Key Findings from the Donor Perception Report (DPR) Subscriber Assessment

February 14th, 2012

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About The Center for Effective Philanthropy

The Center for Effective Philanthropy (CEP) is a nonprofit organization focused on the development of comparative data to enable higher-performing funders. CEP’s mission is to provide data and create insight so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact. This mission is based on a vision of a world in which pressing social needs are more effectively addressed. It stems from a belief that improved effectiveness of philanthropic funders can have a profoundly positive impact on nonprofit organizations and the people and communities they serve.

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About LFA Group: Learning for Action

Established in 2000 and with offices in San Francisco and Seattle, LFA Group: Learning for Action provides highly customized research, strategy, and evaluation services that enhance the impact and sustainability of social sector organizations across the U.S. and beyond. LFA Group’s technical expertise and community-based experience ensure that the insights and information we deliver to nonprofits, foundations, and public agencies can be put directly into action. In the consulting process, we build organizational capacity, not dependence. We engage deeply with organizations as partners, facilitating processes to draw on strengths, while also providing expert guidance. Our high quality services are accessible to the full spectrum of social sector organizations, from grassroots community-based efforts to large-scale national and international foundations and initiatives.

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Executive Summary

About the Donor Perception Report (DPR)

The Center for Effective Philanthropy (CEP) provides foundations with data that reveal insights into how they can better define, assess, and improve effectiveness and impact. Specifically, CEP creates assessment tools, disseminates research-based publications, and provides programming to catalyze foundations in developing clearer goals; coherent, well-implemented strategies; and relevant performance indicators. The Donor Perception Report (DPR) is one among a set of assessment tools that CEP has developed.

CEP developed the DPR with advice from community foundation leaders as a tool to help them “understand their donors perceptions of their strengths and areas for improvement.” The DPR assessment process involves the administration of a survey to community foundation donors. In addition to assessing donors’ charitable giving and motivations for giving, the DPR instrument asks donors to reflect on the following areas:

- Donor engagement and preferences;
- Communication and satisfaction;
- Donor motivations;
- Future giving plans; and
- Topics specific to the community foundation.

As a hallmark of CEP’s foundation assessment tool research approach, the DPR not only provides a summary of results for the individual community foundation, but also the report indicates how individual results stack up relative to a comparison group of other community foundations. This comparative assessment allows community foundations to understand their donor-rated performance against benchmarks established by the comparison group of other community foundations whose donors CEP has surveyed.

Overview and Purpose of this Assessment

CEP engaged LFA Group: Learning for Action, an independent research, evaluation, and strategy firm, to assess the DPR subscriber experience. The primary areas of focus for LFA Group’s assessment study of the DPR subscriber experience include:

- Community foundation satisfaction with the DPR process and product, and with CEP’s presentation of the data to key stakeholders;
- Specific areas for improvement highlighted in the DPR that the community foundations have taken action to change; and
- The overall value of the DPR relative to cost, expectations, and other community foundation assessment processes available or undertaken.

Methods Overview

This assessment of the DPR employed an online survey as well as key informant interviews with subscriber community foundations. A total of 11 foundation representatives completed the online survey, for a 100% response rate. Additionally, 10 of 11 foundations completed key informant interviews, representing a 91% participation rate.
Comparisons of foundation responses based on key independent variables such as foundation asset size and tenure of foundation representatives within their positions at their foundations and in the community foundation field overall revealed no significant differences in survey responses between groups.¹ LFA Group’s data analyses on the quantitative survey results include univariate statistics, such as frequencies of response, mean, minimum, maximum and standard deviation, and inferential statistics, including independent t-tests.

**Key Findings**

A highlight of key findings from the 2011 DPR evaluation report is included below.

**Reflections on the DPR Experience**

- **Reasons for Commissioning the DPR.** Respondents heard about the DPR in a few different ways: some had commissioned other CEP services in the past; some heard about the DPR through outreach efforts; and some learned about the opportunity through the Irvine Foundation who offered to fully underwrite their participation. Among a variety of reasons for commissioning the DPR, many respondents wanted feedback from their donors, to learn about donor satisfaction and communication and service offering preferences. Some subscribers noted that their foundation had never surveyed donors before, while some saw importance in having a survey administered by a third party, such as CEP, rather than solely relying on internal donor assessment efforts. Some respondents noted that their foundation had implemented changes, and they wanted to gauge donor response to those changes. In addition, some subscribers expressed interest in the comparative data and benchmarks provided by commissioning the DPR.

- **Satisfaction with the DPR Assessment Tool.** Respondents indicated they were highly satisfied (at least a 6 on a 7-point scale) in five out of six areas. These areas included 1) the overall DPR experience, 2) the extent to which CEP’s interpretation was meaningful for guiding reflection on a foundation’s performance, 3) the extent to which the DPR highlighted areas where a foundation was performing well, 4) areas where a foundation could improve performance, and 5) the extent to which the DPR helped deepen a foundation’s understanding of its donors’ needs/interests. Key themes that emerged from the interviews were high satisfaction with the design of the donor survey instrument and with the results received through the DPR. Feedback from DPR subscribers was somewhat mixed regarding their perceptions of the comparative data. While some subscribers mentioned the value they saw in receiving their results compared to other community foundations, some noted that the dataset is currently small, making it difficult to interpret and generalize. Growing the comparative dataset was cited as a way in which the DPR process will continue to improve over time.

- **Reflections on CEP Staff.** Subscribers view CEP staff to be very responsive and found CEP staff’s answers to questions to be very helpful. On a 7-point scale, with a score of 7 associated with “very responsive” or “very helpful,” the mean score for responsiveness of CEP staff to questions was 6.7 and the mean score for helpfulness of CEP staff responses was 6.9. In the interviews, many subscribers cited their interactions with CEP staff as a strength of the DPR process.

- **Reflections on the DPR Process.** Many subscribers were very pleased that the process was not challenging or burdensome to them. Some subscribers cited the way that CEP staff shared results—whether it was through phone conversations, or sessions with staff and board

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¹ It is important to note that conducting statistical analysis with this small sample size reduces the likelihood of finding meaningful difference.
members—as a key strength, and noted how helpful that was for their organization. At the same time, some interviewees noted that they could have benefitted from greater support in interpreting results, and one recommendation was to give foundations concrete examples of changes that other community foundations have successfully implemented (which will be feasible as CEP grows the comparative dataset).

- **Recommending the DPR.** All subscribers (100%) who responded to the survey reported they would recommend the DPR to colleague community foundations, indicating high satisfaction with the service.

