
DONOR PERCEPTION REPORT®

PREPARED FOR

Innovia Foundation

MAY 2019



THE CENTER FOR
EFFECTIVE PHILANTHROPY

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Cambridge, MA 02139
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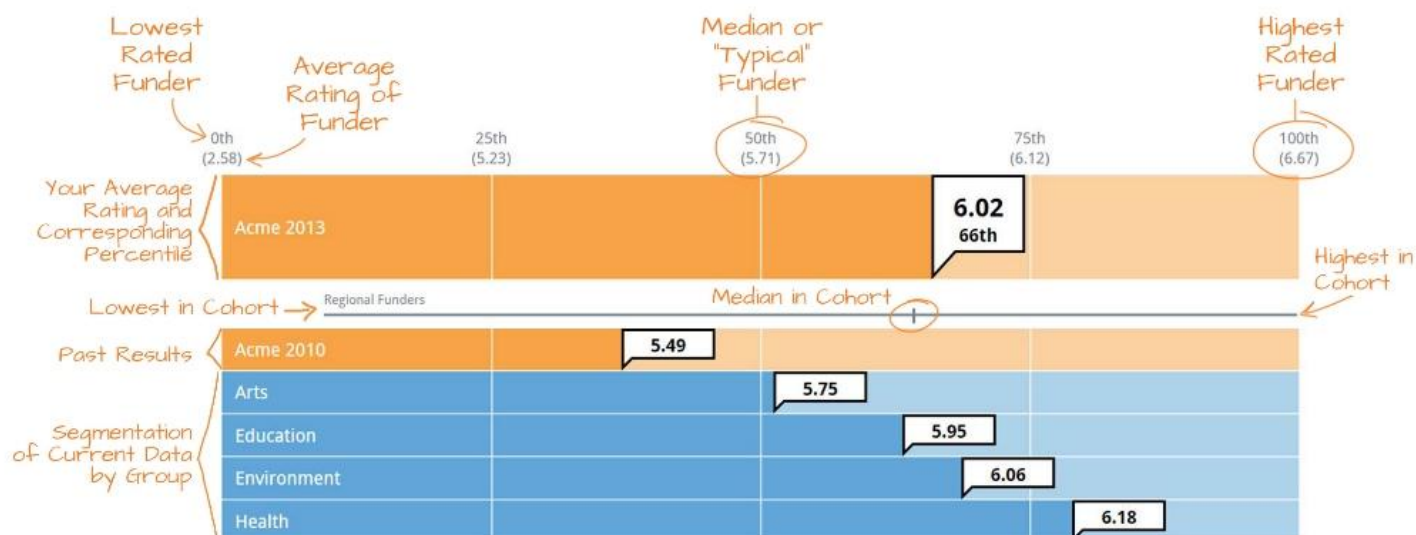
131 Steuart Street
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San Francisco, CA 94105
415-391-3070

cep.org

The online version of this report can be accessed at cep.surveyresults.org.

Interpreting Your Charts

Many of the charts in this report are shown in this format. See below for an explanation of the chart elements.



Missing data: Selected donor ratings are not displayed in this report due to changes in the survey instrument, or when a question received fewer than 5 responses.

STATISTICAL SIGNIFICANCE OF CHANGES OVER TIME

CEP compares your past ratings to your current ratings, testing for statistically significant differences. An asterisk in your current results denotes a statistically significant difference between your current rating and the previous rating.



Key Ratings Summary

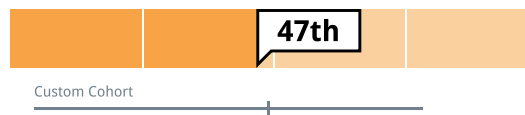
Key Measures

Average Rating

Percentile Rank

Overall Satisfaction

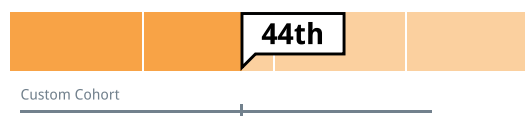
6.07

**Likelihood to Recommend the Foundation**

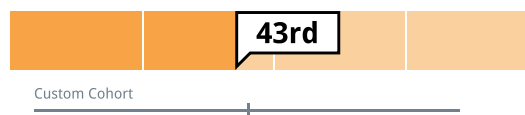
6.13

**Impact on the Community**

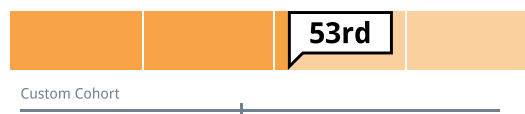
5.72

**Responsiveness of Staff**

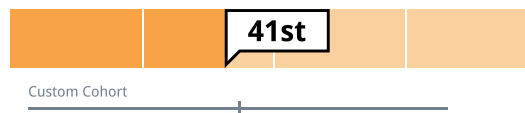
6.35

**Foundation Understanding of Donors' Goals**

5.85

**Clarity of Communication about Foundation's Goals**

5.20



Zealous
Important
Engaged
Done
Inclusive
Open Thinking
Dedicated
Responsive
PJ Excellent
Trying
Generative
Respected
Personalized
Solid
Transformational
Giving
Blossoming
Well
Change
Lifelong
Local
Compassionate
Catalyst
Innovia
Transitioning
Excellence
Informing
Confusion
Quality
Unresponsive
Responsible
Moving
Forward
Innovative
Honest
Philanthropy
Relevant
Informative
Over
Guardian
Useful
Conservative
Partner
Attentive
Passionate
Trustworthy
Improving
Creative
Focused
Broad
Very
Efficient
Unknown
Innovating
Good
Regional
Growing
Enabling
Listening
Trusted
Beneficial
Passion
Resource
Professional
Progressive
Dependable
Easy
Encompassing
Involved
Reliable
Evolving
Community
Great
Supportive
Convenient
Effective
Helpful

4

Survey Population

Survey	Survey Fielded	Survey Population	Number of Responses Received	Survey Response Rate
Innovia 2019	May and June 2019	512	122	24%

Throughout this report, Innovia Foundation's survey results are compared to CEP's broader dataset of nearly 10,000 donors from nearly 80 community foundations. The full list of participating funders can be found at <http://cep.org/dpr-participants/>.

Subgroups

In addition to showing Innovia's overall ratings, this report also shows ratings segmented by Fund Type.

Fund Type	Number of Responses
Administrative	11
Nonprofit Agency Endowment	24
Area of Interest	7
Donor Advised Fund	47
Designated	23
Discretionary	8

Non-Responder Analysis

CEP confirmed that overall, Innovia donors who responded to the survey are representative of the broader group of Innovia donors surveyed by Fund Type. However, Innovia donors in the Administrative and Scholarship Fund Type who responded to the survey are under represented and donors in the Discretionary Fund Type who responded to the survey are over represented as compared to Innovia non-respondents. CEP compared respondents to non-respondents using information provided by Innovia.

Subgroup Methodology & Summary of Differences by Subgroup

Subgroup Methodology:

Fund Type: Using tags from Innovia's donor list, CEP grouped donor responses by their fund type.

Subgroup Differences:

Fund Type: While there are no consistent significant differences in donor ratings when segmenting by fund type, ratings from donors in the "Area of Interest" and "Discretionary" fund type trend lower compared to other donors across several survey measures.

Comparative Cohorts

Customized Cohort

Innovia Foundation selected a set of 16 funders to create a smaller comparison group that more closely resembles Innovia in scale and scope.

Custom Cohort

Ann Arbor Area Community Foundation
Berkshire Taconic Community Foundation
Central New York Community Foundation
Charlottesville Area Community Foundation
Community Foundation Sonoma County
Community Foundation for Southern Arizona
Community Foundation for the Fox Valley Region
Community Foundation of Greater Greensboro
Greater Worcester Community Foundation
Innovia Foundation
Rancho Santa Fe Foundation
Sacramento Region Community Foundation
The Community Foundation of Greater Flint
The Community Foundation of North Louisiana
The Greater Tacoma Community Foundation
The Oregon Community Foundation

Standard Cohorts

CEP also included three standard cohorts to allow for comparisons to a variety of different types of funders.

Cohort Name	Count	Description
Small Foundations	37	Community foundations with an annual giving size below \$15 million
Large Foundations	36	Community foundations with an annual giving size of \$15 million or greater
Donor-Advised Funds	16	Community foundations whose donor survey populations contained at least 95% donor-advised funds

Funder Characteristics

Donor Staff Load	Innovia 2019	Median Funder	Custom Cohort
Total full-time donor designated staff	2 FTE	3 FTE	2 FTE
Total donor-advised fund giving per full-time donor designated staff	\$1.2M	\$2.2M	\$1.2M

Foundation Asset and Giving Patterns	Innovia 2019	Median Funder	Custom Cohort
Total assets	\$127.2M	\$229.3M	\$126.6M
Total giving	\$6.8M	\$14.3M	\$7M

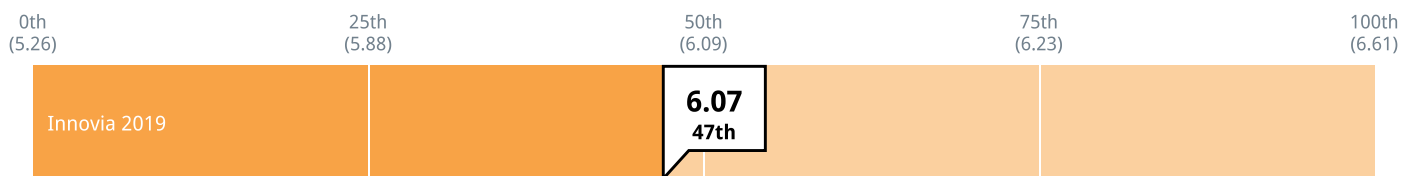
Assets	Innovia 2019	Average Funder	Custom Cohort
Discretionary assets	34%	24%	25%
Donor-advised assets	28%	37%	30%
Other non-discretionary assets	38%	39%	45%

Giving	Innovia 2019	Average Funder	Custom Cohort
Discretionary giving	21%	19%	19%
Donor-advised giving	45%	52%	44%
Other non-discretionary giving	34%	29%	36%

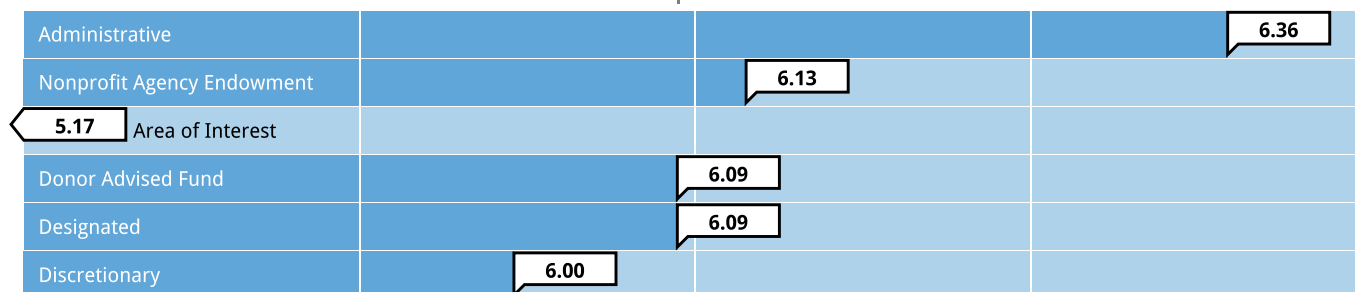
Satisfaction and Likelihood to Recommend

Please rate your overall satisfaction with the Foundation

1 = Not at all satisfied 7 = Extremely satisfied



Custom Cohort



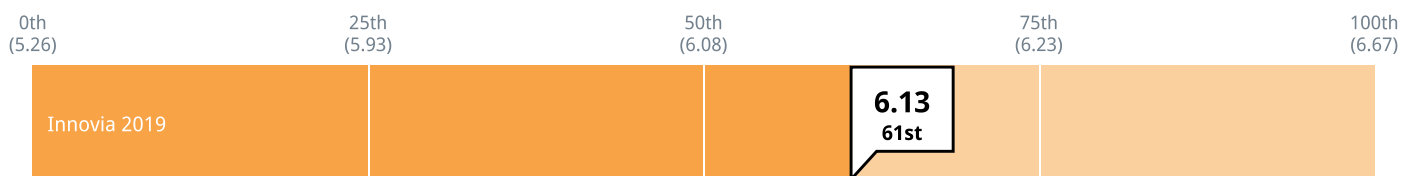
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

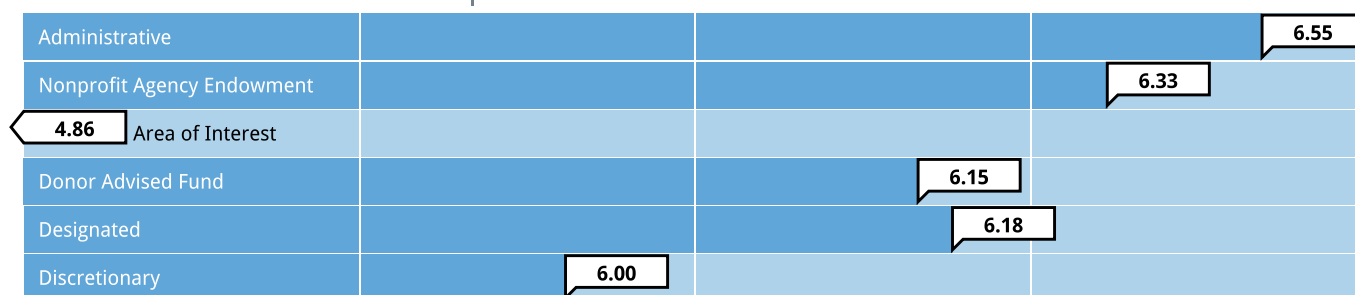
Subgroup: Fund Type ▼

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

1 = Not at all likely 4 = Neutral 7 = Extremely likely



Custom Cohort



Cohort: Custom Cohort ▼

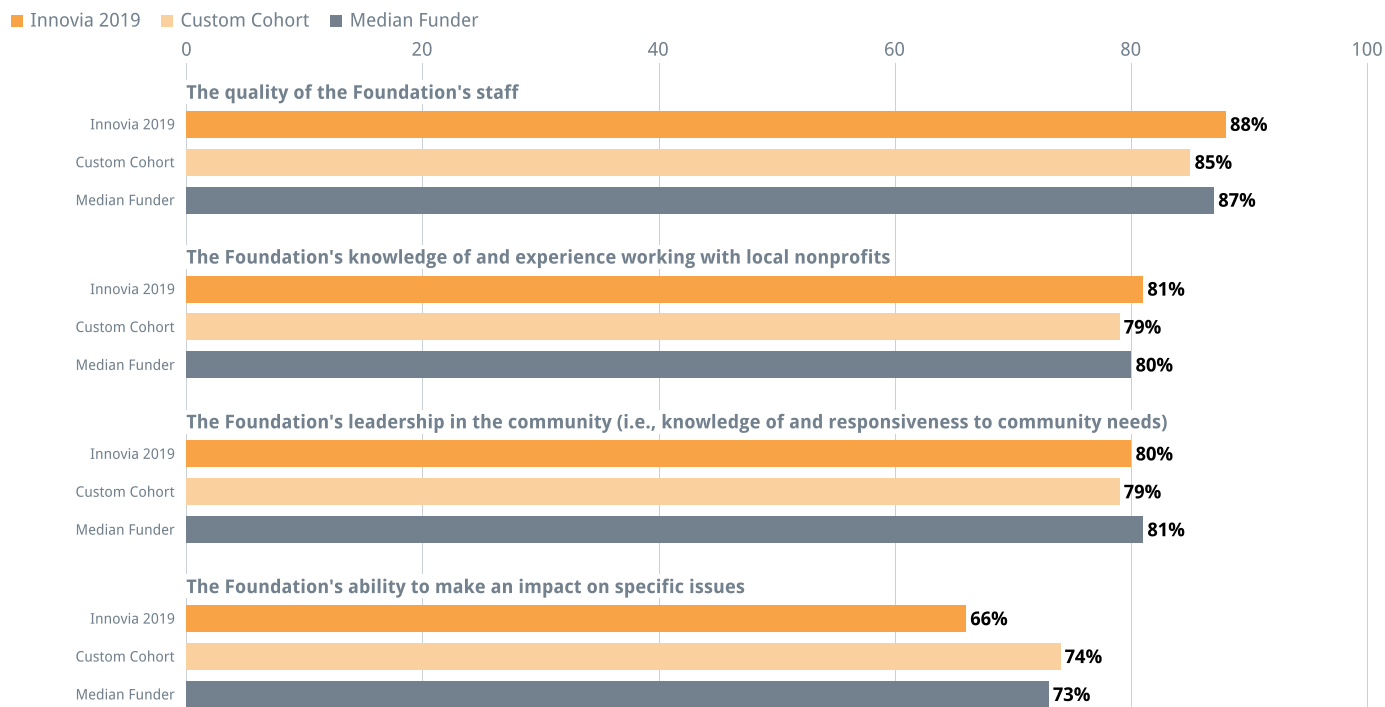
Past results: ☒ On ☐ Off

Subgroup: Fund Type ▼

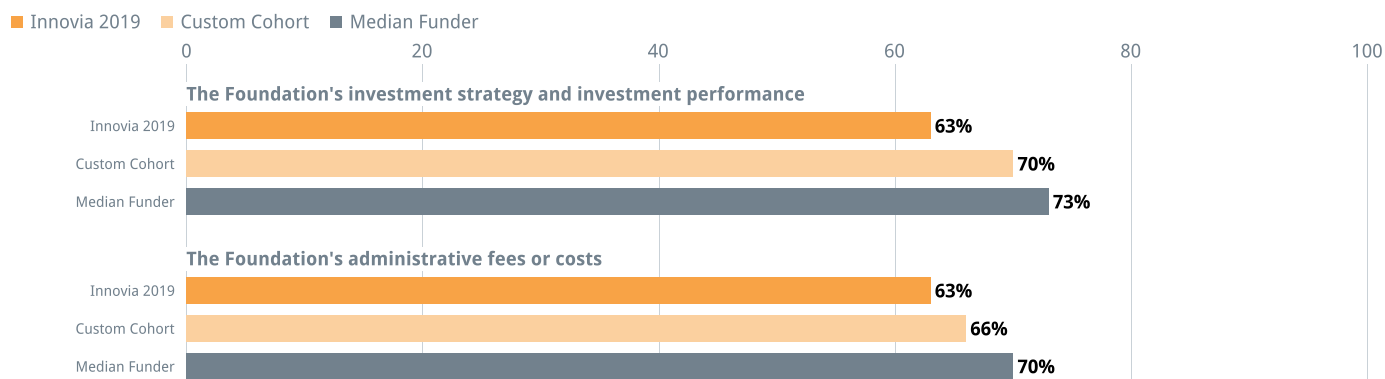
Satisfaction with Aspects of Innovia - Overall

"Please think about your giving to or through the Foundation *over the past 3 years*. When possible, please indicate whether you are satisfied with the Foundation's work in each area."

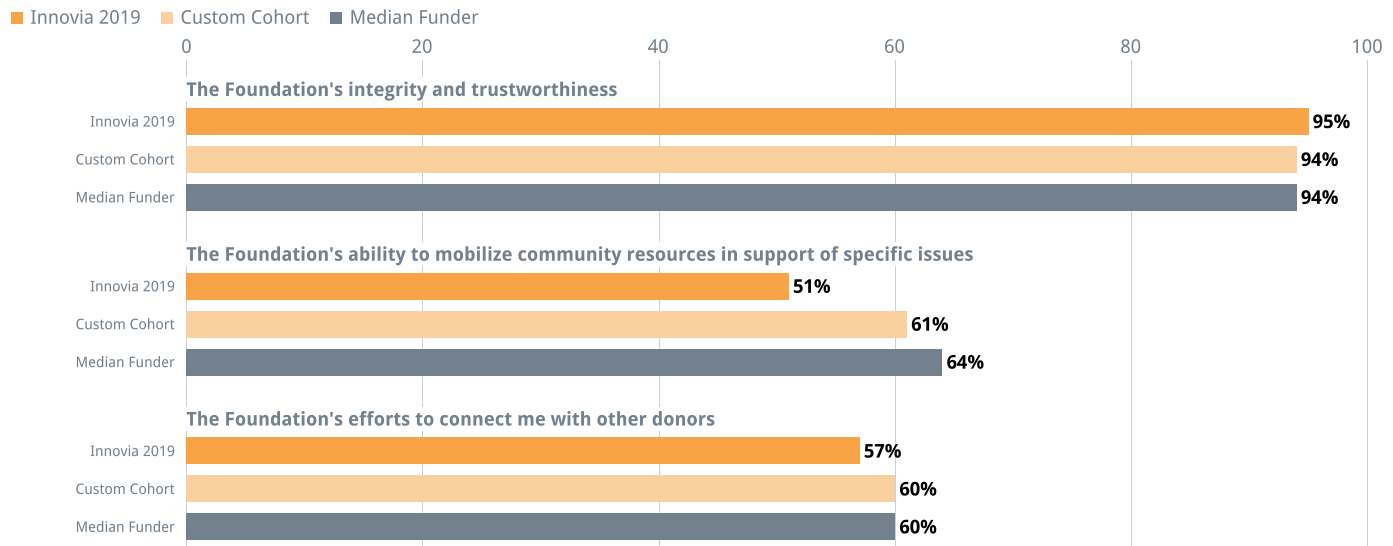
Proportion of Donors Satisfied - Leadership and Knowledge



Proportion of Donors Satisfied - Finance and Administrative Services



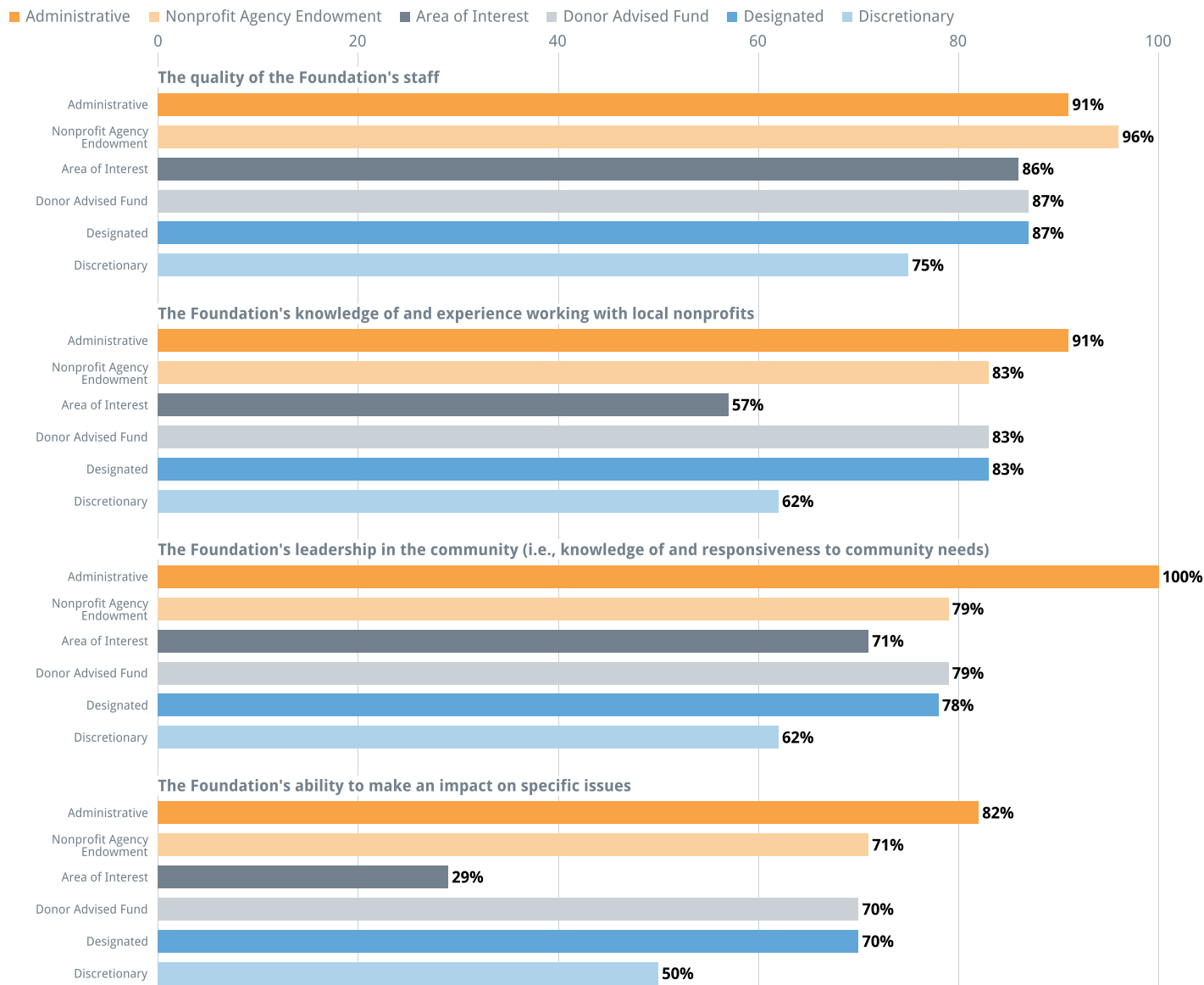
Proportion of Donors Satisfied - Reputation and Referral Network



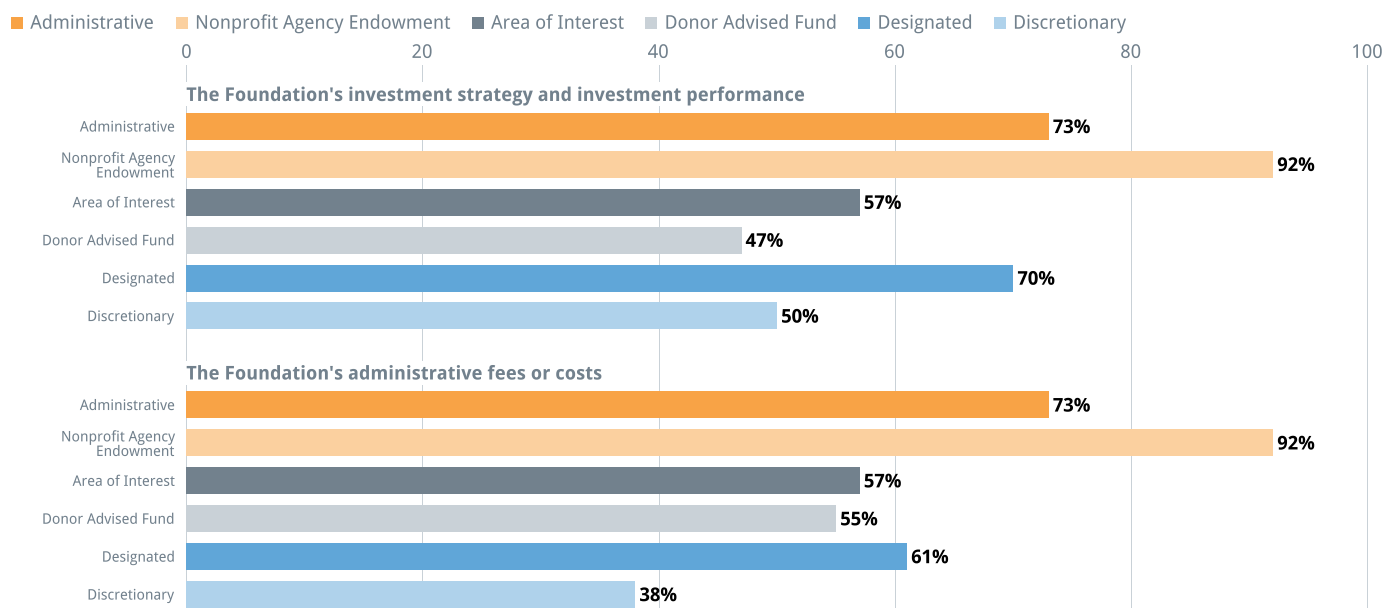
Satisfaction with Aspects of Innovia - by Subgroup

