

# Donor Perception Report

PREPARED FOR THE  
Napa Valley Community Foundation

November 2016



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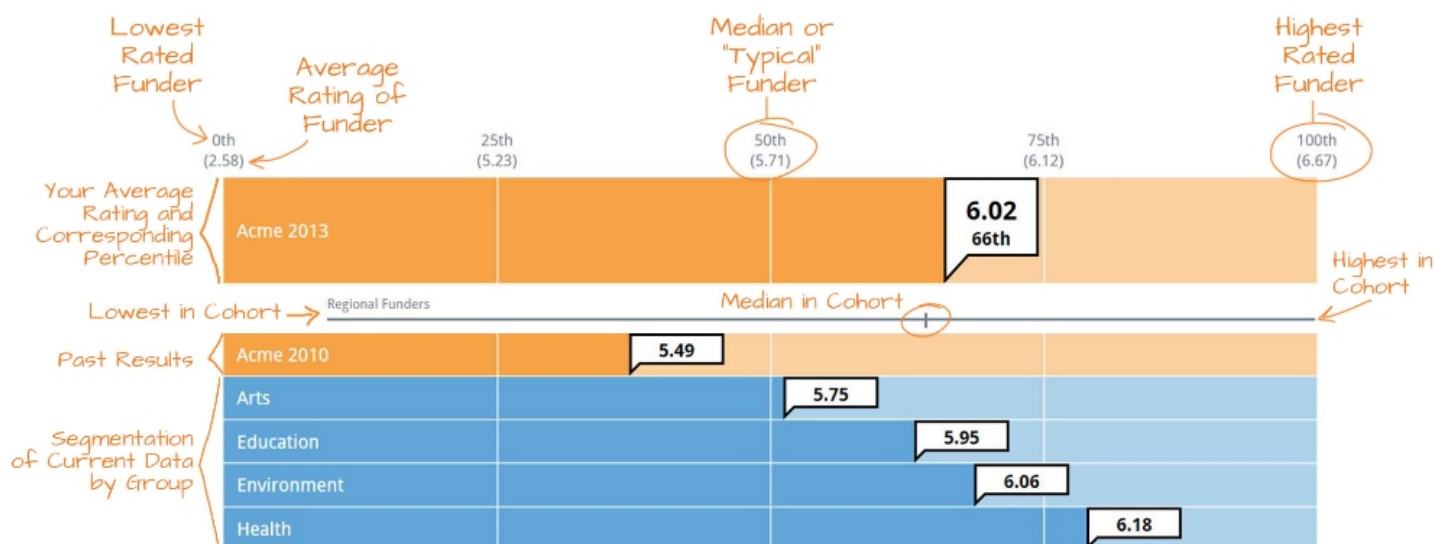
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## Interpreting Your Charts

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

### Trend Data

### Average Rating

### Percentile Rank

#### Overall Satisfaction



6.47



#### Likelihood to Recommend the Foundation



6.63



#### Impact on the Community



6.40



#### Leadership in the Community



6.40



#### Foundation Contribution to Donors' Impact



5.41



#### Responsiveness of Staff



6.69



#### Foundation Understanding of Donors' Goals



6.39



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

N/A

5.90



## Summary of Differences by Subgroup

**Donor vs. Fundholder:** A significantly larger proportion of fundholders have communicated their personal charitable goals with the Foundation. They also show significantly higher interest in engaging in philanthropic services such as developing a strategic giving plan, next generation involvement, and family philanthropy consulting.

**Annual CIF Giver:** Those that are not annual CIF givers provide significantly higher ratings for the responsiveness of the Foundation's staff.

**Size of Fund or Donation:** Donors/fundholders with funds smaller than \$100k/gave less than \$2,500 are significantly more satisfied with the Foundation overall, and perceive it to have a higher impact on the community.

**Age of Fund or First Donation:** A significantly smaller proportion of donors that have been involved with the Foundation for more than ten years indicate planning to give to the Foundation in the future. Also, donors that have been involved with the Foundation for more than ten years rate significantly higher for the clarity of the Foundation's communication of goals.

## Word Cloud

Donors were asked, "At this point in time, what is one word that best describes the Foundation?" In the "word cloud" below, the size of each word indicates the frequency with which it was written by donors. The color of each word is stylistic and not indicative of its frequency. Six donors described Napa as "effective," the most commonly used word.



This image was produced using a free tool available at [www.tagxedo.com](http://www.tagxedo.com). Copyright (c) 2006, ComponentAce. <http://www.componentace.com>.

## Survey Population

Survey	Survey Fielded	Number of Responses Received	Survey Response Rate
Napa 2016	September and October 2016	40	39%
Napa 2009	September and October 2009	29	45%

Throughout this report, Napa Valley Community Foundation's survey results are compared to CEP's broader dataset of more than 6,000 donors built up over surveys of dozens of foundations. The full list of participating funders can be found at <http://www.effectivephilanthropy.org/assessment-tools/dpr/>.

## Subgroups

In addition to showing Napa's overall ratings, this report also shows ratings segmented by Donor or Fundholder, Annual CIF Giver, Size of Fund or Donation, and Age of Fund or First Donation.

**\*Those designated as 'big' fundholders or donors either have a fund that is \$100k or larger, or made a donation of \$2,500 or more. Those with financial contributions less than this are designated as 'small.'**

Donor or Fundholder	Number of Responses
Donor	13
Fundholder	27

Annual CIF Giver	Number of Responses
Yes	15
No	12

Size of Fund or Donation	Number of Responses
Small	25
Big	14

Age of Fund or First Donation	Number of Responses
Less than 5 Years	13
5-10 Years	10
More than 10 Years	17

## Comparative Cohorts

### Customized Cohort

Napa Valley Community Foundation selected a set of 13 funders to create a smaller comparison group that more closely resembles Napa in scale and scope.

#### Custom Cohort

Berkshire Taconic Community Foundation
Community Foundation Serving Boulder County
Community Foundation Sonoma County
Gulf Coast Community Foundation of Venice
Napa Valley Community Foundation
Orange County Community Foundation
Sacramento Region Community Foundation
San Luis Obispo County Community Foundation
Santa Fe Community Foundation
The Chicago Community Trust
The Community Foundation Serving Riverside and San Bernardino Counties
The San Diego Foundation
The San Francisco 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	33	Community foundations with an annual giving size below \$15 million
Large Foundations	26	Community foundations with an annual giving size of \$15 million or greater
Donor-Advised Funds	15	Community foundations whose donor survey populations contained at least 95% donor-advised funds



## Foundation Characteristics

Donor Staff Load (Overall)	Napa 2016	Napa 2009	Median Funder	Custom Cohort
Total full-time donor designated staff	2 FTE	2 FTE	3 FTE	2 FTE
Total donor-advised fund giving per full-time donor designated staff	\$0.9M	\$1.0M	\$2.1M	\$2.9M

Foundation Asset and Giving Patterns (Overall)	Napa 2016	Napa 2009	Median Funder	Custom Cohort
Total assets	\$20.4M	\$18.0M	\$194.6M	\$94.8M
Total giving	\$4.3M	\$2.1M	\$12.6M	\$6.1M

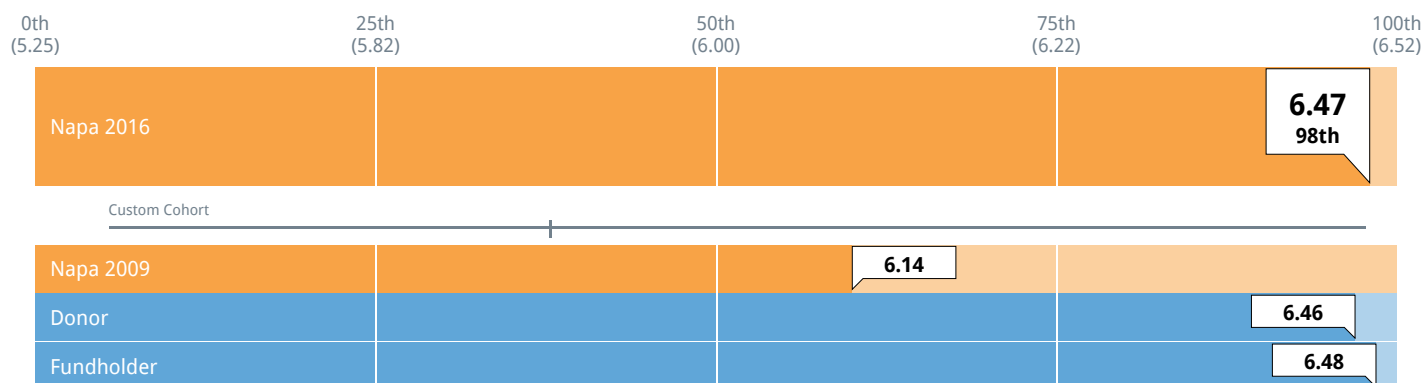
Assets (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Discretionary assets	10%	6%	25%	19%
Donor-advised assets	60%	68%	36%	41%
Other non-discretionary assets	30%	26%	39%	40%

Giving (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Discretionary giving	40%	22%	19%	18%
Donor-advised giving	40%	70%	50%	57%
Other non-discretionary giving	20%	8%	31%	25%

## Satisfaction and Likelihood to Recommend

"Please rate your overall satisfaction with the Foundation."

1 = Not at all satisfied    7 = Very satisfied



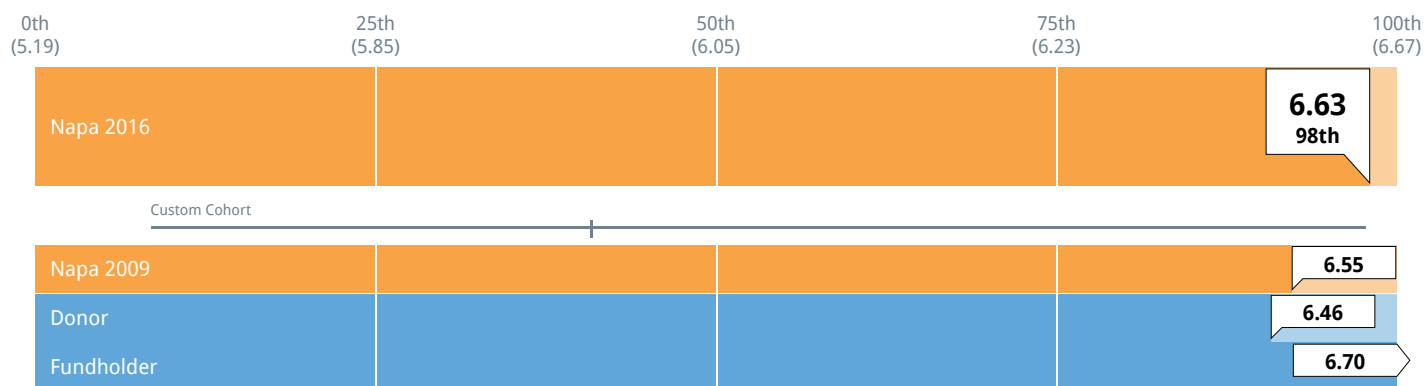
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: Donor or Fundholder ▼

