

The Donor Perception Report[®]

OVERVIEW



The Donor Perception Report

FOR COMMUNITY FOUNDATIONS, DONORS ARE VITAL PARTNERS. UNDERSTANDING DONORS AND THEIR PERCEPTIONS OF THE FOUNDATION, THEIR FUTURE GIVING INTENTIONS, AND THEIR OWN PHILANTHROPIC EXPERIENCE CAN HELP COMMUNITY FOUNDATIONS FOSTER POSITIVE, HIGH-VALUE RELATIONSHIPS WITH THEIR DONORS.

The Donor Perception Report provides funders with actionable benchmarking and insights based on responses to a customizable donor survey. Delivered in a dynamic, online format, the DPR is a tool to help community foundation leaders, staff, and boards make the best choices about how to engage with their donors and create impact.

Through a mix of quantitative and qualitative data, the DPR answers critical questions you face daily:

How satisfied are donors? How likely are they to recommend the foundation to others?

How are your donors planning to give to the Foundation in the future?

How do your donors view the Foundation's leadership in your community?

Which resources at the community foundation are most helpful to donors? What proportion of donors are using each resource?

What proportion of donors' giving is outside the foundation?



The Donor Perception Report has given us the deepest and most useful insights we've ever had into how our donors are experiencing, valuing, and utilizing our services and our communications with them. We have been both affirmed by the report's overall findings, and challenged in the areas where donors expressed needs still to be addressed.... The Center for Effective Philanthropy did an excellent job conducting the survey and preparing the report.

—Shelley Hoss
President
Orange County Community
Foundation





The Arizona Community Foundation has now for the first time in our 34 year history a true and objective baseline of how our donors perceive us and how we compare nationally. We've never really known that before – and the report now catalyzes our business planning and gives us a set of real targets to aim for. Thanks for such a wonderful tool and for the great support and skill brought to us by [your staff.]

–Steve Seleznow
President

The Arizona Community Foundation



Description of Themes

THE DPR IS BASED ON A CONFIDENTIAL, CUSTOMIZABLE SURVEY COVERING ASPECTS OF THE RELATIONSHIP BETWEEN DONORS AND COMMUNITY FOUNDATIONS. MOST CORE SURVEY QUESTIONS FALL INTO FIVE THEMES.

Themes of Donor Perceptions

- Leadership and Impact in the Community** Explores donors’ perceptions of the Foundation’s role in their communities, including its leadership and ability to make an impact.
- Donor Engagement, Interactions, and Communications** Explores donors’ perceptions of donor services and resources provided by the funder, their interactions with the funder, and communications from the funder.
- Donor Motivations and Impact** Highlights donors’ motivations for giving in general and through the Foundation instead of other charitable giving options, and donors perceptions’ of their own impact.
- Future Giving Plans** Highlights donors’ plans for future giving to the community foundation and otherwise.
- Topics Specific to the Foundation** Custom options and new questions can be added to the survey to highlight unique processes, services or other topics relevant to the Foundation.

Benchmark Against a Comparative Dataset

Given the increasingly competitive environment for donor dollars, comparative data allows community foundations to see where they excel and need to improve. The DPR can provide this type of information: responses from your donors will be compared to our database of responses from more than **5,000 donors** at over **50 community foundations**.

In addition to providing benchmarking against all these funders, CEP will compare your results to the results of a subgroup of Foundations you choose.

For a full list of funders that are part of the DPR dataset, please visit our [website](#).

ANALYZE SUB-GROUPS OF RESULTS

Using the latest paper and online survey methodology, CEP can do more than ever to gather and analyze results by categories of donors you find most meaningful. CEP can identify statistically significant differences among different donors with different fund types, giving sizes, donor tiers, or other categories important to you.

INFORMATION ON INITIATIVES, ISSUES, AND RESOURCES SPECIFIC TO YOUR FOUNDATION

Throughout the core survey and in a section at the end, you can add questions or options to gather feedback on items specific to your Foundation. This can be a great way to get feedback on a new resource or any initiative you are working on.