### The DPR’s Influence on Organizational Practices

- **Creating change with the DPR.** One hundred percent of subscriber survey respondents reported that the DPR resulted in some change, with 55% indicating they made "significant change," in at least one area of their foundation practices. Areas where a majority of DPR subscribers reported change included their approach to working with existing donors, communications with existing donors, approaches to engaging new donors, foundation strategy, and collaboration among donor staff and others in the foundation. Subscribers reported the most significant DPR-related change was in their engagement with existing donors. All (100%) subscriber survey respondents reported change in their approach to working with existing donors based on DPR results, with 36% making "significant change" in this area.

- **Internalizing the findings of the DPR.** Interview respondents overwhelmingly reported internalizing the results of the DPR. The majority of community foundation representatives reported sharing their results with their staff, senior management, boards of directors and in limited ways with their donors. Some also reported publicizing results more widely, through their websites or newsletters.

### Overall Value of the DPR

- **Value of the DPR relative to its cost.** DPR subscribers who covered the cost of their own participation considered the DPR highly valuable relative to its cost, with a mean rating of 6.2 on a 7-point scale, where higher scores indicate greater value. Two eighty-eight percent of DPR subscribers gave the DPR a value rating of six or higher. Both interview and survey responses indicated that many community foundations view the DPR as a uniquely valuable opportunity for organizational learning.

- **How the DPR compares to Other Donor Assessment Processes.** Community foundations reported engagement in a range of alternate activities to solicit feedback from donors, including calls and meetings with individual donors, as well as focus groups, internally-administered donor surveys, and other forms of market research. Survey data reveal that as a whole, DPR subscribers consider the DPR to be highly valuable when compared to other assessments of donor perception. On a 7-point scale assessing value relative to other similar processes (with higher scores indicating higher comparative value), 100% of DPR subscribers gave the DPR a rating of six or higher, with a mean score of 6.0.

- **Commissioning the DPR in the Future.** Most DPR subscribers intend to commission the DPR again in the future. Many confirmed that they intend to utilize the DPR on an approximately three-year cycle. Of two subscribers that reported plans to “probably” re-commission the DPR,

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2 Five of 11 respondents’ participation was fully underwritten by the Irvine Foundation. The six responses analyzed reflect community foundations that paid for DPR services, and their perspective on the value relative to the cost.
one indicated potential use of a five to seven year cycle while the other indicated a cycle of ten or more years.

- **Recommendations to make the DPR More Valuable.** DPR subscribers shared ideas for how to enhance the value of the DPR. Some expressed desire for a more robust comparative dataset, requiring CEP to engage more community foundations in the process. Related to this was a request from some respondents for “a refresher,” or continued access to comparative data as new community foundations are added.

**Conclusions and Recommendations**

The Donor Perception Report is an assessment tool that strengthens community foundations’ understanding of donor engagement and preferences, communication and satisfaction, motivations, future giving plans, and other areas of foundation interest. DPR subscriber reflections on the tool and the DPR experience were positive overall. Subscribers reported high satisfaction with the DPR assessment tool and the process. The responsiveness of CEP staff and helpfulness of CEP staff responses to questions were rated at the highest end of a 7-point scale, and in interviews, subscribers emphasized CEP staff knowledge and appreciation for CEP staff professionalism. In addition, every community foundation surveyed reported making at least some change with their DPR results, and respondents rated the value of the DPR relative to cost to be very high. All respondents said that they would recommend the DPR to a colleague community foundation, and nearly all indicated intent to re-commission the DPR in the future.

The DPR subscriber assessment study also elicited ideas from respondents for improving the DPR process and deliverables; these are summarized below.

- **Increase Subscriber Base for More Robust Comparative Data.** Throughout interviews, community foundation representatives highlighted the importance of the comparative assessment component of the DPR, and some subscribers expressed an interest in seeing their performance relative to a more robust comparative dataset. Subscriber interview responses indicated that factors such as foundation size and types of donors assessed influence the utility of comparative data. Continuing to build this comparative dataset to make it as robust as possible will help CEP maintain subscriber interest in this unique component of the DPR.

- **Identify Funding to Subsidize the Costs of the DPR for Small Community Foundations.** While all responding subscribers would recommend the DPR to a colleague, some cited cost as a factor that could prohibit them from commissioning the DPR in the future. When asked about what could encourage participation, several ideas were given, including having another foundation offset costs (similar to the Irvine Foundation’s investment), or having foundations pay incrementally, and periodically have their results updated as the comparative database continues to grow. Continuing to seek out partnerships and creative solutions to financial barriers would enable a wider range of community foundations to both initiate and continue to commission the DPR.³

- **Provide Case Examples of High Performance and Change Made by Other Community Foundations.** As has been suggested in other studies of CEP’s assessment tools, subscribers requested case studies of community foundations that have made change based on the DPR or that are on the high end of the performance spectrum in DPR-assessed areas. CEP’s

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³ In 2011 and 2012, a grant from the Bill and Melinda Gates Foundation will help offset the cost of the DPR for some community foundations.
extensive experience with community foundations can assist DPR subscribers in making DPR results actionable by sharing best practices from the field.
I. Introduction

Background and Context on the DPR

The Center for Effective Philanthropy (CEP) provides foundations with data that reveal insights into how they can better define, assess, and improve effectiveness and impact. Specifically, CEP creates assessment tools, disseminates research-based publications, and provides programming to catalyze foundations in developing clearer goals; coherent, well-implemented strategies; and relevant performance indicators. The Donor Perception Report (DPR) is one among a set of assessment tools that CEP has developed.

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- Specific areas for improvement highlighted in the DPR that the community foundations have taken action to change; and
- The overall value of the DPR relative to cost, expectations, and other community foundation assessment processes available or undertaken.
II. Evaluation Overview

The following section provides an overview of the evaluation methods used for this study. It includes a description of the data collection instruments and the analyses employed.

Evaluation Methods

LFA Group designed an online assessment survey as well as a key informant interview protocol based on the study purposes. LFA Group worked with CEP to modify these instruments in an effort to ensure the quality and relevance of data collected. DPR assessment tools focused on satisfaction with the DPR process, changes foundations made as a result of the DPR, and perceived value of the DPR.