"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



Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

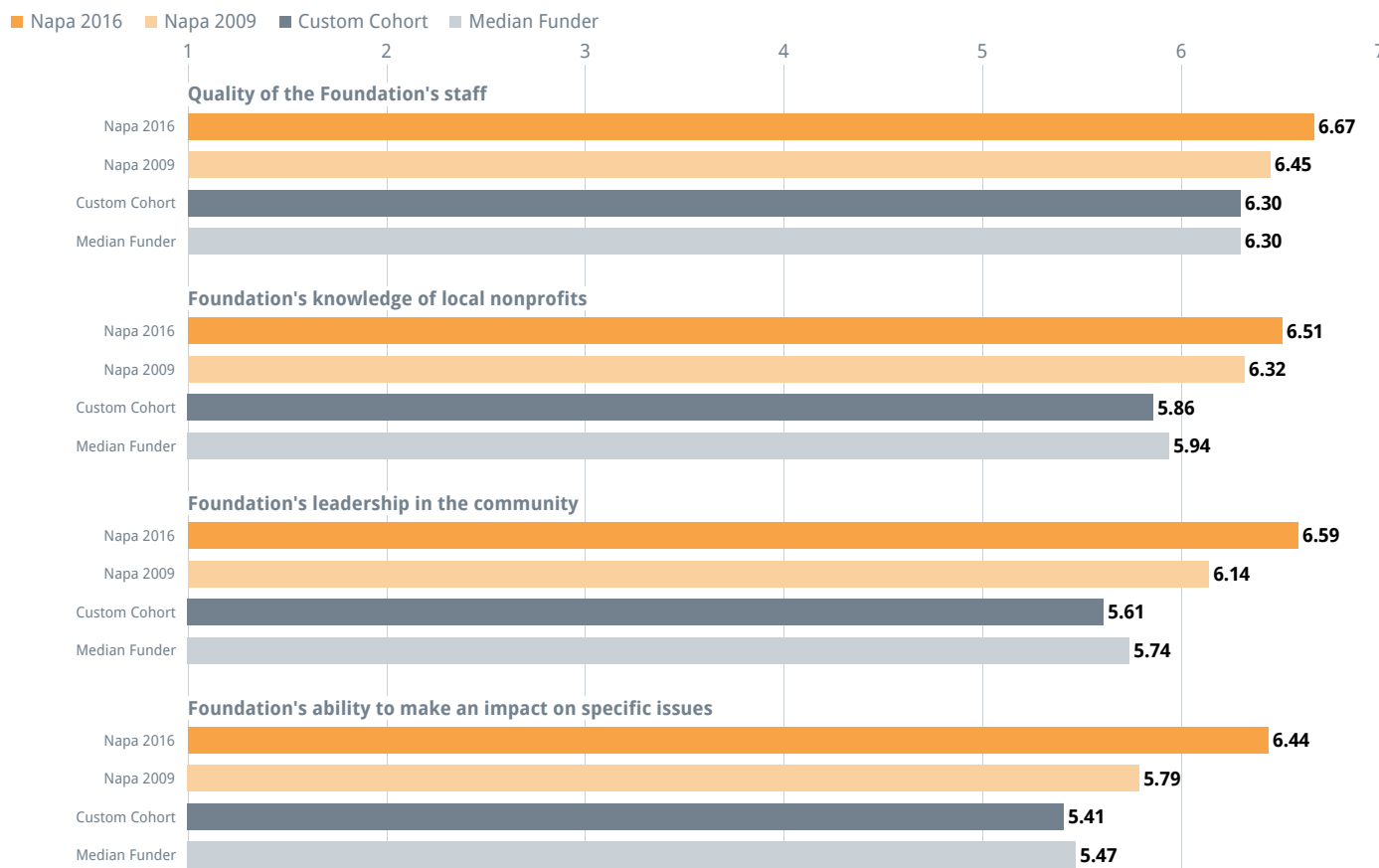
Subgroup: Donor or Fundholder ▼

## Valued Aspects of the Foundation - Overall

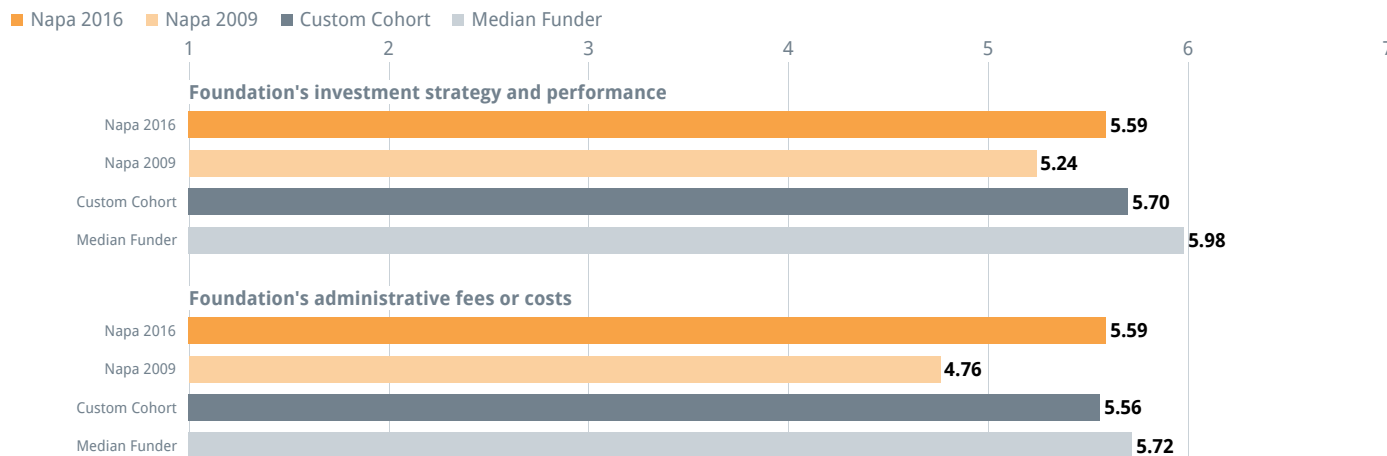
"Please think about your giving to or through the Foundation **over the past 3 years**. Rate the importance of each of the following factors in your decision(s) to establish a fund with the Foundation, or to make contributions to the Foundation or to your fund **instead of giving to or through other charitable options**."

Additionally, donors were asked about their satisfaction with the Foundation's work in each of these areas. They were able to indicate whether they were **satisfied**, **not satisfied**, or **did not know**/the area was **not applicable** to them.

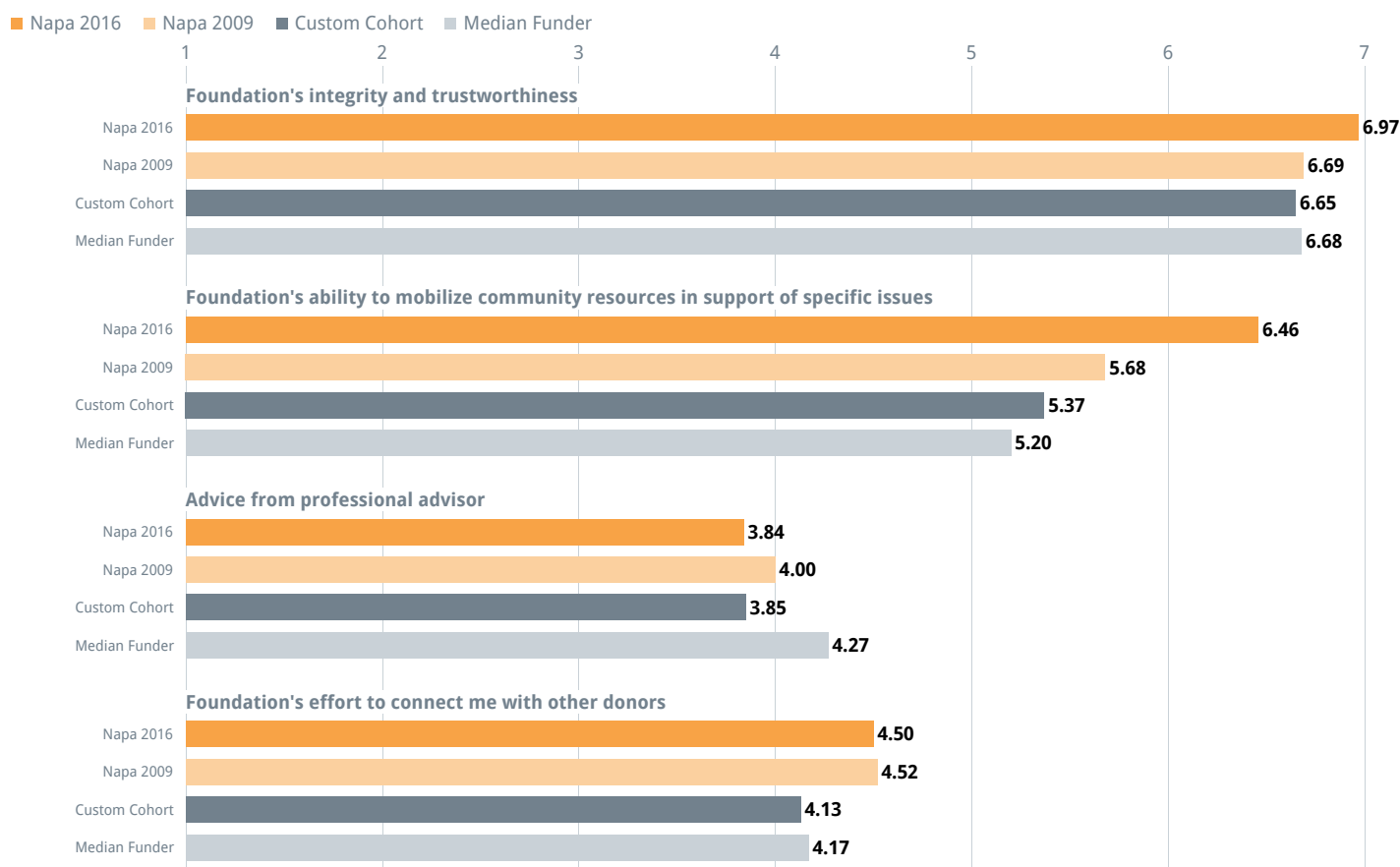
### Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - Leadership and Knowledge - Overall



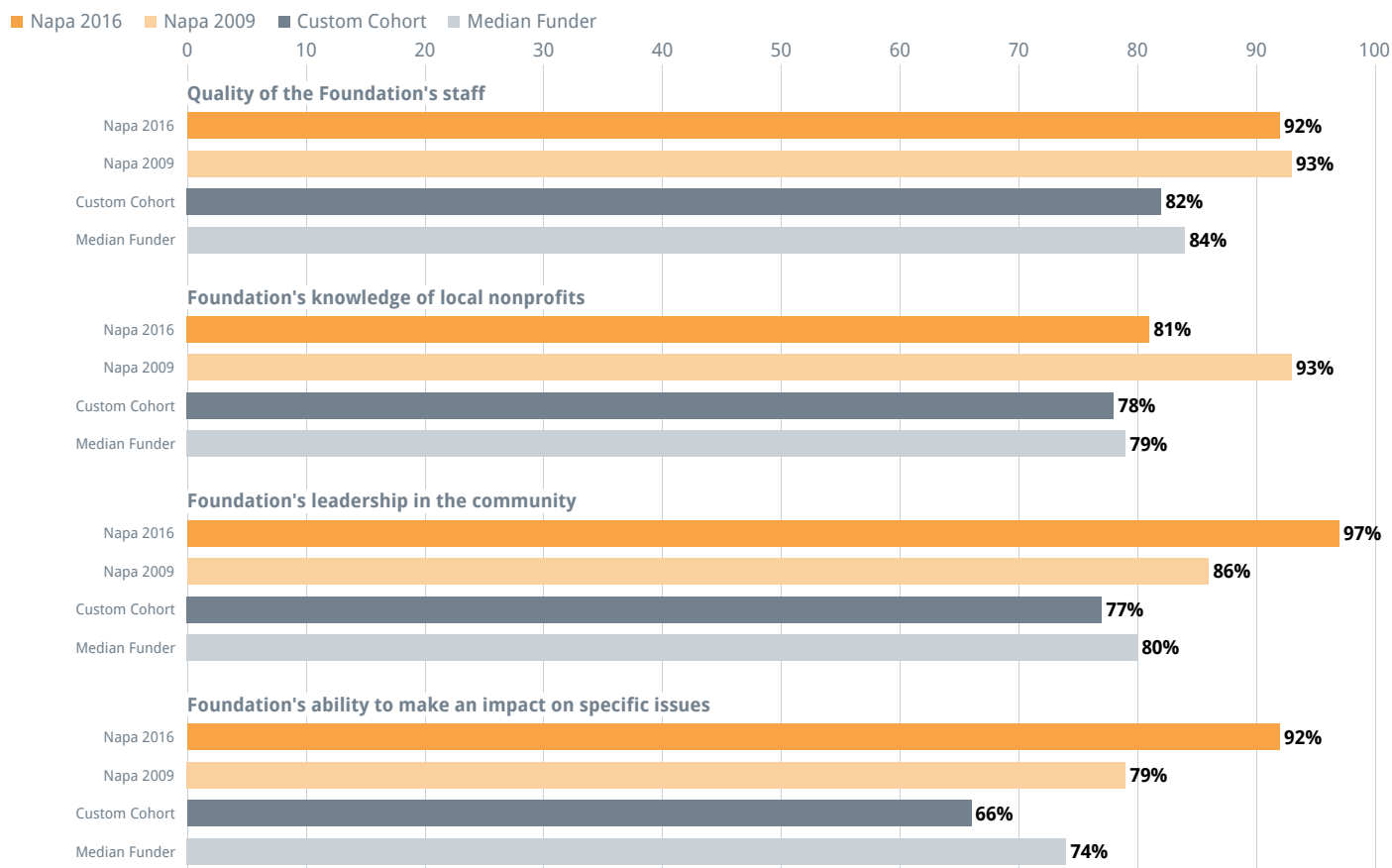
## Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - Finance and Administrative Services - Overall



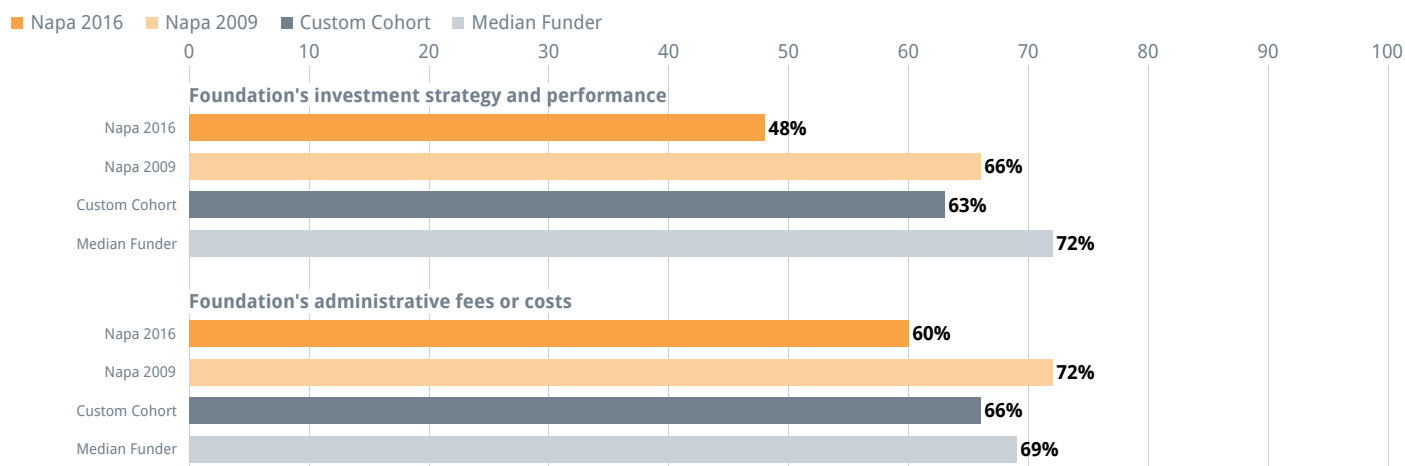
## Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - Reputation and Referral Network - Overall