"Please think about your giving to or through the Foundation *over the past 3 years*. When possible, *please indicate whether you are satisfied with the Foundation's working in each area.*"

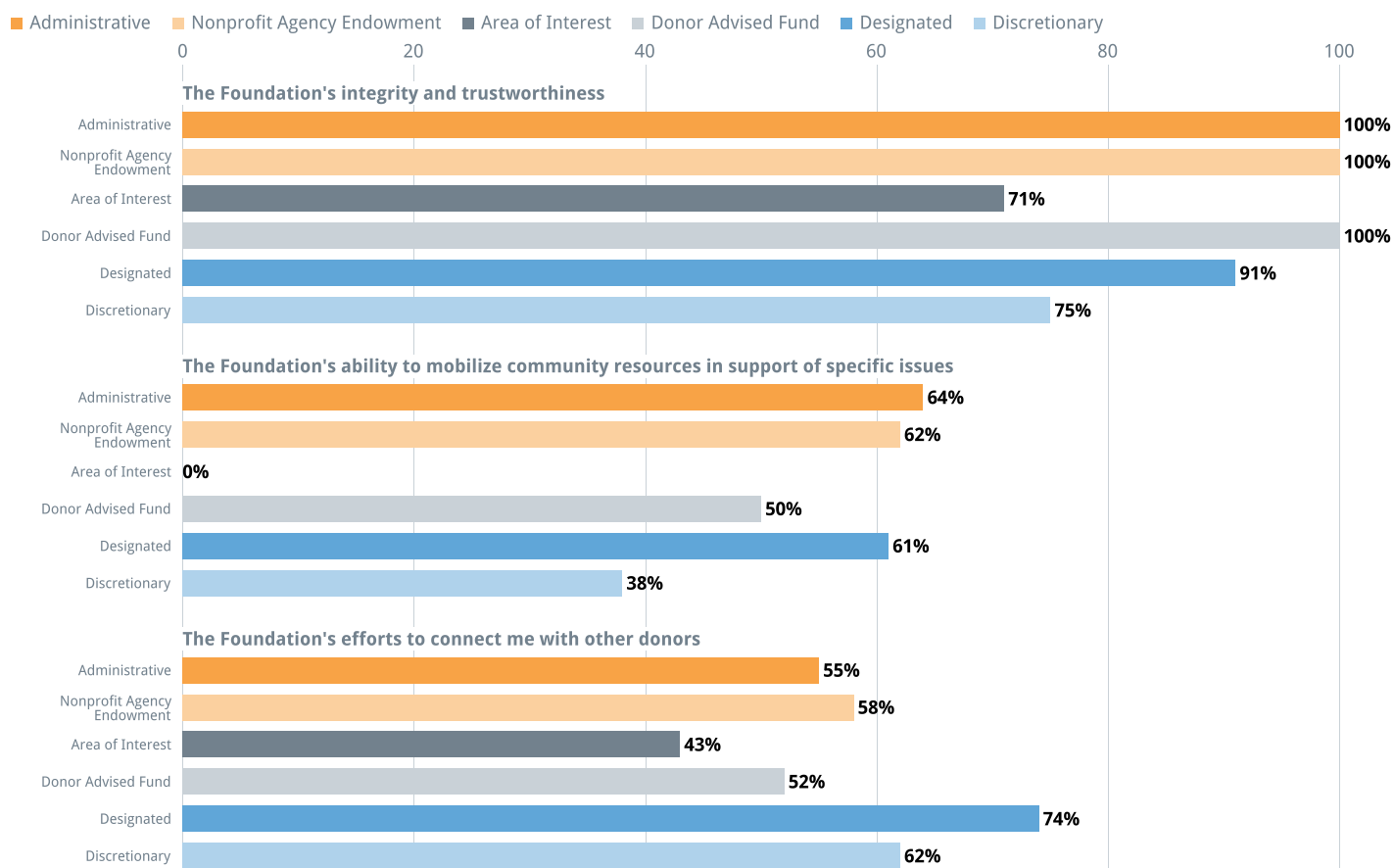
Proportion of Donors Satisfied - Leadership and Knowledge - By Subgroup



Proportion of Donors Satisfied - Finance and Administrative Services - By Subgroup



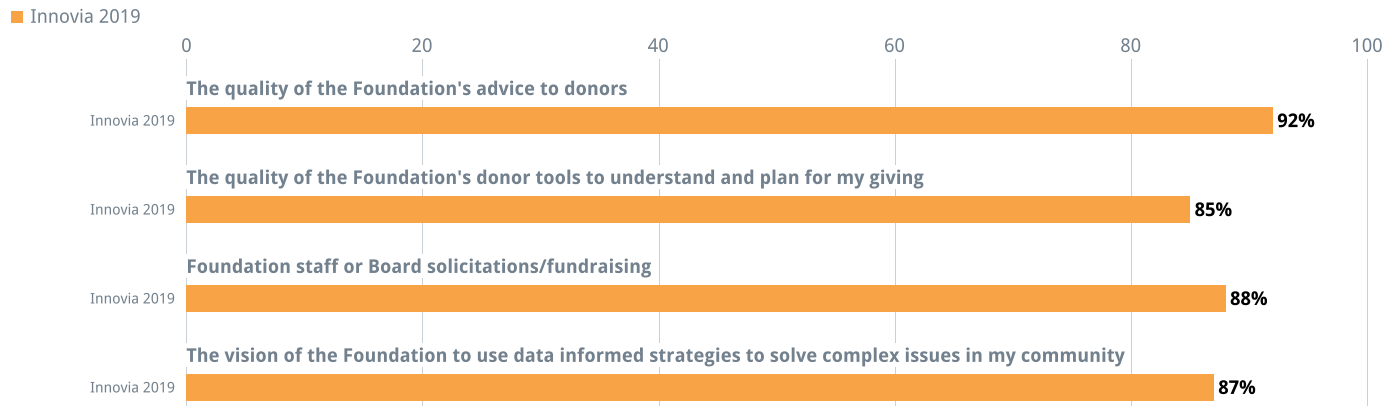
Proportion of Donors Satisfied - Reputation and Referral Network - By Subgroup



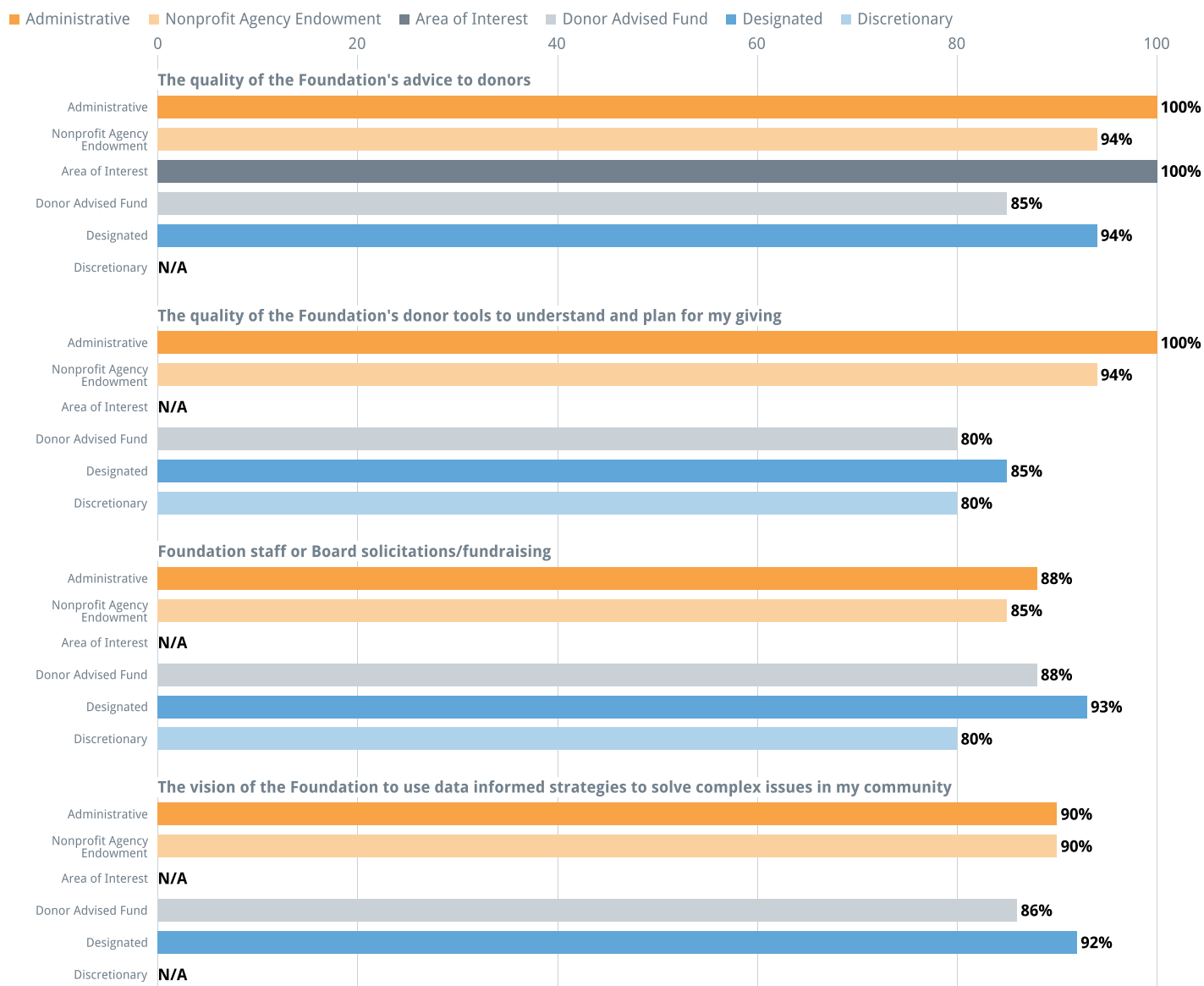
Satisfaction with Aspects of Innovia - Custom Options

"Please think about your giving to or through the Foundation *over the past 3 years*. When possible, *please indicate whether you are satisfied with the Foundation's work in each area.*"

Proportion of Donors Satisfied - Custom Options



Proportion of Donors Satisfied - Custom Options - By Fund Type

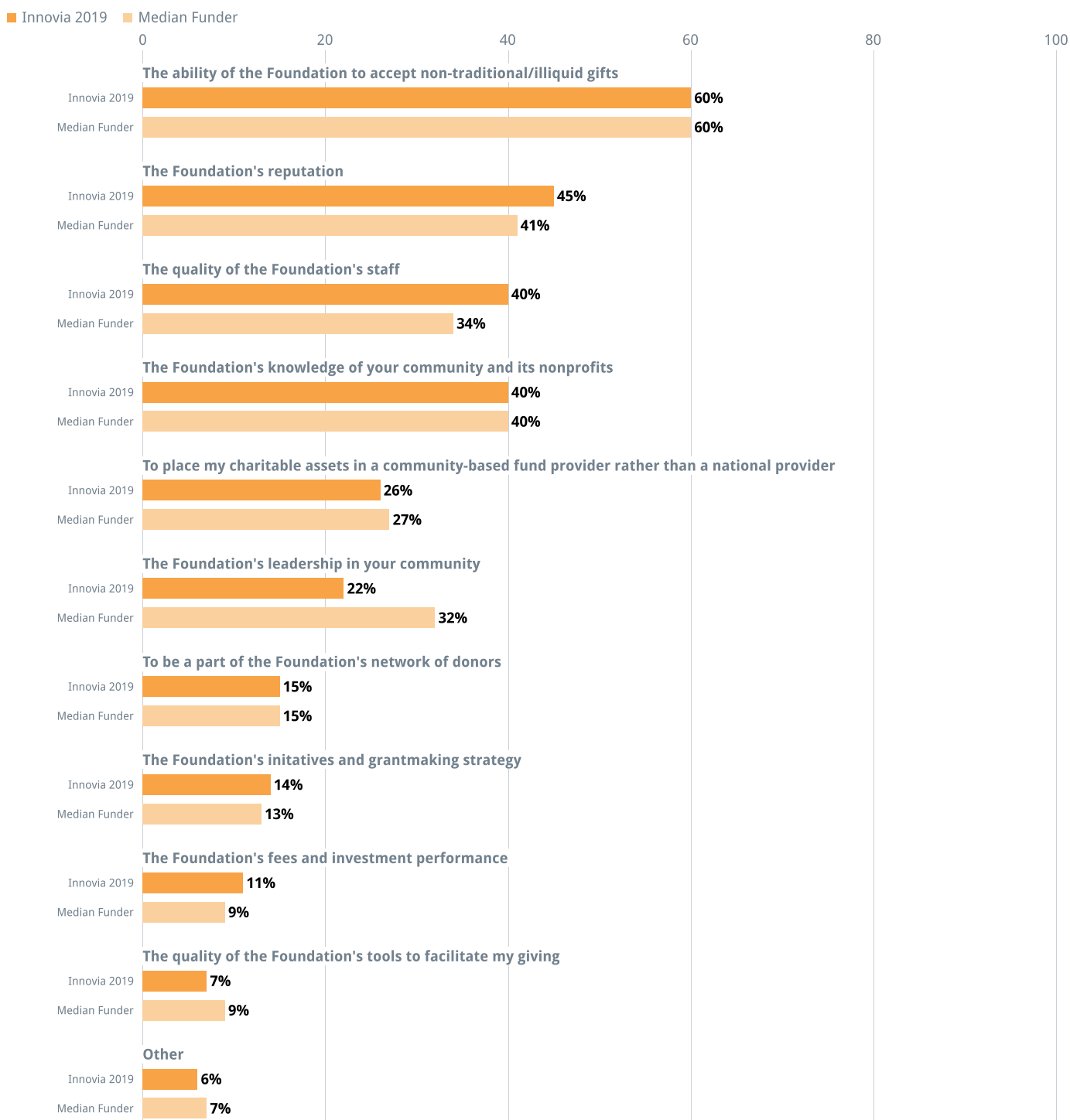


Most Important Reasons for Giving to Innovia - Overall

"From the list below, please select the top three reasons that you choose to conduct charitable giving through the Foundation over other charitable options."

Note: The question below was recently added to the donor survey and depicts comparative data from 11 funders in the dataset.

Top Reasons Donors Choose to Conduct Charitable Giving Through the Foundation Over Other Charitable Options

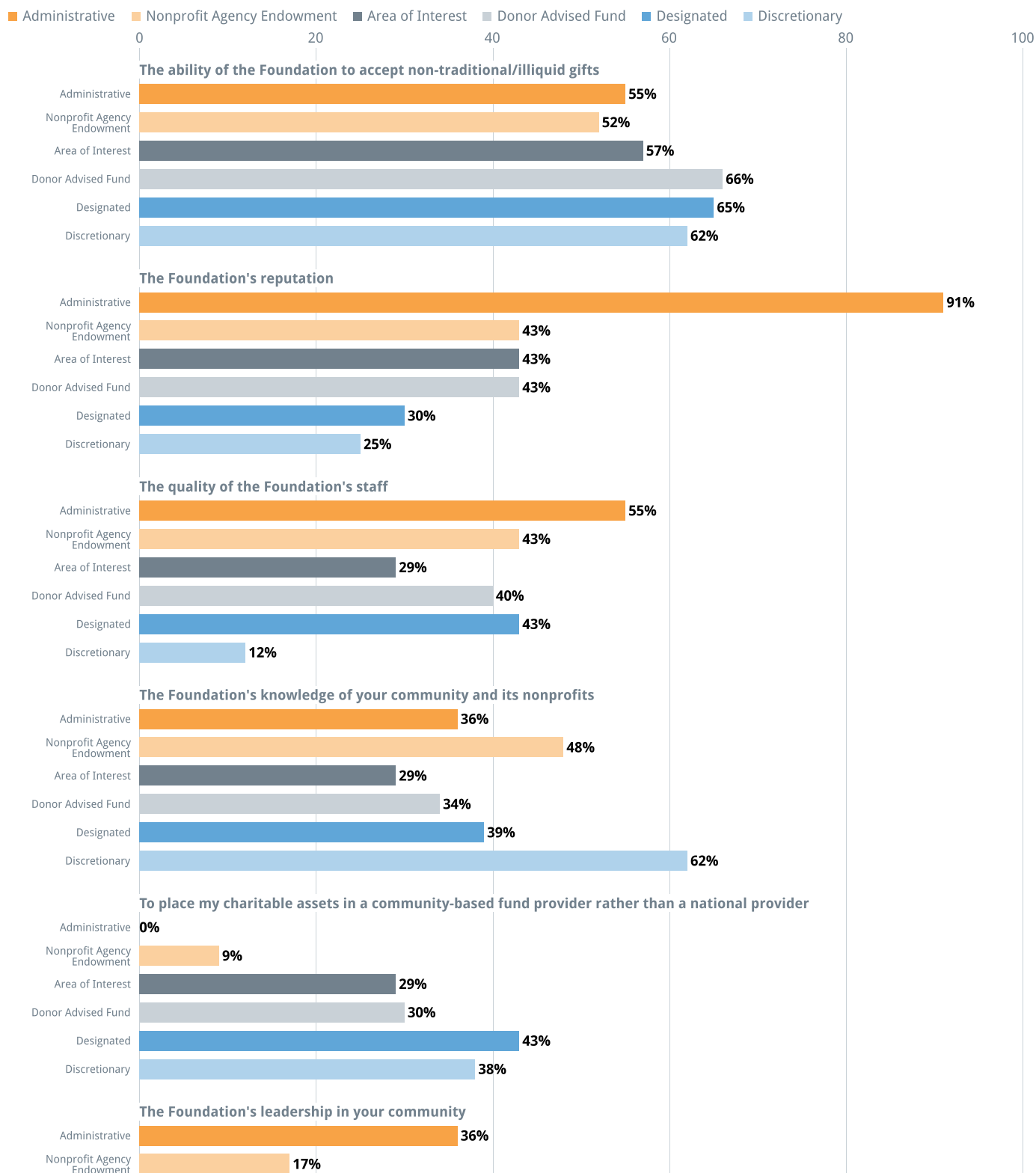


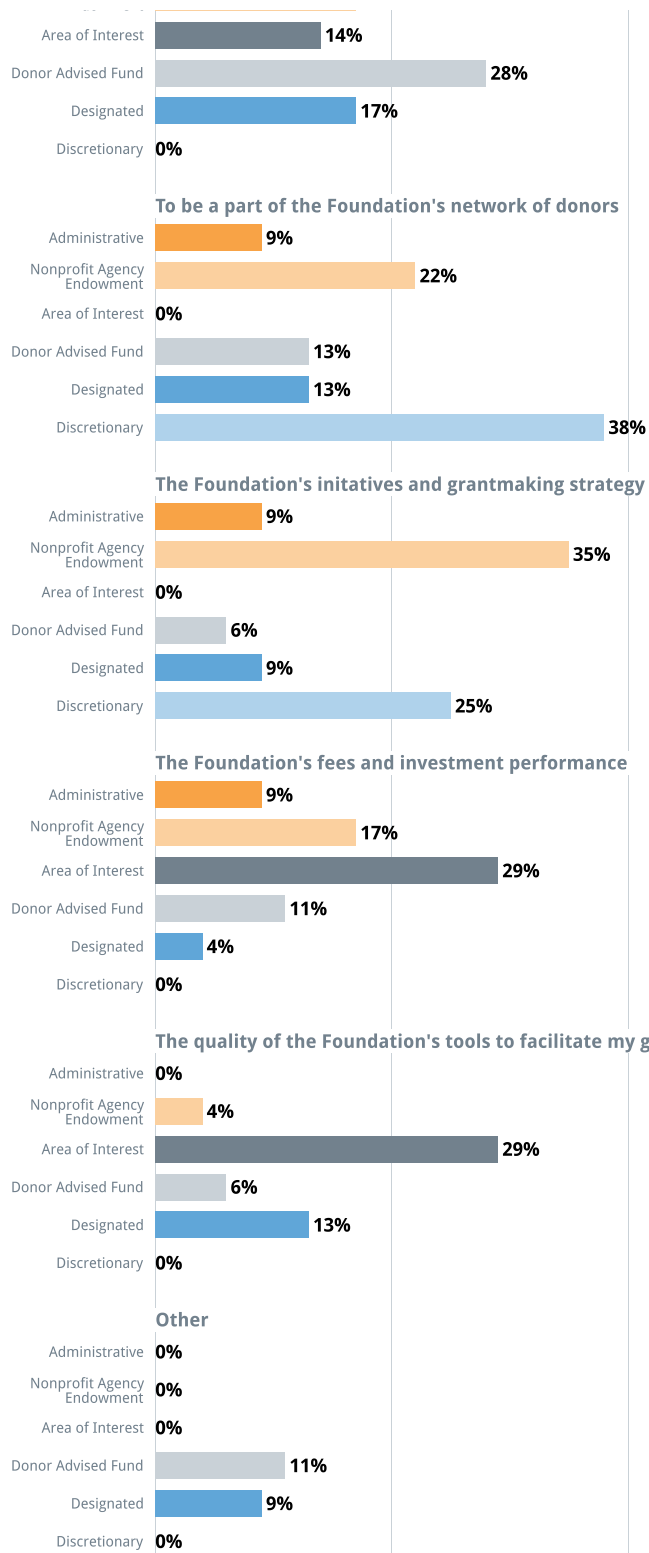
Most Important Reasons for Giving to Innovia - by Subgroup

"From the list below, please select the top three reasons that you choose to conduct charitable giving through the Foundation over other charitable options."

Note: The question below was recently added to the donor survey and depicts comparative data from 11 funders in the dataset.

Top Reasons Donors Choose to Conduct Charitable Giving Through the Foundation Over Other Charitable Options - By Subgroup

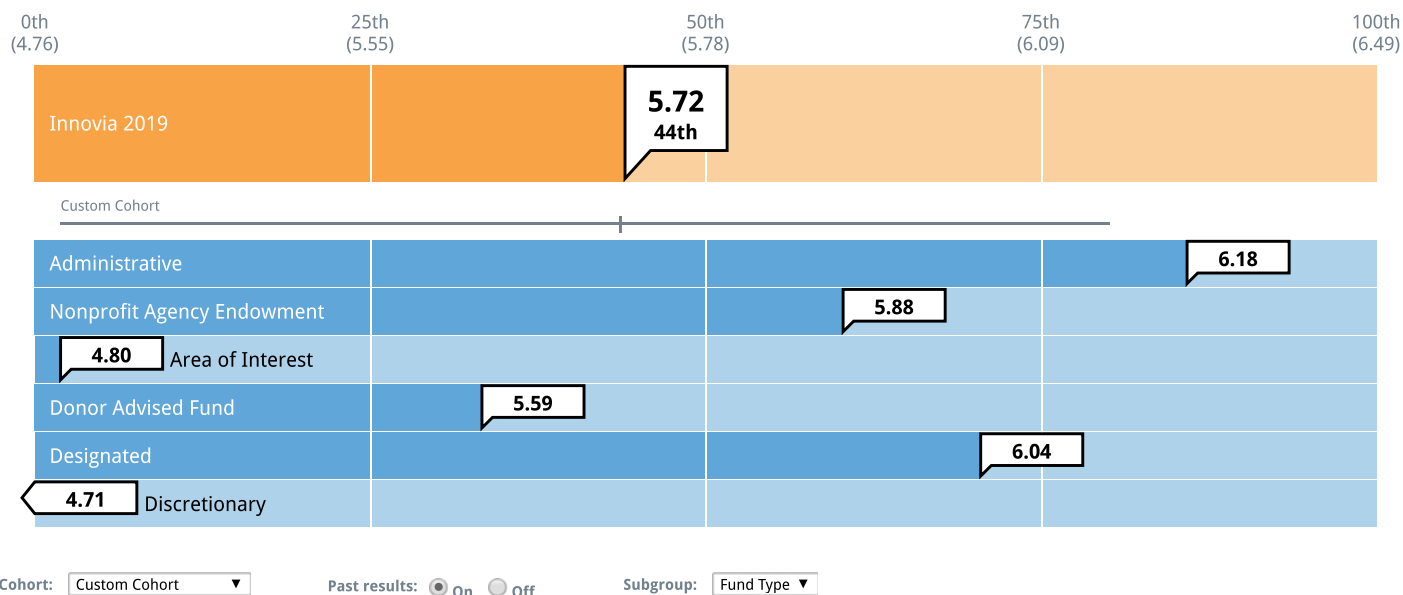




Community-Related Measures

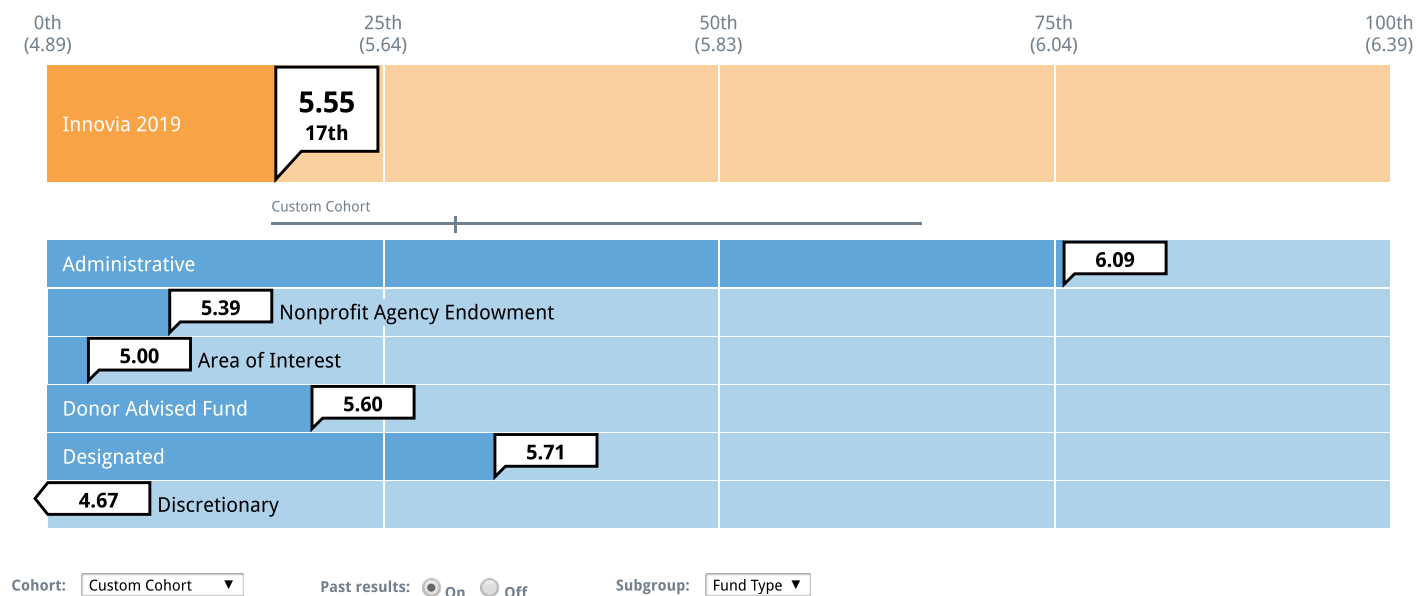
In your opinion, to what extent is the Foundation making an impact on your community?

1 = No impact 7 = Significant positive impact



How well does the Foundation understand your community?