CEP provided LFA Group with the list of primary contacts at each of the community foundations that have commissioned the DPR, for subscribers between Fall 2009 and Fall 2010. The 2011 DPR subscriber assessment survey was sent at least one year after subscribers received their DPR results to allow time for implementation of DPR-informed change. LFA Group distributed the DPR assessment survey to each foundation’s primary staff contact with CEP at the time the DPR was commissioned. This model for administering the survey ensures that those individuals who have the most extensive interaction with CEP provide responses related to satisfaction, changes within the organization as a result of the DPR, and their perception of the DPR’s value. In total, all 11 foundation representatives completed the on-line survey, representing a noteworthy 100% response rate. Additionally, 10 of 11 foundations completed key informant interviews, representing a 91% response rate.

Comparisons of foundation responses based on key independent variables such as foundation asset size, and tenure of foundation representatives within their positions at their foundations and in the community foundation field overall revealed no significant differences between groups. LFA Group’s data analyses on the quantitative survey results include univariate statistics such as frequencies of response, mean, minimum, maximum and standard deviation, and inferential statistics, including independent t-tests. These analyses explored differences in results regarding satisfaction with and utility of the DPR, organizational changes made and perceived value of the DPR.

LFA Group also conducted key informant interviews with representatives of 10 subscriber community foundations to better understand the DPR experience and impact. Using a key informant interview protocol, LFA Group explored how the DPR leads to change in foundations and inquired about DPR subscribers’ impressions of potential DPR-related offerings. LFA Group conducted content analysis to identify themes arising from the interviews.

Response Rates

- 11 of 11 community foundations (100%) using the DPR responded to the 2011 DPR subscriber assessment survey.
- 10 of 11 community foundations (91%) participated in key informant interviews.

4 Please refer to the appendices of this report for copies of the 2011 DPR Assessment Survey and Key Informant Interview Protocol.
5 It is important to note that conducting statistical analysis with this small sample size reduces the likelihood of finding meaningful differences.
Strengths and Limitations

Strengths
There are several strengths of this assessment. First, the strong rate of response reduces concerns about sample bias. Second, in nearly every case, LFA Group was able to get feedback from the staff person at the community foundation who had been most directly involved in the DPR process with CEP, providing access to the most direct source of information on the DPR experience. Third, the use of a mixed-methods design with both quantitative and qualitative data sources allows for triangulation of findings which strengthens conclusions drawn from the complete and combined dataset. Fourth, and perhaps most critically, CEP’s use of an external evaluator to assess their work provided a safe and comfortable opportunity for DPR subscribers to submit honest feedback confidentially, without fear or concern that CEP would be able to link individual responses to names or organizations.

Limitations
This assessment also has some limitations. Primarily, the survey relies on individual self-reports rather than observations, which may introduce bias, particularly with respect to questions about areas of change in which foundations have engaged. Results should be interpreted with this caution in mind. Another limitation of this assessment is the small sample size of DPR subscribers, which serves to limit the generalizability of these findings to future potential DPR subscribers.

About the 2011 DPR Subscriber Assessment Respondents

The positions of the DPR subscribers who responded to the online survey are shown in Exhibit 1. The majority (73%) of respondents most closely identified as either the Vice President of Donor Services/Relations (46%) or the CEO/Executive Director (27%) of their community foundation. Additional respondent positions include Vice President of Communications (9%) and a Donor Engagement/Development Officer (9%). One respondent (9%) identified falling in the “other” category, as an analogous position did not appear in response options.

Exhibit 1: Respondent Position in their Community Foundation (n=11)

<table>
<thead>
<tr>
<th>Position</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Vice President of Donor Services/Relations</td>
<td>46%</td>
</tr>
<tr>
<td>CEO/Executive Director</td>
<td>27%</td>
</tr>
<tr>
<td>Vice President of Communications</td>
<td>9%</td>
</tr>
<tr>
<td>Donor Engagement/Development Officer</td>
<td>9%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

Percentage of Respondents
The DPR survey respondents have held their current positions across a range of years, with 73% in their current job for at least four years (Exhibit 2). In addition, 70% of subscribers interviewed have been at their community foundation for at least 7 years.

Exhibit 2: Respondent Tenure in their Current Position and Community Foundation
III. Reflections on the DPR Experience

The DPR experience for subscribers spans four months, and CEP provides a number of services during this time. Initially, community foundations work closely with CEP to identify the donors they will survey and customize the DPR tool. CEP then surveys donors and analyzes the survey results. The results are then shared with community foundations, and CEP provides their interpretation. The following section explores subscriber reflections on their experience with the DPR, including: how they first learned about the DPR, why their foundation commissioned it, their overall satisfaction, the assessment tool itself, CEP staff interaction, and the DPR process as a whole.

How Subscribers Learned about the DPR

Subscribers learned about the DPR in a variety of ways. Some subscribers noted that they learned about the opportunity because they had commissioned other CEP services, such as the Grantee Perception Report and Stakeholder Assessment Report. In addition, some subscribers mentioned hearing about the DPR at conferences or through outreach done by CEP. Furthermore, a generous grant from the James Irvine Foundation underwrote the cost of the DPR for five of the eleven subscribers participating in this assessment, and some of these subscribers mentioned learning about the opportunity through the Irvine Foundation directly. No one method stood out as more successful at attracting new subscribers; rather, the number of subscribers hearing about the DPR in each of those three ways was nearly equal.

Reasons for Commissioning the DPR

DPR subscribers discussed a range of reasons for commissioning the DPR. Many respondents wanted feedback from their donors to learn about donor satisfaction and their communication and service offering preferences. Some subscribers noted that their foundation had never surveyed donors before, while some saw importance in having a survey administered by a third-party group, like CEP, rather than solely relying on internal donor assessment efforts. Some respondents noted that their foundation had implemented changes, and they wanted to gauge donor response to those changes. In addition, some subscribers expressed interest in the comparative data and benchmarks provided by commissioning the DPR.

Reflections on the DPR Assessment Tool

The DPR subscriber assessment survey examined six dimensions of satisfaction with the DPR experience and tool. As evidenced in Exhibit 3, respondents indicated they were highly satisfied (at least a 6 on a
7-point scale) in five out of six areas. In addition, on average, respondents were satisfied (at least a 5 on a 7-point scale) with the sixth aspect of the report: the usefulness of the DPR on its own.