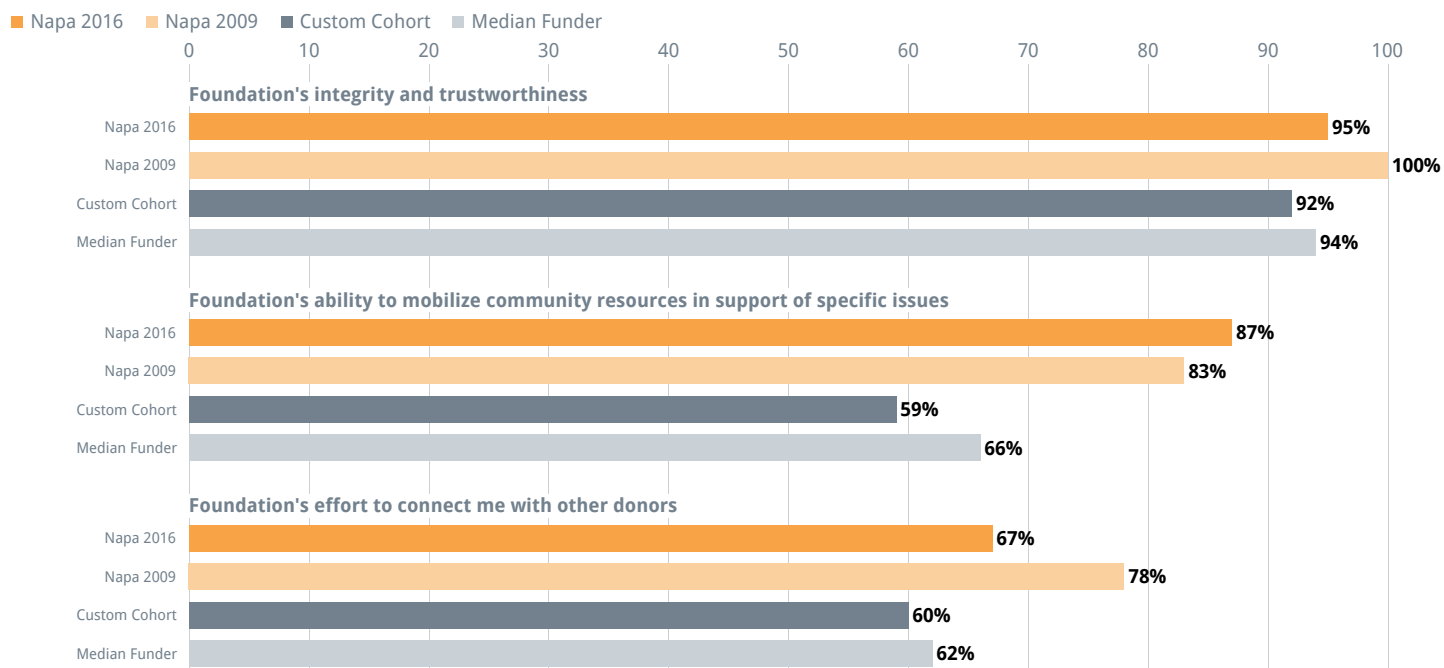
### Proportion of Donors Satisfied - Leadership and Knowledge - Overall



### Proportion of Donors Satisfied - Finance and Administrative Services - Overall



## Proportion of Donors Satisfied - Reputation and Referral Network - Overall

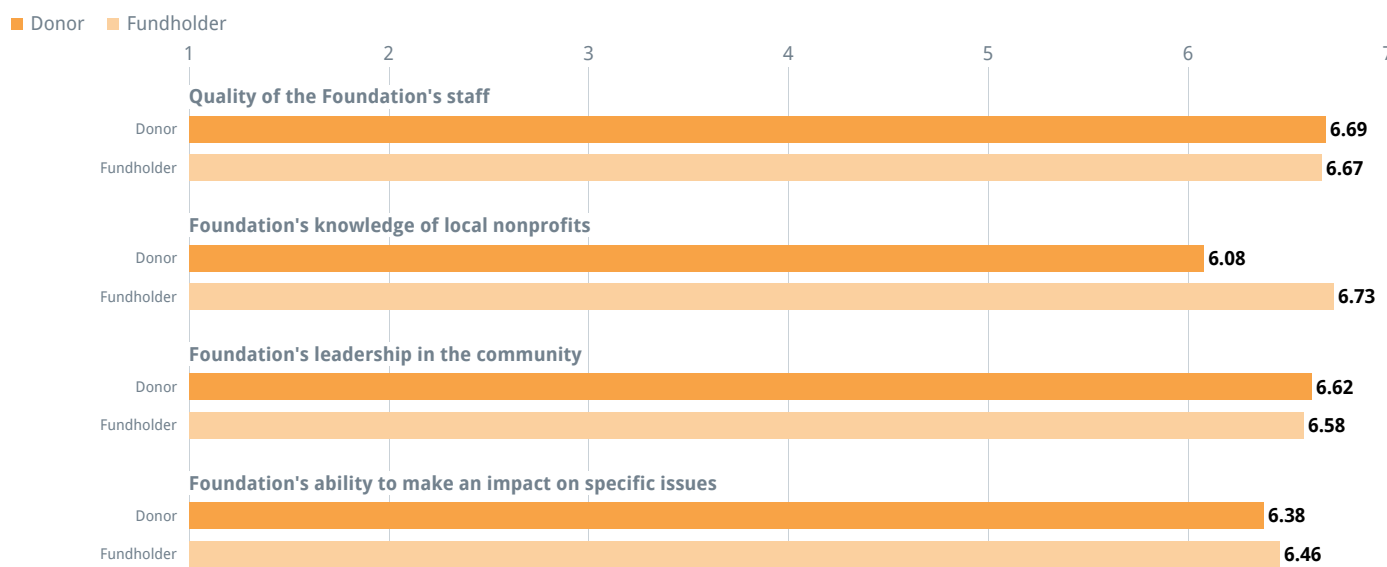


## Valued Aspects of the Foundation - by Subgroup

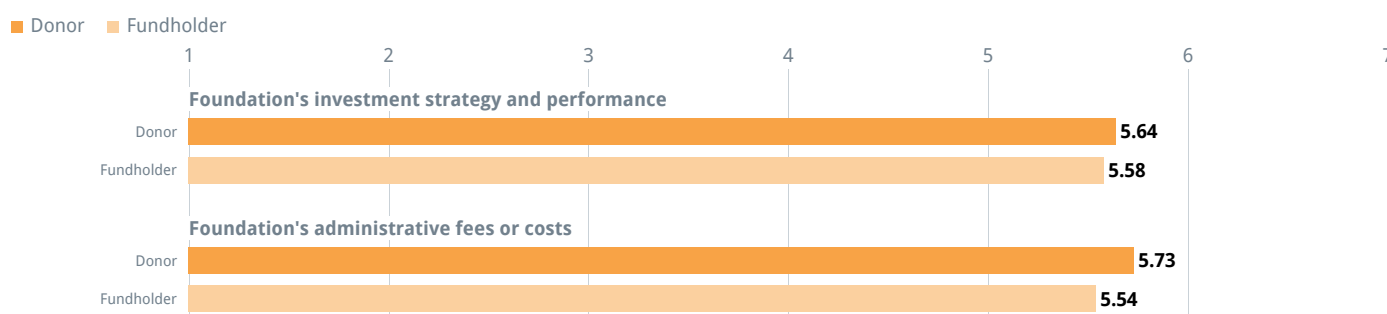
"Please think about your giving to or through the Foundation **over the past 3 years**. Rate the importance of each of the following factors in your decision(s) to establish a fund with the Foundation, or to make contributions to the Foundation or to your fund **instead of giving to or through other charitable options**."

Additionally, donors were asked about their satisfaction with the Foundation's work in each of these areas. They were able to indicate whether they were **satisfied**, **not satisfied**, or **did not know**/the area was **not applicable** to them.

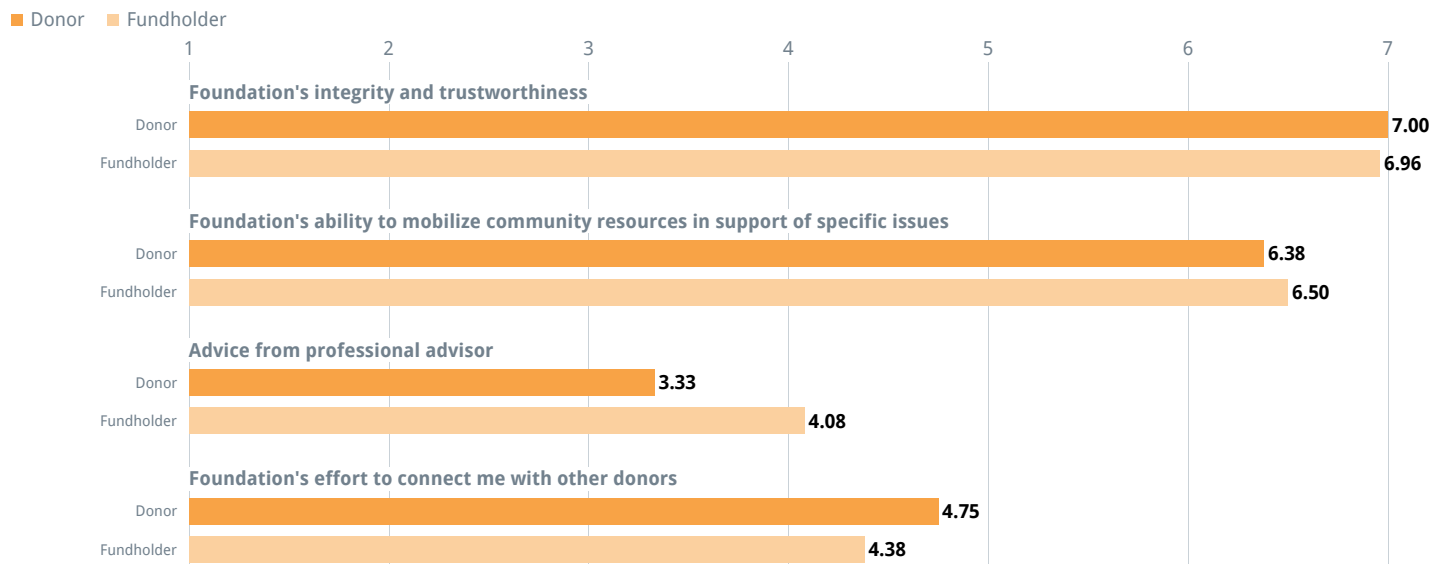
### Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - Leadership and Knowledge - by Subgroup



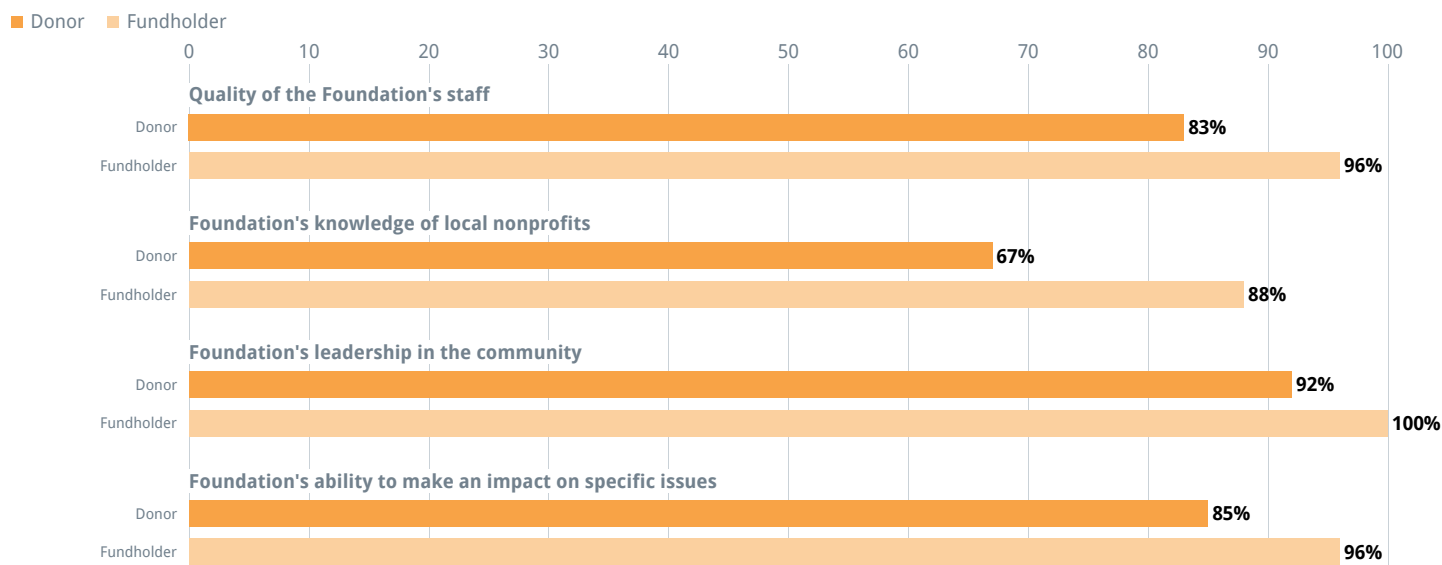
### Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - Finance and Administrative Services - by Subgroup



## Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - Reputation and Referral Network - by Subgroup