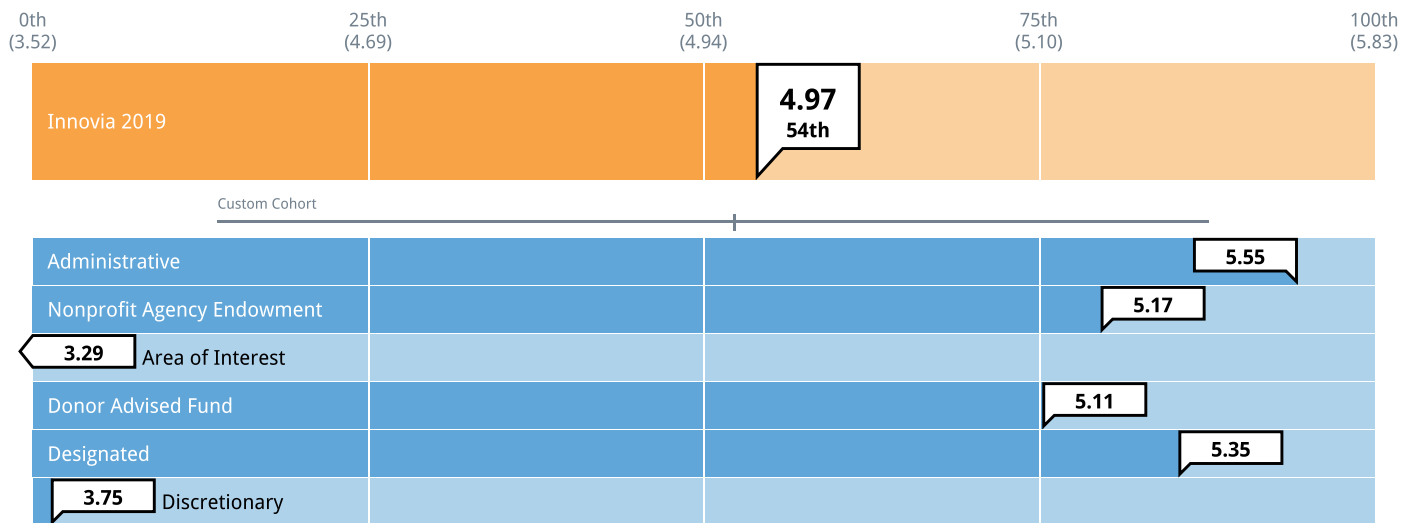
1 = Not at all well 7 = Extremely well



Donors' Connection to the Community

To what extent does working with the Foundation make you feel more connected to your community?

1 = Not at all 7 = To a great extent



Cohort: Custom Cohort ▼

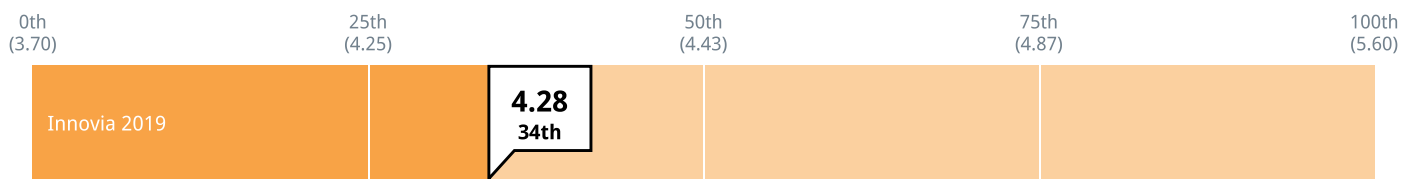
Past results: ☒ On ☐ Off

Subgroup: Fund Type ▼

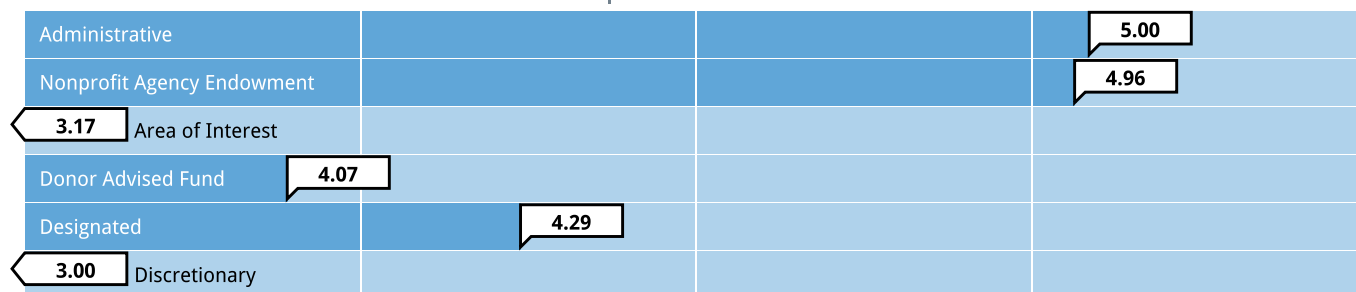
Knowledge of Innovia

How well-known do you think the Foundation is among your friends and colleagues in your community?

1 = Not at all well-known 7 = Extremely well-known



Custom Cohort



Cohort: Custom Cohort ▼

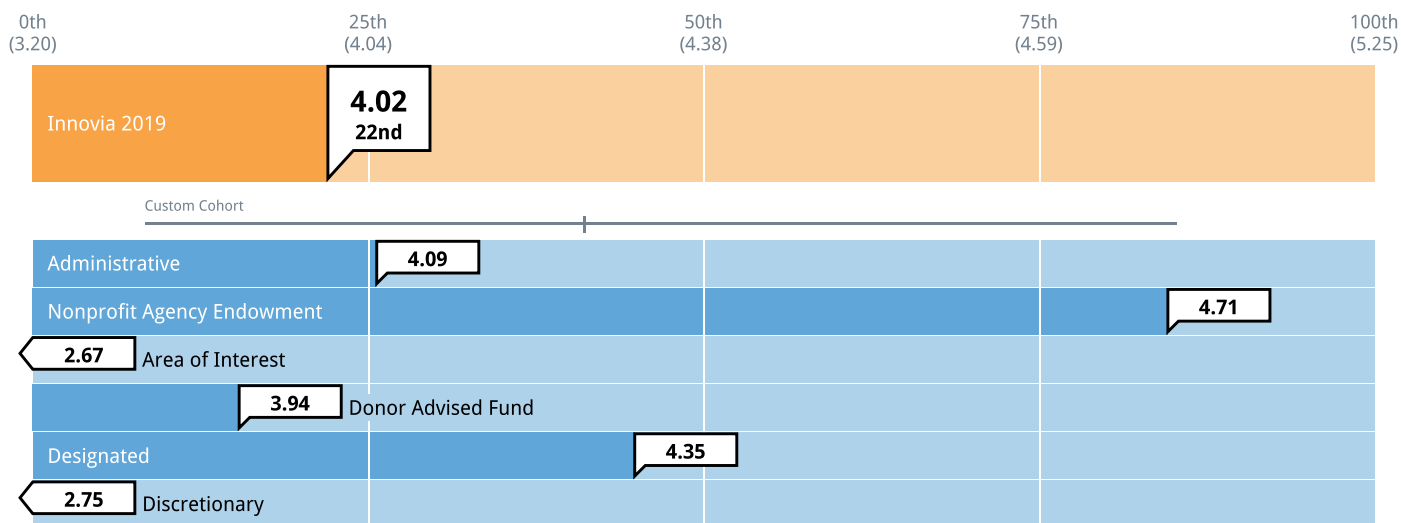
Past results: ☒ On ☐ Off

Subgroup: Fund Type ▼

Donor Impact

To what extent does working with the Foundation enhance your knowledge of the issues you care about?

1 = Level of knowledge is not changed 7 = Level of knowledge is greatly increased



Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

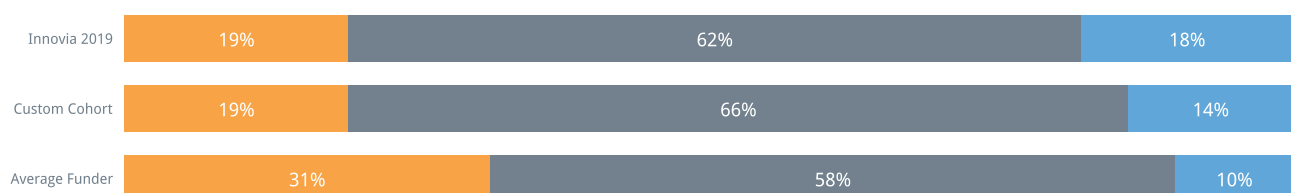
Subgroup: Fund Type ▼

Receiving Information about Community Impact

"Please indicate the frequency with which you receive information from the Foundation about its impact on the community."

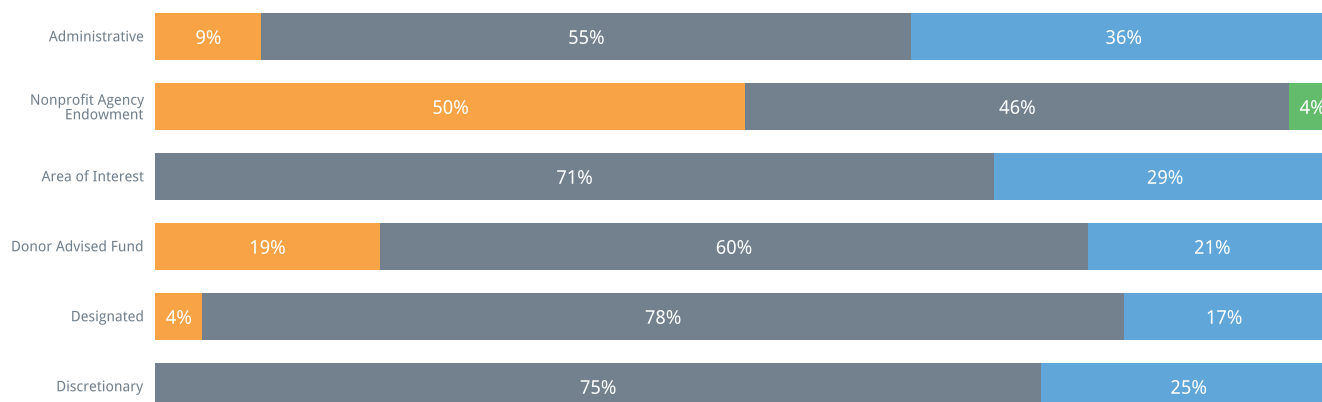
Proportion of Donors Receiving Information about the Foundation's Impact on your community

Monthly or more often Every few months Yearly or less often Never



Proportion of Donors Receiving Information about Impact on the Community - By Subgroup

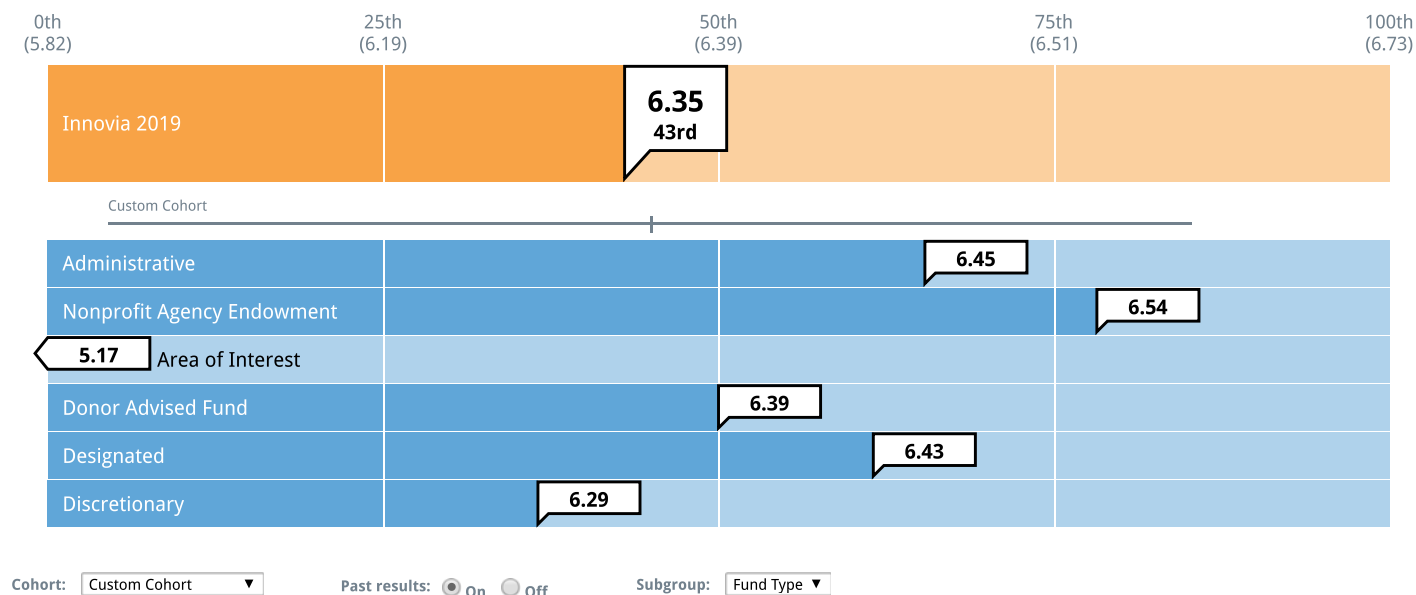
Monthly or more often Every few months Yearly or less often Never



Interactions with Donors

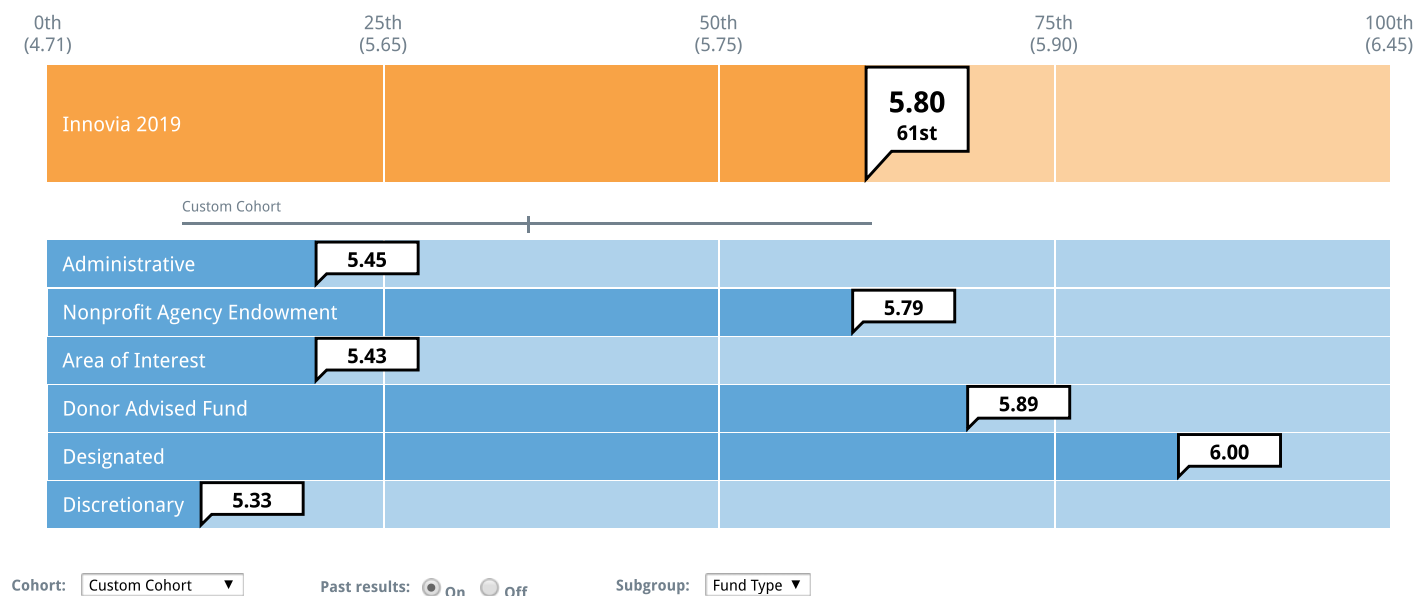
How responsive is the Foundation staff when you have a question or need assistance?

1 = Not at all responsive 7 = Extremely responsive



Overall, how transparent is the Foundation?

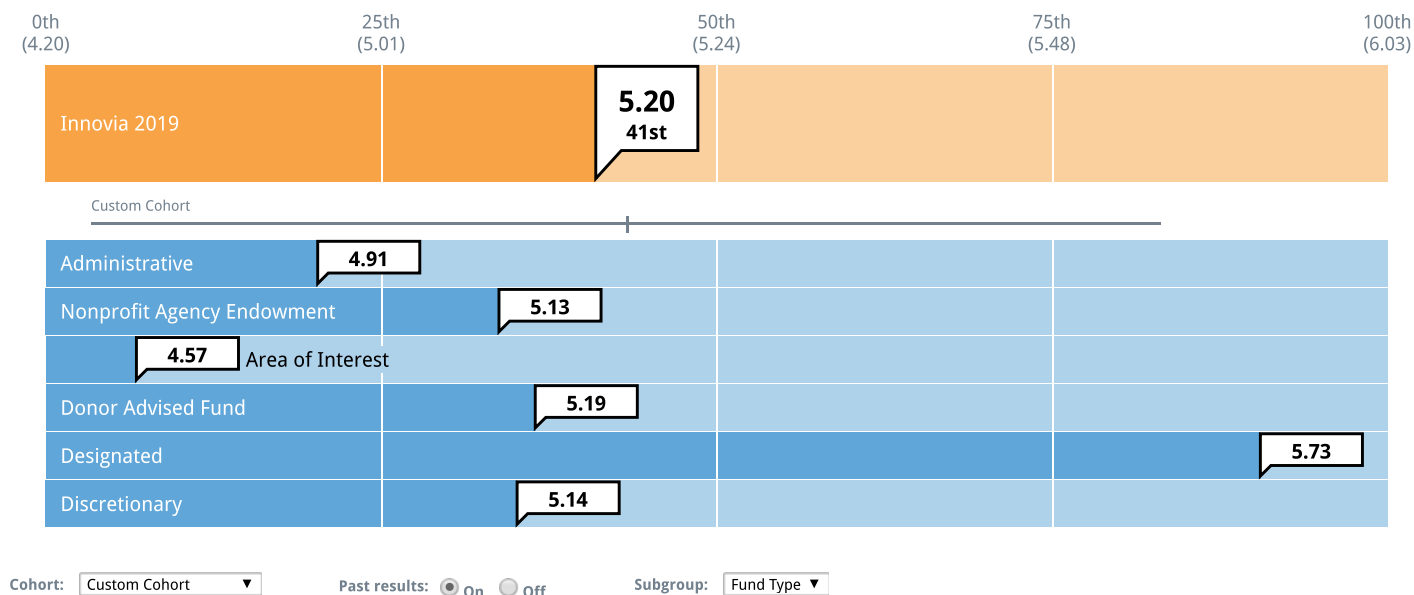
1 = Not at all transparent 7 = Extremely transparent



Foundation Communications

How clearly has the Foundation communicated its own goals to you?

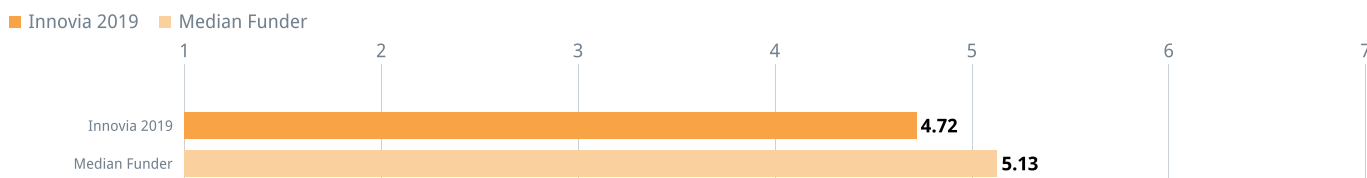
1 = Not at all clearly 7 = Extremely clearly



Note: The question below was recently added to the donor survey and depicts comparative data from 11 funders in the dataset.

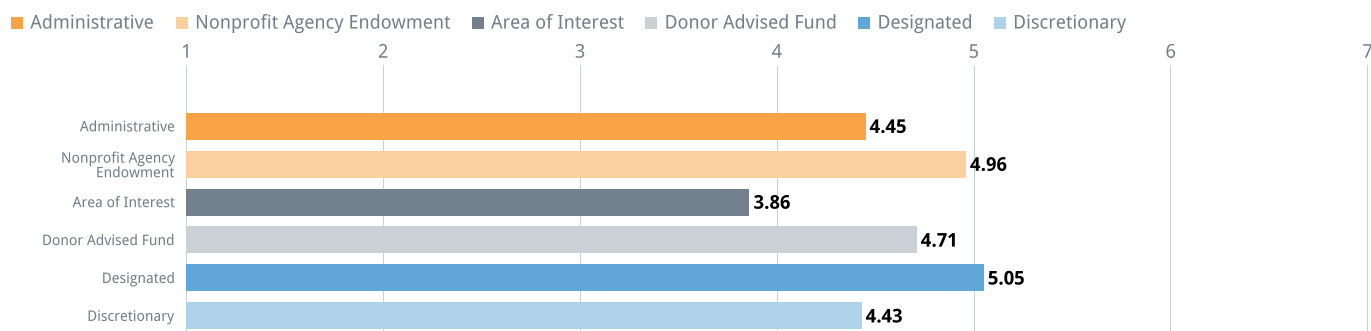
How clearly has the Foundation communicated what it has learned about your community's needs to you?

1 = Not at all clearly 7 = Extremely clearly



How clearly has the Foundation communicated what it has learned about your community's needs to you? - By Subgroup

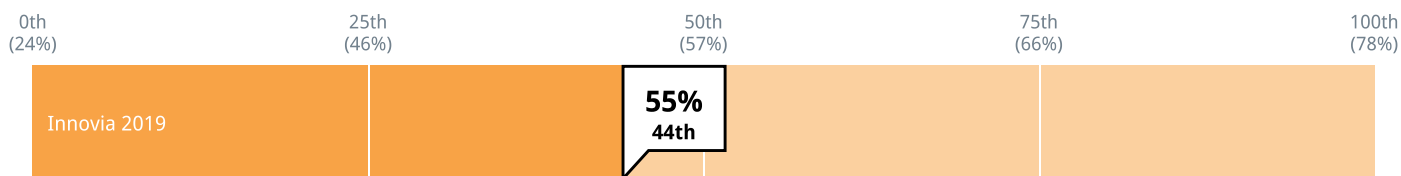
1 = Not at all clearly 7 = Extremely clearly



Donors' Charitable Goals

Have you communicated your personal charitable goals to staff at the Foundation?

Proportion who have communicated their goals



Custom Cohort

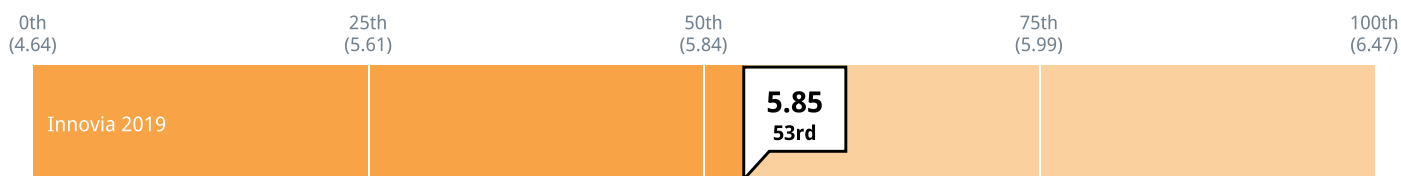
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: Fund Type ▼

In your opinion, how well does the Foundation staff understand your personal charitable goals?

1 = Limited understanding 7 = Complete understanding



Custom Cohort

Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

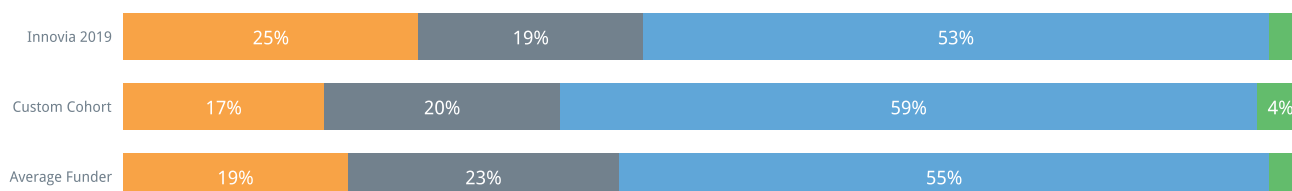
Subgroup: Fund Type ▼

Desired Relationship with Innovia

"Which among the following options best describes the type of relationship you would like to have with the Foundation around issues of giving decisions?"

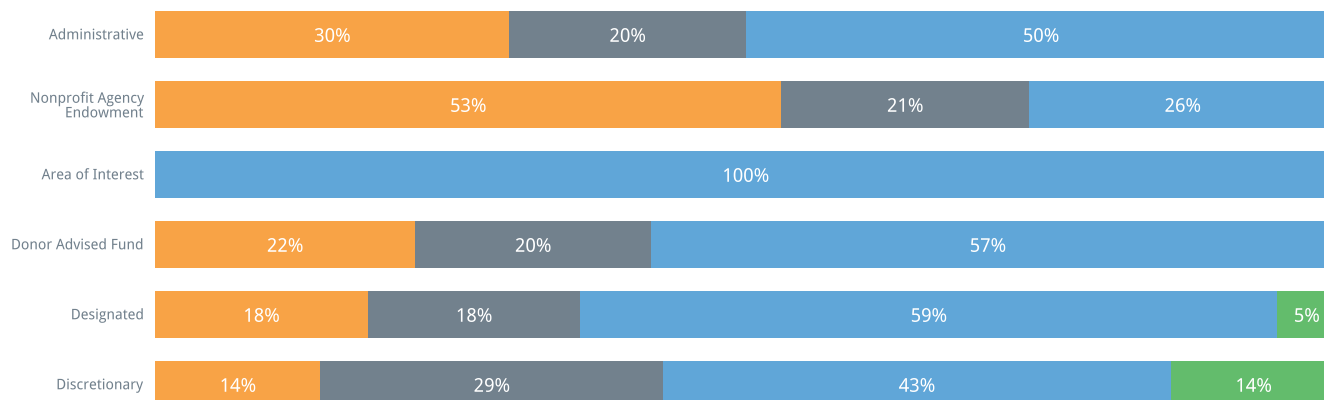
Desired Type of Relationship with the Foundation

■ Want a partner for advice
 ■ Want some assistance with giving decisions
 ■ Want to be self-sufficient and use the Foundation mostly to manage funds
 ■ Other



Desired Type of Relationship with the Foundation - By Subgroup

■ Want a partner for advice
 ■ Want some assistance with giving decisions
 ■ Want to be self-sufficient and use the Foundation mostly to manage funds
 ■ Other

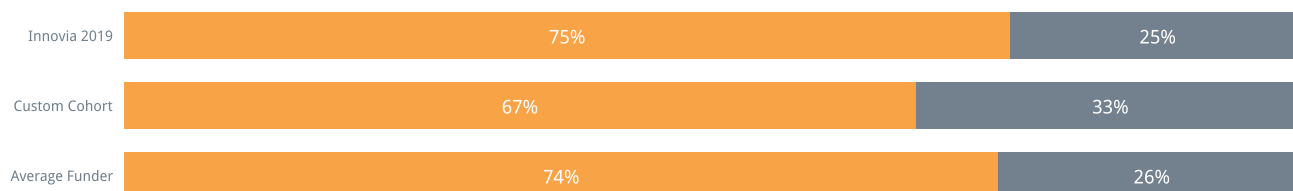


Designated Contact at Innovia

"Do you have a designated contact at the Foundation whom you can reach out to with questions or concerns?"

