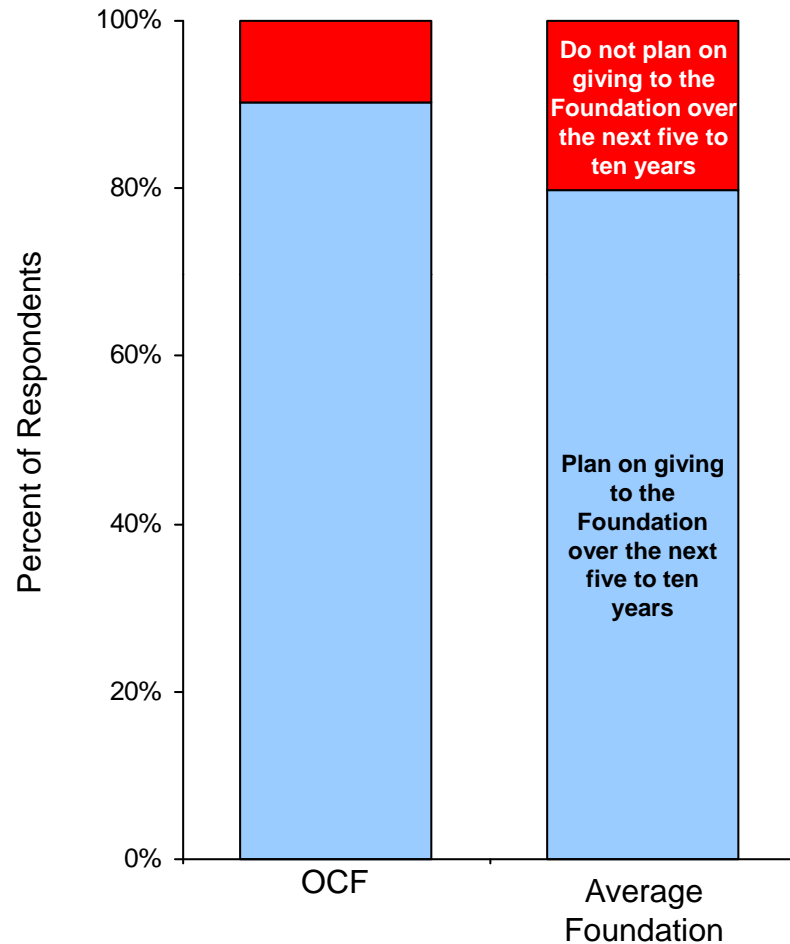
Most Important Reasons Donors Initially Established Funds or Made Contributions to the Foundation



Future Giving Plans (1)

A larger proportion of OCF donors – 90 percent – indicate that they do plan on giving to their funds or to the Foundation over the next five to ten years compared to donors at the average foundation.

Plans for Additional Giving to or Through the Foundation



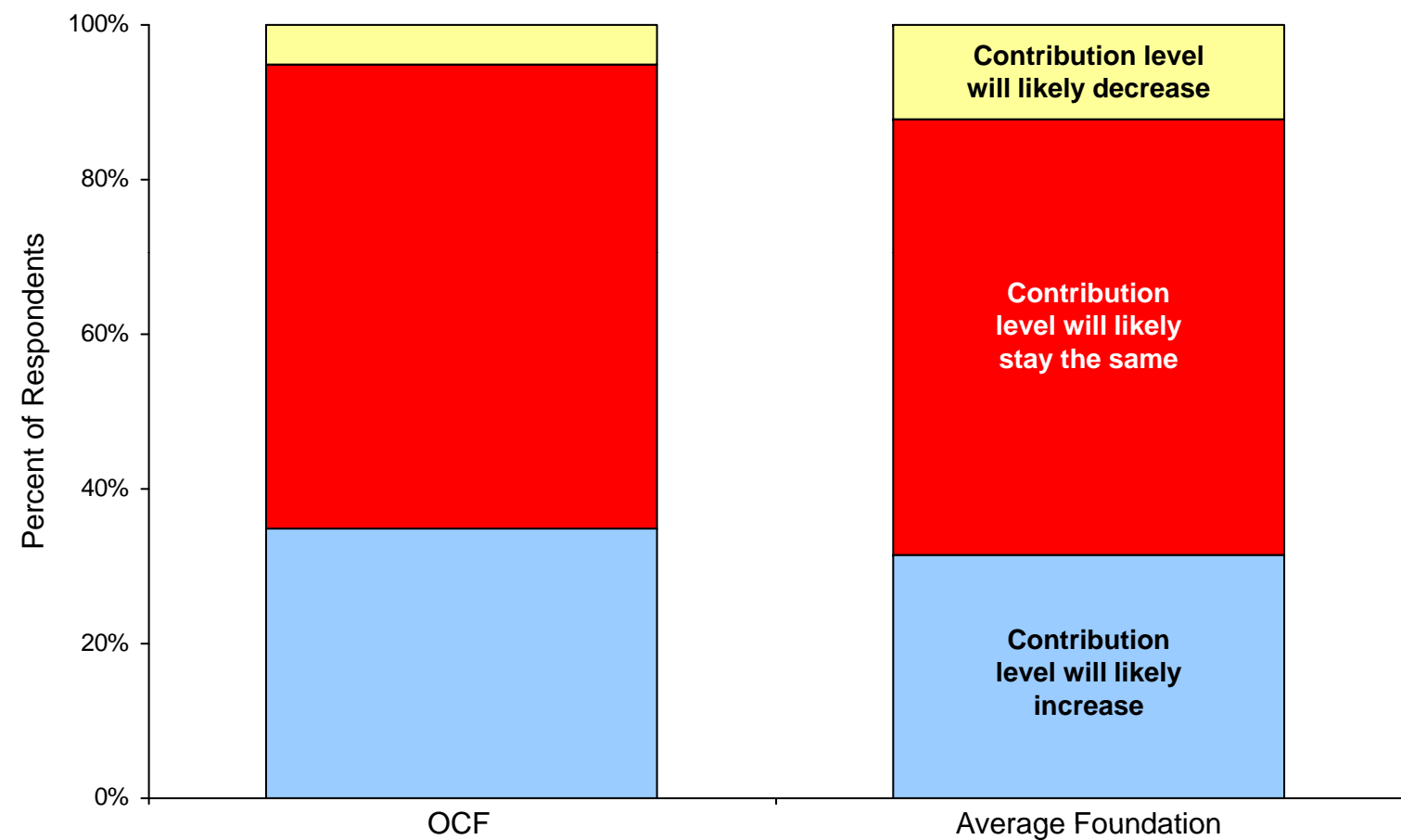
“Please comment on the reason you expect not to give in the future.”¹

- ◆ *“I am retired, I volunteer my time to non-profits, and my assets are limited.”*
- ◆ *“I don’t dislike the Foundation, but do not see the value they add for the cost.”*
- ◆ *“My fund has what it needs for that period of time.”*
- ◆ *“We will just give what little we give directly from our own check book.”*

Future Giving Plans (2)

The proportion of OCF donors who indicate that their contribution level will likely decrease in the next five to ten years is smaller than that of the average foundation.