The Donor Perception Report was an important part of a comprehensive review supporting the Trust's long-term planning efforts. It provided interesting and informative feedback from donors whose support is essential to achieving our goal of building a safe, healthy and productive future for every Chicago resident. The ability to analyze the results in numerous ways has provided invaluable insight into improving the focus of our work.

– Jamie Phillippe
Vice President of Development and
Donor Services
Chicago Community Trust

THE
CHICAGO
COMMUNITY
TRUST

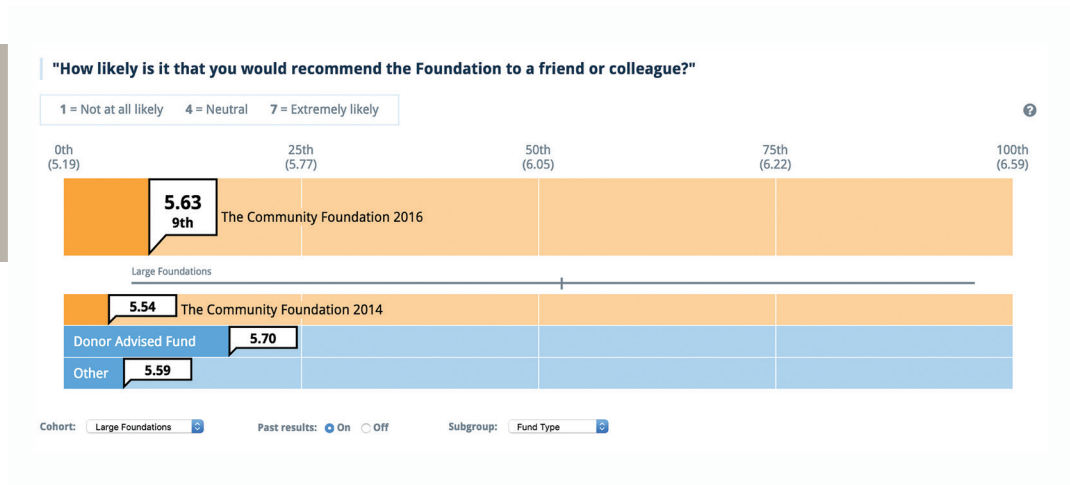
AND AFFILIATES

Comparative Results

Your customized, online report will blend quantitative and qualitative feedback and present your results on a comparative basis.

Sample Question:

How likely is it that you would recommend the Foundation to a friend or colleague?

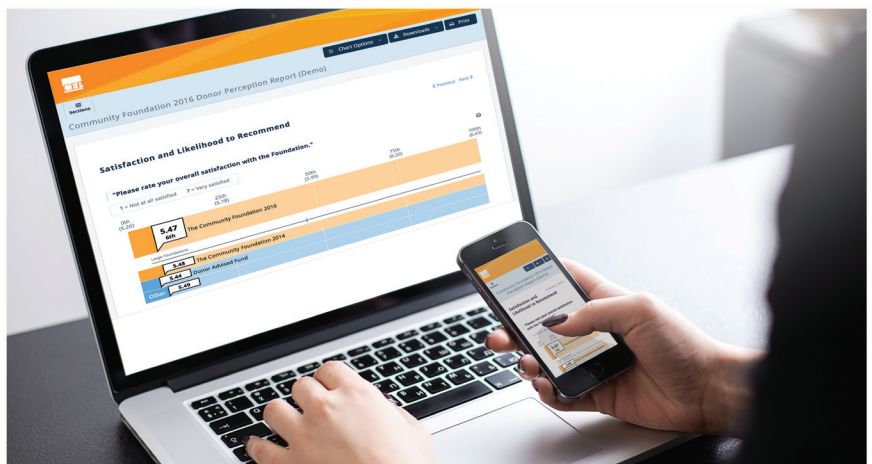


CEP OFFERS CUSTOMIZED ADVISORY SERVICES TO COMPLEMENT ASSESSMENT FINDINGS

These include conducting focus groups or interviews of donors to better understand why they responded as they did to the survey, to further solicit their recommendations for improvements, and to test possible responses to any concerns raised; benchmarking of other funders to identify how they have responded to a specific concern raised; and facilitating staff and/or board discussions to identify and decide on changes in policies and practices in response to findings.