Exhibit 3: Mean Satisfaction with the DPR
(n=11)

<table>
<thead>
<tr>
<th>Aspect</th>
<th>Satisfaction Level</th>
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<tbody>
<tr>
<td>The DPR experience overall</td>
<td>6.3</td>
</tr>
<tr>
<td>The extent to which CEP’s interpretation was meaningful for guiding reflection on your foundation’s performance</td>
<td>6.3</td>
</tr>
<tr>
<td>The extent to which the DPR highlighted areas in which your foundation was performing well</td>
<td>6.2</td>
</tr>
<tr>
<td>The extent to which the DPR highlighted areas in which your foundation could improve performance</td>
<td>6.2</td>
</tr>
<tr>
<td>The extent to which the DPR helped deepen the foundation’s understanding of its donors’ needs/interests</td>
<td>6.1</td>
</tr>
<tr>
<td>How useful the DPR was on its own (without CEP staff explanation)</td>
<td>5.4</td>
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In the five top-rated areas, the mean scores were greater than 6.0 on a 7-point satisfaction scale with higher scores indicating greater satisfaction. On average, DPR subscribers appeared slightly less highly satisfied with the usefulness of the DPR on its own (mean = 5.4), absent an explanation from CEP staff. This finding may provide an opportunity for CEP to consider ways of making the DPR more useful on its own, which could better enable foundations to regard the tool itself as a useful resource in their process of evaluating and improving their performance.

In interviews, DPR subscribers further discussed their satisfaction with the DPR assessment tool itself, the results it solicited, and the comparative data provided. A key theme that emerged from the interviews was high satisfaction with the design of the survey instrument. Many subscribers also appreciated being able to customize questions to the work of their community foundation. While satisfaction with customization was a key theme, some subscribers suggested that further customization also is an area for improvement, noting a desire to capture the different types of products and fund holders that could be surveyed. At the same time, customization of questions increased survey length and, subsequently, the demand on donors, and many respondents either cited the survey length as a key challenge or mentioned it as a tradeoff they faced along the way. Both themes—customization and length—were brought up by many subscribers, which suggests an opportunity for CEP to consider how to increase customization and personalization of the tool, while remaining conscious of length.

Another key theme involved the level of satisfaction with the results received through the DPR. While respondents overall found survey results to be helpful in highlighting ways the foundation was doing well, or ways in which their performance could be improved (see Exhibit 3 above), one
subscriber noted that they would have preferred a more substantial qualitative component. Another mentioned that the data left them wanting to dig deeper into why respondents answered the way they did in some areas. Some subscribers desired both a deeper and broader analysis, wanting to both understand more about the perspectives of those they currently survey and to expand the scope of people surveyed. Examples include wanting to gauge donor understanding of the social change work of the community foundation or wanting to compare different types of fund holders, such as nonprofit agency endowment funds in addition to donor-advised fund holders. Yet, even these suggestions were mixed; while one interviewee mentioned that they wished they could have made the survey work for more audiences, another raised the point that if different community foundations choose to survey different types of fund holders, the value of the comparative data would be diminished.

Feedback from DPR subscribers was mixed regarding their reflections on the comparative data, a primary component of the DPR assessment tool. While some subscribers mentioned the value they saw in receiving their results compared to other community foundations, some noted that the dataset is currently small, making it difficult to interpret and generalize. Growing the comparative dataset was cited as a way in which the DPR process will continue to improve over time.

Reflections on CEP Staff

Perceptions of CEP staff were overwhelmingly positive. As shown in Exhibit 4, subscribers view CEP staff to be very responsive and found CEP staff’s responses to questions to be very helpful. On a 7-point scale, with a score of 7 associated with “very responsive” or “very helpful,” the mean score for responsiveness of CEP staff to questions was 6.7 and the mean score for helpfulness of CEP staff responses was 6.9. This was also a theme that emerged from the interviews: many subscribers cited their interactions with CEP staff as a strength of the DPR process. Some interviewees mentioned CEP knowledge, expertise, and ability to explain results as especially useful. In addition, interviewees described staff as professional, knowledgeable, and diplomatic when presenting sensitive information. Finally, it is worth noting that no subscribers mentioned areas for growth regarding staff interaction, with the exception of wanting to work with CEP staff more.

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6 Nonprofit agency endowment funds provide a way for nonprofits to diversify their income by investing their funds in a community foundation that serves the same community.

I would just emphasize that the team at CEP was really great…This is what makes the difference: the fact that CEP really knows community foundations and this community foundation versus that community foundation and where we might lie.

-DPR Subscriber
Reflections on the DPR Process

Many subscribers shared positive reflections on the DPR process, noting that they were very pleased that the process was not challenging or burdensome to them, and that CEP took on most of the work in the process of surveying donors. Whereas most subscribers were able to accommodate CEP’s needs and requests in the process of implementing the DPR, one foundation suggested CEP should assess subscriber capacity to engage in the DPR process, as their particular organization noted that there was more work involved than they were initially prepared to handle.

Some subscribers cited the way that CEP staff shared back results—whether it was through phone conversations, or sessions with staff and board members—as a key strength, and noted how helpful that was for their organization. At the same time, some interviewees noted that they could have benefitted from greater support in interpreting results, and one recommendation was to give foundations concrete examples of changes that other community foundations have successfully implemented.

Recommending the DPR

A practical and meaningful indicator of satisfaction with a service is whether or not its recipients would recommend it to others. Based on this indicator, DPR subscribers were highly satisfied across the board: all subscribers (100%) who responded to the survey reported they would recommend the DPR to colleague community foundations.

It’s just rich, there’s so much there...It was the first window into this question of what do people really think?...Where is there constructive feedback? How do we rate against our peers? It was tremendously valuable, like flicking on a switch in a dark room.

-DPR Subscriber
IV. The DPR’s Influence on Organizational Practices

The DPR provides community foundations with a reliable method for gathering anonymous, candid donor assessments of foundation practices and benchmarks those results against a comparison group. But, do subscribers actually make change in their community foundations based on DPR findings? The greatest measure of the DPR’s success is the extent to which subscribers make changes based on the DPR results provided to them by CEP. By this measure, the DPR is very effective: 100% of 2011 respondents reported that the DPR resulted in some change (55% indicated significant change) in at least one area of their foundation practices. See Exhibit 5.

As shown in Exhibit 6 below, areas where a majority of DPR subscribers reported change include their approach to working with existing donors, communications with existing donors, approaches to engaging new donors, foundation strategy, and collaboration among donor staff and others in the foundation. Less than one-half (45%) of subscribers surveyed reported changes related to staffing levels or the foundation’s perspective on its role in the community. Survey and interview respondents demonstrated that in some cases, the DPR results may not have initiated changes, but rather it provided data to support existing practices or changes the community foundation was already planning to implement.