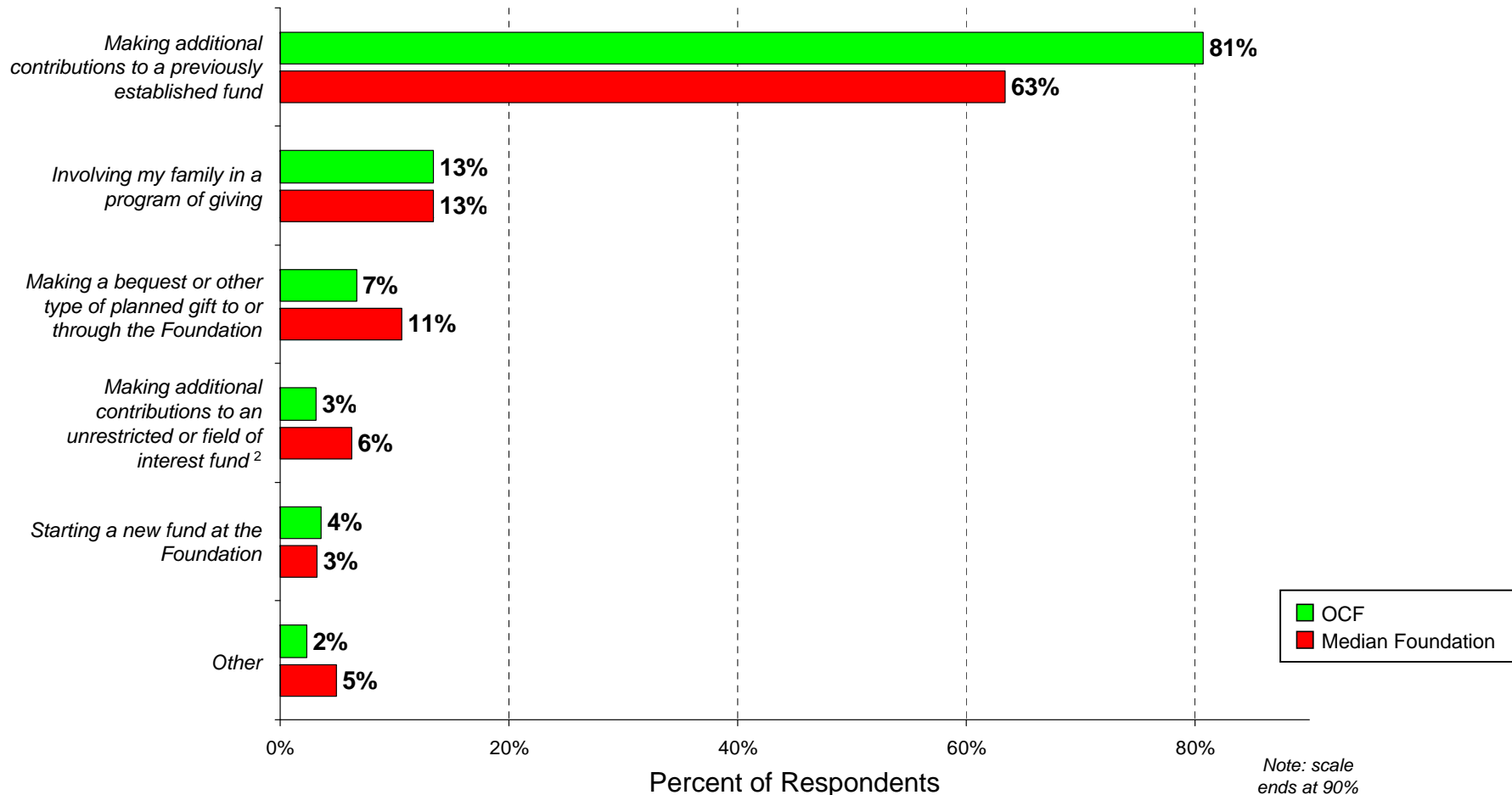
Plans for Future Giving Relative to Past Contributions¹



Future Giving Plans (3)

When asked about their future giving plans, a larger proportion of OCF donors indicate that they plan on making additional contributions to a previously established fund over the next five to ten years compared to donors at the median foundation.

**Type of Additional Giving to or Through the Foundation
(donors were asked to check all that apply)¹**



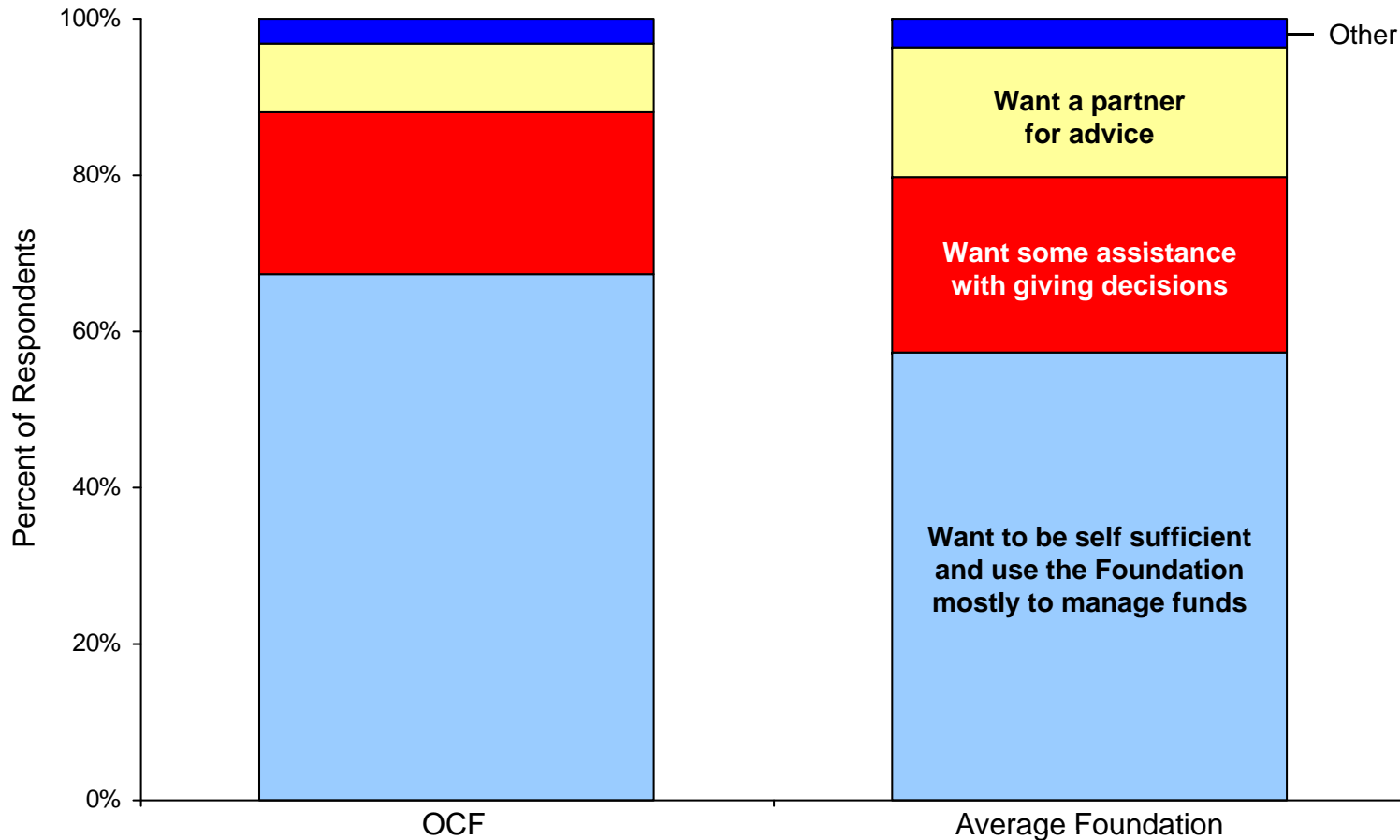
1: This chart only includes responses from the donors who indicated that they do plan on giving in the next five to ten years.