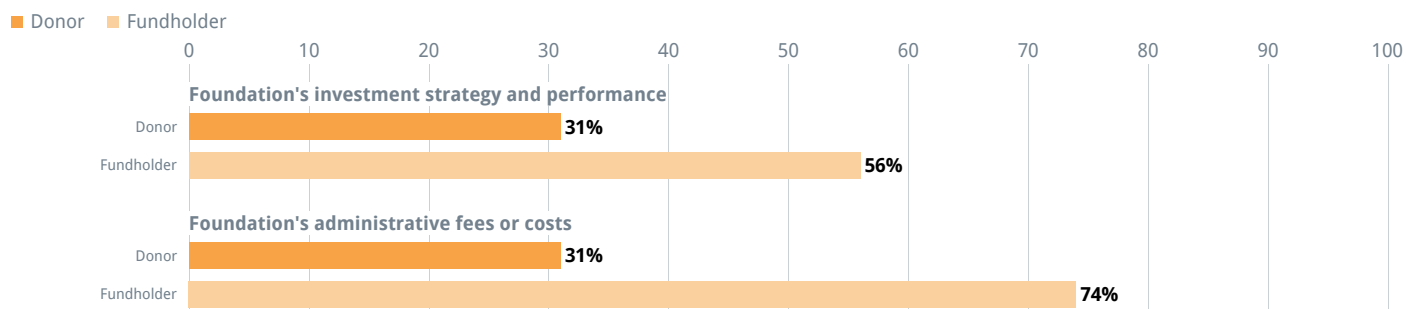


## Proportion of Donors Satisfied - Leadership and Knowledge - by Subgroup

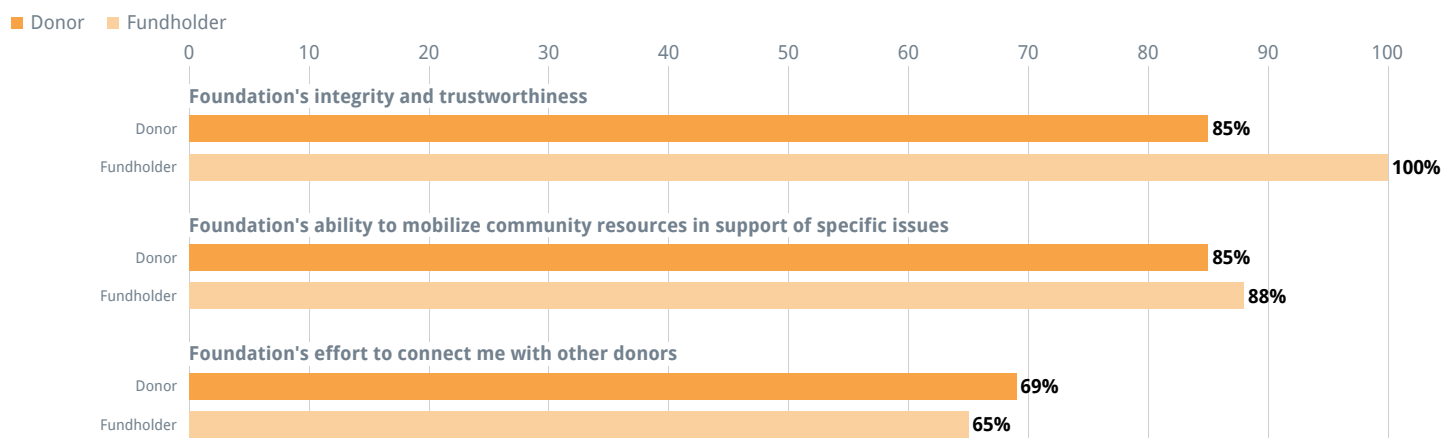




### Proportion of Donors Satisfied - Finance and Administrative Services - by Subgroup



### Proportion of Donors Satisfied - Reputation and Referral Network - by Subgroup

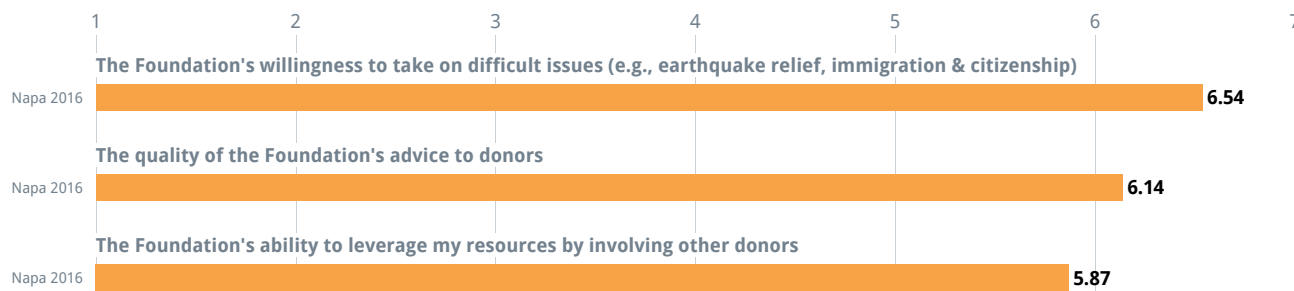


## Valued Aspects of the Foundation - Custom Options

"Please think about your giving to or through the Foundation **over the past 3 years**. Rate the importance of each of the following factors in your decision(s) to establish a fund with the Foundation, or to make contributions to the Foundation or to your fund **instead of giving to or through other charitable options**. In addition, where possible, **please indicate whether you are satisfied with the Foundation's work in each area**."

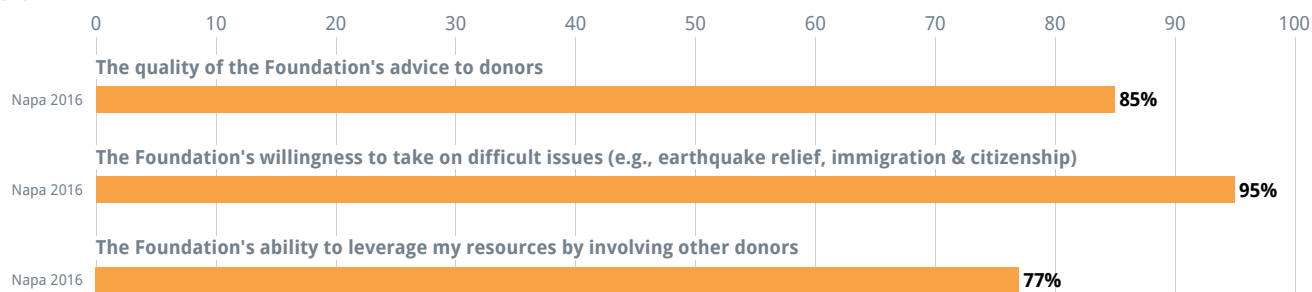
### Importance of Factors in Donors' Decisions to Give to the Foundation over Other Options - Overall

■ Napa 2016

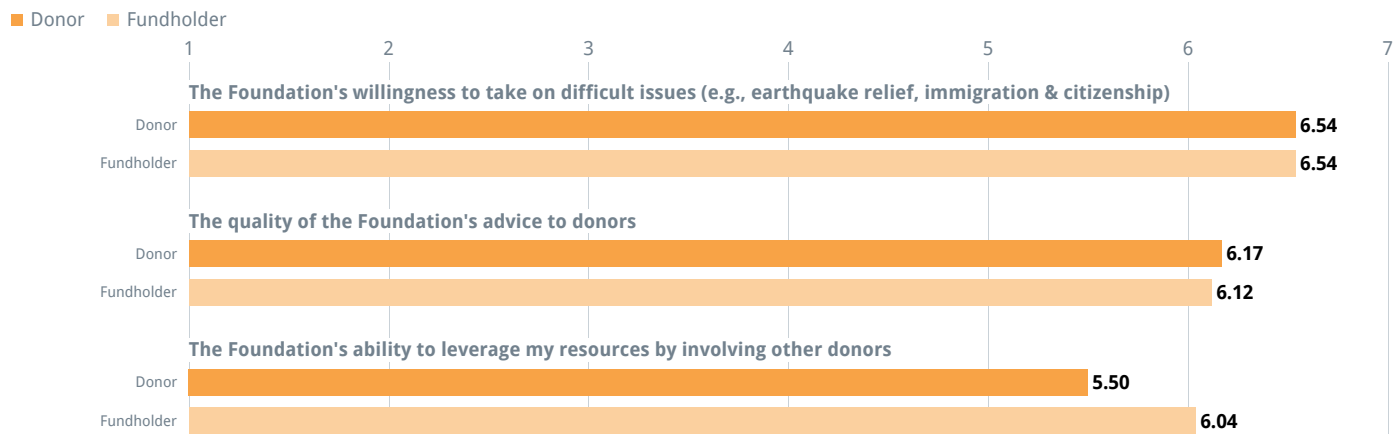


### Proportion of Donors Satisfied - Overall

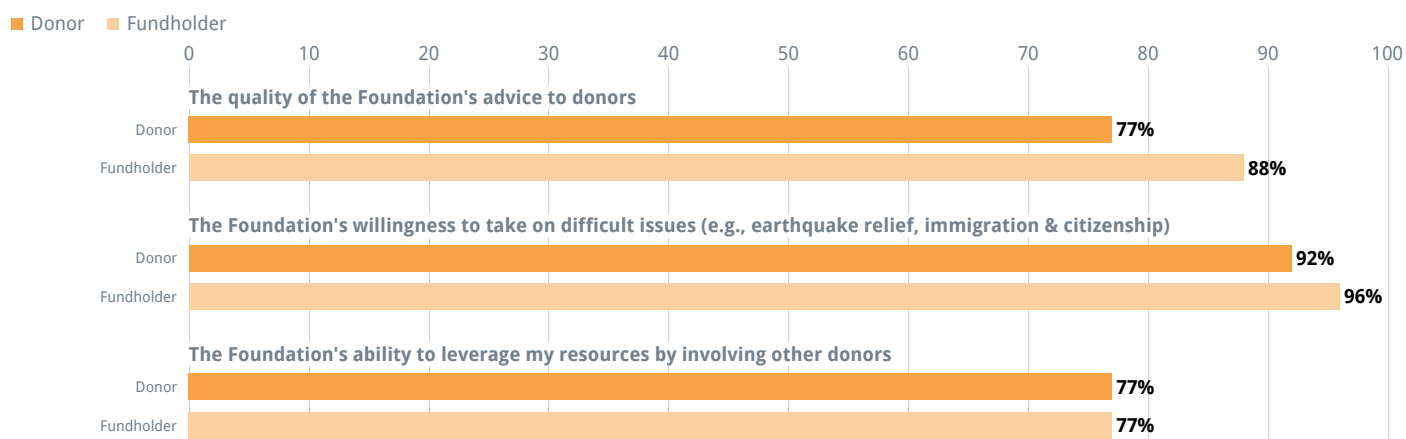
■ Napa 2016



### Importance of Factors in Donors' Decisions to Give to Foundation over Other Options - By Subgroup



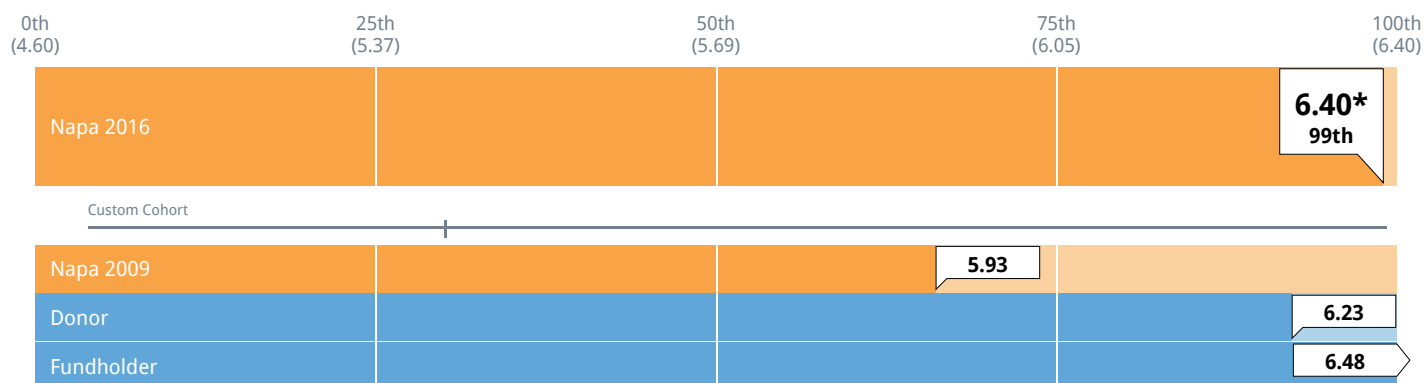
### Proportion of Donors Satisfied - By Subgroup



## Community-Related Measures

### "To what extent is the Foundation making an impact on the community?"

1 = No impact    7 = Significant positive impact



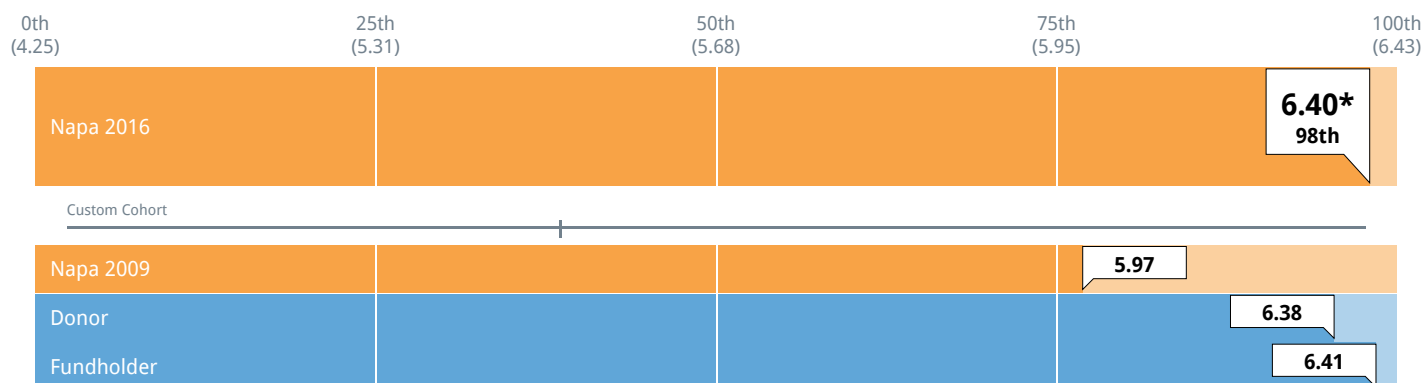
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: Donor or Fundholder ▼

### "To what extent does the Foundation exhibit a leadership role in the community?"

1 = Exhibits little or no leadership    7 = Exhibits strong leadership



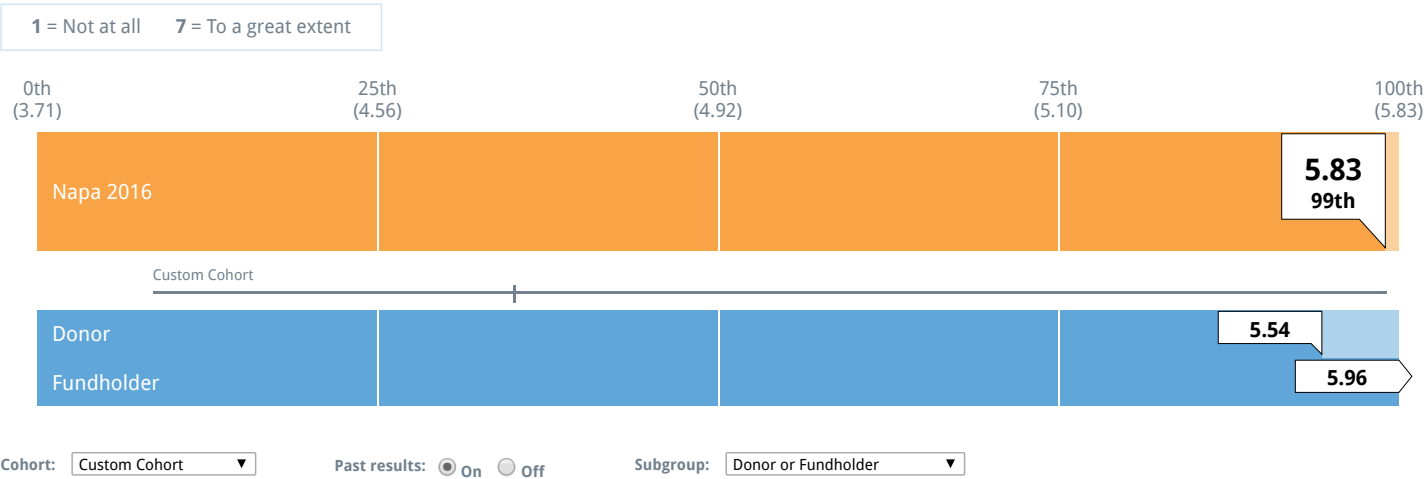
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: Donor or Fundholder ▼

Donors' Connection to the Community

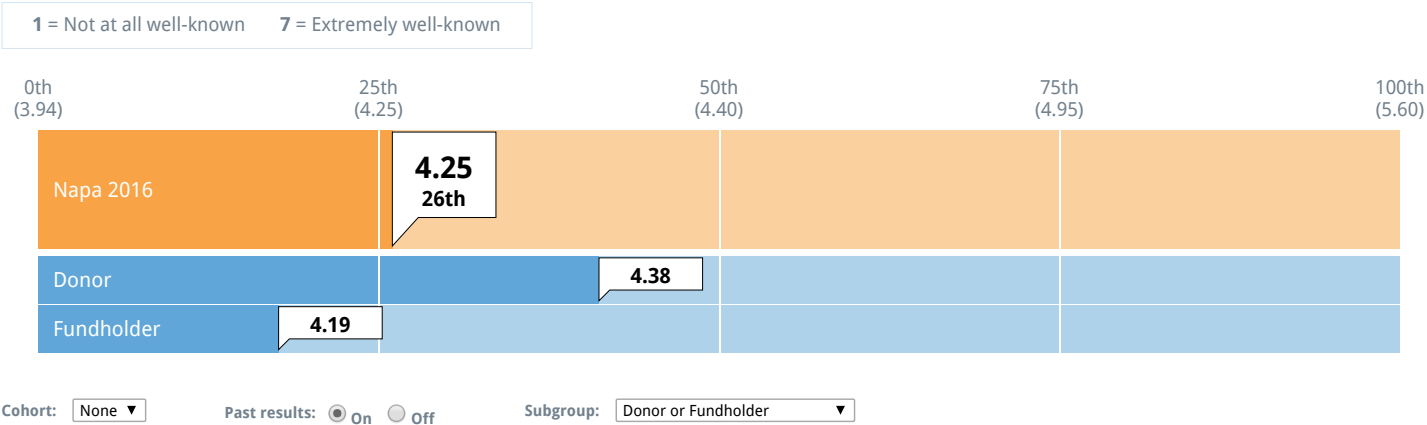
"To what extent does working with the Foundation make you feel more connected to the community?"



