

2008 Donor Survey Report

Introduction

At Silicon Valley Community Foundation we are committed to providing a world-class experience for all donors. To help design services that meet the expectations of our diverse donor family, the community foundation conducted our first donor survey to capture your reflections on the past year and your preferences and ideas for the future. In this report we share the results of the survey, the lessons learned and the steps we are taking to ensure that your experience at the community foundation is as easy, inspiring and unique as you wish it to be.

Background

To help us formulate the questions, create and implement the survey and independently evaluate the resulting data, the community foundation hired FSG Social Impact Advisors, a nonprofit consulting firm with considerable community foundation expertise. The survey was conducted in spring 2008, and was targeted to individual and family donors who work with the community foundation through donor advised funds and supporting organizations. The 32 question survey included an online version and a paper version for donors who do not use email. Phone interviews with a group of donors explored key items from the survey in greater depth.

The response rate for the survey was 23% (207 respondents), exceeding the reported benchmark of 15% for similar surveys in the community foundation field, and was evenly split between donors from San Mateo County and Santa Clara County. The community foundation's board of directors and the donor engagement and giving division committee were briefed and discussed the survey findings with our consultant and with staff.

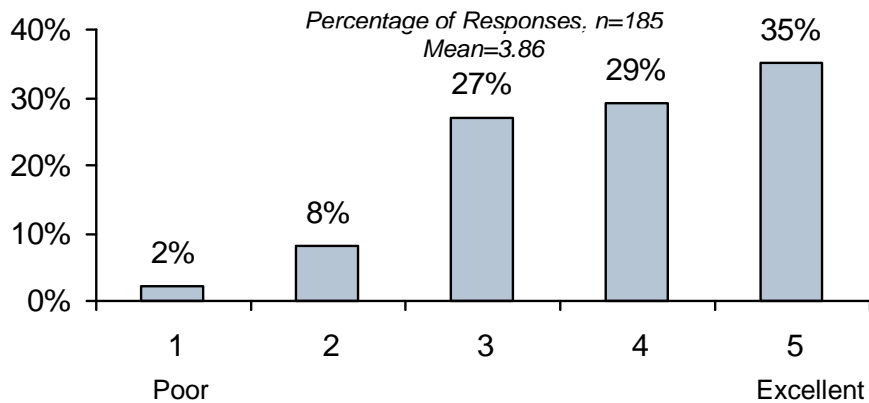
We are grateful for the thoughtful contributions of each survey participant, and are pleased to share the following key findings with you.

Key Findings

1. A majority of respondents report being satisfied with their overall experience with the community foundation and would recommend the community foundation to a friend or colleague.

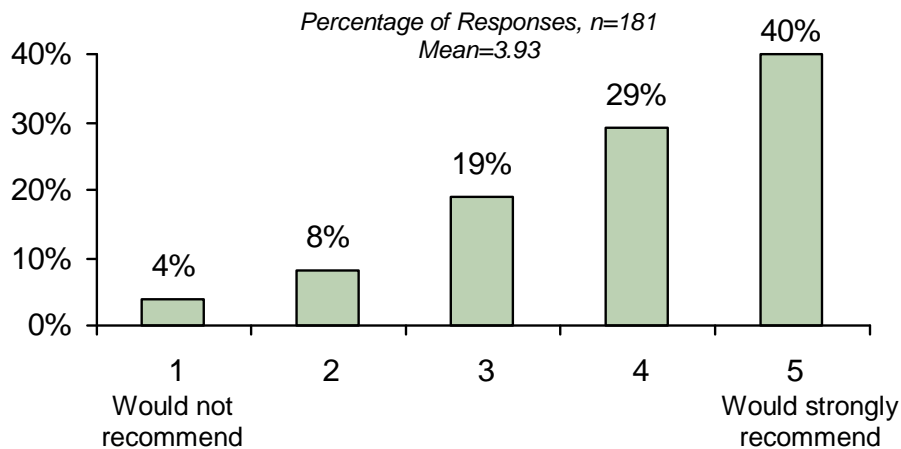
- Sixty-four percent of respondents rated their experience as a 4 or 5 on a 1-5 point scale, with 1 as 'poor' and 5 as 'excellent.' Some 10% rated their experience as poor.