2: Only includes data from 24 foundations due to changes to the survey instrument.

Future Giving Plans (4)

When asked to indicate the type of relationship they would like to have with the Foundation in the future, a larger than typical proportion of OCF donors indicate that they would like to be self-sufficient and rely on the Foundation primarily for management and facilitation of their funds.

Desired Type of Relationship with Foundation

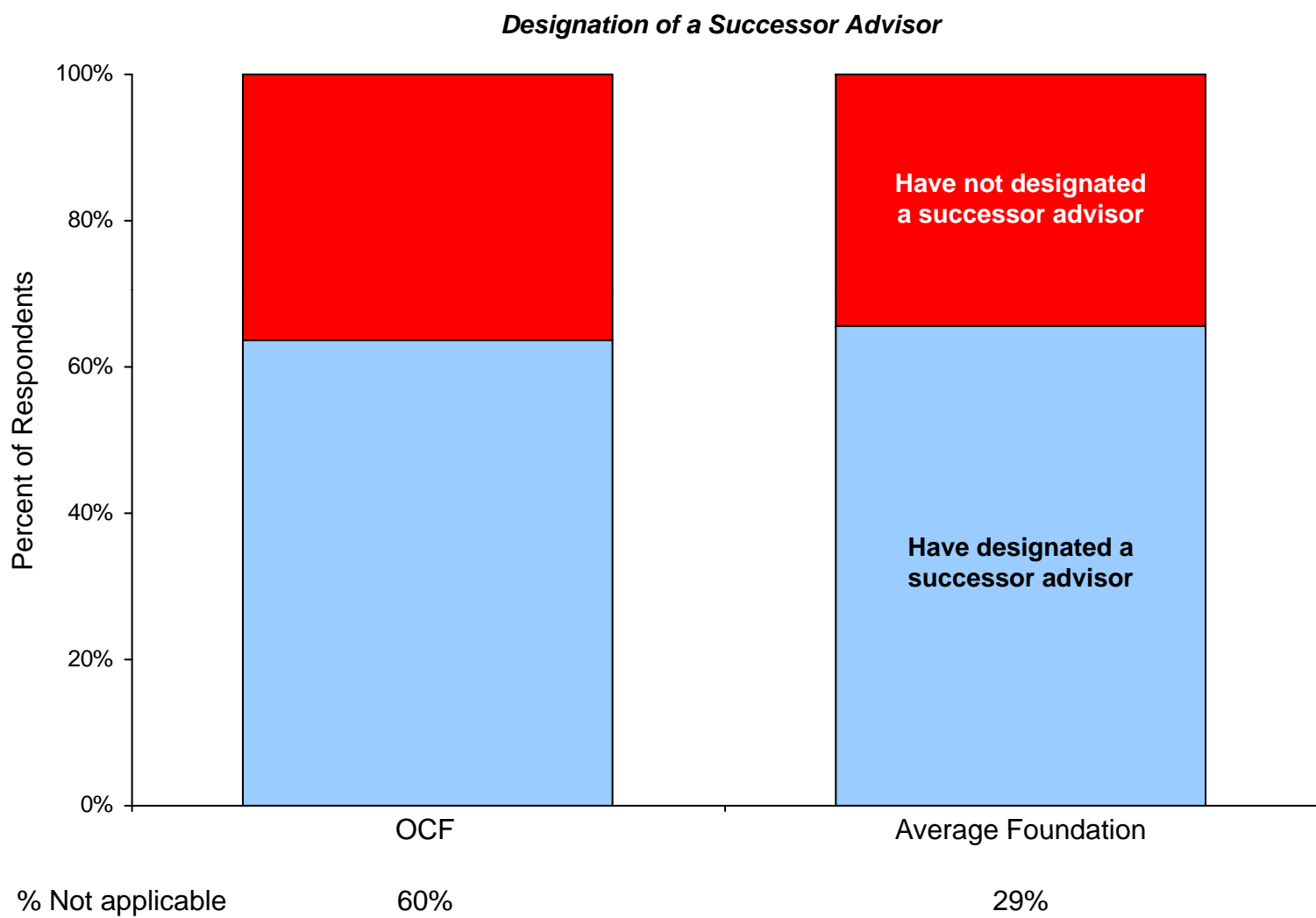


Note: Chart only includes data from 18 foundations due to changes to the survey instrument.

For this question, donors were asked to choose one of four responses: "I would like to be self-sufficient in my giving. I would likely rely mostly on my own information and experience to identify issues/nonprofits. My contact with the Foundation would revolve primarily around managing and facilitating my funds"; "I would like some assistance with my giving decisions. I would likely want some information from the Foundation to guide my giving, but I expect to rely on my own awareness of the issues/non-profits to which I will give."; "I would like to think of the Foundation as a partner in my giving. I expect to rely sometimes on the advice and information provided by Foundation staff to influence my thinking and decisions."; "Other."

Future Giving Plans (5)

The proportion of OCF donors who indicate that they have designated a successor advisor is similar to that of the average foundation.

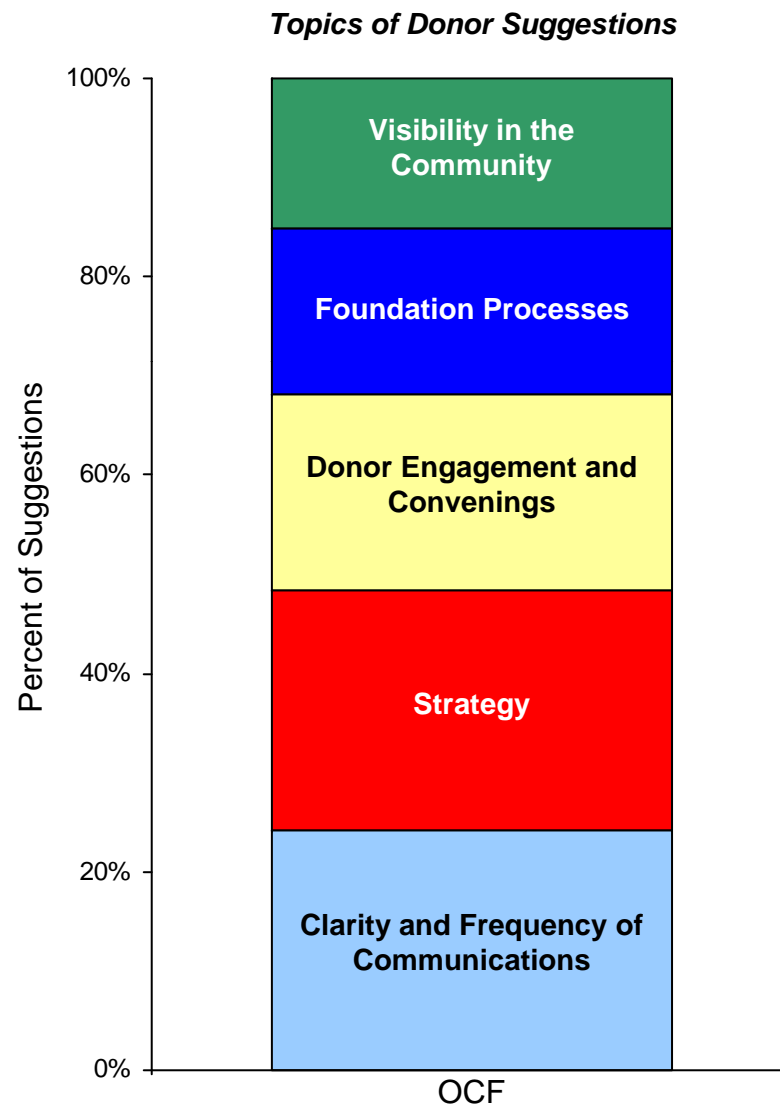


Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Donor Suggestions for the Foundation (1)

OCF donors were asked to provide suggestions for how OCF could improve. CEP characterized the 66 suggestions provided by 54 donors.