Knowledge of Foundation

The following question was recently added to the donor survey and depicts comparative data from fewer than one-third of funders in the dataset.

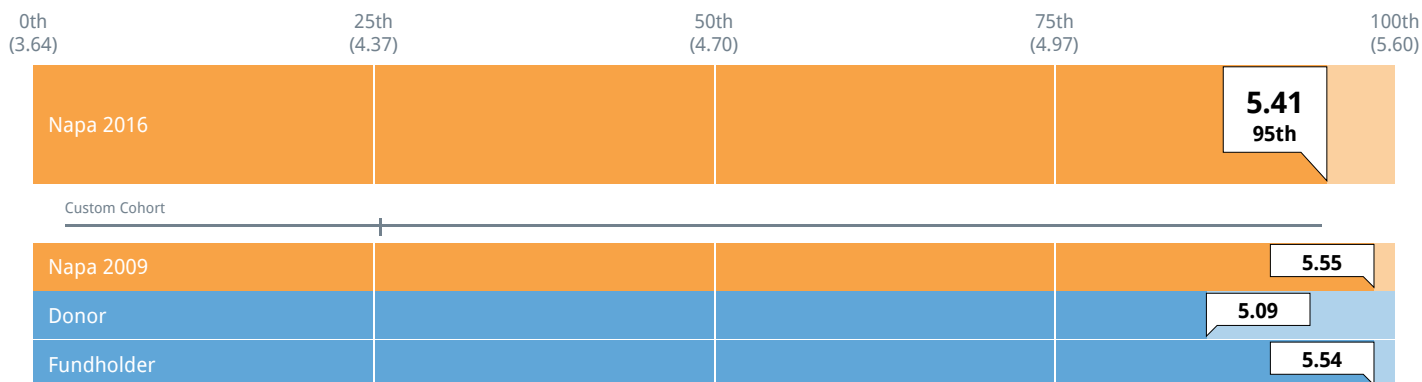
"How well-known do you think the Foundation is among your friends and colleagues in the community?"



## Donor Impact

"To what extent does working with the Foundation contribute to your ability to make an impact on the issues you care about?"

1 = No contribution to my ability    7 = Greatly increases my ability



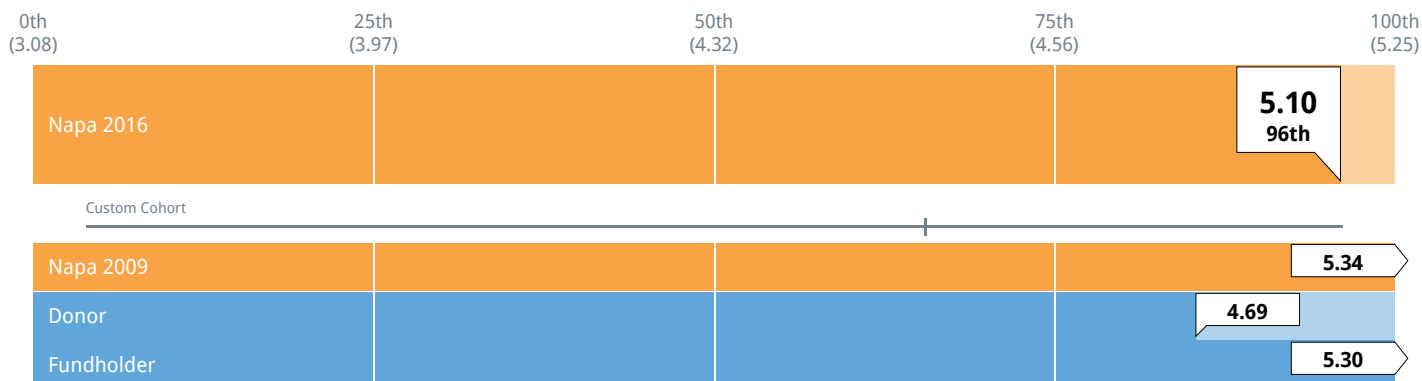
Cohort: Custom Cohort ▼

Past results: ☒ On ☐ Off

Subgroup: Donor or Fundholder ▼

"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: Donor or Fundholder ▼

## Receiving Information about Community Impact

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

This question was recently added to the donor survey and depicts comparative data from fewer than one-third of funders in the dataset.

Proportion of Donors Receiving Information about Impact on the Community (Overall)	Napa 2016	Average Funder
Monthly or more often	70%	35%
Every few months	30%	56%
Yearly or less often	0%	8%
Never	0%	1%

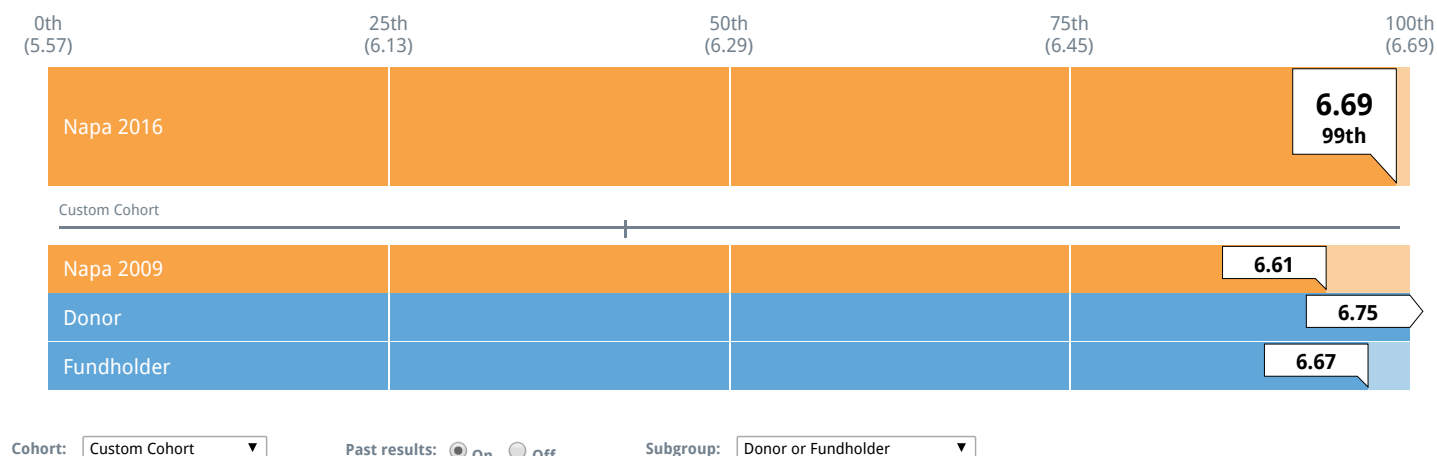
Proportion of Donors Receiving Information about Impact on the Community (By Subgroup)	Donor	Fundholder
Monthly or more often	62%	74%
Every few months	38%	26%
Yearly or less often	0%	0%
Never	0%	0%



## Interactions with Donors

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

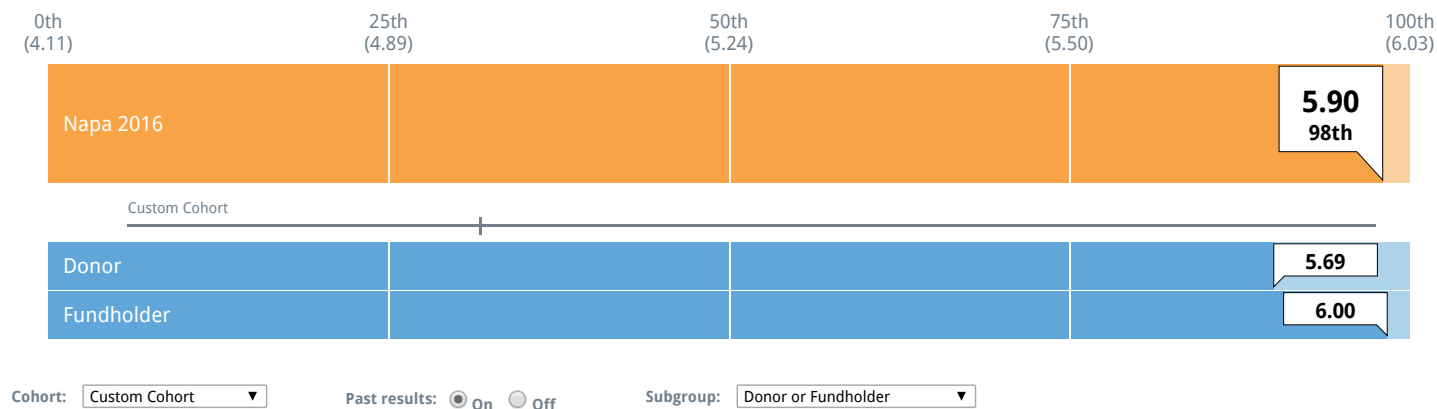
1=Not at all responsive 7=Extremely responsive



Note: The question below was added after 2009 and therefore does not include data from NVCF's previous survey.

### "How clearly has the Foundation communicated its own goals?"

1 = Not at all clearly      7 = Extremely clearly



Note: The question below was recently added to the donor survey in 2016 and therefore does not include comparative data.

### Overall, how transparent is the Foundation?

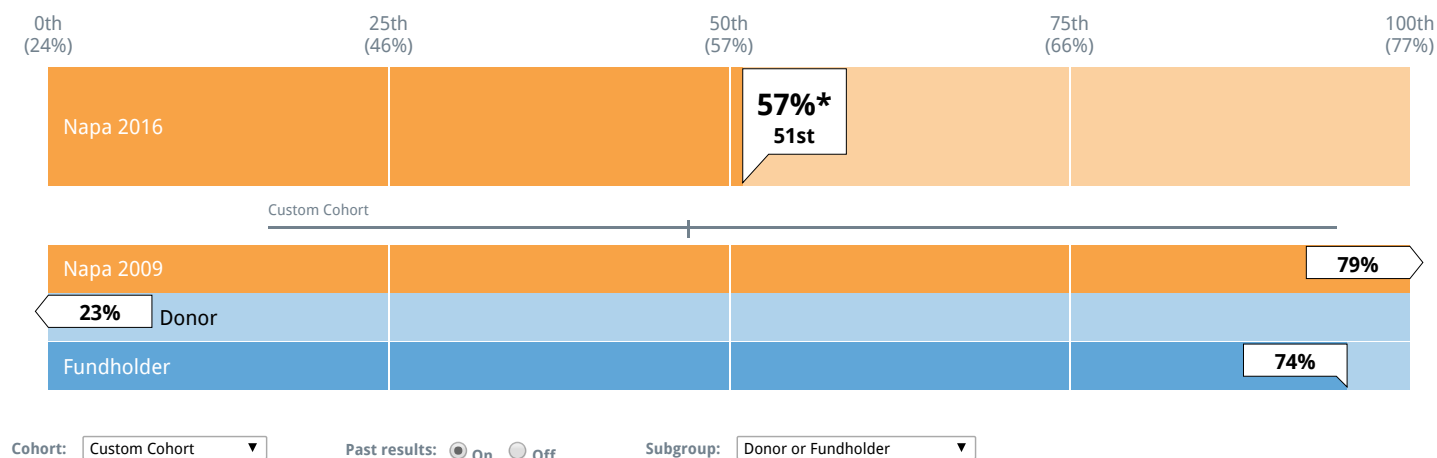
1 = Not at all transparent      7 = Extremely transparent



## Donors' Charitable Goals

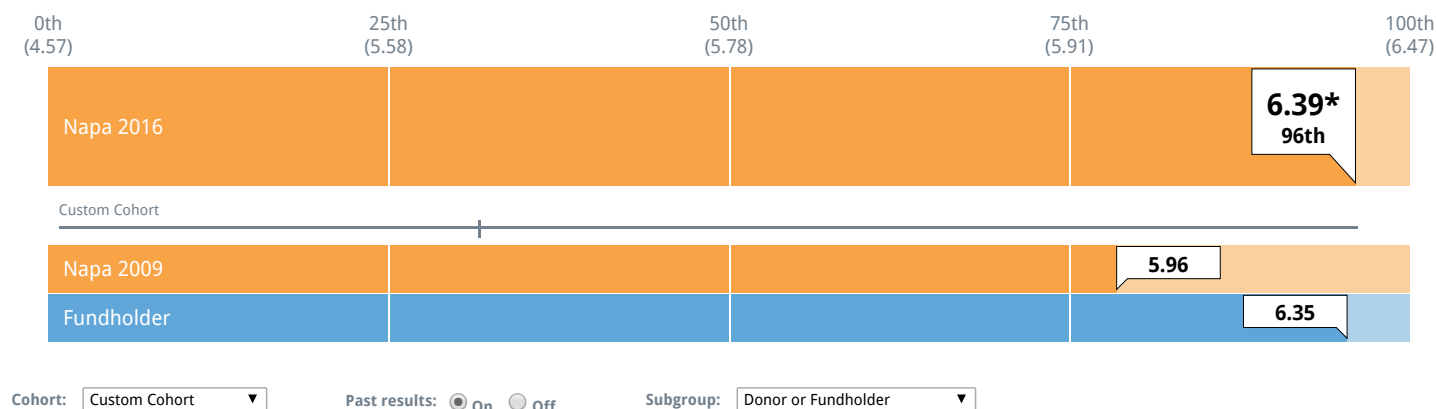
### "Have you communicated your personal charitable goals to staff at the Foundation?"