Overall Experience with the Community Foundation



- Sixty-nine percent of respondents rated their likelihood of recommending the community foundation as a 4 or 5 on a 1-5 point scale with 1 being "would not recommend" and 5 as "would highly recommend."

Recommendation to a Friend or Colleague



2. To open-ended questions about best and worst experiences, respondents report that their best experiences stem from interaction with staff and ease of service, while their biggest concerns relate to loss of personal relationships.

- For best experiences, respondents named smooth and efficient transactions, quality interactions with individual staff members and experiences with specific events held in 2007 and early 2008.

“[Staff member] met me at the door and we had a long meeting where they seemed very interested in my giving priorities. They initiated a very personal relationship and made me feel like a VIP even though my husband and I are not large donors.”

“Both staff I’ve worked with recently have been knowledgeable, friendly and enthusiastic. Working with them makes me excited about my philanthropy.”

- For biggest concerns, respondents named lack of individual contacts with staff, personalized service and merger-related challenges, such as a perceived slow pace of planning and integration.

“It would be nice to have more personal outreach, to have someone to call you once a year – like an account manager. Right now, I don’t know who to contact.”

“My biggest concern was the loss of staff due to the merger.”

3. Survey data suggests our donor family is made up of two distinct groups, and these two groups report different levels of satisfaction with their experience.

- Transaction-driven donors are primarily concerned with the ease of services related to the administration of their fund, such as recommending grants, making gifts, ability to access fund information on DonorConnect and staff accessibility/responsiveness.
- Relationship-driven donors are interested in a smooth transactional experience and also seek services that are highly personalized, such as staff expertise on opportunities for giving, staff knowledge of a donor’s personal interests and preferences, personalization of communication, and learning events and opportunities to support community foundation projects that align with donors’ interests.
- Transaction-driven donors report higher levels of satisfaction with their experience than relationship-driven donors.
- Respondents in San Mateo County report being less satisfied with their experience than did donors in Santa Clara County.

4. The connection between the community foundation and some donors has suffered during the course of the merger, primarily by the loss of long-term relationships with staff.

- Some 11% of respondents feel involved with the community foundation, rating their connection as either a 4 or 5 on a 1-5 scale with 1 as “not involved” and 5 as “highly involved.” Some donors are satisfied with minimal involvement, but others want a deeper connection to the community foundation.
- Across multiple indicators, satisfaction with personal elements of service (such as staff knowledge of donors’ giving priorities and interests) was rated lower than satisfaction with transactions (such as accuracy of fund statements).

- More than 50% of respondents report that they are not receiving personalized forms of communication and interaction.

5. DonorConnect is an essential platform for our donors and needs to be more user-friendly.

- Nearly 60% of respondents named “ease of accessing information via DonorConnect” as one of the greatest contributors to their overall experience.
- In response to questions about how the community foundation could improve the donor experience, we received several quotes pointing to past challenges with DonorConnect.

“I find the design of the website (at least the Merrill Lynch version that I use) to lack functionality and to be a bit buggy.”

“There have been many enhancements to DonorConnect which I greatly appreciate. Just continue to ensure that it is a useful and accurate tool for managing grants.”

- Donors’ preferences for communications vary from those who favor an exclusively online experience, and those who wish to receive information in print.

“I get emails and invitations and don’t want anything more than that. Definitely don’t send me paper!”

“I much prefer written reports. I realize this is the Silicon Valley Community Foundation, but I am barely post-Gutenberg!”

Acting on Lessons Learned

In every aspect, the donor survey affirmed what we have learned in our daily work with each of you during the first 18 months of the new community foundation – that personal contact and stellar customer service are paramount to a world-class donor experience. As we have shared in prior communications, including our fall 2007 report, *A New Way Forward* and in a recent letter from Leigh Stilwell, vice president of donor engagement, we have been hard at work to act on lessons learned. The donor engagement department has been expanded and restructured to a team of 14 to ensure that we keep our ratio of staff to donors at the right level to allow for deeper relationships.