Donor Suggestions for the Foundation (2)

% Donor Suggestions		OCF Donor Suggestions
Topic of Donor Suggestion	OCF	Sub-Themes and Sample of Comments
Clarity and Frequency of Communications	24%	Communicated Available Resources (n=6) "Be a bit more open about upcoming incentives when attracting new sources of capital." "Communications as to ... services."
		Communicating Impact (n=4) "Better communicate the goals and impact to everyday issues and concerns." "Improve communication of impact of Foundation services and field of interest giving."
		Other (n=2) "I would like to have more contact either telephone or personally."
Foundation Strategy	24%	"We need to be more focused on what we can impact and not try to be everything to everybody." "OCF should evolve into more of a resource or nonprofits." "I think OCF should focus on being a pipeline for giving, and seek to develop an enthusiasm in the Omaha community for giving charitably in whatever way they can, rather than pushing any 'pet projects.'"
Donor Resources	20%	Networking (n=5) "We might use more opportunities to connect with other donors." "Networking opportunities with donors and nonprofits on a regularly scheduled basis."
		Other (n=8) "A series of focus groups/meetings for interested donors organized around various themes ... would be very helpful."
Foundation Processes	17%	"Timely quarter reports." "Simplify the ability to contribute closely held stock with a simple redemption agreement." "Make sure the staff does not expand, or incur excess expenses, so that the fees do not have to be increased." "I'd prefer not to have to reconfirm my multi-year gifts every year." "Continue to make it easy to give through the website."
Visibility in the Community	15%	"[The Foundation] should continue to promote their services in the community." "More active marketing of services and community impact. Build market awareness." "More visibility."

Note: There were a total of 66 donor suggestions for the Foundation. A sample of the suggestions are shown here. The full set of suggestions, redacted to protect donor anonymity, will be provided with the DPR.

Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Review of Findings



Key Items	Rating					Questions
	3	4	5	6	7	
Satisfaction						<i>"Please rate your overall satisfaction with the Foundation"</i>
Likeliness to Recommend the Foundation						<i>"How likely is it that you would recommend the Foundation to a friend or colleague?"</i>
Impact on the greater Omaha area and Southwest Iowa community						<i>"In your opinion, to what extent is the Foundation making an impact on the greater Omaha area and Southwest Iowa community?"</i>
Leadership in the greater Omaha area and Southwest Iowa community						<i>"To what extent does the Foundation exhibit a leadership role in the greater Omaha area and Southwest Iowa community?"</i>
Enhancement of Donors' Knowledge of the greater Omaha area and Southwest Iowa community						<i>"To what extent does working with the Foundation enhance your knowledge of the greater Omaha area and Southwest Iowa community?"</i>
Understanding of Donors' Goals						<i>"In your opinion, how well does the Foundation understand your personal charitable goals?"</i>
Contribution to Donors' Impact						<i>"To what extent does working with the Foundation contribute to your ability to make an impact on the issues you care about?"</i>
Enhancement of Donors' Knowledge of Issues						<i>"To what extent does working with the Foundation enhance your knowledge of the issues you care about?"</i>
Clarity of Foundation Communication of its Own Goals¹						<i>"How clearly has the Foundation communicated its own goals to you?"</i>
Responsiveness of Foundation Staff						<i>"How responsive is the Foundation staff when you have a question or need assistance?"</i>

¹: Only includes data from 18 foundations due to changes to the survey instrument.

Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Analysis and Discussion

Overall Positivity of Ratings

Overall, donors are more satisfied with OCF and more likely to recommend OCF to a friend than is typical. They describe the Foundation as “helpful” and “responsive.”

Donors comment positively on the Foundation’s impact on the community, saying it “encourages more philanthropy” in the area, and “provides an invaluable service to many charitable givers.” They also comment on the helpfulness of the staff, saying “individuals involved continue to exceed expectations and are the key to the current and on-going success of the Foundation and its continued immeasurable contributions to Omaha and Southwest Iowa.”

- *Given the overall positivity of the results – on both a comparative and an absolute basis – can the Foundation reflect on what specific aspects of its practices and philosophies yield these results?*
- *How can OCF ensure that the factors that underlie donors’ positive experiences are maintained during moments of future change?*

Analysis and Discussion

A Self-Sufficient Donor Base

Donors at OCF look different than donors of other funders in their use of resources and interactions with the Foundation. Specifically, the patterns of use of donor resources and interactions with OCF suggest a more independent and self-reliant donor base than is typical of donors CEP has surveyed at many other community foundations. When asked what resources they use for information on nonprofits, 71 percent of OCF donors, the largest proportion, say they use their own research, compared to only 44 percent of donors who use meetings or site visits.

This pattern of donor independence may be related to how knowledgeable OCF's donor base is regarding philanthropic causes and local non-profits. Donor comments suggest that many OCF donors know the causes and charities to which they want to give before they interact with the Foundation. In fact, 48 percent of donors, the second highest proportion, say they initially established funds with the Foundation to give to a specific cause or organization. As one donor writes: "We have primarily used [our fund] as a way to manage our donations that we personally choose" rather than "using OCF as a way to connect with new programs or non-profits."

Given these findings and comments, it's perhaps not surprising that 67 percent, a higher than typical proportion, of OCF donors says they want to be self-sufficient in their giving. When asked about the Foundation's impact on their philanthropic giving, many donors note the efficiency and ease with which OCF allows them to make donations, rather than commenting on the Foundation's knowledge and expertise of the community. The words most frequently used by donors to describe the Foundation include "helpful," "efficient," and "convenient." They note that the Foundation "provides a needed conduit," and "facilitates the process of philanthropic giving."

Some donors say the Foundation "does an effective job of communicating community needs and issues," and is able to "both identify the philanthropic needs of the community and identify areas where duplication of services occurs." Other donors, though, suggest the Foundation has an opportunity to increase its impact and utility for donors through increased visibility and leadership. These donors see the Foundation as a "charitable bank, but not as a leader in the community." They suggest that "the creativity and leadership is coming from the donors rather than the Foundation," and that the Foundation is not "having 'impact' other than to give donors a place to put their resources."

- *Are these findings of donors' self-reliance of concern to the Foundation?*
- *How can the Foundation continue to be a conduit for donors who wish to be self-sufficient and yet provide more leadership and communication to the donors who want those resources? Does the Foundation have a sense of which donors want which type of relationship?*

Analysis and Discussion

Clarity of Communication and Visibility in the Community

Omaha Community Foundation donors rate the Foundation lower than is typical on measures related to the Foundation's external impact and visibility in the community. Only 16 percent of donors rate the Foundation a six or seven on a seven point scale for its enhancement of donors' knowledge of the community – a lower than typical proportion.