Exhibit 6: Level of Change Made with the DPR

1When calculating mean, “No change” =0, “Some change” =1, and “Significant change” =2.
2Some n-values are smaller due to respondents selecting "too soon to tell" whether change had been made or that the DPR influenced an evaluation of previous change.”
Creating Change with the DPR

The following section describes some of the most significant changes community foundations made that were informed by the DPR results provided by CEP. The case study below provides a glimpse into the kinds of DPR-inspired change.

**Engagement Strategy with Existing Donors**

Subscribers reported the most significant DPR-related change was in their engagement with existing donors. One hundred percent of 2011 subscriber survey respondents reported change in their approach to working with existing donors based on DPR results, with 36% making “significant change” in this area (see Exhibit 6). In addition, 91% of DPR subscribers reported change in communications with existing donors, with 40% making “significant change.” DPR results emphasized to some subscribers the need to build relationships with donors. For these subscribers, the DPR also provided guidance as to how to enhance existing relationships, through increased contact, one-on-one interaction and more targeted matching of donor interests with funds. Change to communication strategies was widespread and varied based on donor response. For some subscribers, the DPR signaled that donors wanted greater access through online resources. For example one subscriber found that donors were not utilizing a foundation newsletter, while another created a newsletter based on DPR results. Another subscriber had been preparing to launch a social media campaign, and learned through the DPR that her donors expressed no interest in social media. Finally, one subscriber learned that donors preferred one-on-one consultation over donor programming, while for some, DPR results indicated support for increased programming, building foundation visibility through community events.

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**Creating Change with the DPR: A Case Study**

For one community foundation, commissioning the DPR was rooted in a desire to further develop relationships with donors. Because most of their funds are donor advised funds, they suspected that their interactions with donors were mostly administrative, and hoped to find ways to further tap into the interests of their donors.

Since the DPR, the community foundation has gone through significant changes based on donor feedback. They have developed a strategic grantmaking program that increases the involvement of donors. As a result, they quickly met and exceeded fundraising goals. This is one of many programs developed to bring donors closer to the foundation and to the work of the nonprofits they support. The foundation also now provides more events to familiarize donors with foundation initiatives, and has increased communication through a quarterly newsletter and quarterly phone calls to donors. This has in part been made possible through the hiring of a Donor Services Officer, a decision that the foundation made based on DPR results. The foundation reports that when the Donor Services Officer was hired, the DPR was the first document she was given to best understand how to meet the needs of donors.

[As a result of the DPR] we do many more donor events, some of them focused on particular initiatives that we’re working on. We get donors more involved in those initiatives. We’re reaching out much more.

-DPR Subscriber
CREATING CHANGE IN DONOR ENGAGEMENT

One community foundation commissioned the DPR during a time of transition in their Donor Services department. In order to inform future directions, the community foundation decided to go beyond their internal donor survey processes and engage CEP; they hoped that utilizing an outside group of experts and accessing benchmarks from other community foundations would enhance their strategic change efforts.

Commissioning the DPR uncovered donor perceptions that were critical in guiding the community foundation in three areas of communication and donor engagement. First, at the time of the DPR, the community foundation was preparing to launch a social media campaign. However, the DPR provided valuable feedback that their donors had no interest in social media. Secondly, the DPR motivated the community foundation to reexamine their differentiation of donors into two tiers. The community foundation had created these tiers based on a theory that one was more likely to give large donations than the other. The DPR showed that in reality, donors in the two tiers gave similar amounts of money to the community foundation. However, the community foundation had provided different treatment to donors in the two tiers, and as a result one group felt closer to the foundation than the other. This discovery prompted the community foundation to increase the attention they paid to donors who previously received less. Finally, the benchmark data provided by CEP allowed this community foundation to recognize that their personal interactions with donors were comparatively infrequent. As a result, their new Donor Services team was trained to treat spending time with donors as their highest priority.

Differentiating Donor “Market Segments”

Many subscribers expressed that the DPR results allowed them to recognize important distinctions between varied donor market segments. In some cases, this was related to the foundation approach towards different groups of existing donors. For one subscriber, the DPR demonstrated that two different tiers of donors gave comparable amounts to the foundation, but one received more attention and as a result felt closer to the foundation. The DPR informed changes to address this imbalance.

DPR results prompted another subscriber to begin a systematic review of donor history of grantmaking and code areas of interest to facilitate the connection of donors with the funds that match their interests. Some subscribers discovered that donors who worked with professional advisors felt less connection to the community foundation, encouraging them to develop new strategies for engaging these donors and collaborating with professional advisors.

In other cases, DPR results informed strategies to reach out to new donor markets. One subscriber indicated that DPR results were useful in developing new messaging for prospective donor advisors. For another subscriber, the DPR confirmed intuition that the foundation needed to diversify its marketing approach in order to successfully engage new types of donors.

We are trying to put systems in place that allow us to access the right people for the right kinds of interactions. This was a result of what we learned from the survey.

-DPR Subscriber
Reinforcing Strategic Change

Interviewees suggested that for many, the DPR was commissioned as part of a set of larger organizational change efforts. In some cases, this made it difficult for subscribers to know which changes to attribute directly to the DPR as opposed to other aspects of the change process. However, where subscribers did not attribute change directly to the DPR, they did underscore that the results of the DPR provided validation and increased impetus for the direction of organizational change. One respondent noted that the DPR made it possible to present organizational innovations in the context of responsiveness to donor feedback.

Internalizing the Findings of the DPR

The majority of community foundation representatives reported sharing their results with their staff, senior management, boards of directors and in limited ways with their donors. Some also reported publicizing results more widely, through their websites or newsletters. Interview respondents overwhelmingly reported internalizing the results of the DPR.

In some cases, community foundation respondents reported that staff internalized the results to a greater extent than members of their Boards of Directors. An explanation provided for this differential in degrees of internalization was that staff members had a more immediate relationship to donors than did board members, which is to say that this difference is to be expected. One respondent explained that it is the role of the staff to “keep driving this and make it fresh for the board.” Another respondent reported that “to say that everyone internalized the results is probably a stretch,” and related this to the variation in what people in the foundation do as part of their work.

Making the Case for Change

During tough economic times, it is challenging for foundations to allocate resources to internal operations and infrastructure. Some respondents mentioned that addressing areas of development surfaced in the DPR, such as enhancing donor relations efforts, would require additional staff. However, their boards were reticent to hire additional staff in a recession. The DPR provided hard evidence that donors wanted to see changes that would require more staff. As a result, these foundations were able to justify hiring new staff, increasing their ability to respond to donor feedback.