Proportion who have communicated their goals



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

1=Limited understanding 7=Complete understanding



\*Fewer than five donors responded to the question above, and therefore cannot be displayed.

## Designated Contact at the Foundation

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

Designated Contact at the Foundation (Overall)	Napa 2016	Average Funder	Custom Cohort
I have a designated contact	82%	72%	72%
I do not have a designated contact	18%	28%	28%

Designated Contact at the Foundation (By Subgroup)	Donor	Fundholder
I have a designated contact	85%	81%
I do not have a designated contact	15%	19%

## Frequency of Interactions

"Please indicate the frequency with which you interact with the Foundation in the following ways."

Proportion of Donors Receiving General Information from the Foundation (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Never	0%	0%	1%	1%
Yearly or less often	0%	0%	10%	7%
Every few months	48%	36%	59%	55%
Monthly or more often	53%	64%	29%	36%

Proportion of Donors Receiving Personal Emails or Phone Calls from the Foundation (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Never	0%	4%	18%	15%
Yearly or less often	28%	18%	31%	28%
Every few months	62%	61%	37%	39%
Monthly or more often	10%	18%	14%	18%

Proportion of Donors Having In-Person Meetings with the Foundation (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Never	25%	7%	33%	27%
Yearly or less often	40%	50%	43%	42%
Every few months	33%	25%	17%	20%
Monthly or more often	3%	18%	6%	10%

Proportion of Donors Emailing or Calling the Foundation (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Never	18%	3%	17%	15%
Yearly or less often	43%	21%	39%	36%
Every few months	33%	62%	34%	36%
Monthly or more often	7%	14%	10%	14%

Proportion of Donors Attending Foundation Events (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Never	18%	14%	31%	24%
Yearly or less often	45%	28%	42%	44%
Every few months	35%	48%	22%	25%
Monthly or more often	3%	10%	5%	7%

## Frequency of Interactions - By Subgroup

"Please indicate the frequency with which you interact with the Foundation in the following ways."

Proportion of Donors Receiving General Information from the Foundation (By Subgroup)	Donor	Fundholder
Never	0%	0%
Yearly or less often	0%	0%
Every few months	46%	48%
Monthly or more often	54%	52%

Proportion of Donors Receiving Personal Emails or Phone Calls from the Foundation (By Subgroup)	Donor	Fundholder
Never	0%	0%
Yearly or less often	31%	27%
Every few months	54%	65%
Monthly or more often	15%	8%

Proportion of Donors Having In-Person Meetings with the Foundation (By Subgroup)	Donor	Fundholder
Never	31%	22%
Yearly or less often	46%	37%
Every few months	23%	37%
Monthly or more often	0%	4%

Proportion of Donors Emailing or Calling the Foundation (By Subgroup)	Donor	Fundholder
Never	38%	7%
Yearly or less often	62%	33%
Every few months	0%	48%
Monthly or more often	0%	11%

Proportion of Donors Attending Foundation Events (By Subgroup)	Donor	Fundholder
Never	8%	22%
Yearly or less often	54%	41%
Every few months	38%	33%
Monthly or more often	0%	4%

## Donor Engagement

"How has your engagement with the Foundation changed in recent years? When thinking about your engagement, please consider the frequency and quality of interactions with the Foundation, awareness of and involvement in Foundation initiatives, and use of Foundation resources."

Change in Engagement with the Foundation in Recent Years (Overall)	Napa 2016	Average Funder
Less engaged	13%	16%
No change in engagement	36%	48%
More engaged	51%	36%

Change in Engagement with the Foundation in Recent Years (By Subgroup)	Donor	Fundholder
Less engaged	8%	15%
No change in engagement	42%	33%
More engaged	50%	52%

## Desired Relationship with the Foundation

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

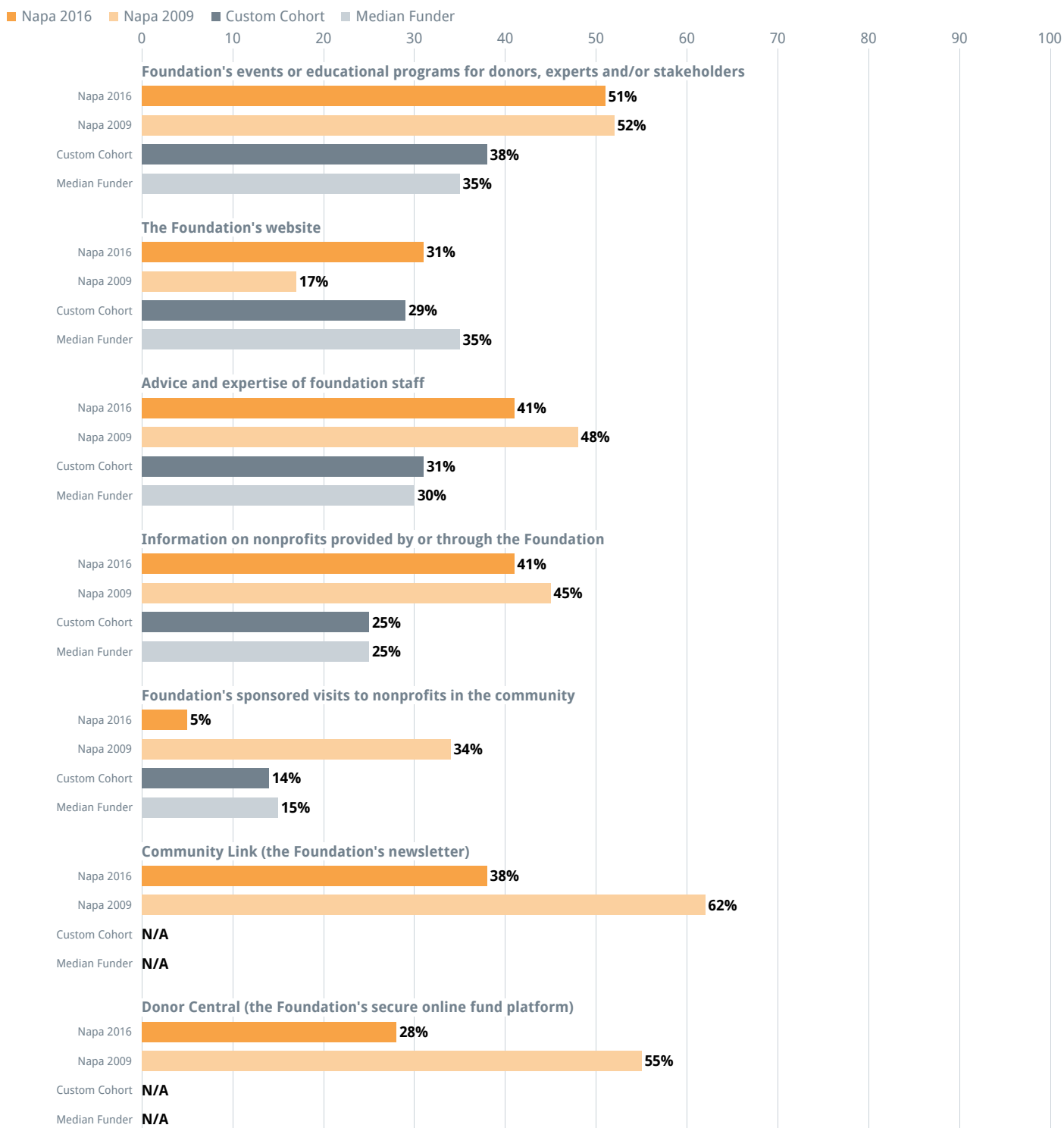
Desired Type of Relationship with the Foundation (Overall)	Napa 2016	Average Funder	Custom Cohort
Want a partner for advice	21%	17%	17%
Want some assistance with giving decisions	38%	23%	30%
Want to be self-sufficient and use the Foundation mostly to manage funds	41%	57%	51%
Other	0%	3%	2%

Desired Type of Relationship with the Foundation (By Subgroup)	Donor	Fundholder
Want a partner for advice	8%	26%
Want some assistance with giving decisions	25%	44%
Want to be self-sufficient and use the Foundation mostly to manage funds	67%	30%
Other	0%	0%

## Donor Resources

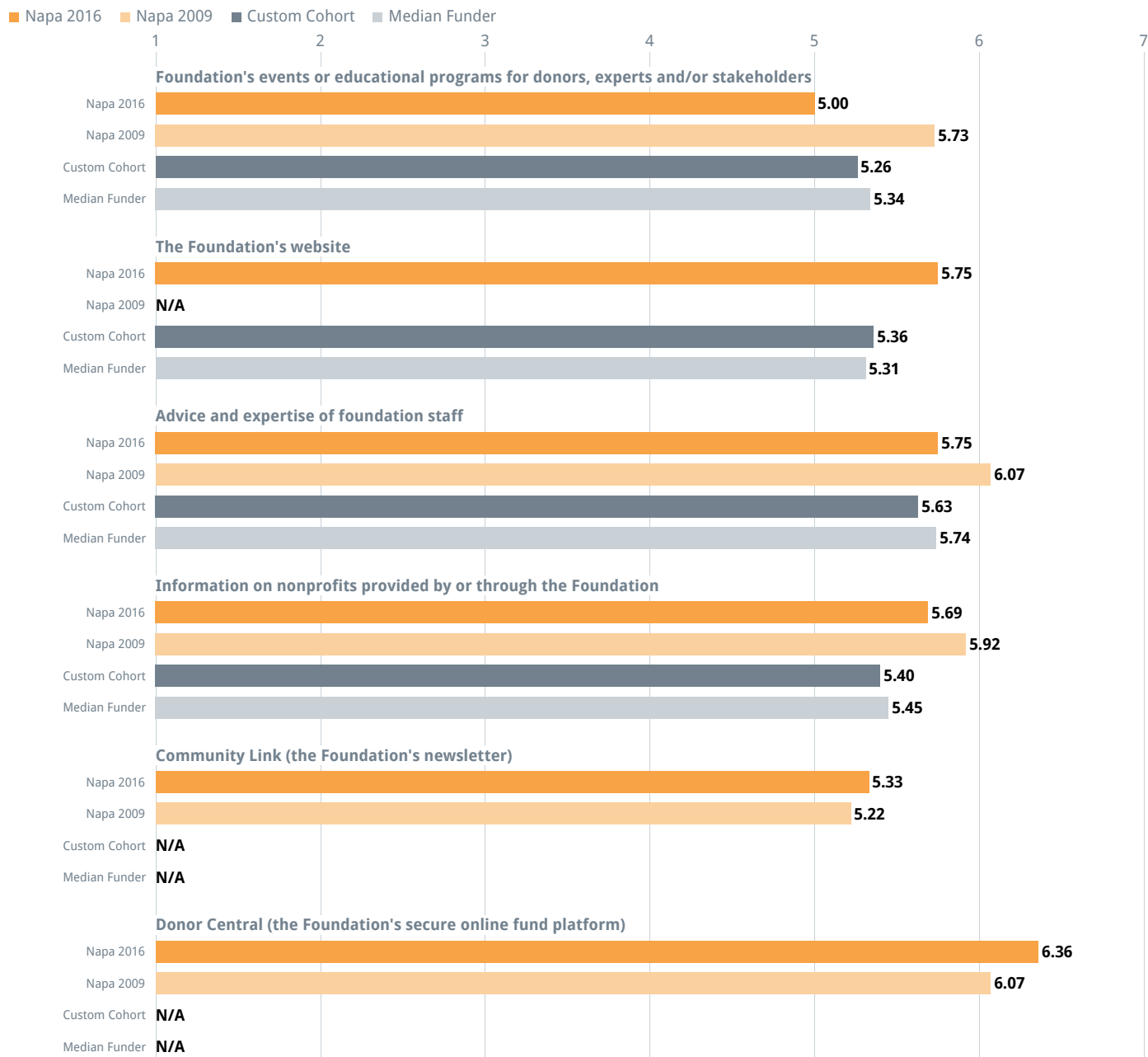
"Where applicable, please indicate which of the following Foundation resources or services you use *to achieve your charitable giving goals*, and the helpfulness of each."