OCF is rated lower than typical for the clarity with which it communicates its own goals and strategies. Additionally, only half of donors are aware of the Foundation's *Let Good Grow Fund*, a key aspect of OCF's most recent strategic plan. Overall, the Foundation's clarity of communication and visibility in the community are some of the most frequently themes reflected in donors' comments. Those donors note that "the Foundation performs more services than the community and Foundation constituents are aware." One suggests that the Foundation should focus on "better communicat[ing] its strategic and tactical goals and plans." To correct this, donors suggest the Foundation work to have "more visibility," and try to "build market awareness." Another suggests the Foundation "do more in terms of making their goals known and leading in the greater Omaha philanthropic community."

In general, donors who do rate the Foundation higher for these measures look different from the overall donor base. The subset of donors who rate the Foundation highly for its leadership in the community are more frequently engaged with the Foundation through interactions like in-person meetings with the Foundation and attendance at Foundation events. They are also less likely to want more of specific Foundation resources, such as personal contact from Foundation staff or communication about the Foundation's work in the community. Similarly, donors who rate the Foundation highly for its impact on the community interact more and are more satisfied with the frequency of their engagement.

Increased perception of external impact is also associated with donors' overall satisfaction with the Foundation: the subset of donors who rate the Foundation highly on measures related to its external impact are more satisfied with the Foundation and are more likely to recommend the Foundation to a friend or colleague.

- *How does the Foundation currently demonstrate its leadership and impact in the community to its current donor base? Does the Foundation have capacity to do more?*

Analysis and Discussion

Opportunity to increase donors' knowledge and impact through better understanding of donors' charitable goals

A lower than typical proportion of OCF donors has communicated their charitable goals to the Foundation. One donor comments that they simply have not “taken advantage of [the Foundation’s] expertise,” while another uses resources to achieve their goals, commenting that the “charitable checkbook makes it easier to fulfill my philanthropic goals.”

Twenty-eight percent of donors rate the Foundation’s *enhancement of their knowledge* on the issues they care about a 1 or a 2 – the two lowest ratings. For the Foundation’s *contribution to their knowledge of the community*, 25 percent of donors rate the Foundation a 1 or 2. Additionally, donors seem less aware of or concerned with OCF’s impact: when deciding to give to OCF over other options, donors rate the importance of the Foundation’s ability to make an impact on specific issues and leadership in community as less important than typical.

However, there’s a bright spot within these findings: donors who report that they have communicated their charitable goals to the Foundation and donors who have used the advice and expertise of Foundation staff rate higher on many measures, including the Foundation’s enhancement of their knowledge of issues they care about and contribution to their knowledge of the community.

- *Can the Foundation find more opportunities to have donors describe their charitable goals to OCF staff?*
- *Is the Foundation concerned that some donors give OCF low ratings for its contribution to their knowledge and impact?*

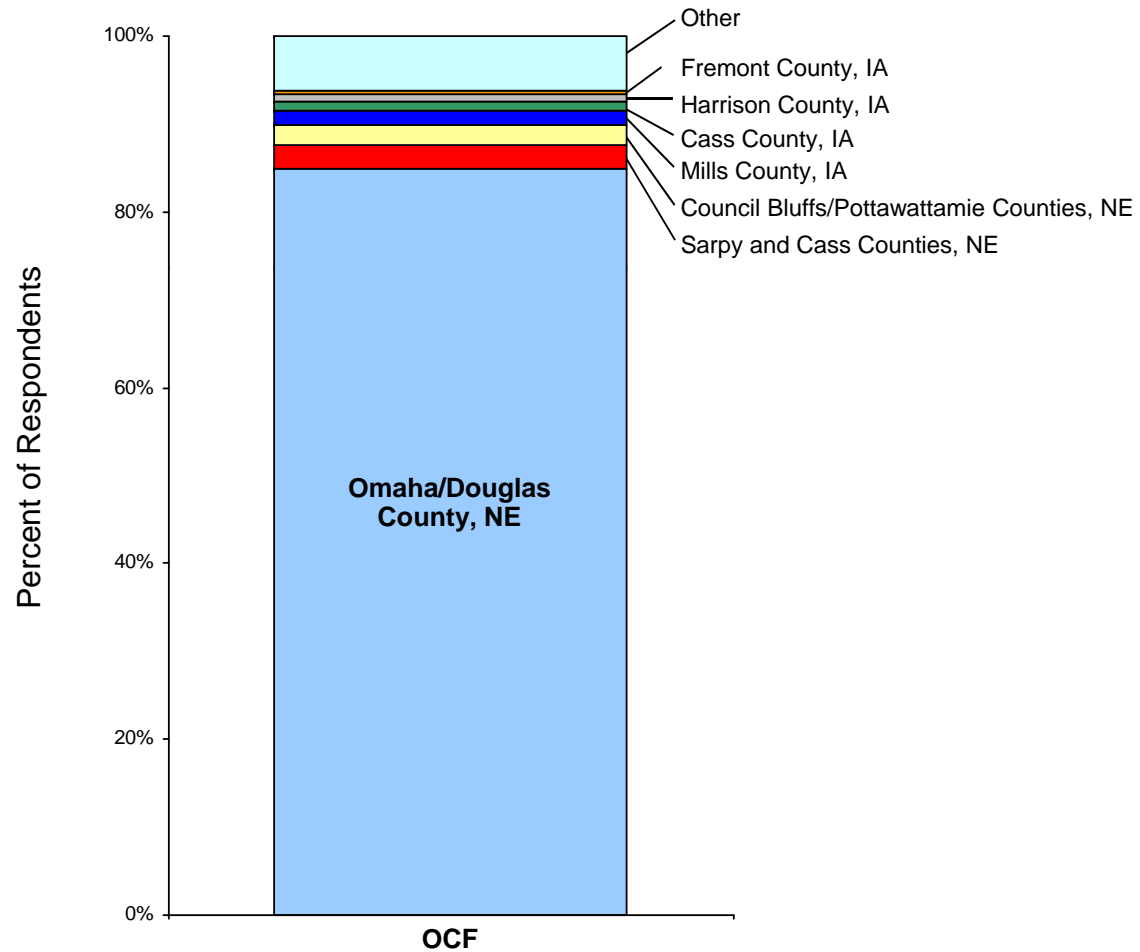
Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Geographic Location of Donors

Eighty-five percent of donors who completed the survey live in Omaha/Douglas County.