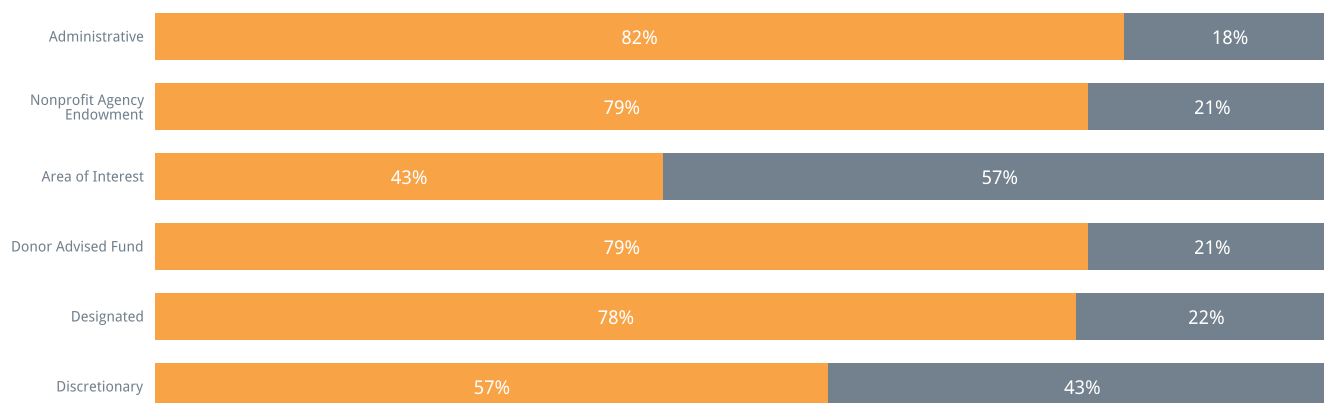
Designated Contact at the Foundation

■ I have a designated contact ■ I do not have a designated contact



Designated Contact at the Foundation - By Subgroup

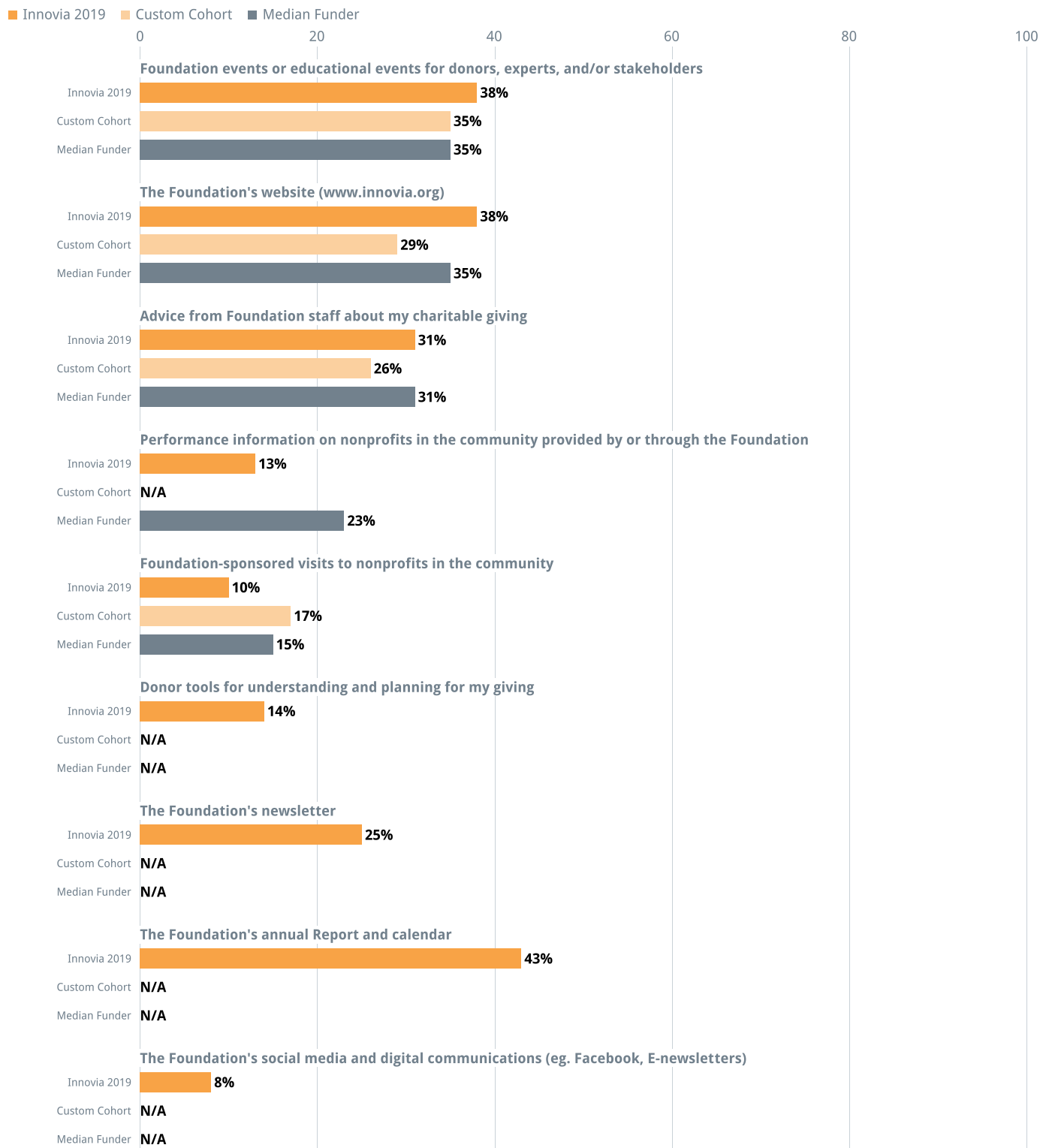
■ I have a designated contact ■ I do not have a designated contact



Donor Resources

"Where applicable, please indicate which of the following Innovia Foundation resources or services you use *to achieve your charitable giving goals, and the helpfulness of each.*"

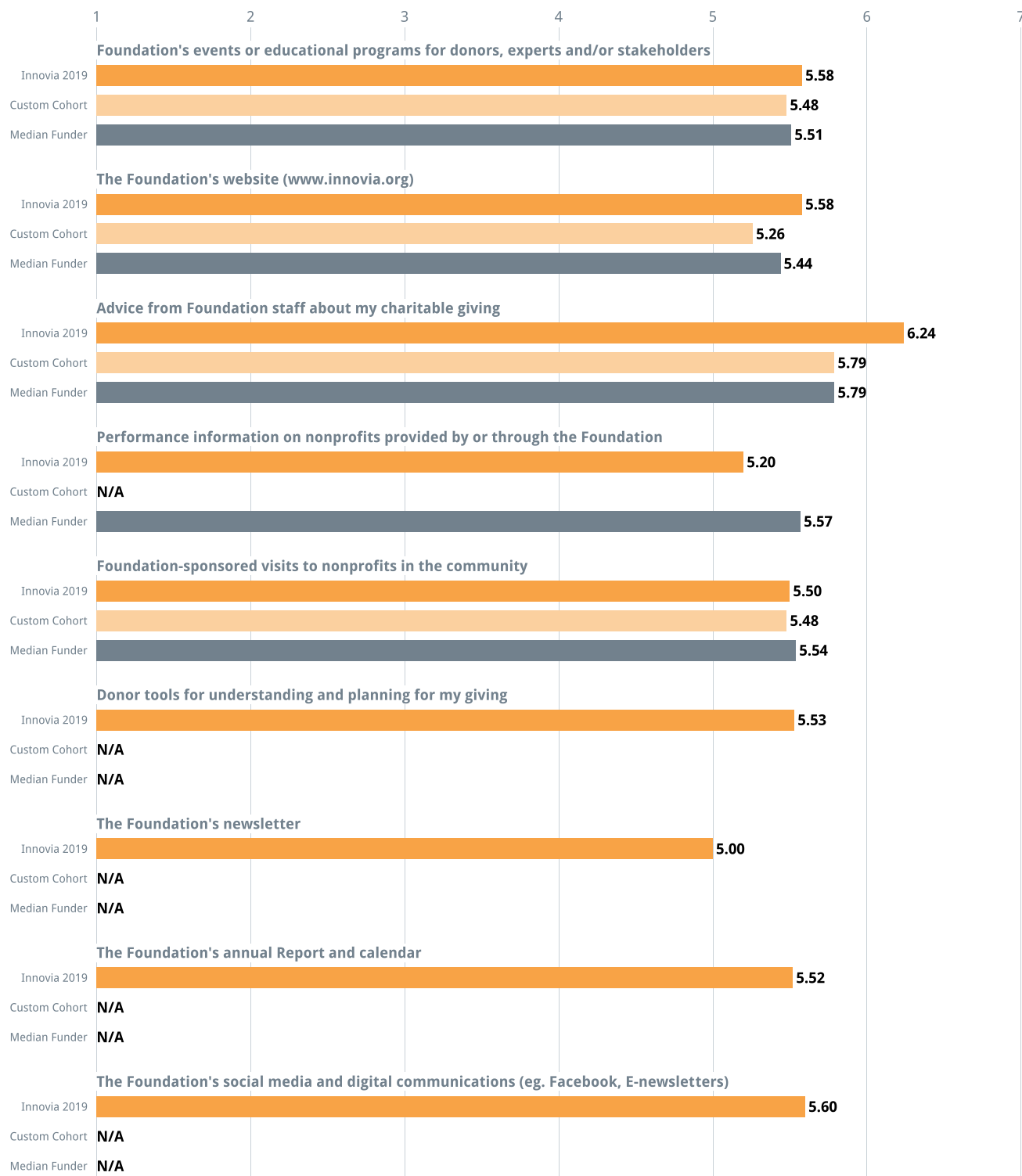
Use of Resources to Achieve Donor Goals



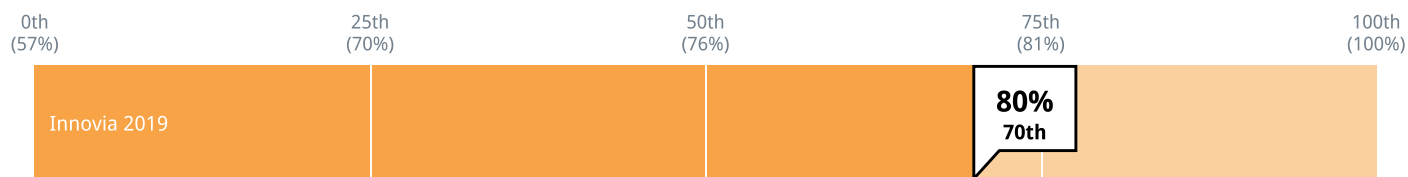
Helpfulness of Donor Resources

1 = Not at all helpful 7 = Extremely helpful

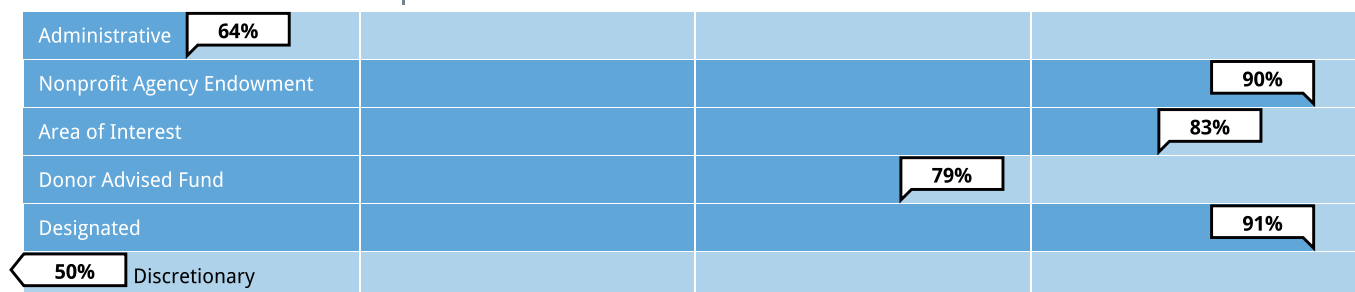
Innovia 2019 Custom Cohort Median Funder



Proportion of donors who have used at least one Foundation resource



Custom Cohort



Cohort: Custom Cohort ▼

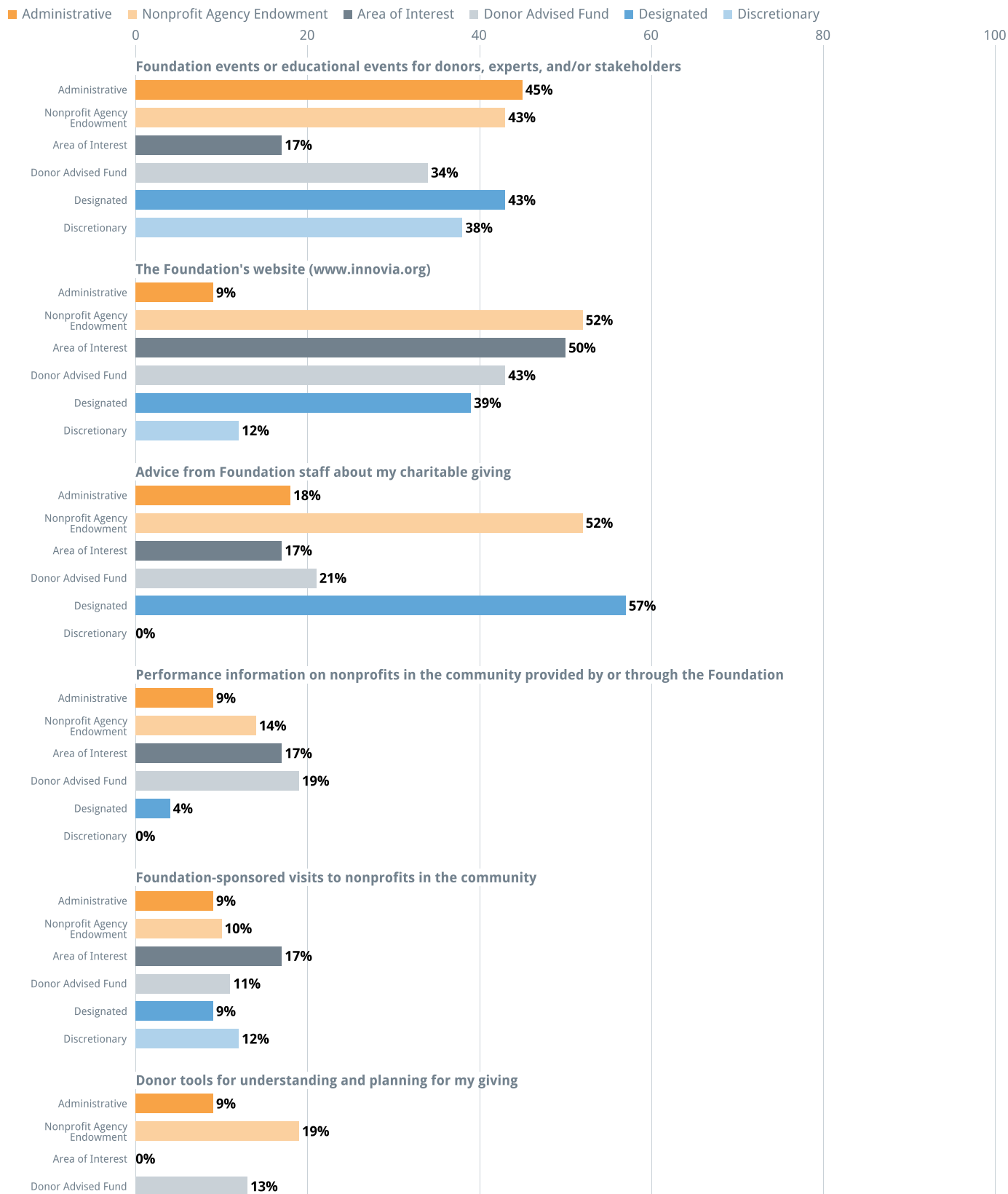
Past results: ☒ On ☐ Off

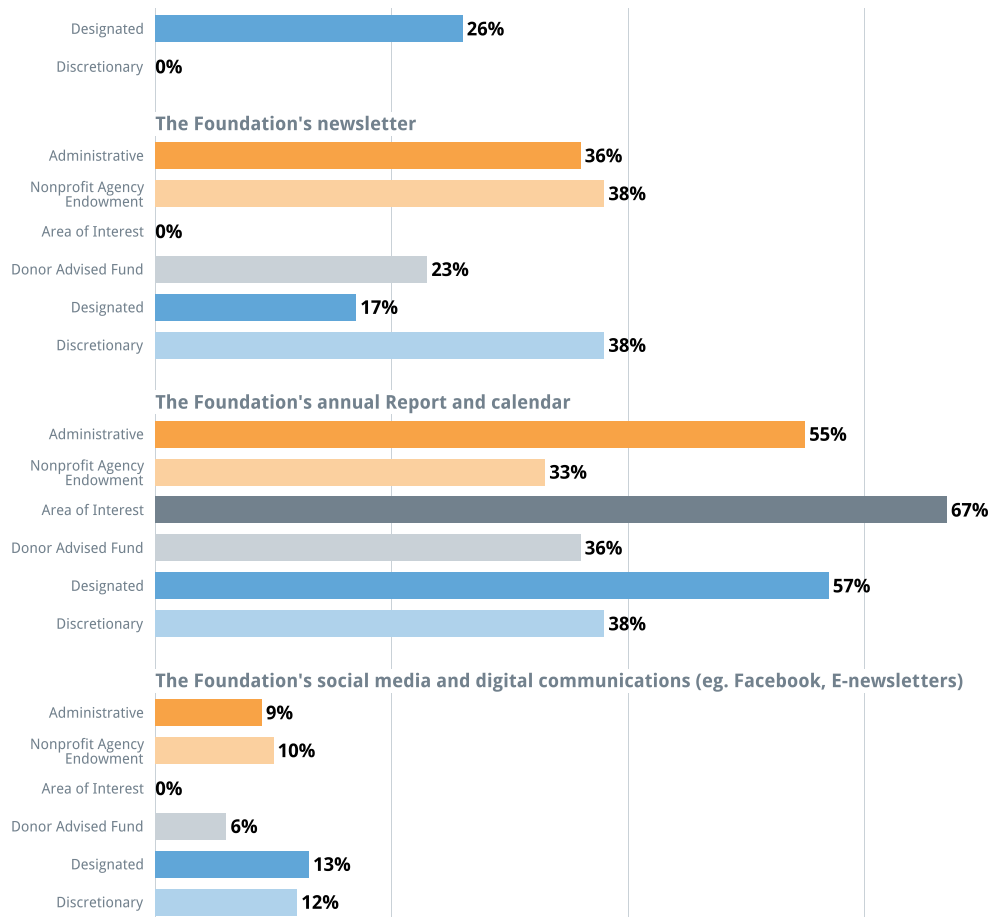
Subgroup: Fund Type ▼

Donor Resources - by Subgroup

"Where applicable, please indicate which of the following Foundation resources or services you use *to achieve your charitable giving goals*, and the helpfulness of each."

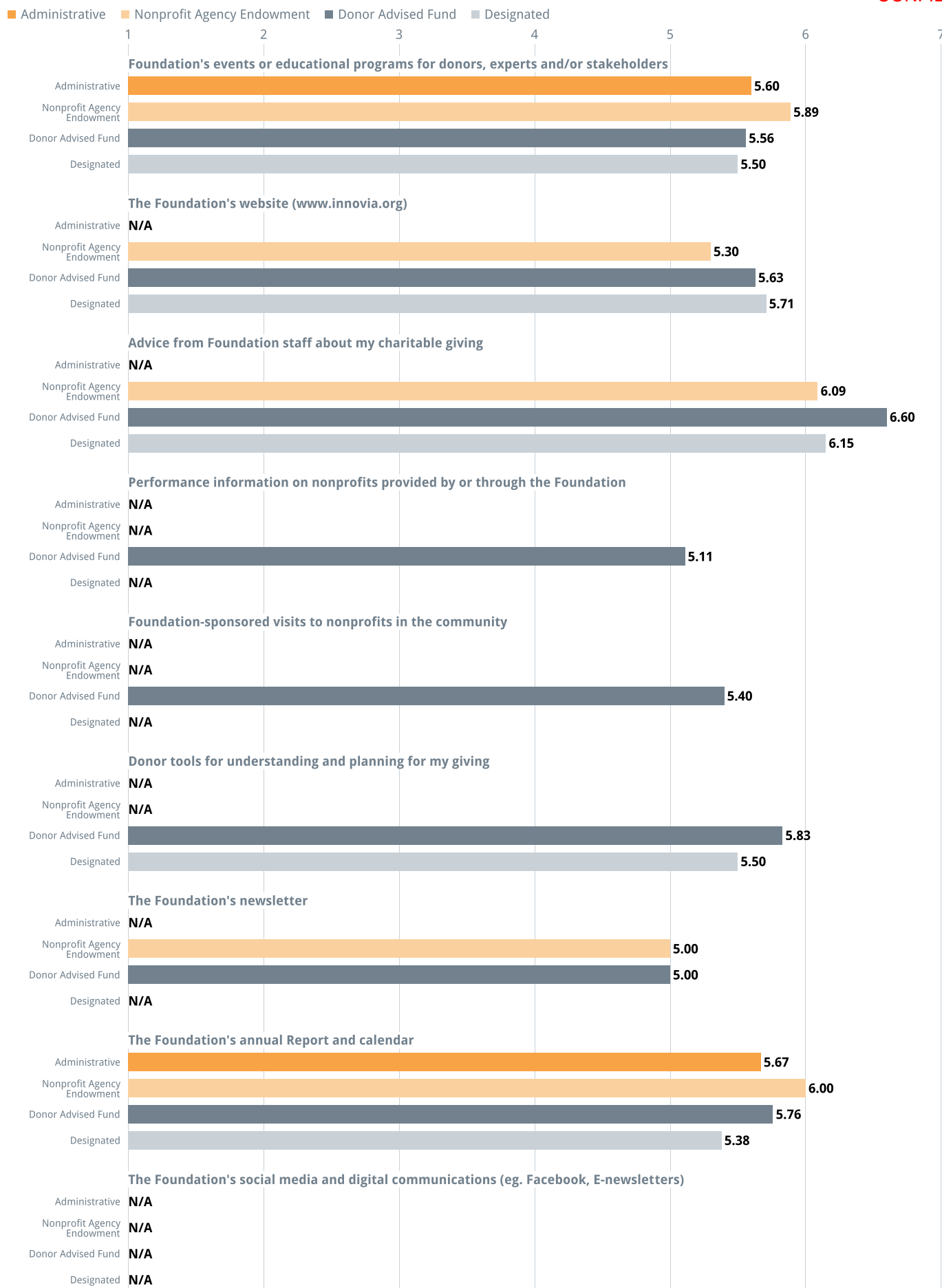
Use of Resources to Achieve Donor Goals - By Subgroup





Helpfulness of Donor Resources - By Subgroup

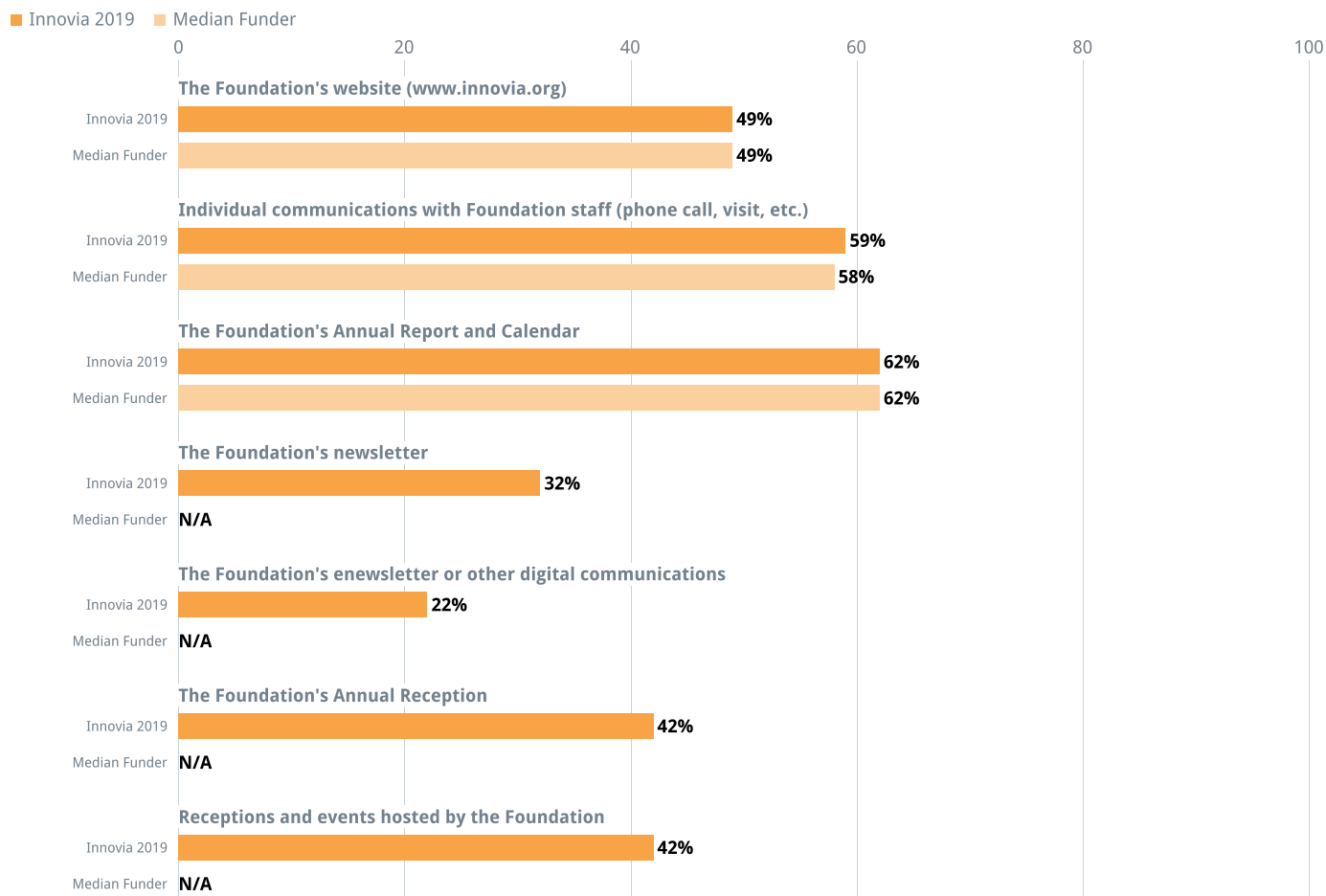
1 = Not at all helpful 7 = Extremely helpful



Resources to Learn about the Foundation's Work

"Please indicate whether you use any of the following Foundation resources *to learn about the Foundation's work*, and if so how helpful each is for keeping abreast of the Foundation's work."