### Use of Resources to Achieve Donor Goals - Overall

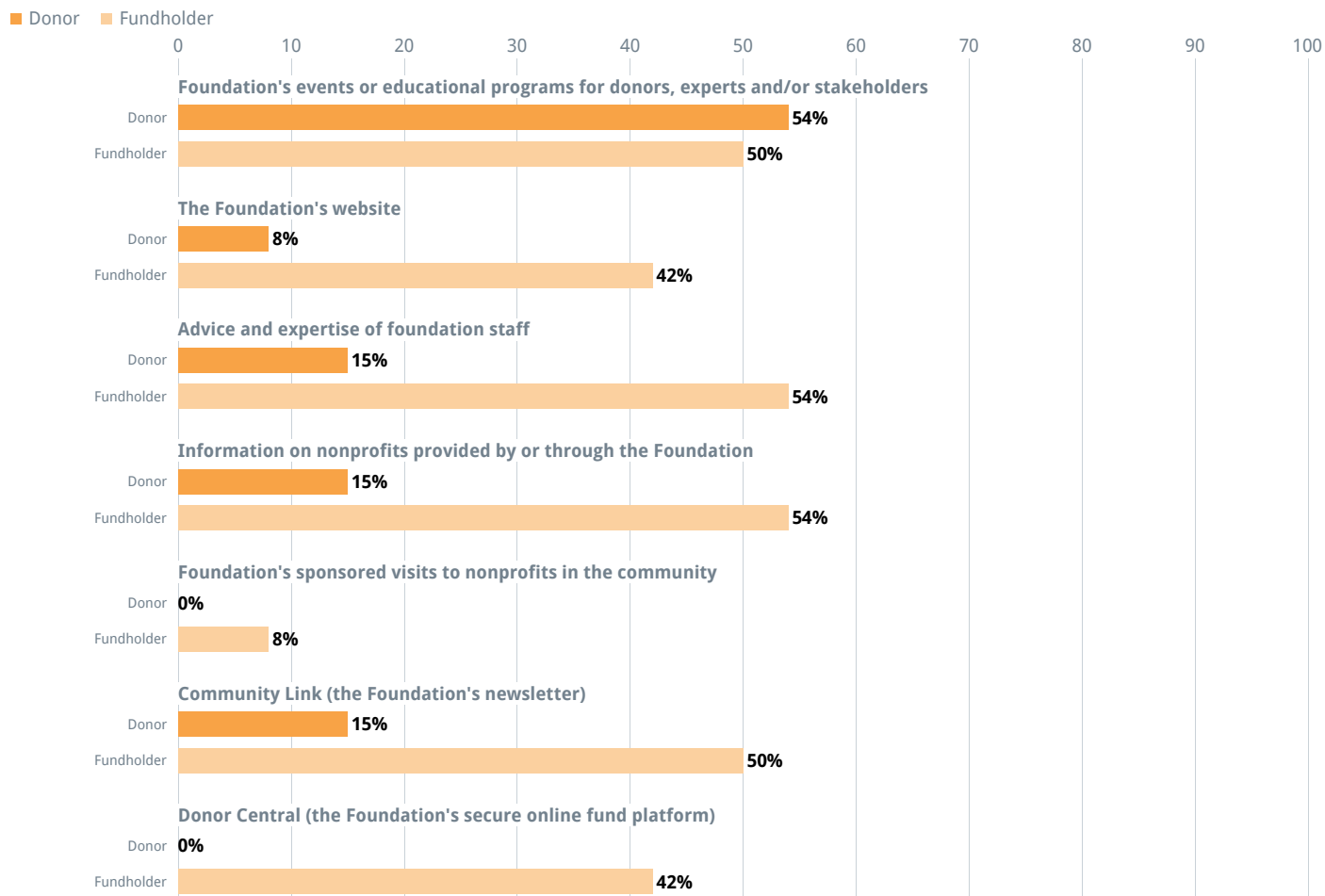




## Helpfulness of Resources to Achieve Donor Goals - Overall

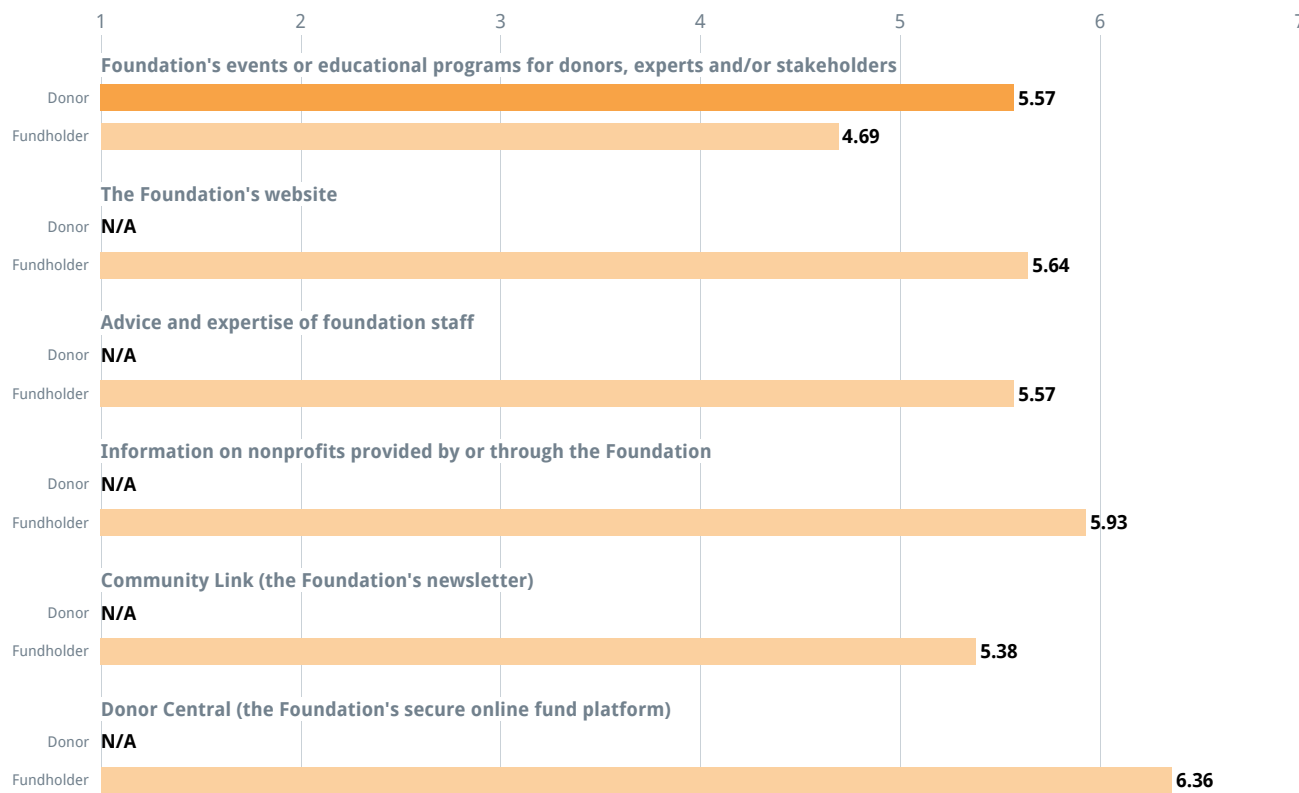


## Use of Resources to Achieve Donor Goals - By Subgroup

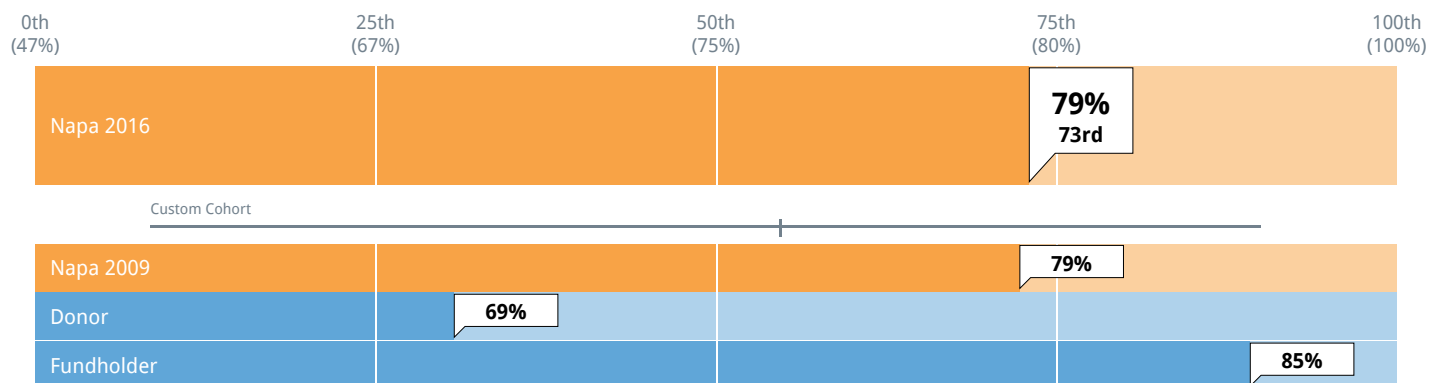


## Helpfulness of Resources to Achieve Donor Goals - By Subgroup

Donor Fundholder



## Proportion of donors who have used at least one foundation resource



Cohort: Custom Cohort ▼

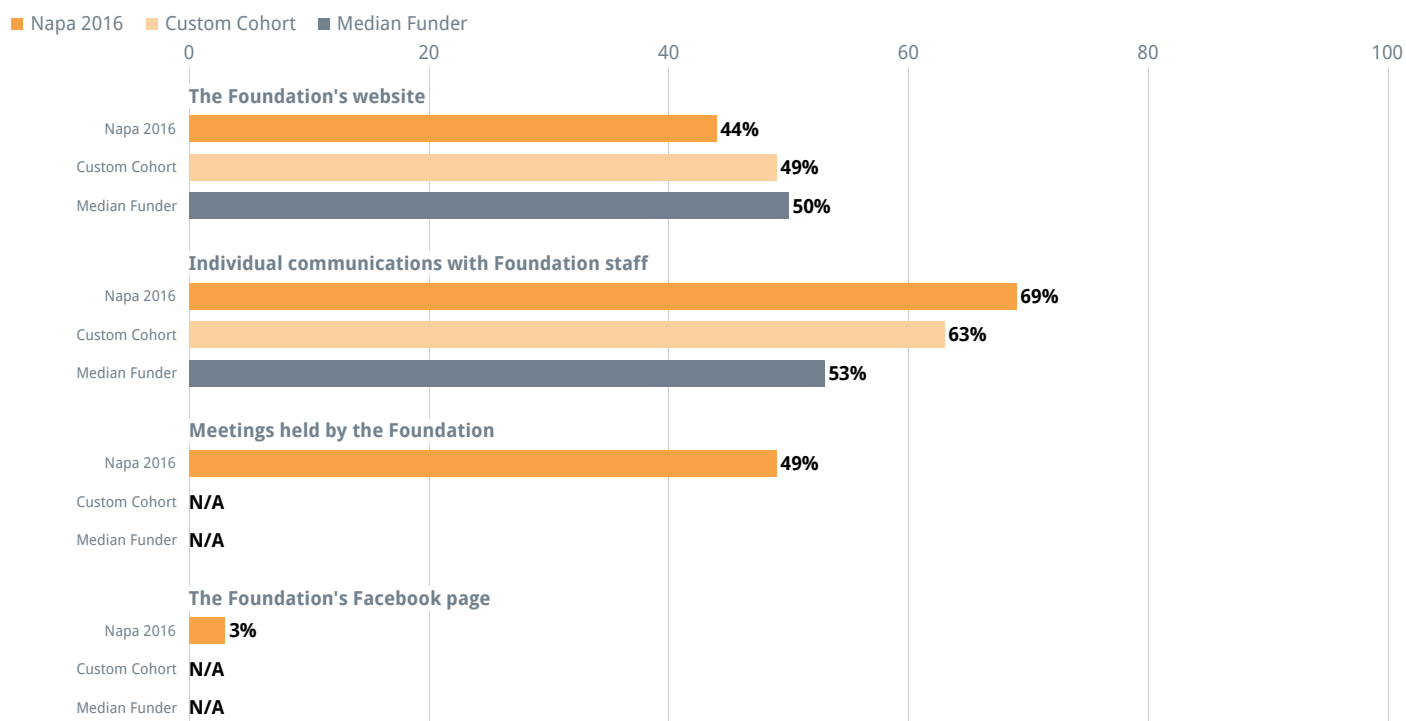
Past results: ☒ On ☐ Off

Subgroup: Donor or Fundholder ▼

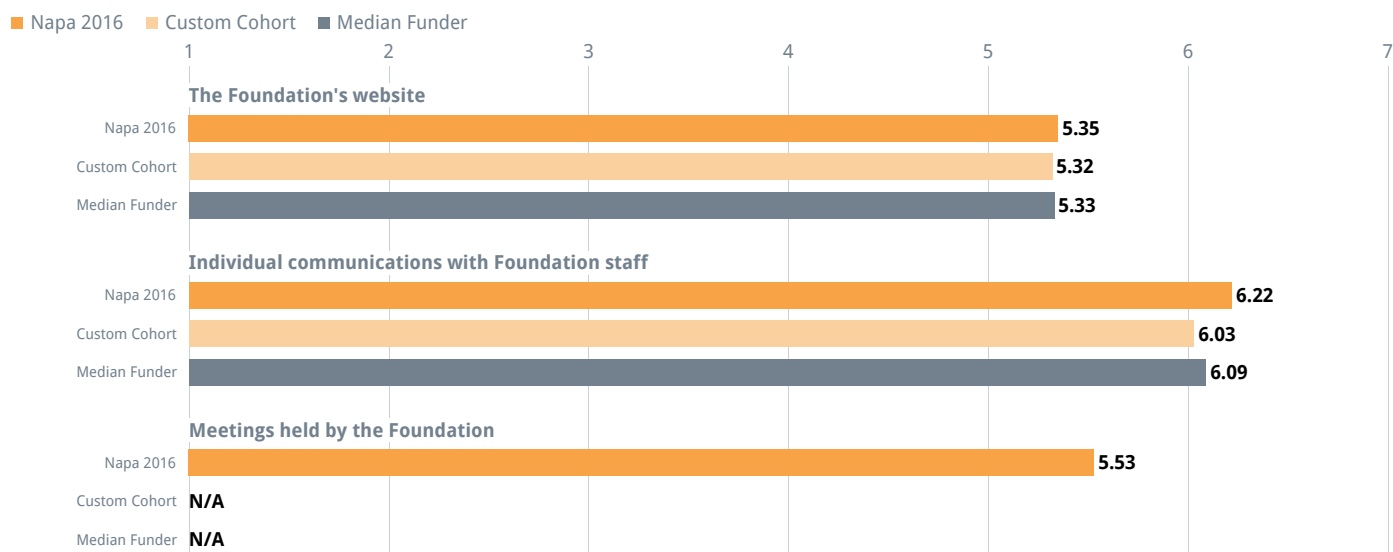
## Resources to Learn about the Foundation's Work

"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."