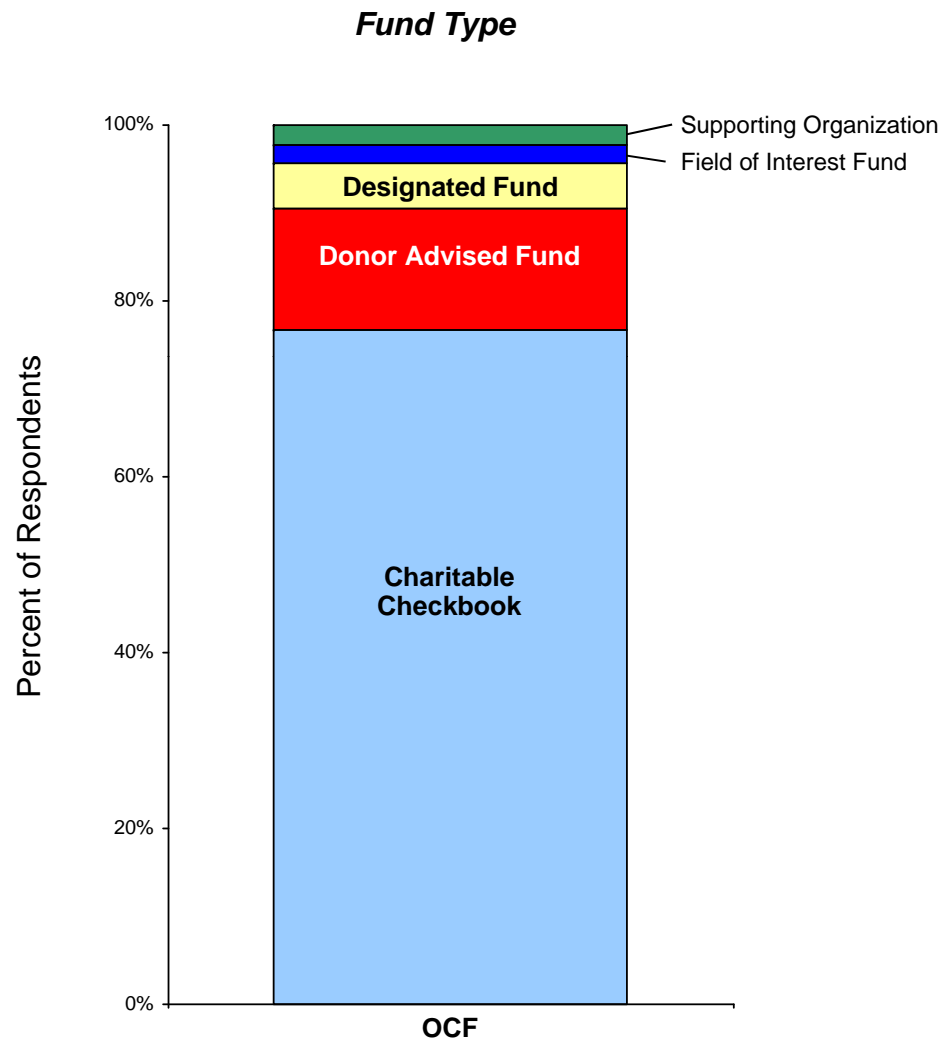
In which of the following communities do you live?



Note: This question was only asked of OCF donors.

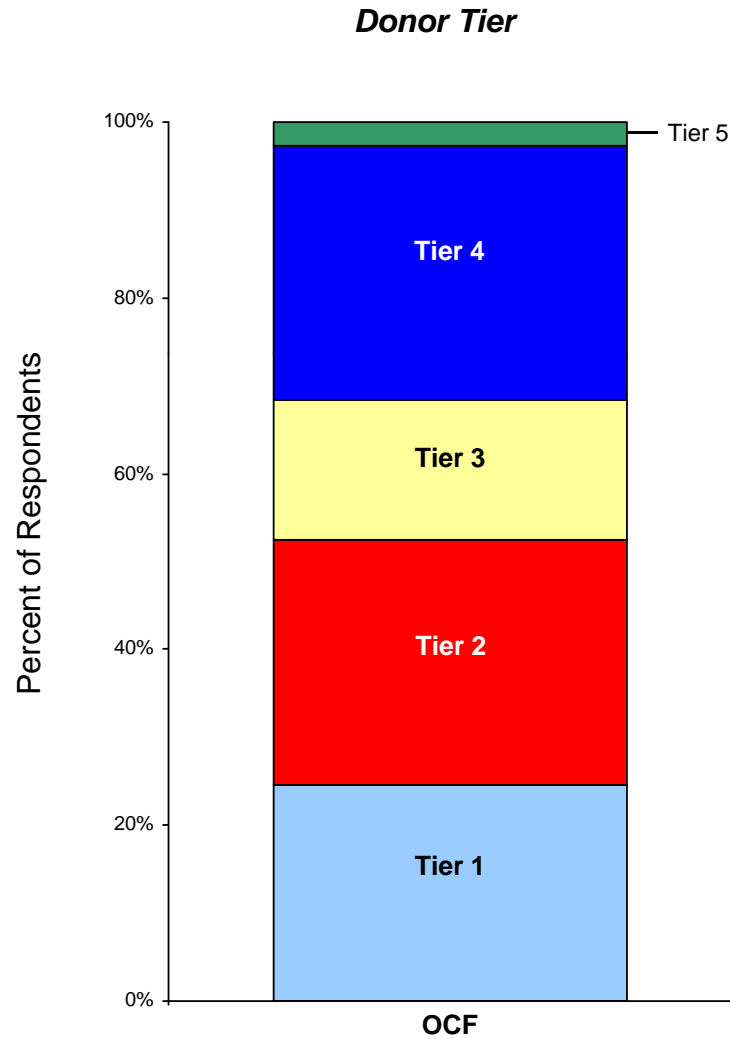
Fund Type of Respondents

Seventy-six percent of OCF's respondents held Charitable Checkbook funds.



Donor Tier

Twenty three percent of respondents were Tier 1 donors.



Note: This question was only asked of OCF donors.

Donor Characteristics (1)

Measure	OCF	Average Foundation
Source of Donors' First Information About the Foundation		
Professional advisor	25%	25%
Foundation staff or Board member	27%	20%
Recommendation from a friend	25%	18%
Local news source	4%	6%
Recommendation from a current donor/Foundation volunteer	11%	6%
Nonprofit resource organization	1%	3%
Foundation website, advertisement, or mailing	2%	2%
Other	4%	20%
Donors' Preferred Method of Communication		
Email	69%	65%
Regular mail	23%	26%
Phone	9%	9%

Donor Characteristics (2)

Measure	OCF	Average Foundation
Use of Charitable Giving Vehicles Outside the Foundation		
Nonprofits directly	88%	92%
Federated giving program	32%	26%
Other community foundation	5%	9%
Corporate or workplace giving program	20%	8%
Private foundation	6%	7%
Commercial charitable gift fund	3%	3%
Other	6%	7%
Total Size of Annual Giving Outside the Foundation		
<\$1K	8%	8%
\$1K – \$9K	39%	32%
\$10K – \$49K	37%	34%
\$50K – \$99K	5%	10%
\$100K – \$500K	6%	11%
>\$500K	6%	5%

51 Note: 4 percent of donors at the Foundation and 4 percent of donors at the median foundation indicate that their only charitable giving is to or through the Foundation.

Donor Characteristics (3)

Measure	OCF	Average Foundation
Age of Respondents		
25 – 34	2%	1%
35 – 44	11%	5%
45 – 54	15%	16%
55 – 64	31%	28%
65 – 74	24%	30%
75 and above	18%	21%
Gender of Respondents		
Male	72%	56%
Female	28%	44%
Race/Ethnicity of Respondents		
Caucasian/White	99%	94%
Asian (including the Indian subcontinent)	>1%	2%
African-American/Black	>1%	2%
Multi-racial	>1%	1%
Hispanic/Latino	>1%	1%
American Indian/Alaskan Native	>1%	>1%
Pacific Islander	>1%	>1%
Other	1%	1%

Note: One percent of OCF donors and 1 percent of donors at the average foundation answered “Prefer not to say” for their age, 1 percent of OCF donors and 1 percent of donors at the average foundation answered “Prefer not to say” or “Other” for their gender, and 2 percent of OCF donors and 4 percent of donors at the average foundation answered “Prefer not to say” for their race/ethnicity.