Barriers to Change

Although the DPR provided subscribers with donor feedback to guide changes, implementation of some changes remains challenging for some community foundations. Some subscribers mentioned funding as their ultimate limitation in implementing changes suggested by the DPR results. Other subscribers indicated that donor requests for technological advancement were beyond what they could immediately put in place. Conversely, one subscriber reported that with technology in place, challenges arise related to reaching older donors who do not use the Internet.
V. Overall Value of the DPR

The DPR is a tool that allows community foundations to assess their effectiveness and performance, and reflect upon their organizational practices, using information provided through the lens of donors. Some subscribers indicated that the DPR was the first formal process in which they had engaged to assess donor perceptions. The DPR provides subscribers with data that they can then use to make informed decisions. In open-ended responses, foundation representatives described areas in which the DPR provided unique benefits as well as areas in which the process could be enhanced for greater value.

Value of the DPR Relative to its Cost

DPR subscribers consider the DPR highly valuable relative to its cost, with a mean rating of 6.2 on a 7-point scale, where higher scores indicate greater value (See Exhibit 7). Subscribers whose participation was fully underwritten by the Irvine Foundation were excluded from these analyses. Of those foundations that paid for the DPR, 88% gave the DPR a value rating of six or higher. Both interview and survey responses indicate that many community foundations view the DPR as a uniquely valuable opportunity for organizational learning.

Exhibit 7: Value of the DPR Relative to Cost

<table>
<thead>
<tr>
<th>Value for the Cost</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Poor</td>
<td>17%</td>
</tr>
<tr>
<td>Poor</td>
<td>50%</td>
</tr>
<tr>
<td>Neutral</td>
<td>33%</td>
</tr>
<tr>
<td>Excellent</td>
<td>0%</td>
</tr>
</tbody>
</table>

Mean = 6.2

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7 Five of 11 respondents were removed because their participation was fully underwritten by the Irvine Foundation. The six responses analyzed reflect community foundations that paid for DPR services, and their perspective on the value relative to the cost.
Considerations and Cost Sensitivities

Many foundation representatives indicated that limits on operating budget expenses was a key consideration in thinking about commissioning the DPR. For some, the ability to have the DPR funded by an outside foundation provided impetus to commission the DPR when they did. One respondent indicated that commissioning the DPR was only possible because it was paid for through grantmaking rather than operating funds. Many respondents referenced in interviews that foundation budget size was a consideration in undertaking this type of effort. Many subscribers also saw the DPR as a unique opportunity to see how their donor-rated performance compares against benchmarks established by a comparison group of other foundations whose donors CEP has surveyed. Other considerations include the priorities of the board, alignment with strategic planning goals, time required of staff and donors, and ability to pay for the DPR through grantmaking (rather than operational) budgets as factors making it easier to commission work such as the DPR.

When asked what might be a reasonable price for the DPR, interviewees’ responses varied greatly. The majority of responses were divided among ballpark estimates of $5,000, $10,000 and $15,000. Only one respondent indicated ability and willingness to pay over $20,000, and this was contingent on the ability to utilize the grantmaking budget to fund the process.

How the DPR Compares to Other Donor Assessment Processes

Community foundations reported engaging in a range of alternate activities to solicit feedback from donors, including calls and meetings with individual donors, focus groups, internal donor-focused surveys, and other forms of market research. Survey data reveal that, as a whole, DPR subscribers consider the DPR to be highly valuable when compared to other assessments of donor perception. On a 7-point scale assessing value relative to other similar processes (with higher scores indicating higher comparative value), 91% of DPR subscribers gave the DPR a rating of six or higher, with a mean score of 6.2 (See Exhibit 8).

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8Analysis of survey results did not indicate statistically significant differences in perceived value based on the size of the community foundation.
Two central themes emerged as interview respondents compared alternate donor assessment processes to the DPR:

- **CEP’s experience and expertise**: Community foundation representatives expressed appreciation for CEP’s professionalism, ability to provide customized survey options, and deeper analysis than other donor perception assessment processes. The benefits of engaging CEP as a third party were also recognized in CEP’s ability to handle survey logistics and ensure donor confidentiality. Furthermore, CEP’s familiarity with community foundations was noted as a strength.

- **The comparative dataset** was mentioned by many interviewees as a distinct benefit of the DPR process. One interviewee cited comparative data as the “true value” of the DPR, explaining that the foundation could have hired someone else or relied on in-house donor surveys, but they wouldn’t have had access to benchmarks from other community foundations.

**Commissioning the DPR in the Future**

Most DPR subscribers report intent to commission the DPR again in the future. Many confirmed that they intend to utilize the DPR on an approximately three-year cycle. Of two subscribers that reported plans to “probably” re-commission the DPR, one indicated potential use of a five to seven year cycle while the other indicated a cycle of 10 or more years. Interview respondents who were uncertain about whether or not they would commission the DPR again were among those whose participation had been underwritten by the Irvine Foundation, and they cited cost as a potentially prohibitive factor. Yet, some DPR subscribers who paid for the DPR also cited cost as a potential barrier. For example, one subscriber who paid for the DPR noted that while they intend to commission the DPR again in the future, if the costs were to increase substantially, it would cause them to reconsider. Another mentioned that cost was a factor in how frequently their foundation could commission the GPR. Some subscribers also expressed concern about over-burdening donors. Foundation representatives were sensitive to the amount of time they ask of their donors in participating in the DPR and other similar processes, as well as the frequency of such requests. Furthermore, one respondent found that among older donors, consultative work to enhance organizational operation was considered a questionable use of funds.
Recommendations to Make the DPR More Valuable

DPR subscribers shared ideas for how to enhance the value of the DPR. Some expressed desire for a more robust comparative dataset, requiring CEP to engage more community foundations in the process. Related to this was a request from some respondents for “a refresher,” or continued access to comparative data as new community foundations are added.

One subscriber reported that increased in-person contact and dialogue regarding how to implement findings would increase the value of the DPR. Another recommended that CEP provide examples of how other, similar community foundations had successfully implemented change based on DPR results.

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If it’s $15,000, [thought of as] $5,000 over three years, that’s an easier buy for people. There’s a first crunch of data and a couple refreshes. That might be a way to get more people to participate.