Based on survey results and our vision for the donor experience, all donors with funds at the community foundation can expect the following:

1. **A primary staff contact—your philanthropy manager—dedicated to understanding your philanthropic goals and to bringing the right mix of services and expertise from throughout the community foundation to support you.**
Your philanthropy manager’s name and contact information were mailed to you in early June, and are permanently available on the DonorConnect “Contact us” page as well as on your quarterly statements. To help us better understand your interests and goals, we are developing a new tool to capture your personal preferences. This knowledge helps us recommend funding ideas, learning opportunities and connections with other donors that are tailored to your giving interests and preferences.

- 2. Complete information to make full use of the fund(s) you advise at the community foundation.**
While your philanthropy manager can be your primary source to answer any questions about the fund(s) you advise, we also post forms and instructions on DonorConnect and on our website to help you manage various aspects of your philanthropy such as recommending grants, making gifts, modifying your fund agreement and changing your investment allocation.
- 3. Ongoing access to the best local funding opportunities from throughout our region.**
Our Community Connections program on DonorConnect offers you an inside look at funding ideas, reviewed by our grantmaking staff and recommended to you and the rest of our donor family as promising ways to strengthen our community. We have experienced a steep increase in demand for these ideas and we will expand these offerings to keep an active pipeline of funding ideas available for posting as each request is filled.
- 4. A robust slate of events that allows us to learn together about the practices of effective giving, local community needs, great nonprofits and funding opportunities.**
Learning together and sharing ideas with peers strengthens the connection to each other and to our community. We invite you to review the scheduled donor events posted on the calendars located on both DonorConnect and the community foundation website. In addition to our e-newsletter we are exploring other ways to share these learning opportunities with you. For donors who are interested in a topic, but are unable to attend an event, we have launched a new component of Community Connections, called Conversation to Action, that summarizes the discussion and funding opportunities described at the event.
- 5. Services and opportunities that reflect our large region and the diversity of our donor family.**
Our service area spans a broad geographic area with diverse economic, cultural and environmental needs. Philanthropy can be equally diverse, impacting the region as a whole or individual neighborhoods or residents. We are working to ensure that you have convenient access to events and opportunities to learn about the wide range of funding ideas that represent both our broad service area and individual communities within our region. Philanthropy managers and grantmaking staff are available to meet with you in your home, at your favorite coffee shop or at any one of our three offices – in San Mateo, Mountain View and San José. We will host events throughout our region, and if you would like to host a donor event in your home, please contact Marie Young, director of donor learning and connection.
- 6. An organizational focus on customer service.**
To ensure regular donor feedback and input, we have established the community foundation's first donor advisory council, co-chaired by donors Greg Avis and Jody Buckley. About 40 donors from throughout the region serve on the council and act as a sounding board for donor experiences as well as a source for new ideas and opportunities to deepen our work. In addition to the donor advisory council, the community foundation board of directors and the board committee for the donor engagement and giving division remain deeply engaged in our work with donors.
- 7. Finally, a commitment to remain a learning institution.**
Through the many lessons learned in our first 18 months, we have developed and continue to build an extensive training program, including case studies, to ensure that staff understand the many facets of our work with donors and are well-equipped to deliver an exceptional experience to you.

Thank you again to those who responded to our first donor survey. Your honesty and interest in helping the community foundation understand your experience and expectations are deeply appreciated by the community foundation's board of directors and the staff.

We encourage you to contact your philanthropy manager, and if you would like to discuss any aspect of the survey, please contact Leigh Stilwell, vice president of donor engagement. We invite you to continue to provide insights and ideas to inform our work at any time. Our partnerships, and our service to you, are profoundly important to us all as we strive to serve the vibrant and diverse community that makes up San Mateo and Santa Clara Counties.

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