Foundation Characteristics

- ♦ The following table is 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	OCF	Median Foundation
Funds to Staff Ratio		
Total donor advised funds per full-time donor designated staff	184 funds	75 funds
Total other non-discretionary funds per full-time donor designated staff	74 funds	93 funds
Total donor-advised fund giving per full-time donor designated staff	\$4.0MM	\$2.2MM
Assets		
<i>Total assets</i>	<i>\$606MM</i>	<i>\$235MM</i>
Discretionary assets	4%	26%
Donor-advised assets	51%	30%
Other non-discretionary assets	45%	35%
Giving		
<i>Total giving</i>	<i>\$116MM</i>	<i>\$16MM</i>
Discretionary giving	0%	25%
Donor-advised giving	14%	40%
Other non-discretionary giving	86%	31%

Note: Tables on this page only include data from 19 foundations, except "Total other non-discretionary funds per full-time donor designated staff," which only includes data from 8 foundations; "Discretionary assets," "Donor advised assets," and "Other non-discretionary assets," which only include data from 18 foundations.

Fund Characteristics (1)

- ♦ 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	OCF	Median Foundation
History of Fund¹		
<i>Average Length of Fund Establishment</i>	5.8 years	9.4 years
0 – 2 years	23%	17%
3 – 5 years	31%	22%
6 – 10 years	22%	27%
11 – 20 years	16%	27%
>20 years	1%	6%
Size of Fund (3 year average)²		
<i>Median Fund Balance</i>	\$4.9K	N/A
<\$10K	61%	N/A
\$10K – \$49K	23%	N/A
\$50K – \$199K	11%	N/A
\$200K – \$499K	2%	N/A
\$500K – \$999K	3%	N/A
\$1MM-\$2.9MM	1%	N/A

1: Only includes data from 22 foundations.

2: Only includes data from the Foundation.

Fund Characteristics (2)

Measure	OCF
Total Contributions Per Fund Over 3 Years	
<i>Median Total Contributions</i>	\$34K
>\$0K – \$24K	42%
\$25K – \$99K	30%
\$100K – \$249K	14%
\$250K – \$499K	5%
>=\$500K	9%
Total Giving Out Per Fund Over 3 Years	
<i>Median Total Giving</i>	\$25K
\$0K	4%
>\$0K – \$24K	46%
\$25K – \$49K	17%
\$50K – \$149K	16%
\$150K – \$299K	7%
>=\$300,000	11%

Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

Profiles of Foundations in Dataset (1)

Foundation	Description
Berkshire Taconic Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$82,083,168 and giving of \$7,103,403 (as of 2009) Established in 1987, the Foundation focuses on Berkshire County, MA; Columbia County and northeast Dutchess County, NY; and northwest Litchfield County, CT The Foundation makes grants in the areas of education, health care, basic human services, transportation, the arts, youth and senior programs Surveyed 150-200 Donor Advised, Legacy and Scholarship funds
The Boston Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$669,314,078 and giving of \$79,732,935 (as of 2009) Established in 1915, the Foundation focuses on Greater Boston, MA The Foundation wants their donors to meet their own philanthropic goals, while strengthening the Foundation. The Foundation also plays a civic leadership role for the region through its research publications, convenings, and its agendas for change. Surveyed over 500 Donor-Advised Fund donors
The Chicago Community Trust	<ul style="list-style-type: none"> Community Foundation with assets of \$1,591,487,286 and giving of \$101,796,647 (as of 2008) Established in 1915 in the city of Chicago, IL 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. Surveyed over 500 Donor-Advised Fund donors
Communities Foundation of Texas	<ul style="list-style-type: none"> Community Foundation with assets of \$705,056,000 and giving of \$76,049,786 (as of 2010) Established in 1953, the Foundation focuses on Northern Texas – Urban CFT is a hub for collaboration between donors, nonprofits, and other funders to stimulate creative solutions to key community challenges. Surveyed 400-500 Agency, Charitable Trust, Designated, Donor-Advised, Field of Interest, Gift Annuity, Scholarship, and Unrestricted donors
Community Foundation for Greater Buffalo	<ul style="list-style-type: none"> Community Foundation with assets of \$202,118,717 and giving of \$8,178,742 (as of 2010) Established in 1919, with a focus on Western New York CFGB connects people, ideas, and resources to improve lives in Western New York, and is dedicated to helping donors make the most of their generosity. Surveyed 200-300 Donor-Advised, Field of Interest, Scholarship, Designated, Undesignated, and Agency Endowment fund donors
Community Foundation of Greater New Britain	<ul style="list-style-type: none"> Community Foundation with assets of \$33,124,242 and giving of \$690,877 (as of 2009) Founded in 1941, the Foundation focuses on Berlin, New Britain, Plainville, and Southington, CT. The Foundation collaborates with communities to bring people, programs, ideas and resources together to build a better future Surveyed 80-100 Donor-Advised, Scholarship, Field of Interest, Agency Endowment and other funds.
The Dallas Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$175,000,000 and giving of \$32,075,750 (as of 2009) Founded in 1929, the Foundation aims to help donors in Dallas County create charitable funds that reflect their interests The Foundation manages Donor-Advised Funds, Designated Funds, Field of Interest Funds, Agency Endowment Funds, Scholarship Funds and Community Impact Funds Surveyed over 150-200 Donor-Advised Funds

Profiles of Foundations in Dataset (2)

Foundation	Description
Fremont Area Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$162,306,085 and giving of \$8,646,764 (as of 2009) Serving the Newaygo County, Michigan area The Foundation seeks to improve the quality of life for the people of Newaygo County. The Foundation connects the needs of the community with those who have the conviction to make a lasting impact. Surveyed 100-200 Donor-Advised and Designated fund donors
Grand Rapids Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$197,767,352 and giving of \$9,668,851 (as of 2010) Established in 1922 in the city of Grand Rapids, MI The community foundation helps foster academic achievement, build economic prosperity, achieve healthy ecosystems, encourage healthy people, support the arts and social enrichment and create vibrant neighborhoods. Surveyed 100-200 Donor-Advised Fund donors
The Greater Cincinnati Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$397,053,145 and giving of \$64,447,731 (as of 2009) Established in 1963 in Cincinnati, OH The Foundation offers a variety of giving tools to help people achieve their charitable goals – and create lasting good work in their communities. Surveyed over 500 Donor-Advised Fund donors
Greater Milwaukee Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$429,446,000 and giving of \$32,200,000 (as of 2008) Founded in 1915, the Foundation focuses on Washington, Waukesha, Ozaukee and Milwaukee Counties The Foundation is guided by three tenets: helping donors create personal legacies of giving that last beyond their lifetimes; investing donor funds for maximum return with minimum risk; and playing a leadership role tackling the community's most challenging needs. Surveyed over 250-300 Donor-Advised Funds
Gulf Coast Community Foundation of Venice (FL)	<ul style="list-style-type: none"> Community Foundation with assets of \$178,500,000 and giving of \$11,300,000 (as of 2009) Established in 1995, the Foundation focuses on Venice, FL and surrounding communities Gulf Coast Community Foundation builds strong communities through leadership, partnership, and endowed philanthropy. Surveyed 100-200 Donor-Advised Fund donors, Scholarship Fund donors, Designated Fund donors, and other donors
Hampton Roads Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$244,287,165 and giving of \$12,301,230 (as of 2010) Established in 2010 from the merger of The Norfolk Foundation and The Virginia Beach Foundation, with a focus on Southeastern Virginia The Foundation's mission is to inspire philanthropy and transform the quality of life in Southeastern Virginia. Surveyed 300-400 Donor Advised, Scholarship, Designated, Unrestricted, and Field of Interest fund donors
Kalamazoo Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$315,650,660 and giving of \$15,208,974 (as of 2010) Established in 1925, with a focus on Kalamazoo County The Community Foundation enhances the quality of life for all in the greater Kalamazoo area through community leadership and the stewardship of permanently endowed funds. Surveyed 400-500 Donor Advised, Scholarship, Designated, Unrestricted, Field of Interest fund, and multiple gift donors