-DPR Subscriber
VI. Conclusion

The Donor Perception Report is an assessment tool that strengthens community foundations’ understanding of donor engagement and preferences, communication and satisfaction, motivations, future giving plans, and other areas of foundation interest. DPR subscriber reflections on the tool and the DPR experience were very positive overall. Subscribers reported high satisfaction with the DPR assessment tool and the process. The responsiveness of CEP staff and helpfulness of CEP staff responses to questions were rated at the highest end of a 7-point scale, and in interviews, subscribers emphasized CEP staff knowledge and appreciation for CEP staff professionalism. In addition, every community foundation surveyed reported making at least some change with their DPR results, and respondents rated the value of the DPR relative to cost to be very high. All respondents said that they would recommend the DPR to a colleague community foundation.

In the spirit of reflection and learning, the DPR subscriber assessment study also elicited from respondents ideas for improving the DPR process and deliverables; these are summarized below.

Learning for Action: Recommendations for the DPR

- **Increase Subscriber Base for More Robust Comparative Data.** Throughout interviews, community foundation representatives highlighted the importance of the comparative assessment component of the DPR, and some subscribers expressed an interest in seeing their performance relative to a more robust comparative dataset. Subscriber interview responses indicated that factors such as foundation size and types of donors assessed influence the utility of comparative data. Continuing to build this comparative dataset to make it as robust as possible will help CEP maintain subscriber interest in this unique component of the DPR.

- **Identify Funding to Subsidize the Costs of the DPR for Small Community Foundations.** While all responding subscribers would recommend the DPR to a colleague, some cited cost as a factor that could prohibit them from commissioning the DPR in the future. When asked about what could encourage participation, several ideas were given, including having another foundation offset costs (similar to the Irvine Foundation’s investment), or having foundations pay incrementally, and periodically have their results updated as the comparative database continues to grow. Continuing to seek out partnerships and creative solutions to financial barriers would enable a wider range of community foundations to both initiate and continue to commission the DPR.9

- **Provide Case Examples of High Performance and Change Made by Other Community Foundations.** As has been suggested in other studies of CEP’s assessment tools, subscribers requested case studies of community foundations that have made change based on the DPR or that are on the high end of the performance spectrum in DPR-assessed areas. CEP’s extensive experience with community foundations can assist DPR subscribers in making DPR results actionable by sharing best practices from the field.

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9 In 2011 and 2012, a grant from the Bill and Melinda Gates Foundation will help offset the cost of the DPR for some community foundations.
VII. List of Appendices

Appendix A: DPR Subscriber Assessment Survey

Appendix B: DPR Key Informant Interview Protocol
Appendix A: DPR User Assessment Survey

The Donor Perception Report (DPR) User Assessment Survey

The Center for Effective Philanthropy (CEP) is turning the tables on assessment once again: this time to get feedback from foundations that have commissioned CEP’s Donor Perception Report (DPR). CEP has engaged an outside research and evaluation consultant, LFA Group, to conduct this survey. Your candid input is essential for helping CEP understand the effectiveness of and how to improve the DPR from your perspective—that of its primary users. This survey is confidential: only LFA team members will be able to see your responses, and only aggregate information will be presented to CEP.

Thank you very much for taking the time to complete this survey. Please respond by October 19th, 2011. We estimate it will take you less than 10 minutes. If one of your colleagues could better fill out all or part of this survey, please feel free to pass this survey along to that person.

If you have any questions, please contact Elisabeth Morgan Thompson at LFA Group, Elisabeth@LFAgroup.com or 415.392.2850 x327.

About the DPR Report and Services

1. How satisfied were you with the DPR experience overall?

   Not at all Satisfied
   1  2  3  4  5  6  7

   Very Satisfied

2. How responsive was staff from CEP to questions your community foundation had during the DPR process?

   Not at all Responsive
   1  2  3  4  5  6  7

   Very Responsive

3. In general, how helpful were the responses CEP staff provided to questions your community foundation had?

   Not at all Helpful
   1  2  3  4  5  6  7

   Very Helpful

4. How satisfied are you with the following aspects of the DPR report?

<table>
<thead>
<tr>
<th>Aspect of the DPR Report</th>
<th>Not at all Satisfied</th>
<th>Very Satisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. How useful the DPR was on its own (without CEP staff explanation).</td>
<td>1  2  3  4  5  6  7</td>
<td></td>
</tr>
<tr>
<td>b. The extent to which the CEP’s interpretation of the results was meaningful for guiding reflection on your</td>
<td>1  2  3  4  5  6  7</td>
<td></td>
</tr>
</tbody>
</table>
Creating Change with DPR Results

5. Considering the aspects of your work identified in the table below, please indicate the degree to which the DPR results affected change in your community foundation's decision-making or practices. (Please consider tangible changes in policy or strategy as well as intangible changes in culture, approach, or mindset when responding.)

<table>
<thead>
<tr>
<th>Aspect of the DPR Report</th>
<th>Not at all Satisfied</th>
<th>Very Satisfied</th>
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<tbody>
<tr>
<td>community foundation’s performance overall.</td>
<td></td>
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<tr>
<td>c. The extent to which the DPR highlighted specific areas in which your community foundation was performing well.</td>
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<td></td>
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<tr>
<td>d. The extent to which the DPR highlighted specific areas in which your community foundation could improve performance.</td>
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<td></td>
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<tr>
<td>e. The extent to which the DPR helped deepen the foundation’s understanding of its donors’ needs/interests.</td>
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<table>
<thead>
<tr>
<th>Community Foundation Functions</th>
<th>To what extent has the DPR affected change in your community foundation in these areas?</th>
<th>No Change</th>
<th>Some Change</th>
<th>Significant Change</th>
<th>Evaluation of Previous Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>To Soon to Tell</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Communications with existing donors (e.g., clarity, methods)</td>
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<tr>
<td>b. Approaches to working with existing donors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Approaches to engaging new donors</td>
<td></td>
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<tr>
<td>d. Foundation strategy (e.g., what it is you’re trying to do, focus)</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Community Foundation Functions</td>
<td>To what extent has the DPR affected change in your community foundation in these areas?</td>
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<tr>
<td></td>
<td>Too Soon to Tell</td>
<td>No Change</td>
<td>Some Change</td>
<td>Significant Change</td>
<td>Evaluation of Previous Change</td>
</tr>
<tr>
<td></td>
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<tr>
<td>e. Collaboration among donor staff and others in the Foundation</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. Staffing levels</td>
<td></td>
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<td></td>
<td></td>
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<tr>
<td>g. The foundation’s perspective on its role in the community</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Overarching Assessment of the DPR**

6. How valuable was the DPR relative to its cost?

| Very Poor | Excellent |
| Value for the Cost | Value for the Cost |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