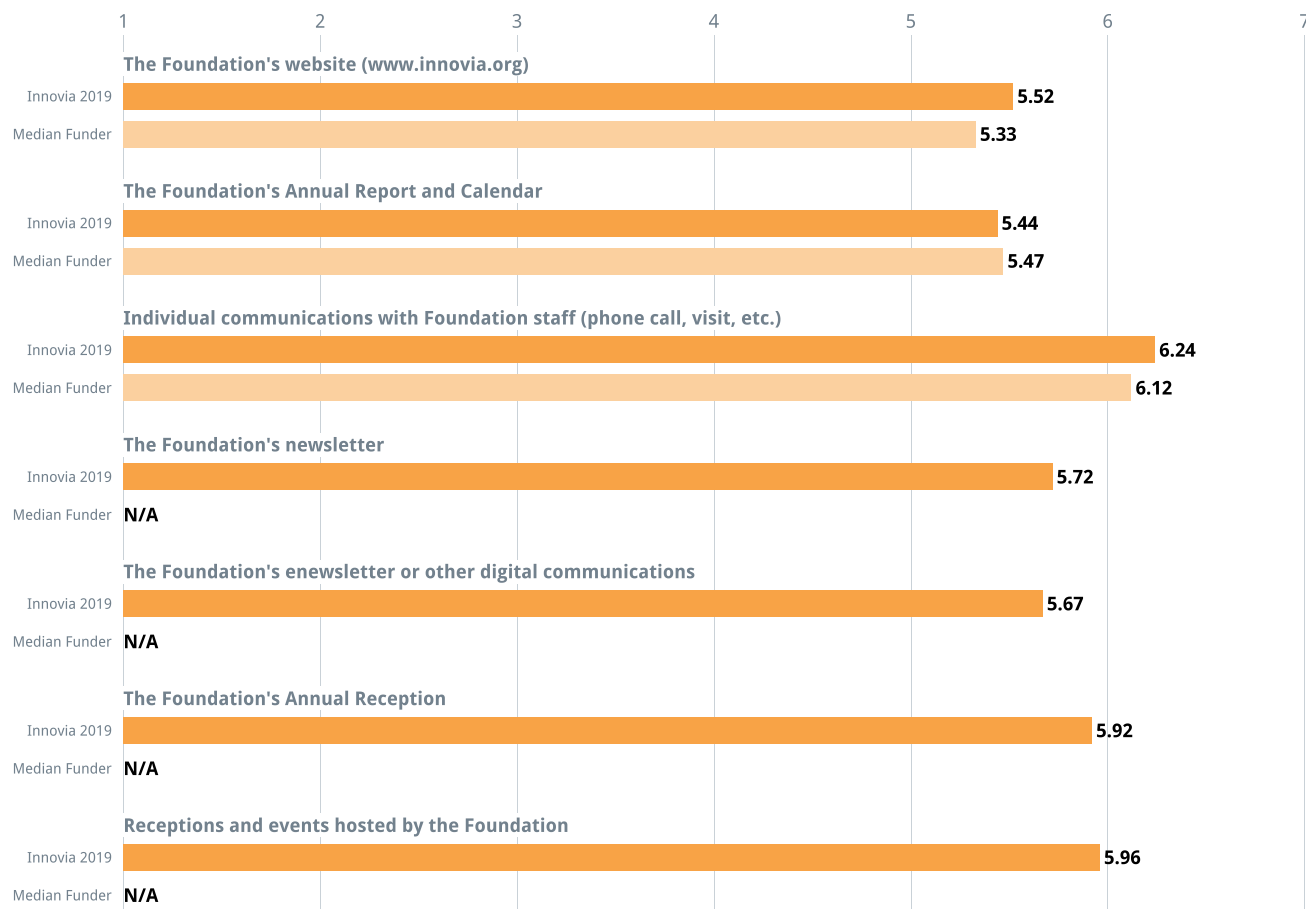
Use of Resources to Learn about the Foundation's Work



Helpfulness of Resources to Learn about the Foundation's Work

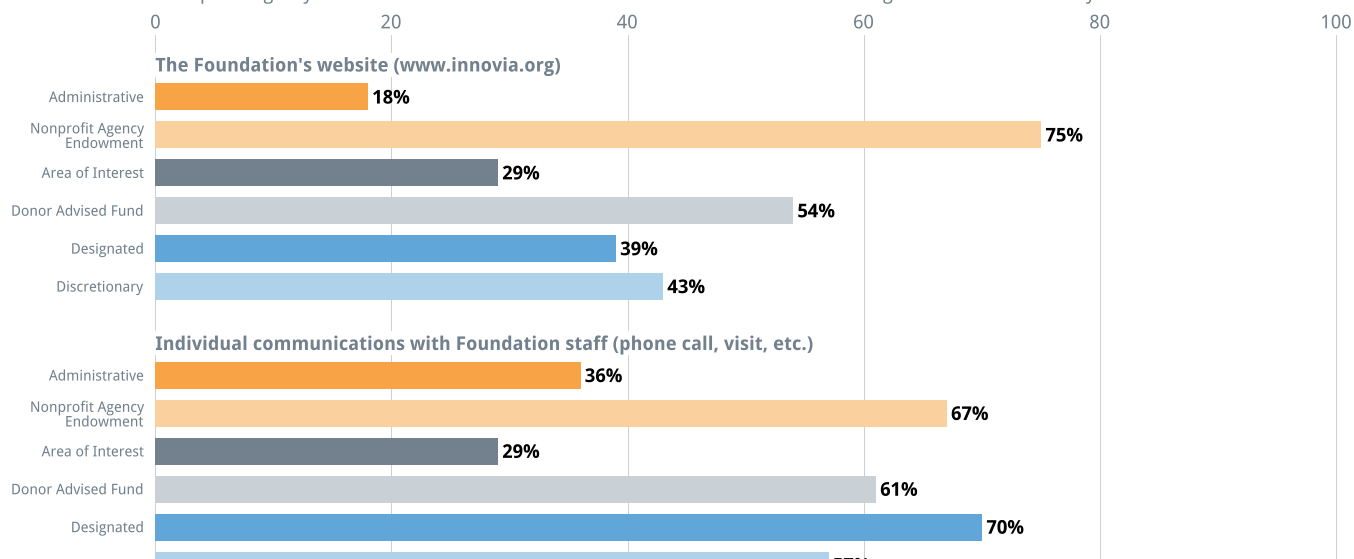
1 = Not at all helpful 7 = Extremely helpful

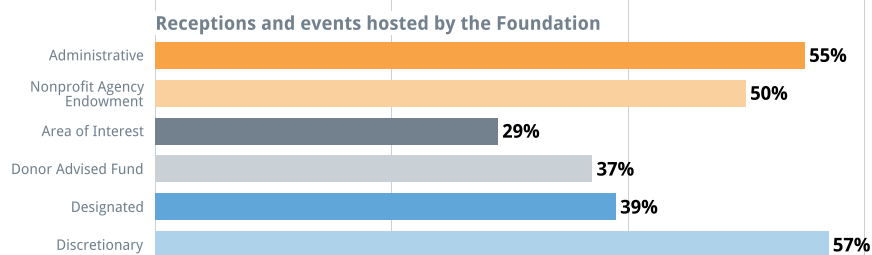
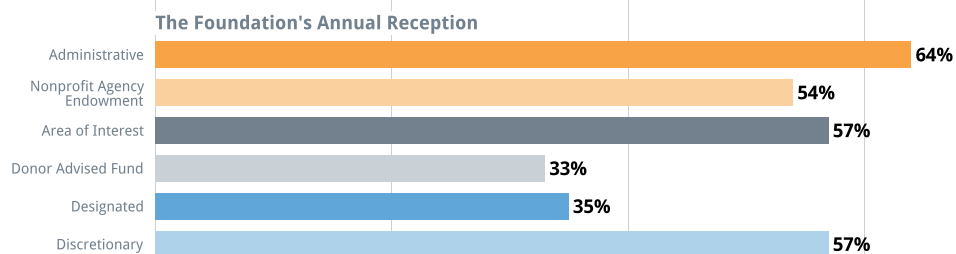
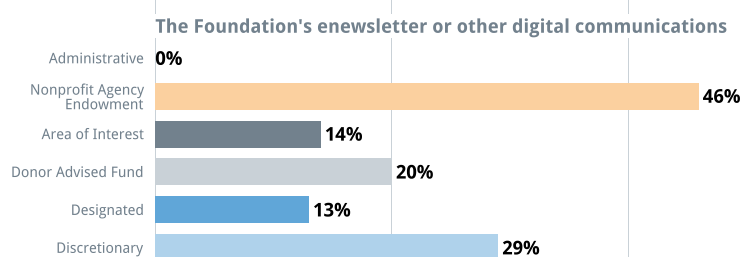
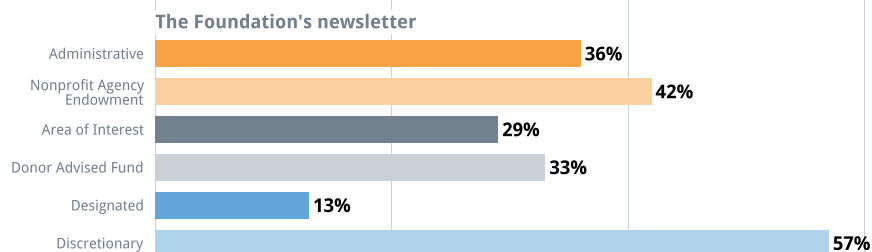
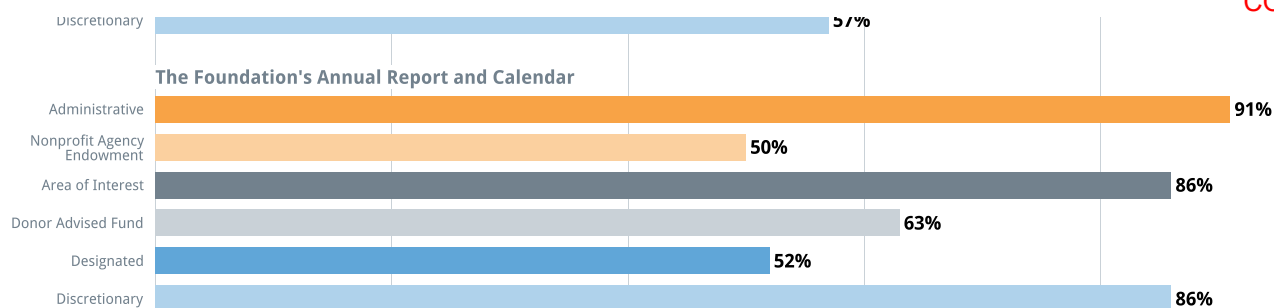
Innovia 2019 Median Funder



Use of Resources to Learn about the Foundation's Work - By Subgroup

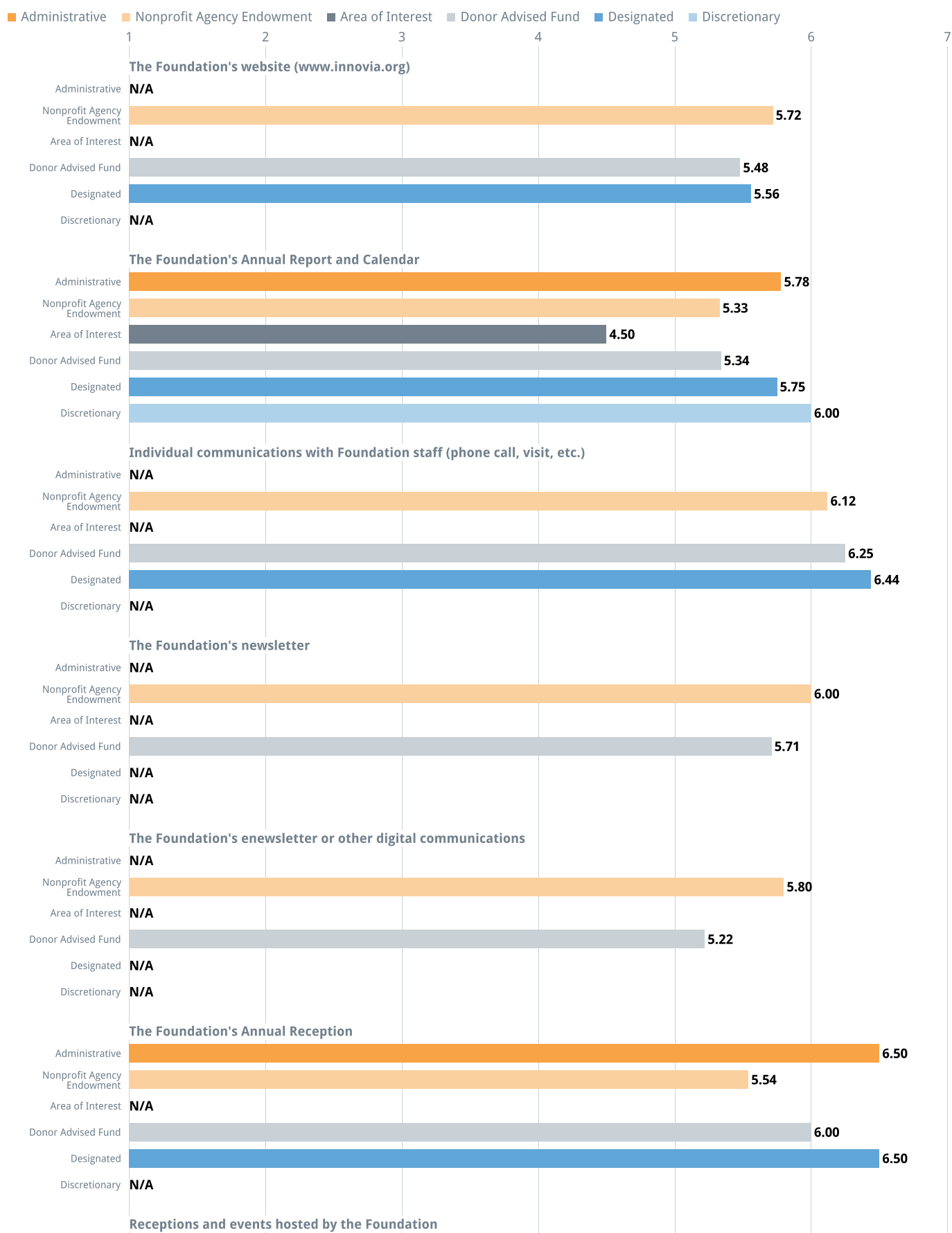
Administrative Nonprofit Agency Endowment Area of Interest Donor Advised Fund Designated Discretionary

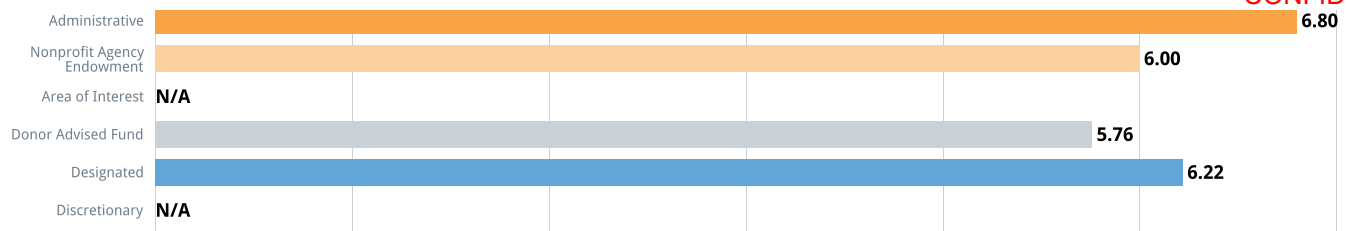




Helpfulness of Resources to Learn about the Foundation's Work - By Subgroup

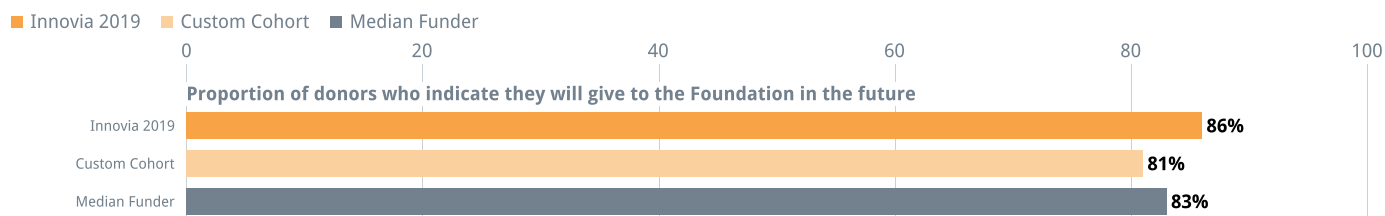
1 = Not at all helpful 7 = Extremely helpful



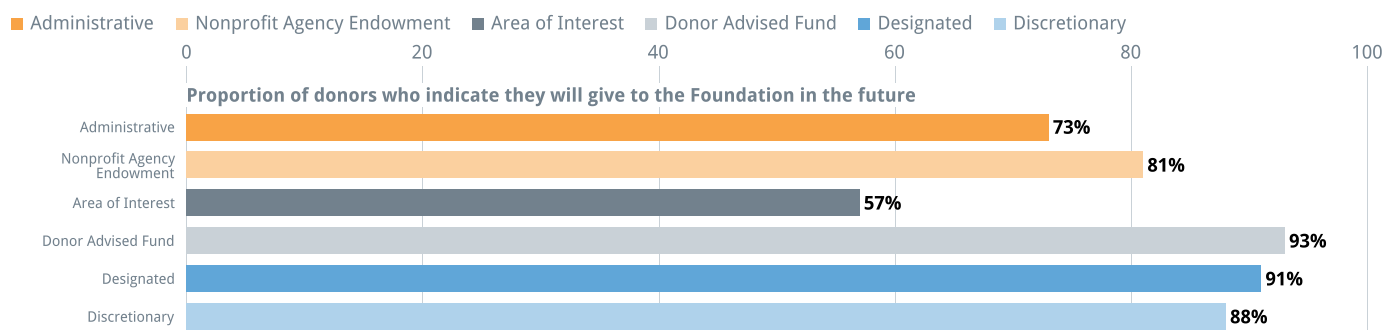


Future Giving

Proportion of Donors who Indicate They Will Give to the Foundation in the Future



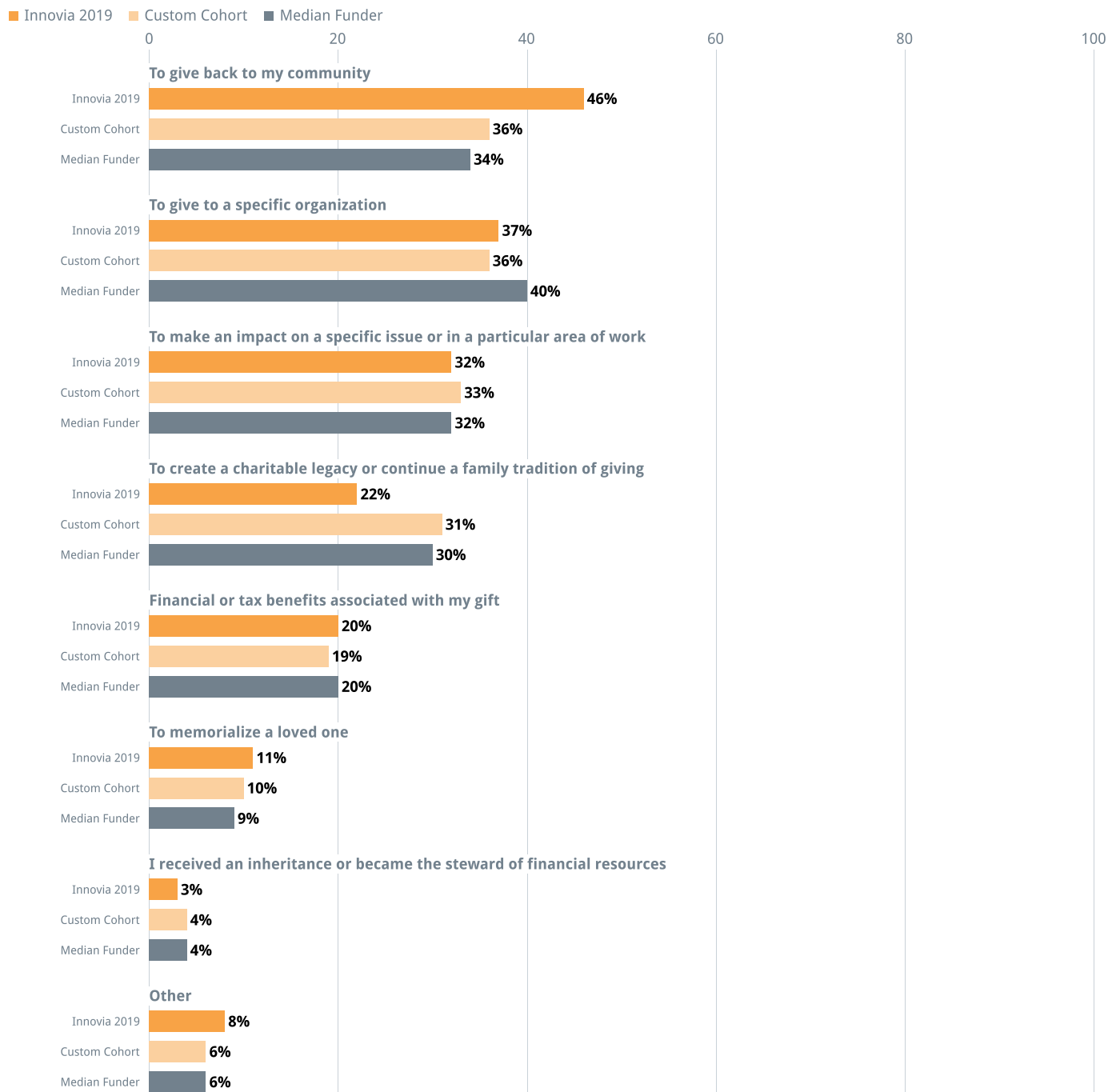
Proportion of Donors who Indicate They Will Give to the Foundation in the Future - By Fund Type



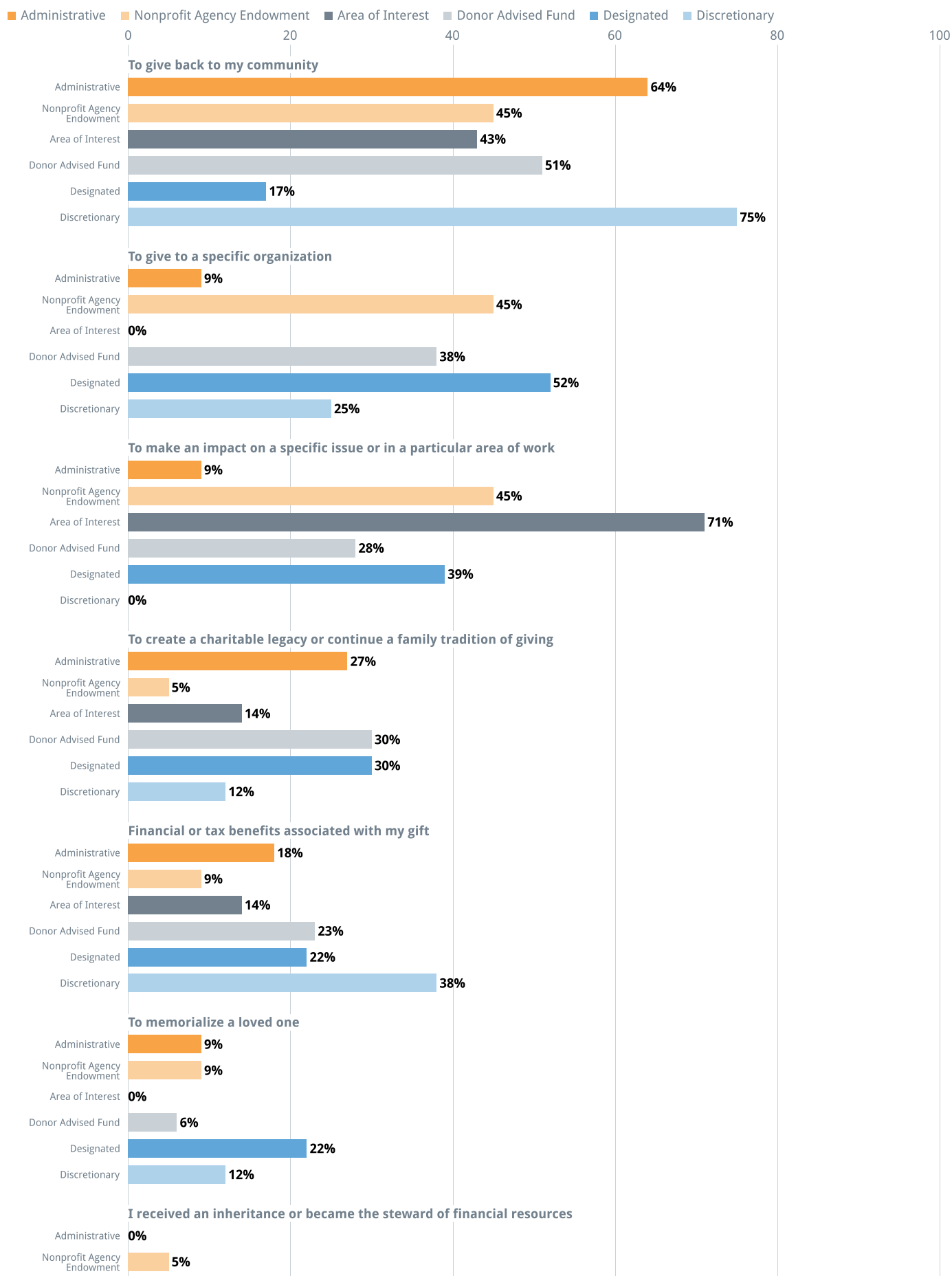
Motivation for Contribution

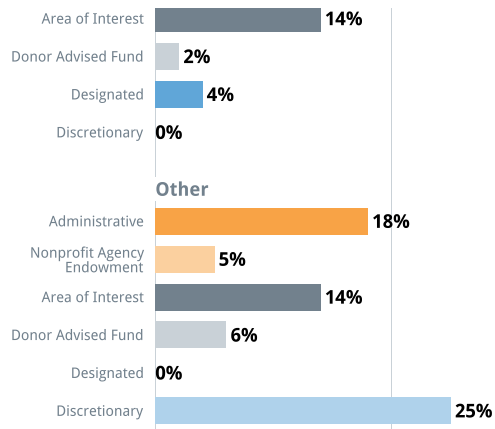
"Please think back about your giving to or through the Foundation over the past three years. Choose among the following options the two most important reasons you give to or through the Foundation."

Most Important Reasons for Giving to or Through the Foundation Over Past Three Years



Most Important Reasons for Giving to or Through the Foundation Over Past Three Years - By Fund Type





Characteristics of Future Giving

"How would you characterize your plans for future giving to the Foundation or to your fund over the next five to ten years, relative to your contributions in the past?"