Interactive Online Reporting Tool

DPR results are presented through CEP's secure online reporting system. This system allows you to deeply engage data, controlling and changing which data to review for each question in your survey and modifying the groups of funders your results are compared to.





The Center for Effective Philanthropy’s staff and research tools were invaluable to our effort to learn more about our donor’s perceptions of our impact on our community, our services, and the resources we provide to enable them to reach their philanthropic goals. The quality of the report and staff interaction throughout the process ensured that the final product could be used to advance our efforts to better serve our donors and our community.

– Beth Fisher
Vice President for Donor
Services and Development
The Columbus Foundation



Results That Enable Change

CEP’S EXPERTS GENERALLY PRESENT THE REPORT FINDINGS IN PERSON TO A FOUNDATION’S STAFF AND/OR BOARD OF DIRECTORS. WE USE THIS OPPORTUNITY TO FURTHER EXPLAIN THE RESULTS, SHARE BEST PRACTICES FROM OTHER FUNDERS, AND EXPLORE WAYS YOU CAN USE THE DATA TO DRIVE CHANGE.

According to an independent survey conducted by LFA Group: Learning for Action, 100% of respondents would recommend the DPR to colleague community foundations.

The insights from the DPR have led foundations to make significant changes:

88%

of respondents reported making changes to at least one area of foundation practice

94%

reported making changes to communications and approaches to working with existing donors

73%

report changes to approaches to engaging new donors

Price Information

AS A NONPROFIT, CEP STRIVES TO KEEP THE COST OF THE DPR AS LOW AS POSSIBLE. THE PRICE OF THE DPR VARIES WIDELY, DEPENDING ON THE OPTIONS YOU SELECT.

The full cost of the DPR generally ranges between \$10,000 – \$28,000, and varies by foundation based on several variables:

- Method of survey: paper-based or online
- Number of donors to be surveyed
- Number of custom questions
 - Customization of analyses
 - Customized survey process
- Subgroups of donors within a funder
- Community Foundation annual giving

Deadlines and Timing

TIMELINES FOR UPCOMING SURVEY ROUNDS CAN BE FOUND BELOW.

Deadline to Finalize Survey and Donor List	Surveys Distributed	Receipt of Report(s)
Mid-January	Mid-February	May – July
Mid-April	Mid-May	August – October
Early August	Early September	November – February

Please contact CEP prior to the Survey and Donor List Deadline in order to sign-up, and a CEP staff member will guide you through the process.



The Donor Perception Report was truly illuminating, and incredibly helpful. It provided us with new, objective insights about our donors – about their views and experiences, their preferences and plans. Unlike other donor surveys, the comparative data helped us identify the areas of our work that are making a big difference for our donors, and also areas where we can improve. As a result of this donor feedback and our conversations with CEP staff, we are now working on a priority list of improvements in areas like donor services and communications. We are also spending our limited budget dollars on services and programs that we know to be highly valued by our donors, because they said so in the DPR. Having this kind of certainty in this kind of economic climate is very valuable.

– Terence P. Mulligan
President
Napa Valley Community Foundation

NAPA VALLEY
COMMUNITY FOUNDATION

Contact CEP Today

IF YOU WOULD LIKE TO LEARN MORE ABOUT THE DONOR PERCEPTION REPORT, PLEASE CONTACT CEP:

Naomi Orensten, Director

617-492-0800 x253

naomio@cep.org

Jenny Goff, Manager

617-492-0800 x244

jennyg@cep.org

Amber Bradley, Director

415-391-3070 x251

amberb@cep.org

Austin Long, Director

415-391-3070 x127

austinl@cep.org

Charlotte Brugman, Manager

415-391-3070 x173

charlotteb@cep.org

Mena Boyadzhiev, Manager

617-492-0800 x158

menab@cep.org



Cambridge, Massachusetts

675 Massachusetts Avenue

7th Floor

Cambridge, MA 02139

Phone: 617-492-0800

Fax: 617-492-0888

San Francisco, California

131 Steuart St

Suite 501

San Francisco, CA 94105

Phone: 415-391-3070

Fax: 415-956-9916