7. How valuable was the DPR relative to other similar processes your community foundation has engaged in previously (such as donor surveys)?  
   - Not Applicable

| Very Poor | Excellent |
| Value for the Cost | Value for the Cost |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |

8. Would you recommend the DPR to a colleague community foundation?  
   - Yes  
   - No

**About You**

9. Which category best describes your position in the community foundation? Please check one.
CEO/Executive Director          Director of Research/Evaluation
Vice President of Programs      Vice President of Communications
Vice President of Donor Services/Relations    Donor Engagement/Development Officer
Other: Please specify ________________________________

10. How long have you been in your current position? Please check one.
    - Less than a year
    - 1-3 years
    - 4-6 years
    - 7-10 years
    - More than 10 years

Thank you for your time and input!
Appendix B: DPR User Assessment Key Informant Interview Protocol

Center for Effective Philanthropy
Donor Perception Report Subscriber Satisfaction and Impact Assessment

Key Informant Interview Protocol

Thank you for taking the time to speak with me today. As you know, CEP is conducting an assessment of its Donor Perception Report and is interested in understanding the value of the report’s findings to your organization and any changes your organization may have implemented as result of the Donor Perception Report findings. CEP is also interested in your perspective on your engagement with CEP staff, and your overall impressions of the Donor Perception Report (DPR) process.

CEP has engaged LFA Group: Learning for Action, an independent research, evaluation, and strategy firm to conduct this evaluation. We will be conducting interviews with representatives from community foundations that have commissioned the DPR to understand funder experience, identify areas for improvement, and increase opportunities for the DPR to help community foundations improve their effectiveness. We are using information gathered through these interviews to develop the strongest possible recommendations for CEP about what works, what doesn’t, and what ideas for change to the DPR subscribers suggest.

These interviews are confidential and your comments will not be linked to you or your organization in our report to CEP. LFA Group has not seen any Donor Perception Report results from your organization. This interview should last for about 45 minutes. Do you have any questions for me before we begin?

<table>
<thead>
<tr>
<th>Interview Date: ______________________</th>
<th>Interviewee Name: ______________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization: ________________________</td>
<td>Title: _________________________________</td>
</tr>
</tbody>
</table>

Background and Context

1. I’d like to start by asking a little bit about yourself. How long have you been with your community foundation? How long have you been working in the community foundation field?

2. How did you first learn about CEP’s Donor Perception Report?

3. What was the impetus at your organization to commission the Donor Perception Report?
   
   **Probe:** What were the questions you hoped the Donor Perception Report might answer?

The Donor Perception Report Process
4. Thinking generally about your experiences with the Donor Perception Report process, what were the greatest strengths of the process and what were the weaknesses/areas for improvement?  
   [Reference Survey q1-4]  
   probe: What specific recommendations do you have for how can CEP improve the process or survey (interaction with CEP staff, receipt or interpretation of the results, the report itself, etc.)?

Donor Perception Report-Fueled Change

5. Can you tell me a little bit about your organization’s Donor Perception Report results?  
   probe: Did the results answer the questions you had as you entered into the process?  
   probe: Did you find any analysis CEP may have done with data from your community foundation (e.g., segmentations by fund size or donor tier) to be particularly useful (e.g., as compared other analyses provided in the report)?

6. Do you feel that your organization (staff and Board) internalized the Donor Perception Report findings – both the ‘good’ and the ‘bad’? Why or why not?  
   probe: With whom were the Donor Perception Report results shared? (*Probe only if interviewee has not mentioned who saw the findings.)

7. Please tell me – in as much detail as possible – about the most important changes your organization made as a result of the Donor Perception Report findings.  
   [Reference survey q5]  
   probe: How significant do you think these changes have been for enhancing the effectiveness of your organization?  
   probe: What other factors in your organization or environment facilitated or impeded your ability to make change based on these results? Was there anything that CEP could have done to have helped you in this process?  
   probe: Has there been any follow-up with donors regarding the Donor Perception Report findings?  
   probe: Has/Do you think implementing the changes you made in response to your Donor Perception Report helped/will help result in an increased level of giving from your donors in the future?

The following questions drill down into specific types of change your community foundation may have made as a result of the DPR.  
   [Interviewer: Refer to the respondent’s survey results to target probing.]

8. Did the Donor Perception Report influence your community foundations donor engagement strategy? If yes, how so? If not, why not?  
   [Reference survey q5a, q5b, q5c]

9. Did the Donor Perception Report influence your programmatic or organizational goals / strategy / approach to grantmaking? If yes, how so? If not, why not?  
   [Reference survey q5d]  
   probe: Did the Donor Perception Report findings affect your thinking and future strategy about the impact your community foundation is able to have on the communities and fields it targets with funding?  
   probe: Did the Donor Perception Report influence your thinking and future strategy regarding efforts outside of donor relations, or partnerships with non-donor constituents?

10. Did the Donor Perception Report findings affect your organization’s communications practices? If yes, how so? If not, why not?  
    [Reference survey q5a, q5e]
11. Are there other ways in which the Donor Perception Report has been useful to your organization?

Value: Cost Ratio

[Note to Interviewer: Review the interviewee’s survey responses to the question regarding value relative to cost and other similar processes - q6, q7.]

12. I see that on the survey you indicated that the DPR was [INSERT RESPONSE HERE] relative to the cost. Could you share more with me about your thinking regarding the value of the DPR relative to its cost?
   probe: Do you know how your community foundation paid for the Donor Perception Report (for example, through its organizational budget, through a grant)?

13. What, if any, other processes has your organization engaged in to assess donor perceptions?
   probe: When thinking about those processes, how does the Donor Perception Report compare in terms of value (in absolute terms and relative to cost)?

14. [Note to Interviewer: Ask only of those subscribers who received scholarships via the Irvine grant.] A generous grant from the James Irvine Foundation allowed CEP to offset the cost for some community foundations utilizing the Donor Perception Report. As this grant has ended, CEP wants to ensure that the Donor Perception Report remains accessible to community foundations while also covering CEP’s costs to execute the process, analyze data, and produce the report. Reflecting on your survey and report, what do you think would have been reasonable cost for your Donor Perception Report?

15. What are the considerations and cost sensitivities that your community foundation takes into account when making decisions about collecting data from donors about their experiences with the community foundation?

16. How likely is it, do you think, that your community foundation will commission the Donor Perception Report in the future? Why or why not?
   probe: What would encourage your community foundation to repeat the Donor Perception Report?

Closing

17. Do you have any additional comments about the Donor Perception Report and your organization’s experience that you would like to share?

   Thank you for your time!