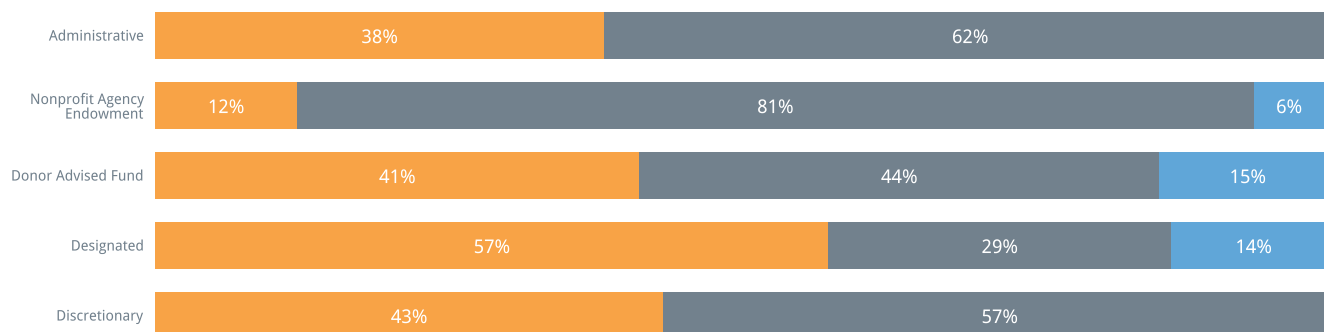
Future Giving Relative to Past Contributions

■ Likely to increase contribution level
 ■ Likely to continue giving at the same contribution level
 ■ Likely to decrease contribution level



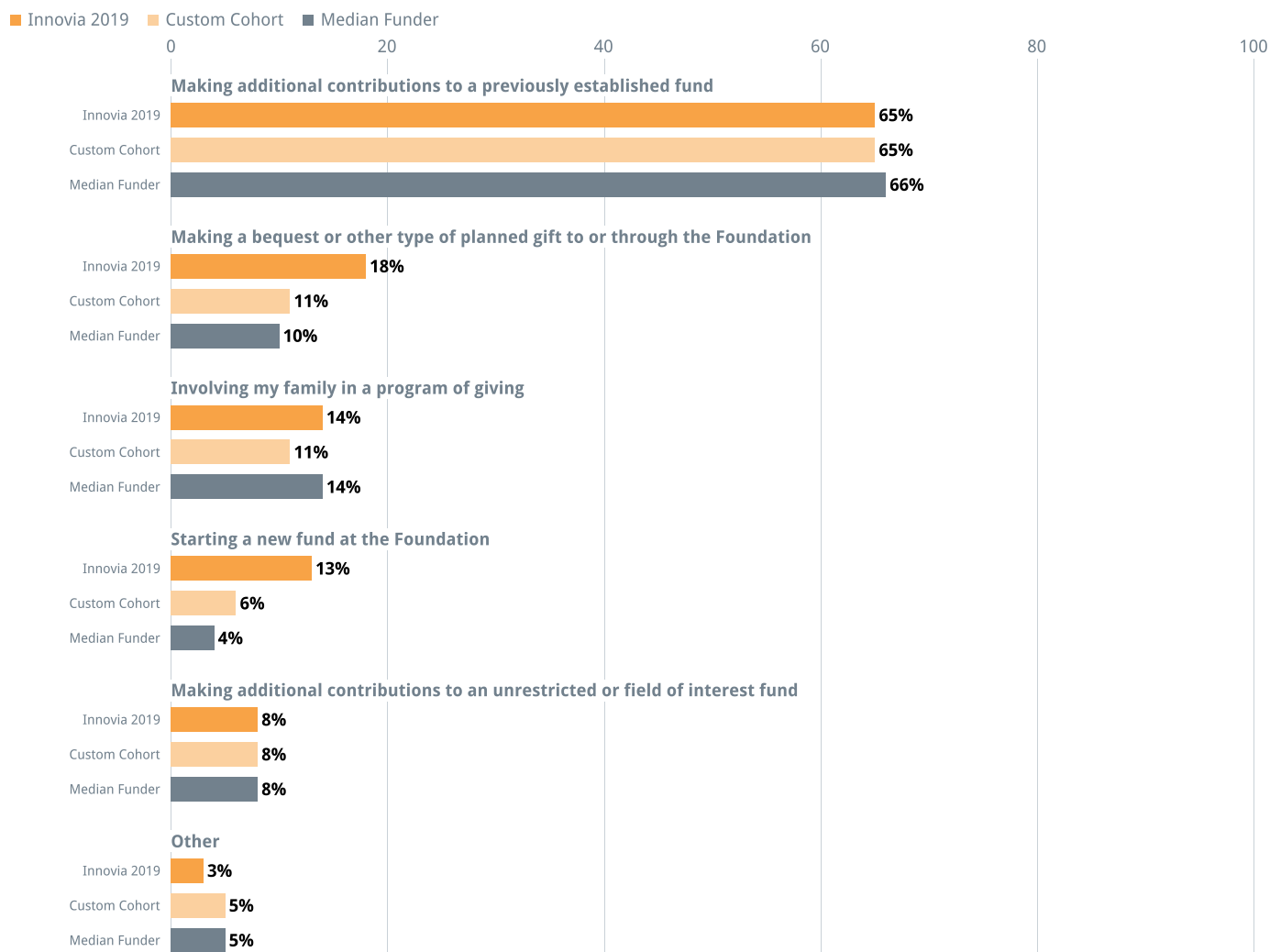
Future Giving Relative to Past Contributions - By Subgroup

■ Likely to increase contribution level
 ■ Likely to continue giving at the same contribution level
 ■ Likely to decrease contribution level

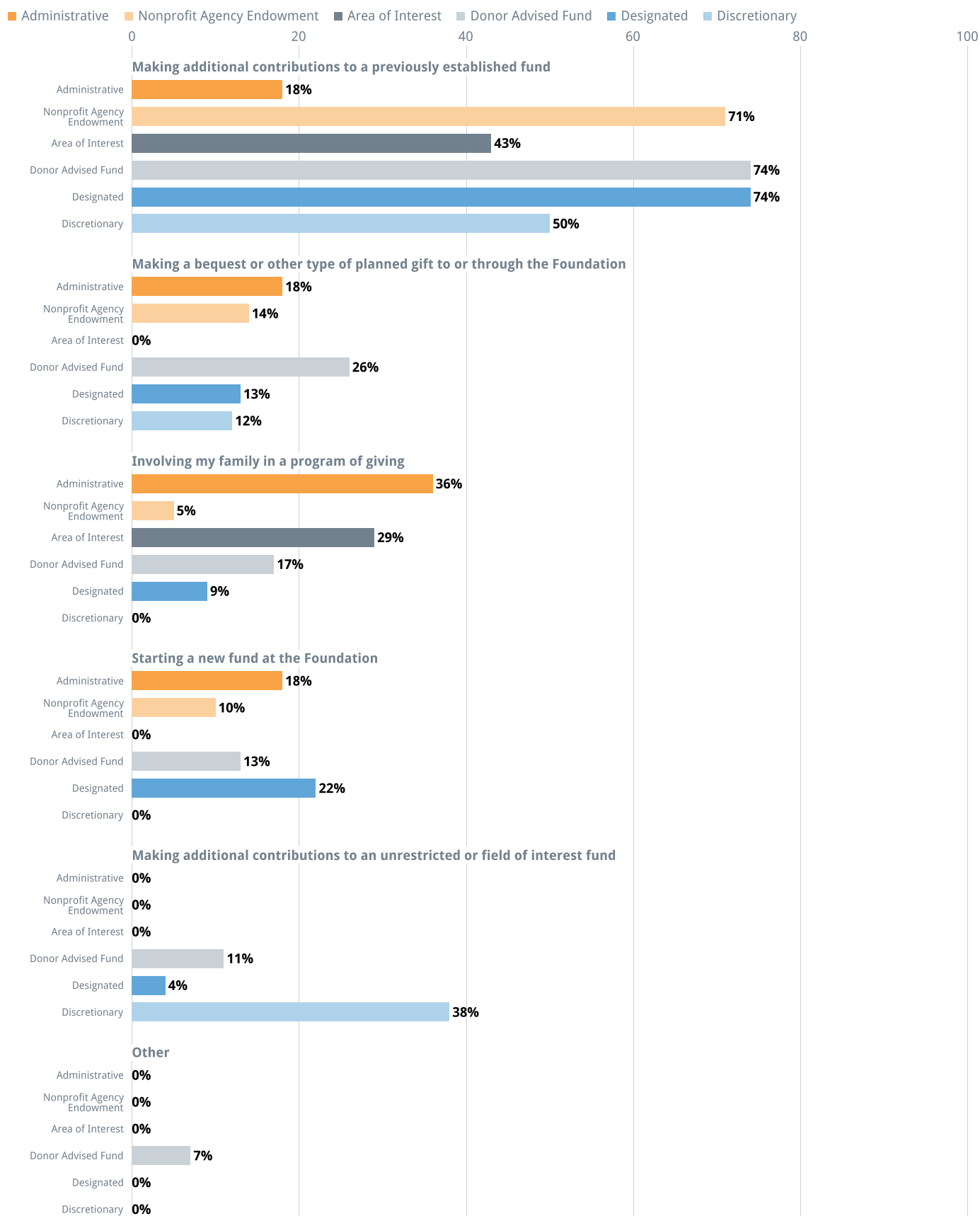


"Are you considering any of the following options for additional giving to your fund at the Foundation, or for other gifts to the Foundation over the next five to ten years?"

Type of Future Giving



Type of Future Giving - By Fund Type



Reasons Donors are Not Giving in the Future

"If you do not plan on giving to the Foundation or to your fund in the next five to ten years, what is the *primary* reason you do not plan on giving?"

Reasons Donors Are Not Giving in the Future	Innovia 2019	Average Funder	Custom Cohort
Giving directly to nonprofits instead	44%	30%	34%
Limited financial resources	19%	19%	18%
Gift/fund was a one-time contribution	38%	27%	24%
Administrative fees/costs are too high	0%	4%	6%
Benefits received have not met my expectations	0%	2%	1%
Processes, tools, and services have not met my expectations	0%	3%	3%
Other reasons	0%	15%	14%

Reasons Donors Are Not Giving in the Future (By Subgroup)	Administrative	Nonprofit Agency Endowment	Area of Interest	Donor Advised Fund	Designated	Discretionary
Giving directly to nonprofits instead	N/A	N/A	N/A	N/A	N/A	N/A
Limited financial resources	N/A	N/A	N/A	N/A	N/A	N/A
Gift/fund was a one-time contribution	N/A	N/A	N/A	N/A	N/A	N/A
Administrative fees/costs are too high	N/A	N/A	N/A	N/A	N/A	N/A
Benefits received have not met my expectations	N/A	N/A	N/A	N/A	N/A	N/A
Processes, tools, and services have not met my expectations	N/A	N/A	N/A	N/A	N/A	N/A
Other reasons	N/A	N/A	N/A	N/A	N/A	N/A

Charitable Giving

"Please think of your charitable giving over the past five years, including gifts you made to or through the Foundation. Approximately, what has been the size of your total charitable giving on an annual basis?"

Note: The question below was recently added to the donor survey and depicts comparative data from 11 funders in the dataset.

Total Size of Annual Giving	Innovia 2019	Average Funder
<\$1K	13%	8%
\$1K - \$9K	29%	19%
\$10K - \$49K	34%	36%
\$50K - \$99K	10%	14%
\$100K - \$249K	8%	12%
\$250K - \$499K	3%	5%
\$500K - \$999K	2%	3%
\$1MM - \$5MM	1%	2%
Greater than \$5MM	1%	1%

Total Size of Annual Giving (By Subgroup)	Administrative	Nonprofit Agency Endowment	Area of Interest	Donor Advised Fund	Designated	Discretionary
<\$1K	0%	25%	0%	9%	22%	12%
\$1K - \$9K	64%	30%	0%	24%	22%	50%
\$10K - \$49K	36%	25%	57%	27%	43%	38%
\$50K - \$99K	0%	10%	0%	18%	4%	0%
\$100K - \$249K	0%	10%	0%	13%	4%	0%
\$250K - \$499K	0%	0%	14%	4%	4%	0%
\$500K - \$999K	0%	0%	14%	2%	0%	0%
\$1MM - \$5MM	0%	0%	0%	2%	0%	0%
Greater than \$5MM	0%	0%	14%	0%	0%	0%

Giving Outside of Innovia

Giving To or Through Foundation As a Percentage of Total Giving	Innovia 2019	Average Funder	Custom Cohort
1% to 20%	58%	45%	55%
21% to 40%	13%	15%	14%
41% to 60%	7%	12%	9%
61% to 80%	11%	13%	10%
81% to 100%	11%	15%	11%

Giving To or Through Foundation As a Percentage of Total Giving (By Subgroup)	Administrative	Nonprofit Agency Endowment	Area of Interest	Donor Advised Fund	Designated	Discretionary
1% to 20%	70%	68%	86%	42%	61%	75%
21% to 40%	30%	5%	14%	18%	4%	12%
41% to 60%	0%	0%	0%	7%	13%	12%
61% to 80%	0%	11%	0%	18%	13%	0%
81% to 100%	0%	16%	0%	16%	9%	0%

Use of Professional Advisors Outside of Innovia

"Are you using advice from a professional advisor outside of the Foundation in planning your charitable giving?"

Note: The question below was recently added to the donor survey and depicts comparative data from 11 funders in the dataset.

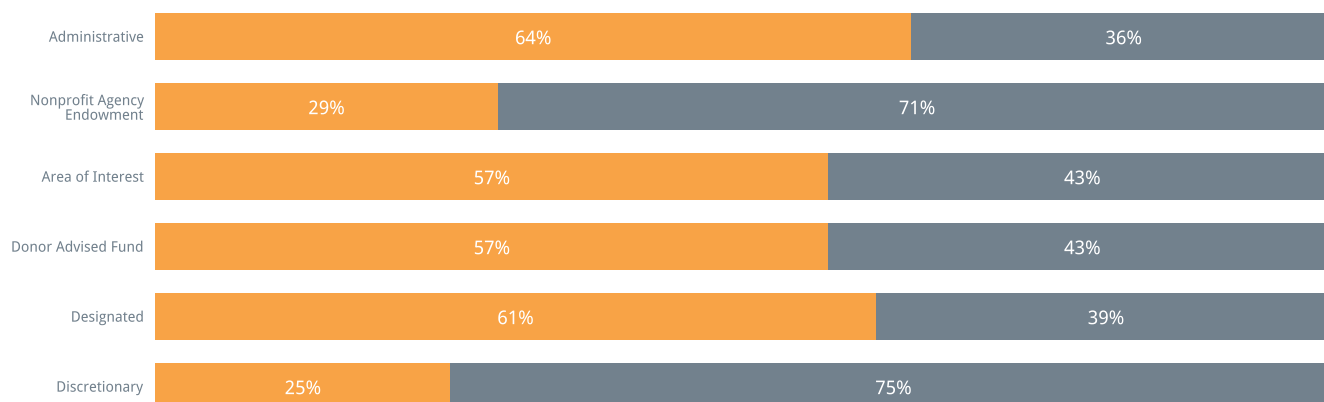
Are you using advice from a professional advisor outside of the Foundation in planning your charitable giving?

■ Yes ■ No



Are you using advice from a professional advisor outside of the Foundation in planning your charitable giving? - By Subgroup

■ Yes ■ No

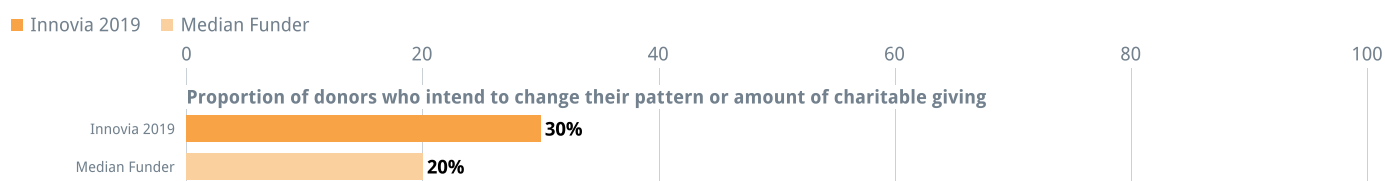


2018 Changes in Tax Code

Note: The following questions were recently added as an optional module to the donor survey and depict comparative data from fewer than one-third of funders in the dataset.

"Do you believe the 2018 changes in the U.S. tax code will have an effect on your charitable giving in the next few years?"

Proportion of Donors who Intend to Change Their Pattern or Amount of Charitable Giving

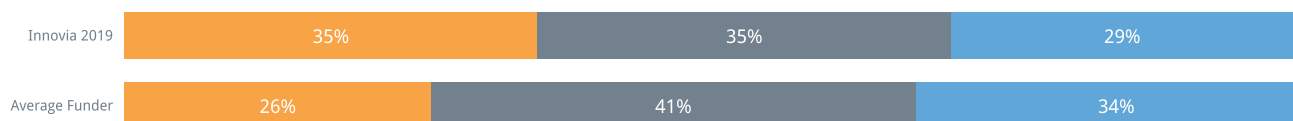


(If donors indicated that they intend to change the pattern or amount of their charitable giving above)

"Thinking about any tax-code related changes in your charitable giving, do you believe you will increase, decrease, or leave unchanged each of the following aspects of your giving?"

The total amount of your annual charitable giving in general

■ Increase ■ No Change ■ Decrease



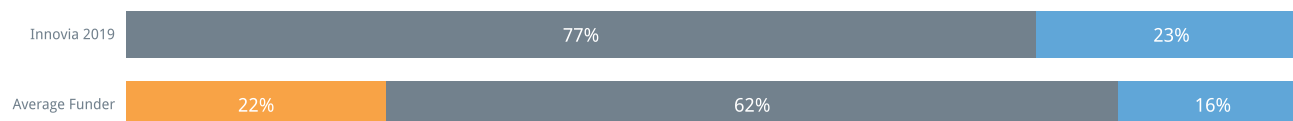
The total amount you contribute to your personal fund at the Foundation

■ Increase ■ No Change ■ Decrease



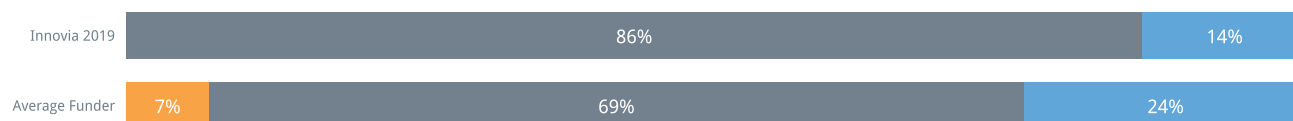
The total amount you contribute to non-profits from your personal fund at the Foundation

■ Increase ■ No Change ■ Decrease



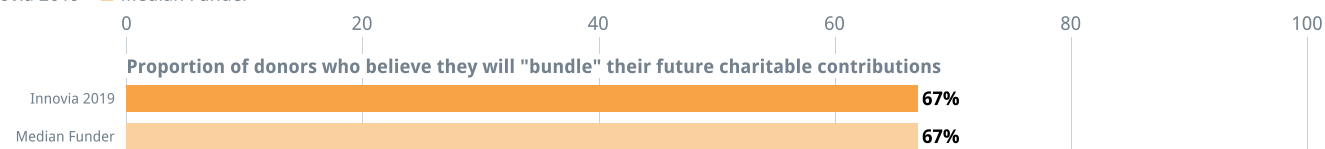
The total amount you contribute to the Foundation's general purpose or other funds

■ Increase ■ No Change ■ Decrease



Proportion of Donors who Believe They Will "Bundle" their Future Charitable Contributions

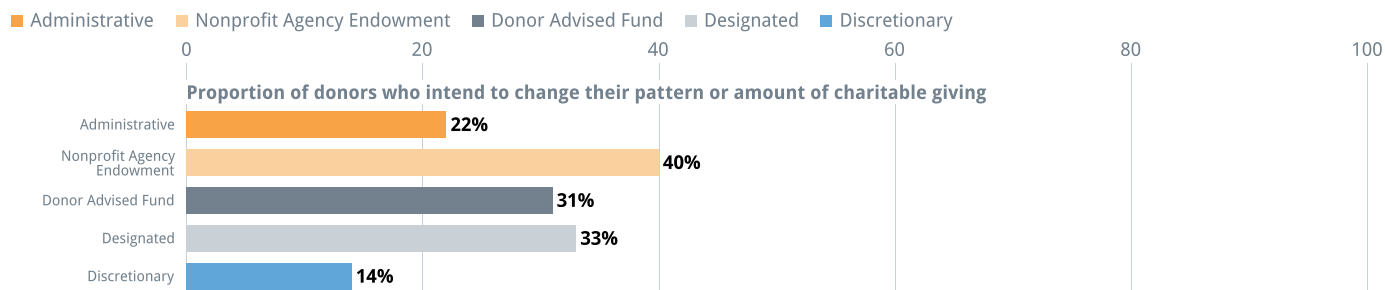
■ Innovia 2019 ■ Median Funder



2018 Changes in Tax Code - By Subgroup

Note: The following questions were recently added as an optional module to the donor survey and depict comparative data from fewer than one-third of funders in the dataset.

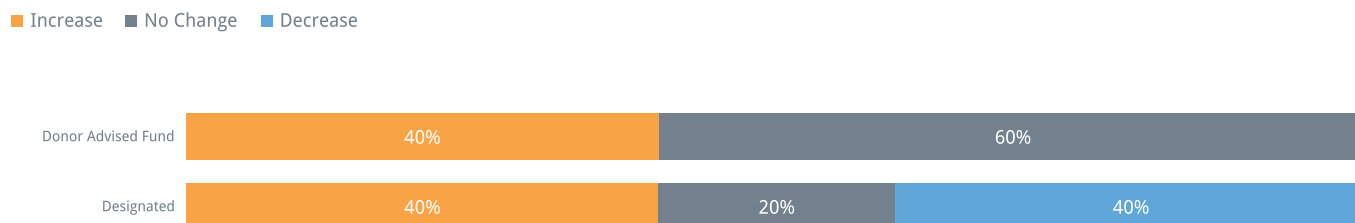
Proportion of Donors who Intend to Change Their Pattern or Amount of Charitable Giving - By Fund Type



(If donors indicated that they intend to change the pattern or amount of their charitable giving above)

"Thinking about any tax-code related changes in your charitable giving, do you believe you will increase, decrease, or leave unchanged each of the following aspects of your giving?"

The total amount of your annual charitable giving in general - By Subgroup



The total amount you contribute to your personal fund at the Foundation - By Subgroup



The total amount you contribute to non-profits from your personal fund at the Foundation - By Subgroup

■ Increase ■ No Change ■ Decrease



The total amount you contribute to the Foundation's general purpose or other funds - By Subgroup

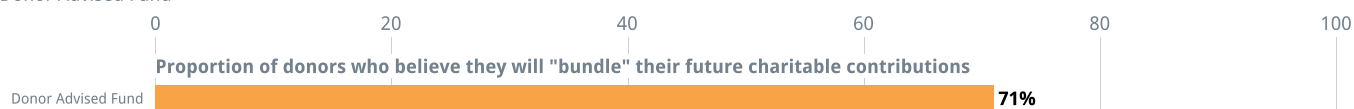
■ Increase ■ No Change ■ Decrease



"Do you believe the 2018 changes in the U.S. tax code will have an effect on your charitable giving in the next few years?"

Proportion of Donors who Believe They Will "Bundle" their Future Charitable Contributions - By Fund Type

■ Donor Advised Fund



Innovia Custom Questions

Interest in Philanthropic Services

Please identify your interest in learning more about:

Co-funding data informed initiatives

■ Not interested ■ Potentially interested ■ Definitely interested



Education collaboratives

■ Not interested ■ Potentially interested ■ Definitely interested



Giving circles

■ Not interested ■ Potentially interested ■ Definitely interested



Opportunities to engage with donors who share similar charitable interests

■ Not interested ■ Potentially interested ■ Definitely interested



Please identify your interest in receiving assistance with the following philanthropic services.

Developing a strategic giving plan

Not interested Potentially interested Definitely interested



Family philanthropy consulting

Not interested Potentially interested Definitely interested



Next Generation involvement

Not interested Potentially interested Definitely interested



Transitioning or administrative support with a private foundation

Not interested Potentially interested Definitely interested

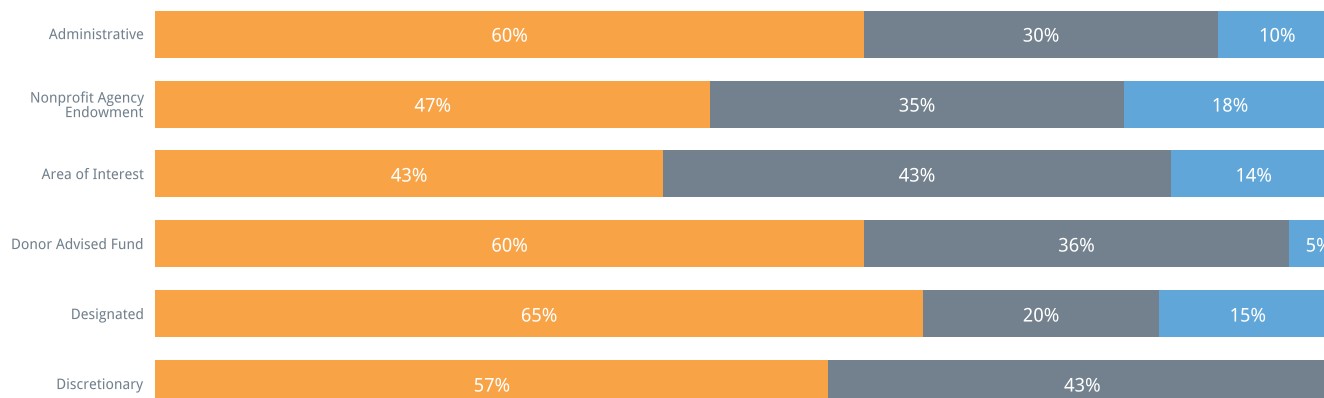


Interest in Philanthropic Services - By Subgroup

Please identify your interest in learning more about:

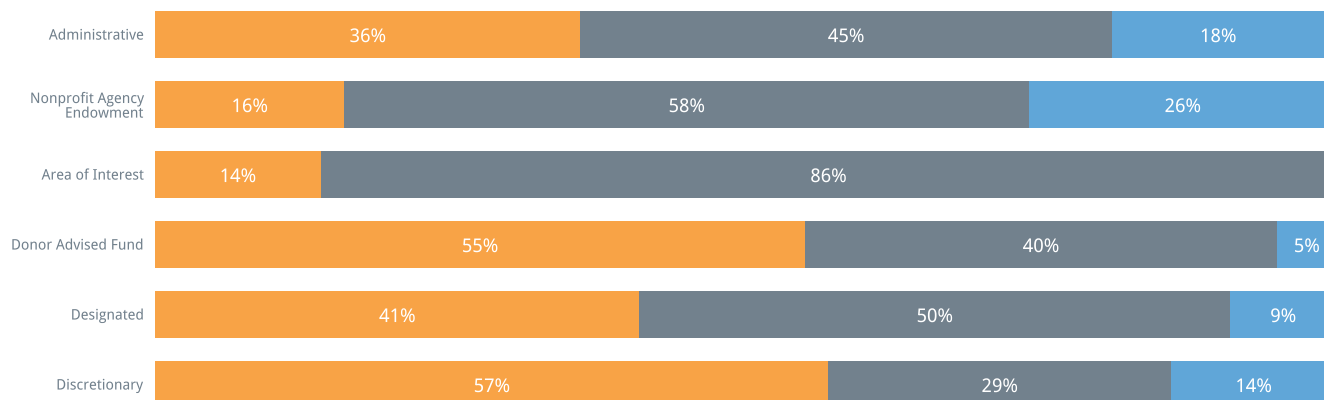
Co-funding data informed initiatives - By Subgroup

Not interested Potentially interested Definitely interested



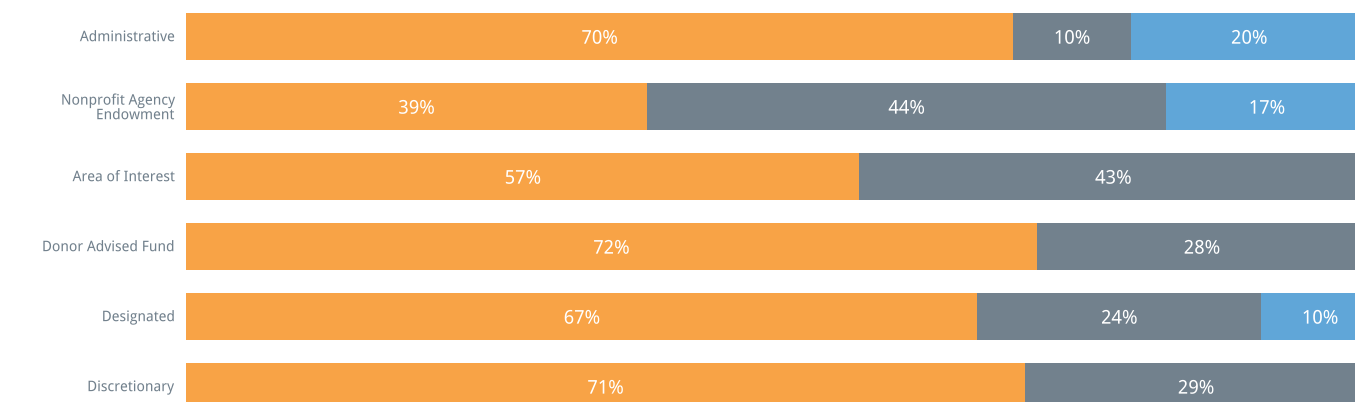
Education collaboratives - By Subgroup

Not interested Potentially interested Definitely interested



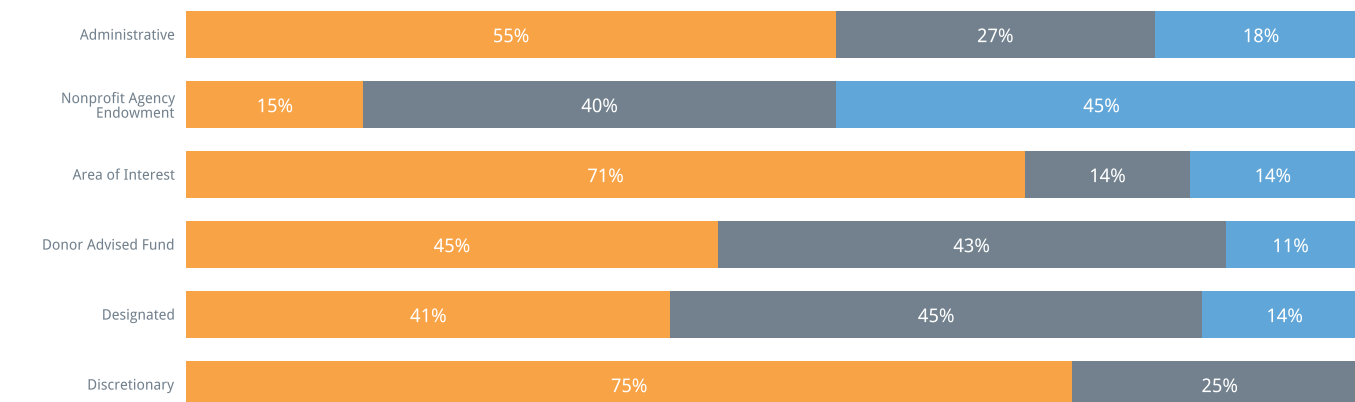
Giving circles - By Subgroup

Not interested Potentially interested Definitely interested



Opportunities to engage with donors who share similar charitable interests - By Subgroup

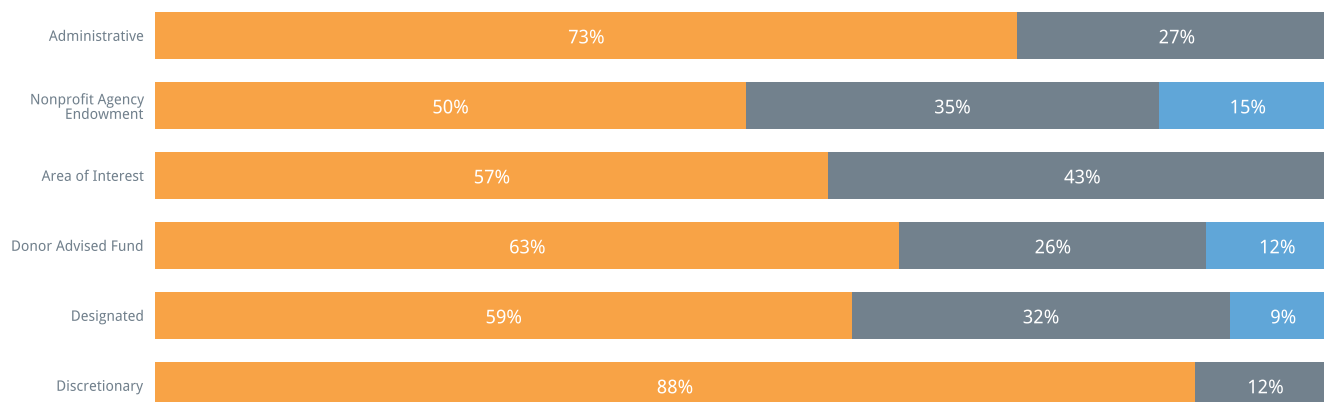
Not interested Potentially interested Definitely interested



Please identify your interest in receiving assistance with the following philanthropic services.