Profiles of Foundations in Dataset (3)

Foundation	Description
Napa Valley Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$18,000,000 and giving of \$2,100,000 (as of 2009) Established in 1994 in Napa County, CA The Foundation mobilizes resources, promotes philanthropy, and provides leadership on vital issues in Napa County. Surveyed 50-100 Donor-Advised Fund donors, Scholarship Fund donors, and Donor-Designated Fund donors
New Hampshire Charitable Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$479,403,236 and giving of \$28,256,844 (as of 2010) Established in 1962, the Foundation funds statewide across New Hampshire The purpose of the Foundation is to improve the quality of life in the communities they serve by encouraging donor partnerships to accomplish charitable purposes, making grants and loans from contributed funds to meet changing needs, and exercising leadership to address emerging issues. Surveyed over 500 Donor Advised, Scholarship, Designated, Unrestricted, and Field of Interest fund donors
Omaha Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$452,107,216 and giving of \$35,010,676 (as of 2009) Founded in 1982, the Foundation focuses on the Omaha metro area and southwest Iowa The Foundation aims to be active in the community, maintain an in-depth knowledge of issues in the community, build support for giving and volunteerism, and understand the intricacies of charitable giving Surveyed over 500 Charitable Checkbook, Designated, Donor Advised, Field of Interest, and Supporting Organization fund donors
Orange County Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$101,402,000 and giving of \$21,300,000 (as of 2009) Established in 1989 in CA 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. Surveyed 100-200 Endowed Fund donors and Non-Endowed Fund donors
The Philadelphia Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$288,263,000 and giving of \$15,548,000 (as of 2010) Established in 1918, with a focus on Greater Philadelphia The Philadelphia Foundation builds community through building philanthropic resources, managing those resources well, and distributing those resources effectively. Surveyed 400-500 Donor Advised and Scholarship fund donors
The Rhode Island Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$523,537,462 and giving of \$26,827,029 (as of 2009) Established in 1916 in Providence, Rhode Island The Foundation is a proactive community and philanthropic leader dedicated to meeting the needs of the people of Rhode Island Surveyed 300-400 Donor-Advised Fund donors, Discretionary Fund donors, Designated Fund donors, and Supporting Organization Fund donors
Rochester Area Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$234,610,799 and giving of \$17,245,000 (as of 2010) Established in 1972, with a focus on the Six-County region in upstate New York The Community Foundation works to improve the quality of life in the greater Rochester region by evaluating and addressing community issues, promoting responsible philanthropy, and connecting donors to the critical needs of the community. Surveyed over 500 donors

Profiles of Foundations in Dataset (4)

Foundation	Description
Sacramento Region Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$74,501,263 and giving of \$5,154,087 (as of 2008) Established in 1983, the Foundation focuses on Yolo, Placer, and El Dorado counties The Sacramento Region Community Foundation is an advocate for quality of life, dedicated to connecting people who care with charitable causes. Surveyed 300-400 Donor-Advised Fund donors and Scholarship Fund donors
The San Diego Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$436,267,780 and giving of \$52,905,876 (as of 2008) Established in 1975 in CA 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. Surveyed 300-400 Donor-Advised Fund donors
The San Francisco Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$1,017,024,000 and giving of \$96,511,000 (as of 2008) Established in 1948, with a focus on the Bay Area community The San Francisco Foundation mobilizes resources and acts as a catalyst for change to build strong communities, foster civic leadership, and promote philanthropy. Surveyed over 500 Donor-Advised Fund donors
San Luis Obispo County Community Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$18,568,561 and giving of \$1,851,832 (as of 2008) Established in 1998 in CA The Foundation provides excellent service to donors, grantees, and the community. Surveyed 200-300 Donor-Advised Fund donors, Field of Interest Fund donors, and Scholarship Fund donors
The Seattle Foundation	<ul style="list-style-type: none"> Community Foundation with assets of \$461,783,279 and giving of \$42,801,253 (as of 2009) Established in 1946 in Seattle, WA The Foundation inspires informed and generous giving to make the community—local, national, and international – a vital and healthy place to live Surveyed 300-400 Donor-Advised Fund donors

Contents

I.	Executive Summary	2
II.	Introduction	4
III.	Donor Perceptions	
	a) Satisfaction	9
	b) Impact on the Community	11
	c) Impact on Donor Giving	16
IV.	Donor Engagement	
	a) Communications and Interactions	20
	b) Donor Resources	22
V.	Future Giving	30
VI.	Suggestions for Improvement	37
VII.	Review of Findings	40
VIII.	Analysis and Discussion	42
	<u>Appendix</u>	
A.	Supplemental Donor, Foundation, and Fund Characteristics	47
B.	List of Foundations in Dataset	57
C.	About the Center for Effective Philanthropy	61

About the Center for Effective Philanthropy (CEP)

Donor Perception
Report
DRAFT

Mission

To provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

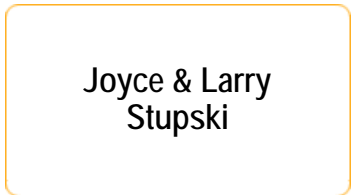
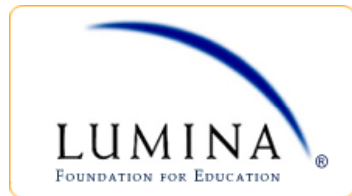
Vision

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

Although our work is about measuring results, providing useful data, and improving performance, our ultimate goal is improving lives. We believe this can only be achieved through a powerful combination of dispassionate analysis and passionate commitment to creating a better society.

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>Indicators of Effectiveness: Understanding and Improving Foundation Performance</i> (2002)
	<i>Assessing Performance at the Robert Wood Johnson Foundation: A Case Study</i> (2004)
	<i>The State of Foundation Performance Assessment: A Survey of Foundation CEOs</i> (2011)
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)
	<i>Rhetoric versus Reality: A Strategic Disconnect at Community Foundations</i> (2011)
Funder Governance	<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)
	<i>More than Money: Making a Difference with Assistance Beyond the Grant</i> (2008)
	<i>Working with Grantees: The Keys to Success and Five Program Officers Who Exemplify Them</i> (2010)
	<i>A Time of Need: Nonprofits Report Poor Communication and Little Help from Foundations During the Economic Downturn</i> (2010)
	<i>Lessons from the Field: From Understanding to Impact</i> (2010)
	<i>Grantees Report Back: Helpful Reporting and Evaluation Processes</i> (2011)
	<i>Can Feedback Fuel Change at Foundations?</i> (2011)
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)

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 key findings, 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
- **Strategy Landscape Tool (SLT):** an online interactive visualization tool, developed by Monitor Institute and delivered with CEP, that allows users to easily see and understand grantmaking strategies and patterns within and across institutions so they can make better decisions in pursuit of their goals

Contact Information

- ◆ This report was produced for Omaha Community Foundation by the Center for Effective Philanthropy in October, 2011.

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