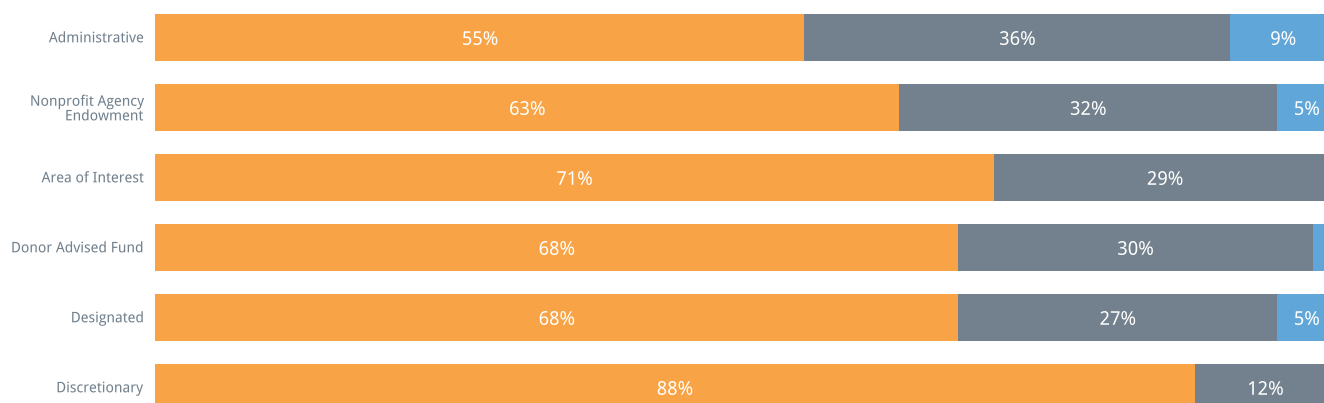
Developing a strategic giving plan - By Subgroup

Not interested Potentially interested Definitely interested



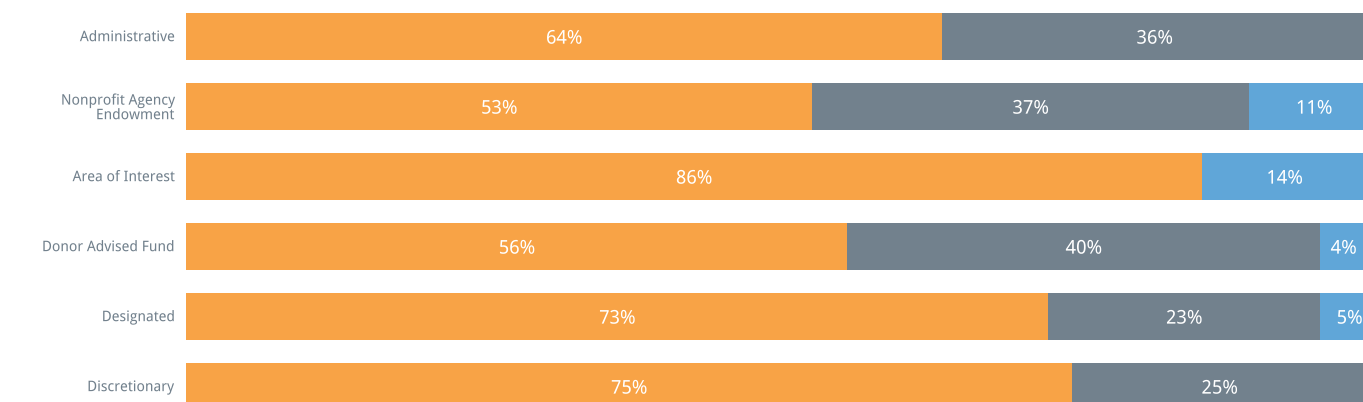
Family philanthropy consulting - By Subgroup

Not interested Potentially interested Definitely interested



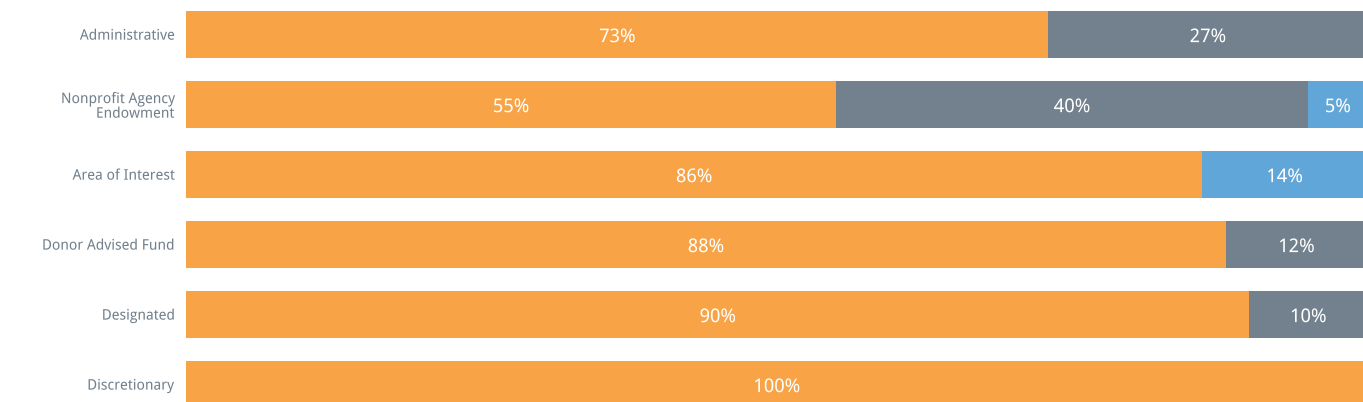
Next Generation involvement - By Subgroup

Not interested Potentially interested Definitely interested



Transitioning or administrative support with a private foundation - By Subgroup

Not interested Potentially interested Definitely interested



Communication on Additional Topics - Overall

Would you like to speak with advisors at Innovia about any of the following topics?

Personal contact from Foundation staff to discuss your charitable giving goals

■ No ■ Yes



Advice about giving opportunities that align with your goals

■ No ■ Yes



Communication regarding the Foundation's work in the community

■ No ■ Yes



Updates about the Foundation's discretionary grants

■ No ■ Yes



Information about Impact Investing opportunities

■ No ■ Yes



Information on Co-Funding initiatives and/or collaborative grantmaking with Innovia Foundation

■ No ■ Yes



In the question above we asked you about your preferences for communication with the Foundation. Would you like CEP to provide the Foundation with your responses to this question so that they may know your wishes personally? (Only if you indicate YES will your name be shared to the Foundation along with your answer, and only on these two questions. This information will have no impact on the confidentiality of your other responses.)

■ No ■ Yes

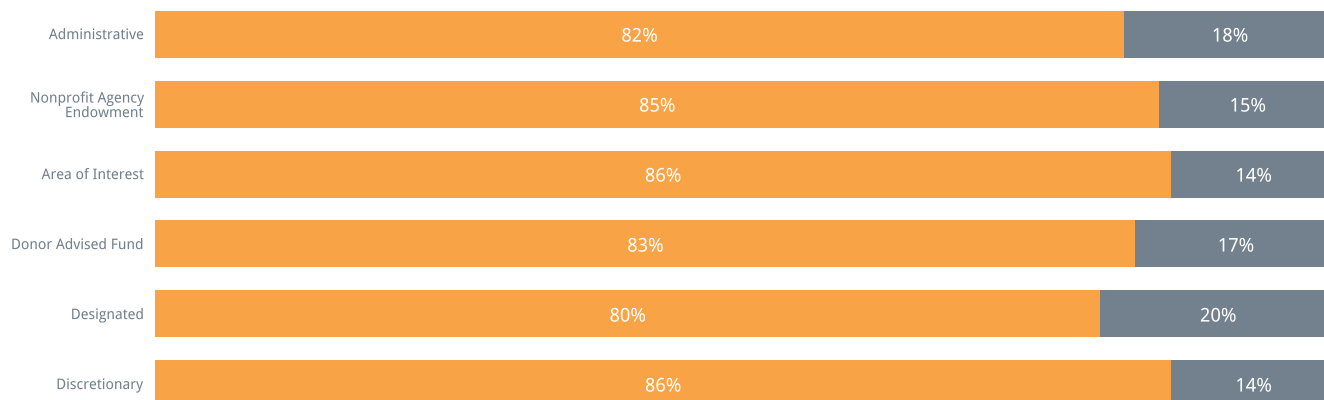


Communication on Additional Topics - By Subgroup

Would you like to speak with advisors at Innovia about any of the following topics?

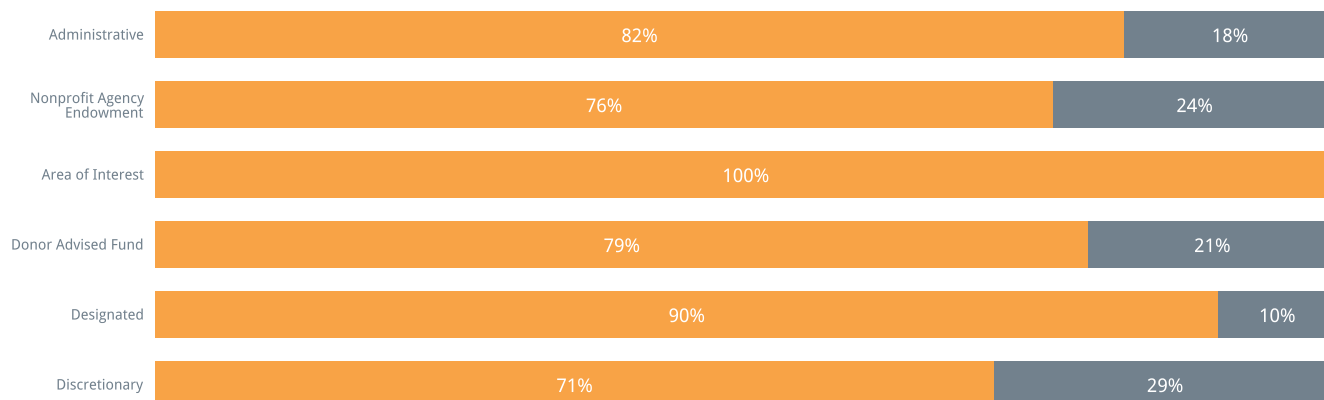
Personal contact from Foundation staff to discuss your charitable giving goals - By Subgroup

■ No ■ Yes



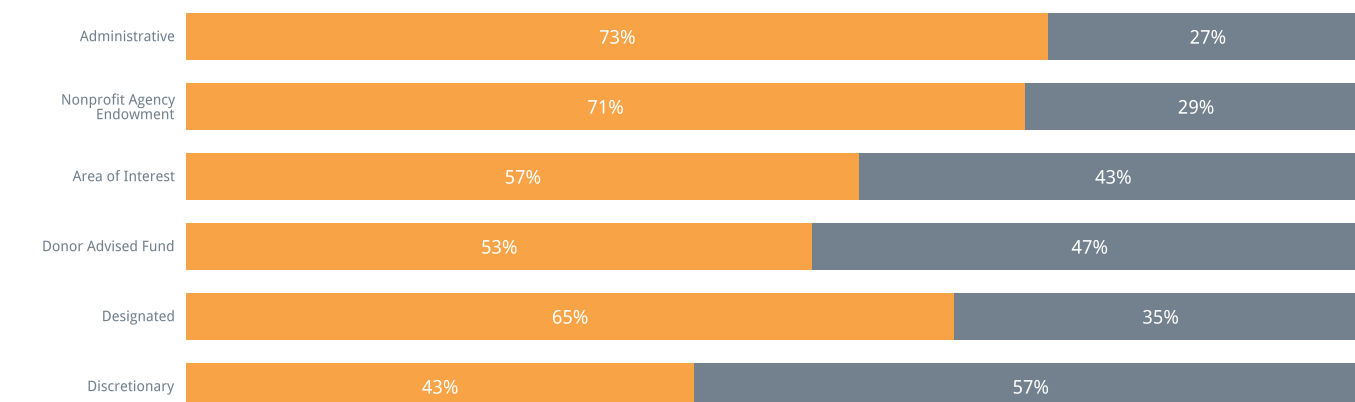
Advice about giving opportunities that align with your goals - By Subgroup

■ No ■ Yes



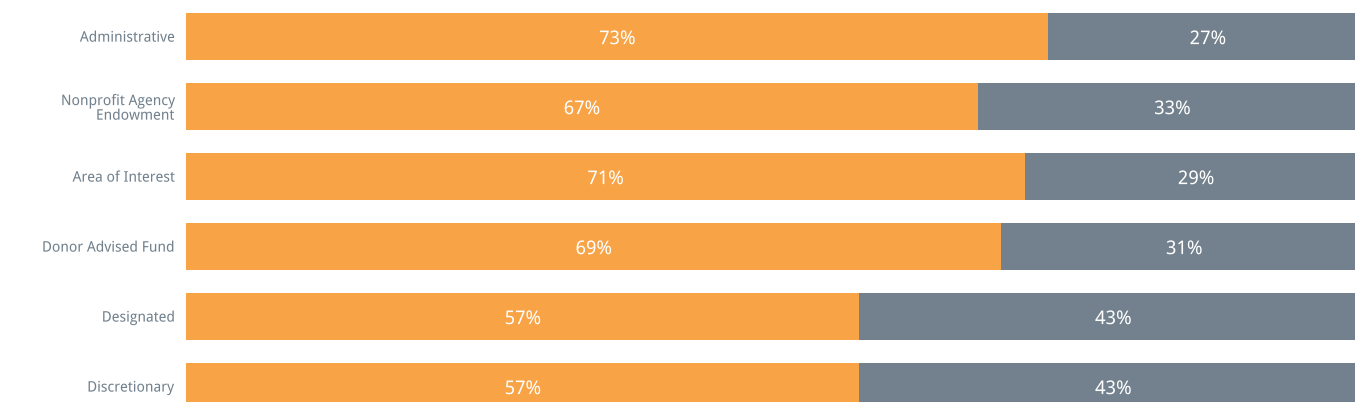
Communication regarding the Foundation's work in the community - By Subgroup

■ No ■ Yes



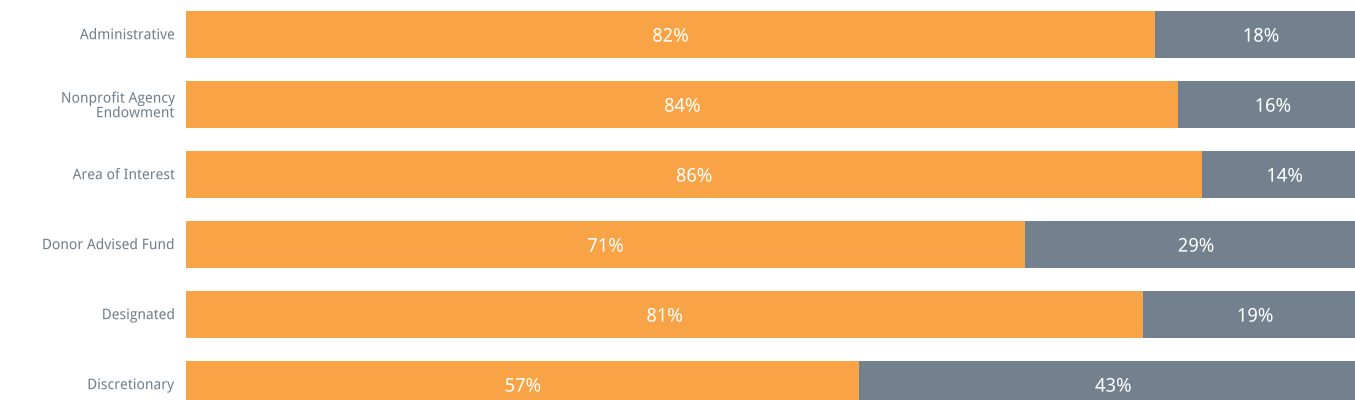
Updates about the Foundation's discretionary grants - By Subgroup

■ No ■ Yes



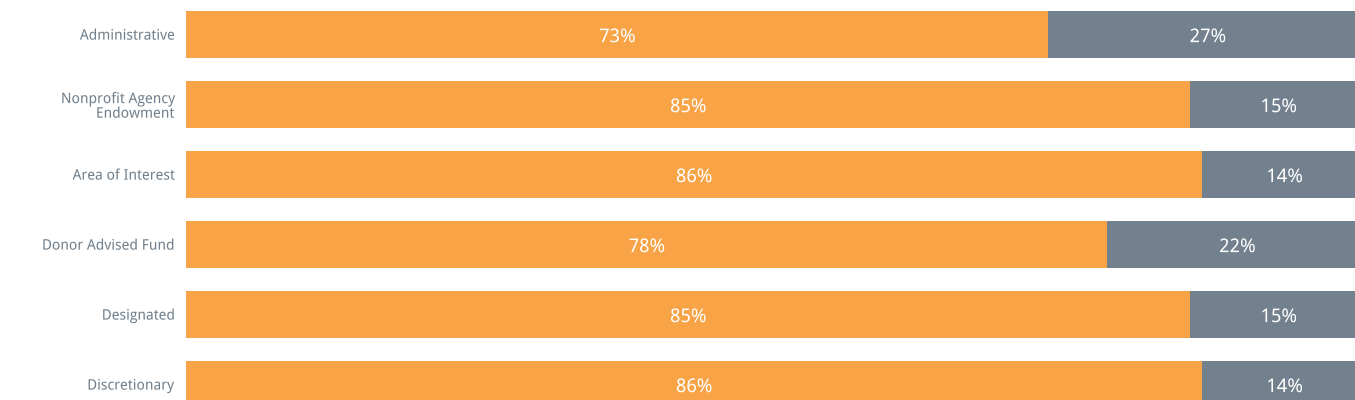
Information about Impact Investing opportunities - By Subgroup

■ No ■ Yes



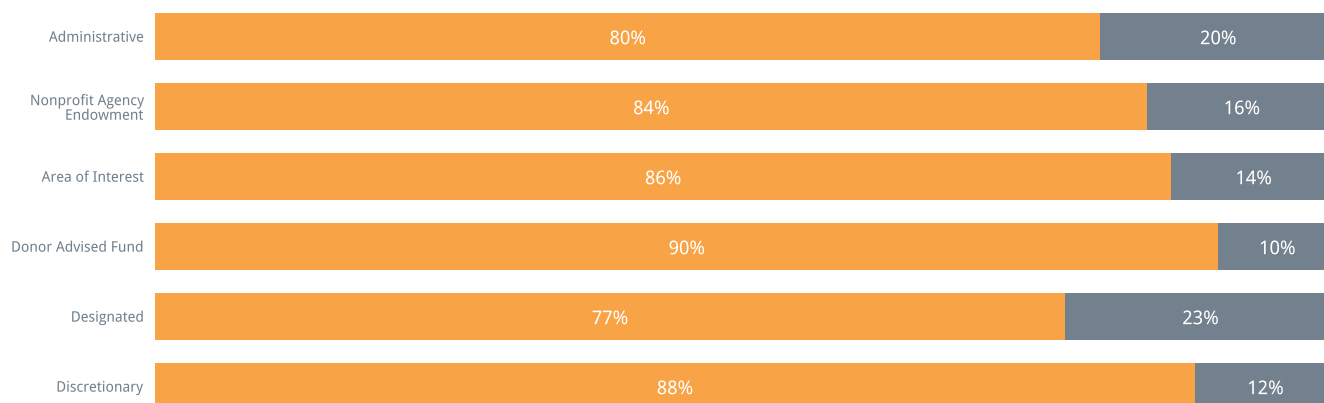
Information on Co-Funding initiatives and/or collaborative grantmaking with Innovia Foundation - By Subgroup

■ No ■ Yes



In the question above we asked you about your preferences for communication with the Foundation. Would you like CEP to provide the Foundation with your responses to this question so that they may know your wishes personally? - By Subgroup

■ No ■ Yes



Options for Permanent Funds - Overall

Please consider the following options for charitable giving that create permanent funds at the Foundation.

Are you familiar with the following giving opportunities at the Foundation?

An endowed fund that provides an ongoing stream of charitable funds to organizations you specify. (e.g. Designated Fund)

■ No ■ Yes

Innovia 2019 5% 95%



Response	Percentage
No	5%
Yes	95%

An endowed fund that provides an ongoing stream of charitable funds to support community-wide initiatives. (e.g. Community Fund)

■ No ■ Yes

Innovia 2019 13% 87%



Response	Percentage
No	13%
Yes	87%

An endowed fund that provides an ongoing stream of charitable funds to be invested in causes that matter to you (e.g. arts, education, health and well-being, environment etc.) by the Foundation (e.g. Area of Interest Fund)

■ No ■ Yes

Innovia 2019 13% 87%



Response	Percentage
No	13%
Yes	87%

An endowed fund that provides an ongoing stream of charitable funds to support community initiatives or projects that address critical, complex challenges throughout the region (e.g. Civic Leadership Fund at Innovia Foundation)

■ No ■ Yes

Innovia 2019 23% 77%



Response	Percentage
No	23%
Yes	77%

Please consider the following options for charitable giving that create permanent funds at the Foundation.

Please rate the extent to which each opportunity interests you as a giving vehicle to accomplish your charitable goals?

An endowed fund that provides an ongoing stream of charitable funds to organizations you specify. (e.g. Designated Fund)

Not interested Potentially interested Definitely interested



An endowed fund that provides an ongoing stream of charitable funds to support community-wide initiatives. (e.g. Community Fund)

Not interested Potentially interested Definitely interested



An endowed fund that provides an ongoing stream of charitable funds to be invested in causes that matter to you (e.g. arts, education, health and well-being, environment etc.) by the Foundation (e.g. Area of Interest Fund)

Not interested Potentially interested Definitely interested



An endowed fund that provides an ongoing stream of charitable funds to support community initiatives or projects that address critical, complex challenges throughout the region (e.g. Civic Leadership Fund at Innovia Foundation)

Not interested Potentially interested Definitely interested



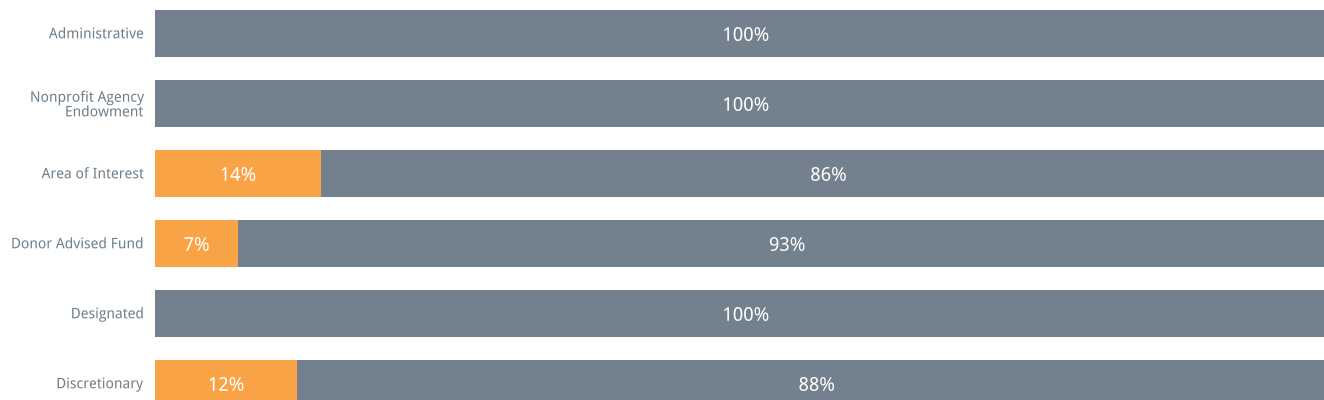
Options for Permanent Funds - By Subgroup

Please consider the following options for charitable giving that create permanent funds at the Foundation.

Are you familiar with the following giving opportunities at the Foundation?

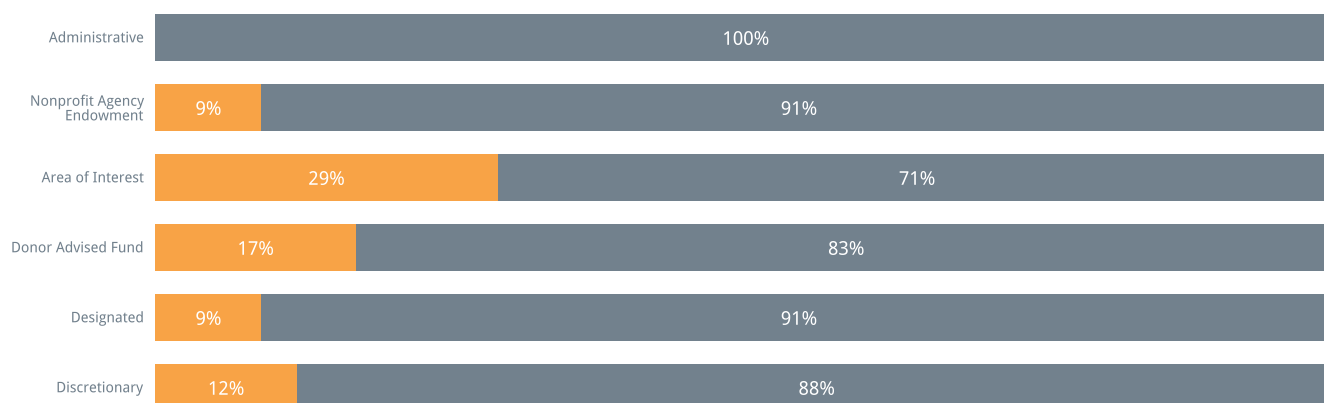
An endowed fund that provides an ongoing stream of charitable funds to organizations you specify. (e.g. Designated Fund)- By Subgroup

■ No ■ Yes



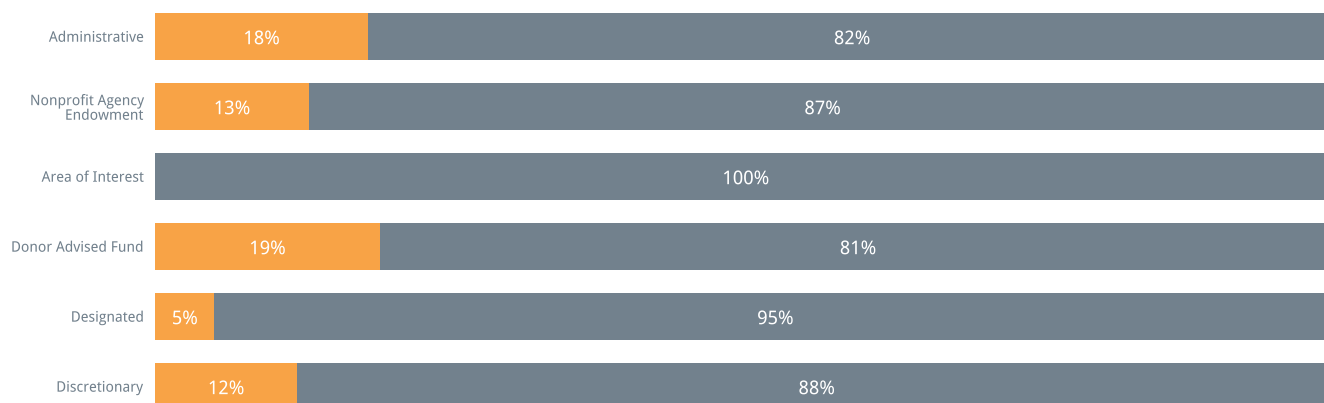
An endowed fund that provides an ongoing stream of charitable funds to support community-wide initiatives. (e.g. Community Fund) - By Subgroup

■ No ■ Yes



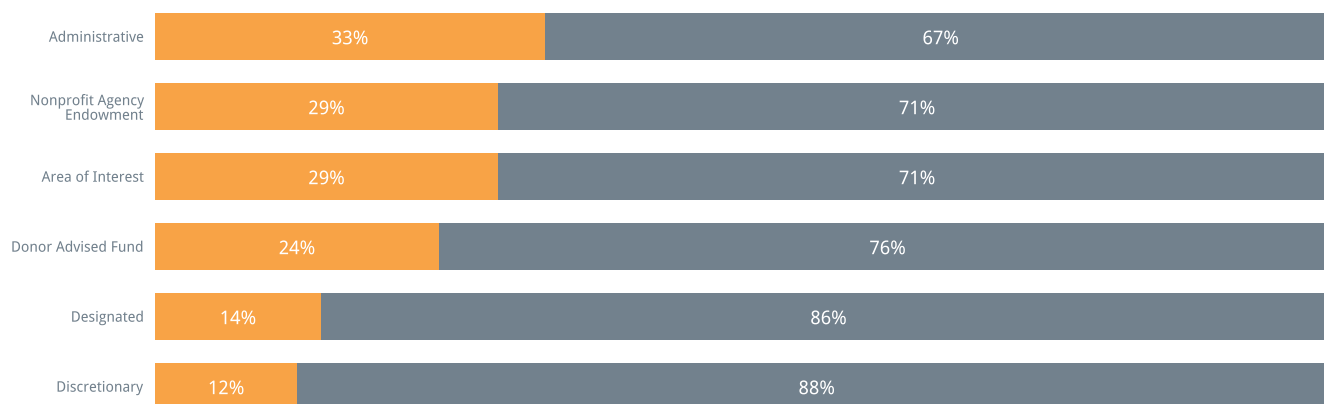
An endowed fund that provides an ongoing stream of charitable funds to be invested in causes that matter to you (e.g. arts, education, health and well-being, environment etc.) by the Foundation (e.g. Area of Interest Fund) - By Subgroup

■ No ■ Yes



An endowed fund that provides an ongoing stream of charitable funds to support community initiatives or projects that address critical, complex challenges throughout the region (e.g. Civic Leadership Fund at Innovia Foundation)- By Subgroup

■ No ■ Yes

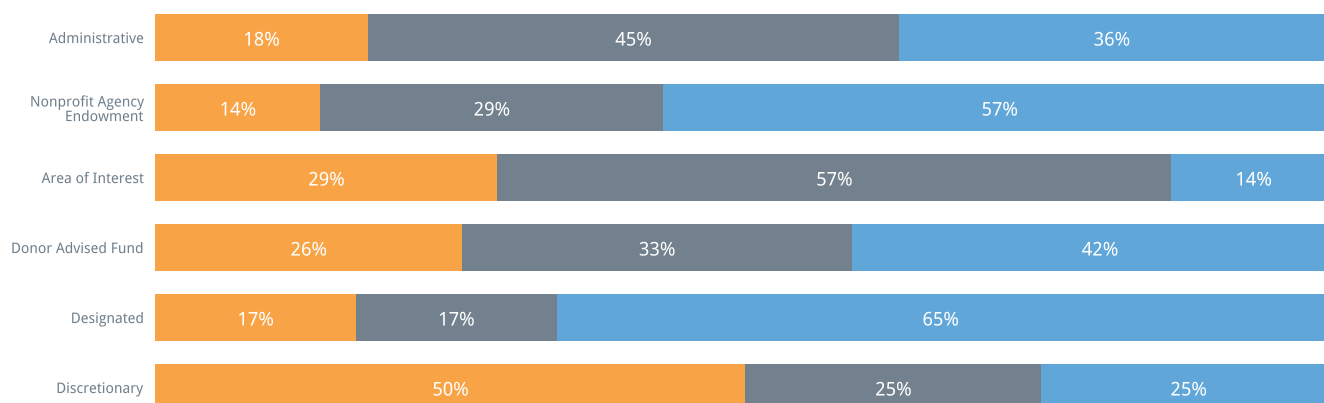


Please consider the following options for charitable giving that create permanent funds at the Foundation.

Please rate the extent to which each opportunity interests you as a giving vehicle to accomplish your charitable goals?

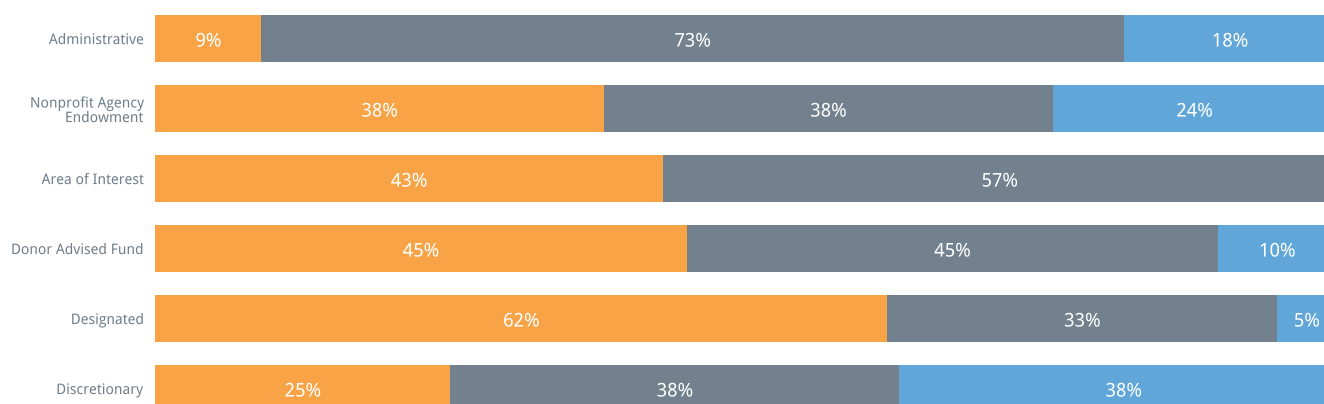
An endowed fund that provides an ongoing stream of charitable funds to organizations you specify. (e.g. Designated Fund) - By Subgroup

Not interested Potentially interested Definitely interested



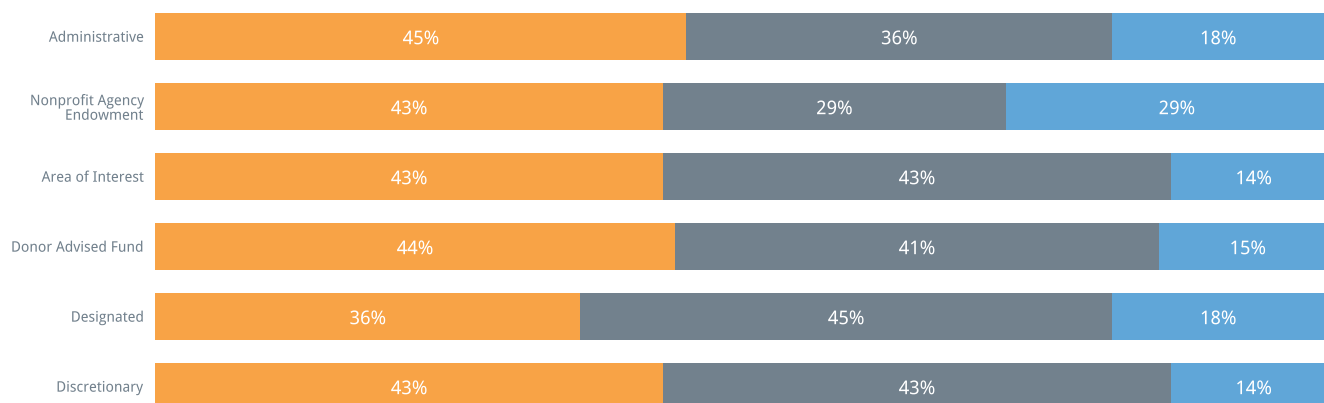
An endowed fund that provides an ongoing stream of charitable funds to support community-wide initiatives. (e.g. Community Fund) - By Subgroup

Not interested Potentially interested Definitely interested



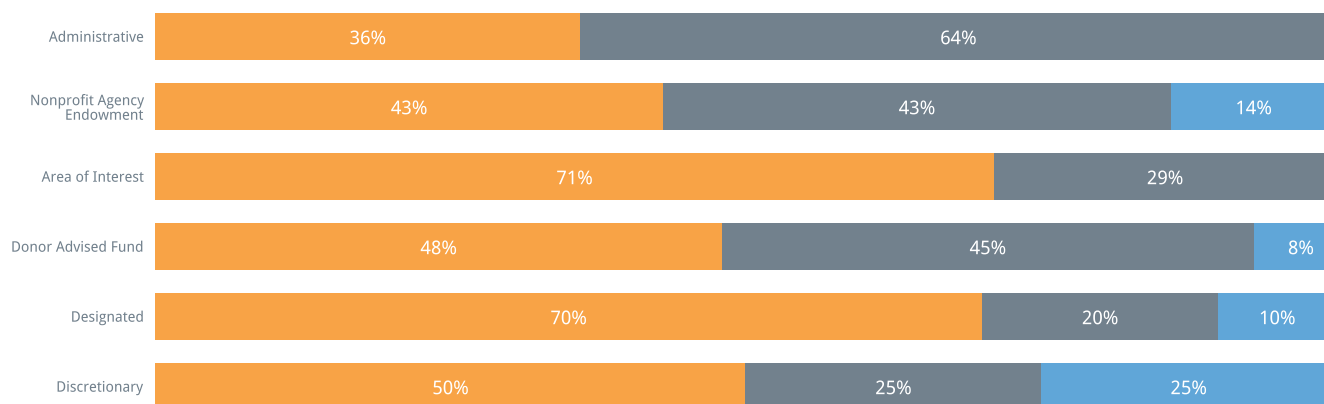
An endowed fund that provides an ongoing stream of charitable funds to be invested in causes that matter to you (e.g. arts, education, health and well-being, environment etc.) by the Foundation (e.g. Area of Interest Fund) - By Subgroup

■ Not interested ■ Potentially interested ■ Definitely interested



An endowed fund that provides an ongoing stream of charitable funds to support community initiatives or projects that address critical, complex challenges throughout the region (e.g. Civic Leadership Fund at Innovia Foundation) - By Subgroup

■ Not interested ■ Potentially interested ■ Definitely interested



Donor Suggestions for Innovia

Donors were asked to provide any suggestions for how Innovia could improve. Of the 122 donors that responded to the survey, 65 provided constructive suggestions. These suggestions were thematically categorized by CEP and grouped into the topics below.

To download the full set of donor comments and suggestions, please refer to the "Downloads" dropdown menu at the top right of your report. Please note that comments have been edited or deleted to protect the confidentiality of respondents.

Proportion of Donor Suggestions by Topic

Topic of Suggestion	Proportion
Foundation Communications	35%
Impact on and Understanding of Grantees' Communities	20%
Innovia's Name Change	14%
Finance and Investments	9%
Donor relations	6%
Non-Monetary Assistance	5%
Operations	5%
Administrative Process	2%
Communications	2%
Donor Relations	2%
Non-Monetary Assistance for Donors	2%

Donor Suggestions

Foundation Communications (35% N=23)

- Communication of Impact (N = 7)
 - "My scholarship fund at Innovia has been less than satisfying. I never receive a thank you letter with any specific information: was the scholarship awarded, to whom - what are their aspirations? I never hear from the school or the student. I have another scholarship fund with a Foundation in California and the result has been very exciting and gratifying. The result is that I have discontinued increasing that fund and am redirecting funds to the other Scholarship program. With only a "form" letter of thanks from Innovia each year with no specifics about my specific scholarship I [feel] very detached and unwilling to invest more in that fund."
 - "Feedback on results."
 - "Better communication community wide about initiatives that they have undertaken and the results that have been achieved."
 - "Let the community know of the recipient response."
- Publicity (N = 5)
 - "Although the Foundation has experienced financial growth the majority of people still are not aware of Innovia and its underlying purpose. Given the increase in annual distributions you'd think there would be a higher level of awareness. I'm most interested in how we create greater awareness of the wonderful work this foundation has done and has the capacity to do with strong partners. If they don't know about the "causes that matter" and an opportunity to address them, what would compel them to participate."
 - "Could have more publicity events in the smaller communities. The object would be to bring more information at the local level."
 - "The Foundation needs to be better known in Spokane."
- More Substantial Communication (N = 4)
 - "Better understanding about how it reaches its decisions on what to support and why."
 - "I would suggest the foundation highlight various programs that have been funded in their communications with donors (including photos). It would help donors have a better understanding of the breadth of programs that are beneficiaries of the foundation's donations."
 - "Better communication and outreach with potential donors throughout entire area of service through attorneys, accountants, financial planners, and real estate personnel and offering seminars for donors."
- Donor-Grantee Relationship (N = 3)
 - "Idea - annually or semi-annually - personally/specifically connect donors interested in certain "causes" with nonprofits working in that area (especially those that have funds with Innovia that the donor could give to). For example, here is a list and description of nonprofits with funds at Innovia that relate to your charitable giving goals. Would you like me to schedule a visit for you to learn more?"
 - "As a non-profit with a fund at Innovia it would be great to have deeper connections with those that are directing funds to our programs or that might be interested in supporting our work."
- Other (N = 3)
 - "I do not receive much information on the resources they offer... I would prefer information on other area funding opportunities, as well as local resources for non-profit development."
 - "Provide a specific name at the foundation as a point of contact for questions -- don't really know who to contact -- kind of lost ."
- More Frequent Communications (N = 1)
 - "I would like more connection. Hear their speeches and presentations, get information via mail, etc."

Impact on and Understanding of Grantees' Communities (20% N=13)

- Strategy (N = 6)
 - "I think there needs to be more risk taking. While I know that "Data driven giving" is kind of the new buzz word, I also feel that there is a need for more leadership development and connection among impacted communities. Those kinds of relationship building efforts don't have the data driven outcomes that everyone seems to gush over but those impacts are immeasurably large and have ripple effects across our communities."
 - "Pick 1 sustainable initiative that Innovia can tackle for multiple years. Eg--Decrease drug usage through increased advertising campaigns demonstrating hazards of drug use."
 - "I think joining the chamber was an awesome move. Perhaps coming to some of the fundraising events that our non profits put on and meeting the real people behind the scenes that makes our non profit community amazing. We live here, if we could work on figuring out collaboration between non-profits that would be good. I would be more than happy to meet and introduce people!"
 - "I appreciate the Foundation's use of data to determine how to effectively invest its funds. However, it is important to recognize that there are gaps in data especially when it comes to disproportionality when it comes to race."
- Funder Collaboration (N = 3)
 - "Aligning sources of funds together to make a greater impact on a given solution or strategy."
 - "Then they should have funds for strategic initiatives. Perhaps between Innovia and other funders, they could convene with various agencies to truly make a difference in our community on bigger initiatives."
- Foundation's Understanding Of Grantees' Communities (N = 2)
 - "And Innovia should be out in the community more--offering up sponsorships and being present at events supporting nonprofits. Also recognizing that some organizations need operational dollars and some donors would like more information about areas of interest to them. Connecting donors with other nonprofits seems critical."
- Orientation Change (N = 2)

- "It feels like over the past year and a half the Foundation has become "corporate" in nature--less focused on relationships and leaving smaller nonprofits to fail."

Innovia's Name Change (14% N=9)

- Dissatisfied (N = 6)
 - "I find the new name (Innovia) to be odd and nondescriptive."
 - "Change the name back to Inland Northwest Community Foundation; it is much more descriptive of what the Foundation does than "Innovia"."
 - "Not changing names anymore."
 - "Fix the problem created by the name change and restore and emphasize "community foundation" in all branding."
- Publicity (N = 3)
 - "When the name change to Innovia came last May, they got coverage once in the Spokesman Review & once in the Journal of Business. Time for a followup in those publications: my CPA this spring was not aware of the change!"
 - "I don't know how much the general public knows about Innovia. The name doesn't convey its activities or locality focus unlike the former name. Would it bring in more donations if it were more well known?"

Finance and Investments (9% N=6)

- Investment Understanding (N = 4)
 - "I need a better understanding of the wealth management practices of Innovia's financial professionals of named donor funds like the one we sponsor."
 - "I think it would be helpful to know how the foundations investments are doing for the past three years. This should be done once a year."
 - "Our endowment is split between two difference community foundations. Innovia's return is generally below that of the other. I believe our finance committee would like to see a better return. We would like to better understand the investment strategy and the investment committee."
- Fees (N = 1)
 - "Fees seem high for setting up a Charitable Trust."
- Investment Opportunities (N = 1)
 - "Generate more funds with more giving flexibility..."

Donor relations (6% N=4)

- website (N = 2)
 - "The new website is modern and visually appealing. But it lacks detailed, specific information that I prefer. I can find no details about the different Impact Area funds, or specific information about Civic Leadership Fund or Partnership Fund. I cannot find anything about specific existing funds other than the drop-down list or a PDF that simply lists the funds. If it had more details for me to study, I would be more likely to donate to funds other than our own fund. And the website structure seems to ultimately funnel down to "Give Now". I understand the benefit of this, but it is a little too conspicuous, especially given the lack of detailed information to help me in deciding to Give Now."
- Information (N = 1)
 - "Knowledge of what other resources are available."
- Other (N = 1)
 - "Since the change to Innovia, I feel like attention to my needs as a donor have lessened, and the needs of the organization have become more important than the people who finance it."

Non-Monetary Assistance (5% N=3)

- Facilitate Collaboration and Convenings between Grantees (N = 2)
 - "Facilitate networking with donors with like interests."
- Capacity-Building Supports (N = 1)
 - "Trainings for nonprofits on establishing meaningful metrics, stats."

Operations (5% N=3)

- Other (N = 3)
 - "More flexibility in gifting to designated recipients...or new ones...more than once per year."
 - "The only issue we have had at Innovia is the slow process of liquidating shares of stock quickly when received and the slow process of making the proceeds available for gifting in our DAF... Would recommend improvement with the broker notifying Innovia that shares have been received and then quickly executing the sale of the shares so that the funds can be transferred to the DAF."

Administrative Process (2% N=1)

- Streamlining Processes (N = 1)
 - "Simplify administrative procedures on all fronts."

Communications (2% N=1)

- Communication of Impact (N = 1)

- "When I give them a change of address use it. Every year in my donor advised fund I say I would like to hear from the receiving agency and I never do."

Donor Relations (2% N=1)

- Website (N = 1)
 - "Get the website working."

Non-Monetary Assistance for Donors (2% N=1)

- Capacity-Building Supports (N = 1)
 - "Training donors that not all stats are meaningful and some impacts are hard to quantify."

Donor Characteristics

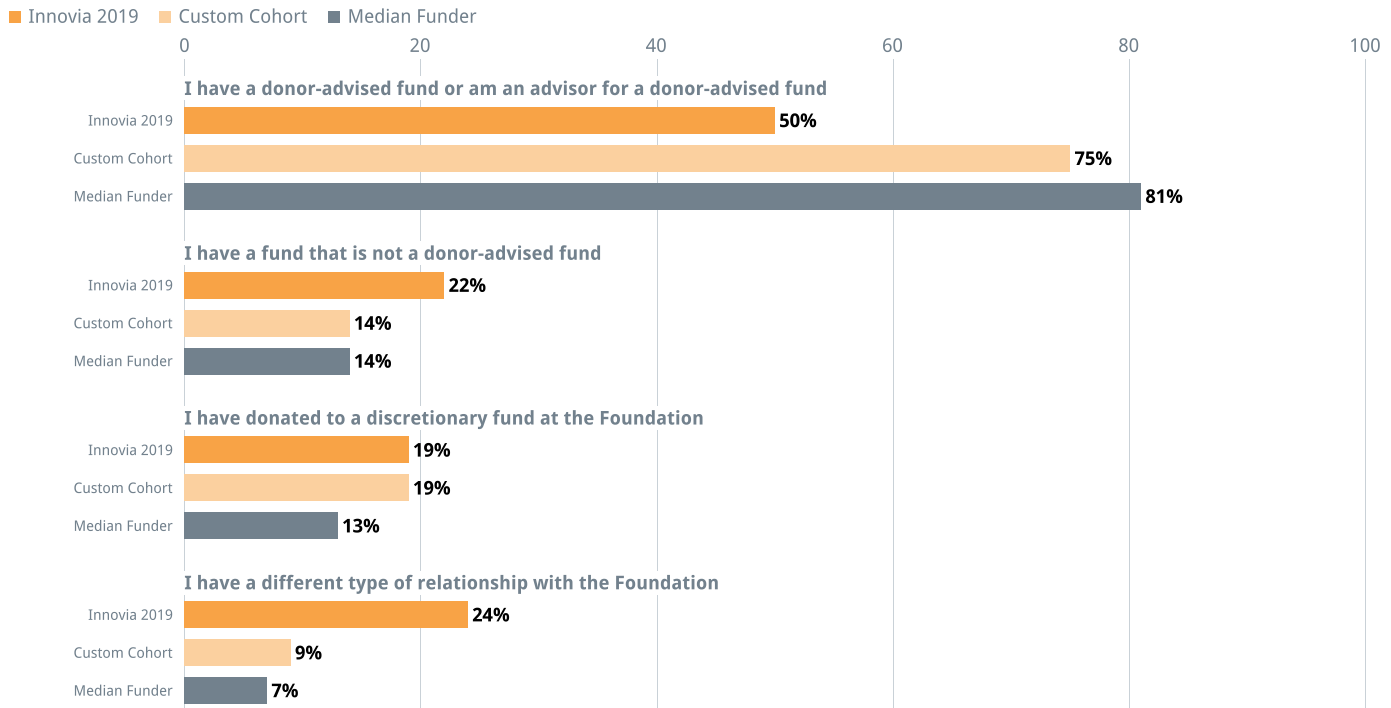
Age of Respondents	Innovia 2019	Average Funder	Custom Cohort
Under 25	0%	0%	0%
25-34	1%	1%	1%
35-44	5%	4%	2%
45-54	14%	11%	10%
55-64	27%	26%	26%
65-74	27%	34%	34%
75 or over	26%	24%	26%

Please select the option that represents how you best describe yourself:	Innovia 2019	Average Funder	Custom Cohort
Female	47%	46%	48%
Male	52%	54%	51%
Different Identity	1%	1%	1%

Race/Ethnicity of Respondents	Innovia 2019	Average Funder	Custom Cohort
African-American or Black	0%	2%	2%
American Indian or Alaskan Native	1%	0%	0%
Asian (incl. Indian subcontinent)	2%	1%	1%
Hispanic or Latinx	0%	1%	0%
Multi-racial	1%	1%	1%
Pacific Islander or Native Hawaiian	0%	0%	0%
White	96%	95%	96%
Race/ethnicity not included above	0%	0%	0%

"Which of the following statements best describe your relationship with the Foundation in the past 3 years?"

Relationship with the Foundation



Additional Survey Information

On many questions in the donor survey, donors are allowed to select “don’t know” or “not applicable” if they are not able to provide an alternative answer. In addition, some questions in the survey are only displayed to a select group of donors for whom that question is relevant based on a previous response.

As a result, there are some measures where only a subset of responses is included in the reported results. The table below shows the number of responses included on each of these measures. The total number of respondents to Innovia's donor survey was 122.

Question Text	Number of Responses
Are you currently satisfied with the Foundation's leadership in the community?	122
Are you currently satisfied with the Foundation's ability to make an impact on specific issues?	121
Are you currently satisfied with the Foundation's knowledge of and experience working with local nonprofits?	121
Are you currently satisfied with the quality of the Foundation's staff?	122
Are you currently satisfied with the Foundation's investment strategy and investment performance?	122
Are you currently satisfied with the Foundation's administrative fees or costs?	122
Are you currently satisfied with the Foundation's integrity and trustworthiness?	122
Are you currently satisfied with the Foundation's efforts to connect me with other donors?	121
In your opinion, how well does Foundation staff understand your personal charitable goals?	65
In your opinion, to what extent is the Foundation making an impact on the community?	115
How well-known do you think the Foundation is among your friends and colleagues in the community?	116
How well does the Foundation understand the area community?	106
Do you have a designated contact at the Foundation to whom you can reach out with questions or concerns?	121
Helpfulness of Foundation events or educational programs for donors, experts, and/or stakeholders in achieving charitable goals	45
Helpfulness of the Foundation's website in achieving charitable goals	40
Helpfulness of the advice and expertise of Foundation staff	37
Helpfulness of Foundation-sponsored visits to nonprofits in the community	12
How would you characterize your plans for future giving to the Foundation or to your fund over the next five to ten years?	98
What is the primary reason you do not plan on giving?	16
Do you believe the 2018 changes in the U.S. tax code will have an effect on your charitable giving in the next few years?	74
Thinking about any tax-code related changes in your charitable giving, do you believe you will increase, decrease, or leave unchanged each of the following aspects of your giving: the total amount of annual charitable giving in general?	17
Thinking about any tax-code related changes in your charitable giving, do you believe you will increase, decrease, or leave unchanged each of the following aspects of your giving: the total amount contributed to your personal fund at the Foundation?	16
Thinking about any tax-code related changes in your charitable giving, do you believe you will increase, decrease, or leave unchanged each of the following aspects of your giving: the total amount contributed to non-profits from your personal fund at the Foundation?	13
Thinking about any tax-code related changes in your charitable giving, do you believe you will increase, decrease, or leave unchanged each of the following aspects of your giving: the total amount you will contribute to the Foundation's general purpose or other funds?	14
Do you believe you will 'bundle' your future charitable contributions to your fund at the Foundation?	15

About CEP and Contact Information

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.

About the DPR

Since 2009, the [Donor Perception Report](#) (DPR) has provided community foundations with comparative data on their donors' perceptions, preferences for engagement, and giving patterns. Based on research and guidance from a group of community foundation leaders, the DPR is the only survey process that provides comparative data for community foundations. Nearly 80 community foundations of all sizes from across North America have commissioned the DPR, nearly 10,000 donors have provided their perspectives. The DPR's quantitative and qualitative data helps community foundation leaders to better understand their work with donors, and how that compares to their philanthropic peers.

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