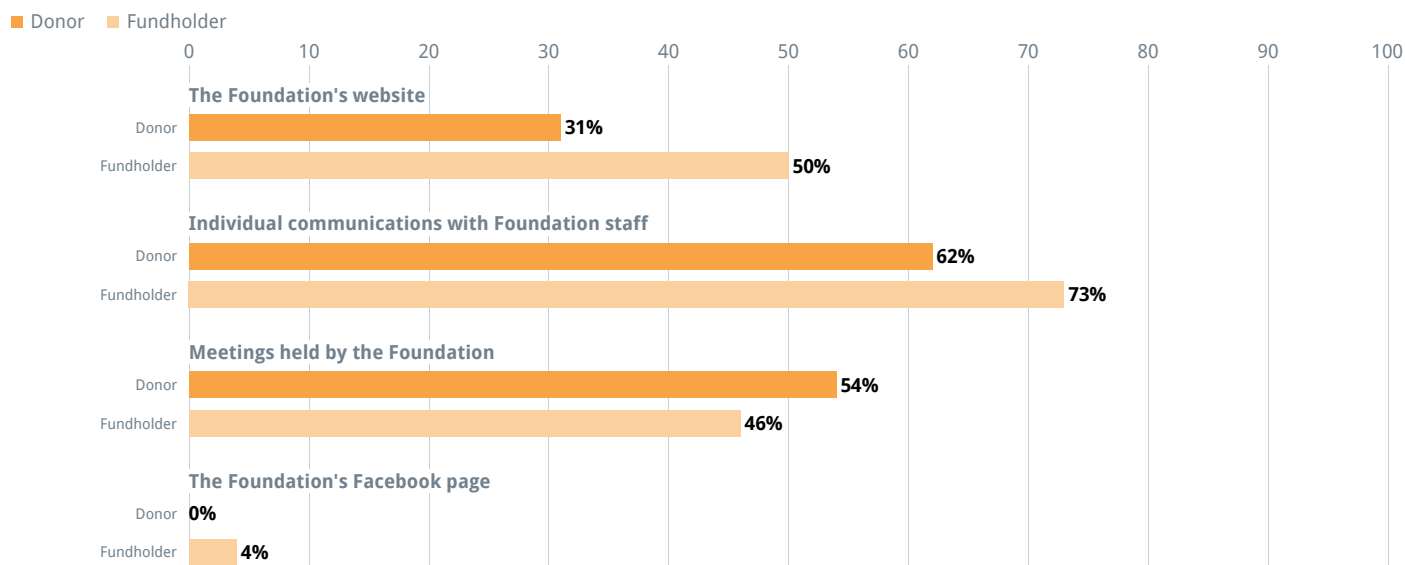
### Use of Resources to Learn about the Foundation's Work - Overall



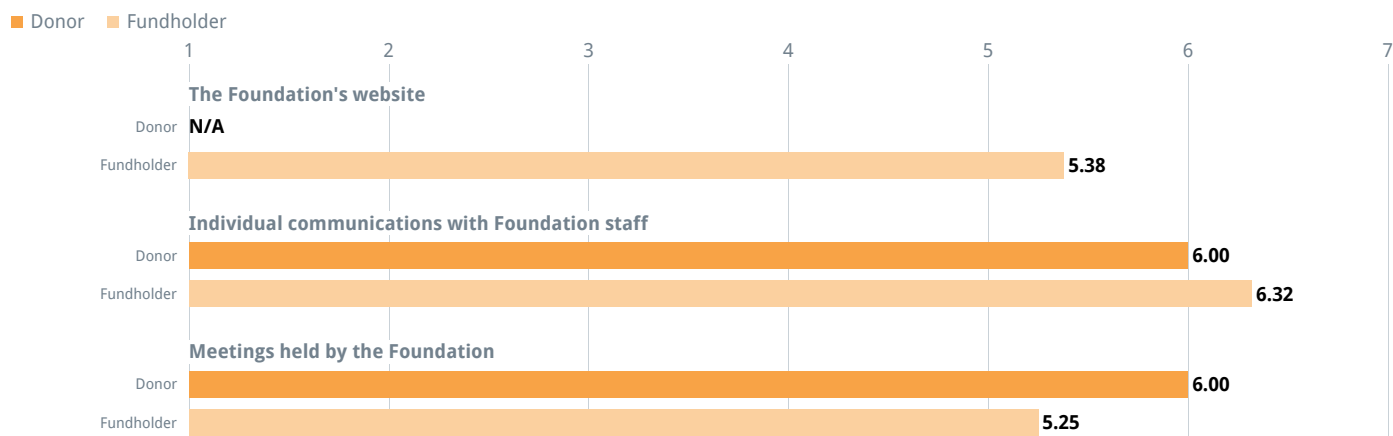
### Helpfulness of Resources to Learn about a Foundation's Work - Overall



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

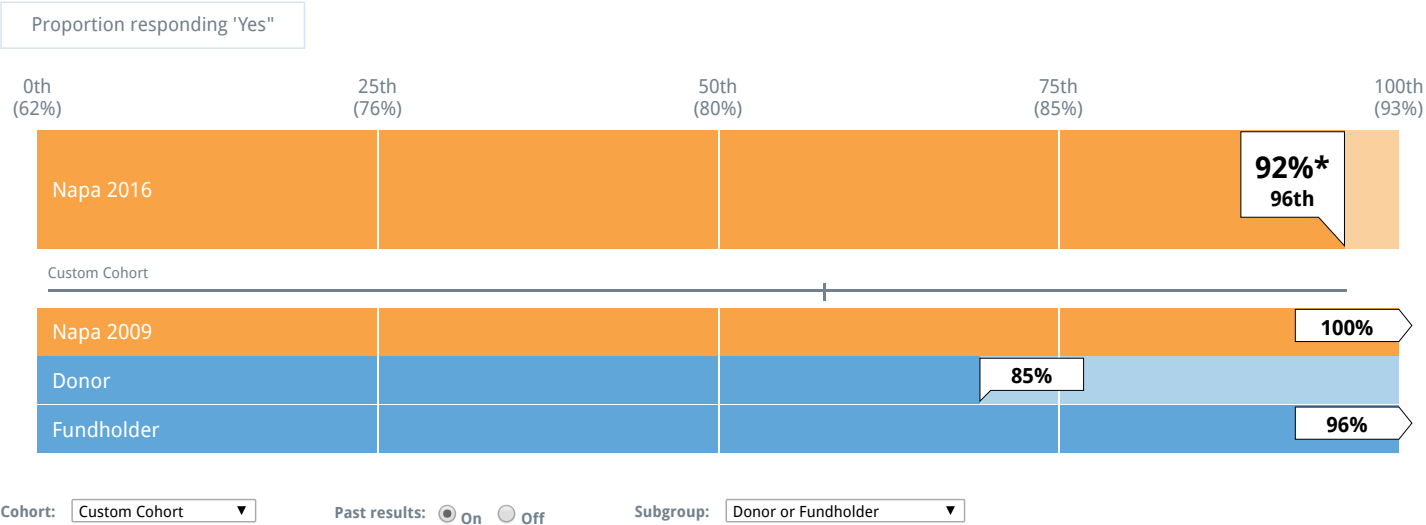


### Helpfulness of Resources to Learn about the Foundation's Work - By Subgroup



Future Giving

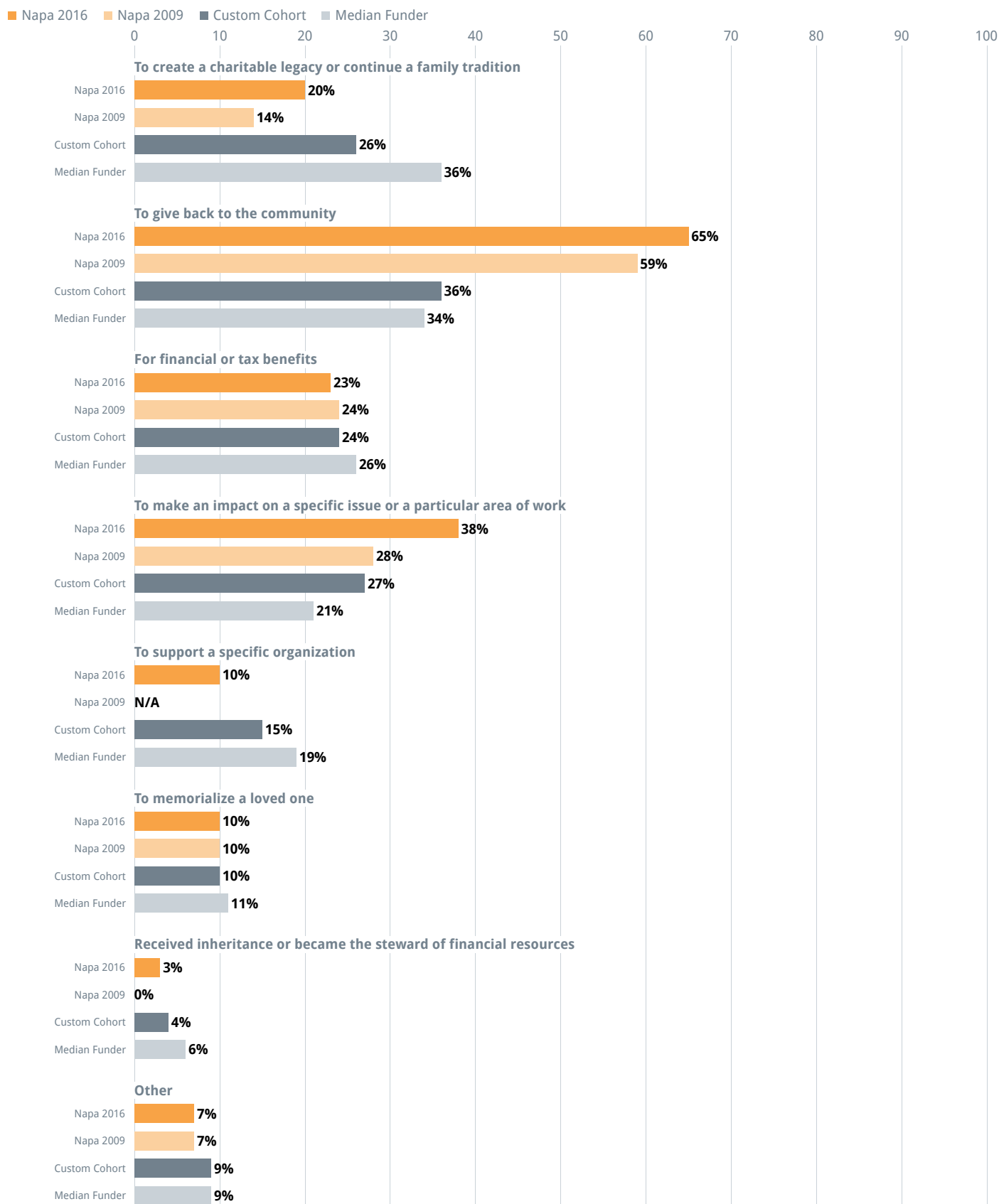
"Do you plan to give to the Foundation in the future?"



## Motivation for Initial Contribution

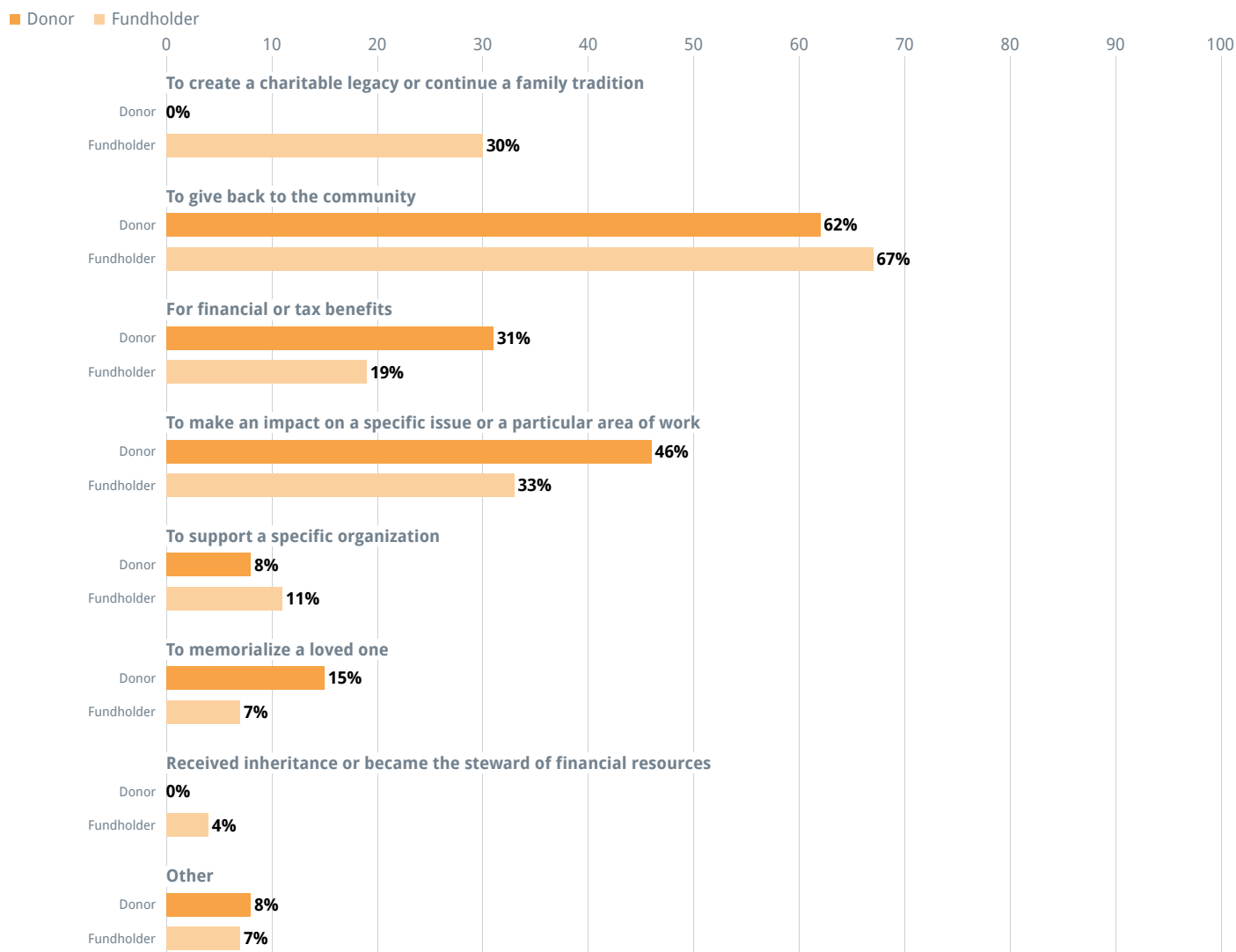
"Please think back to your *first* contribution to or through the Foundation, or your initial establishment of a fund at the Foundation. Choose among the following options the *two most* important reasons you first decided to establish a fund with the Foundation or make a donation to or through the Foundation."

## Motivation for Initial Contribution - Overall

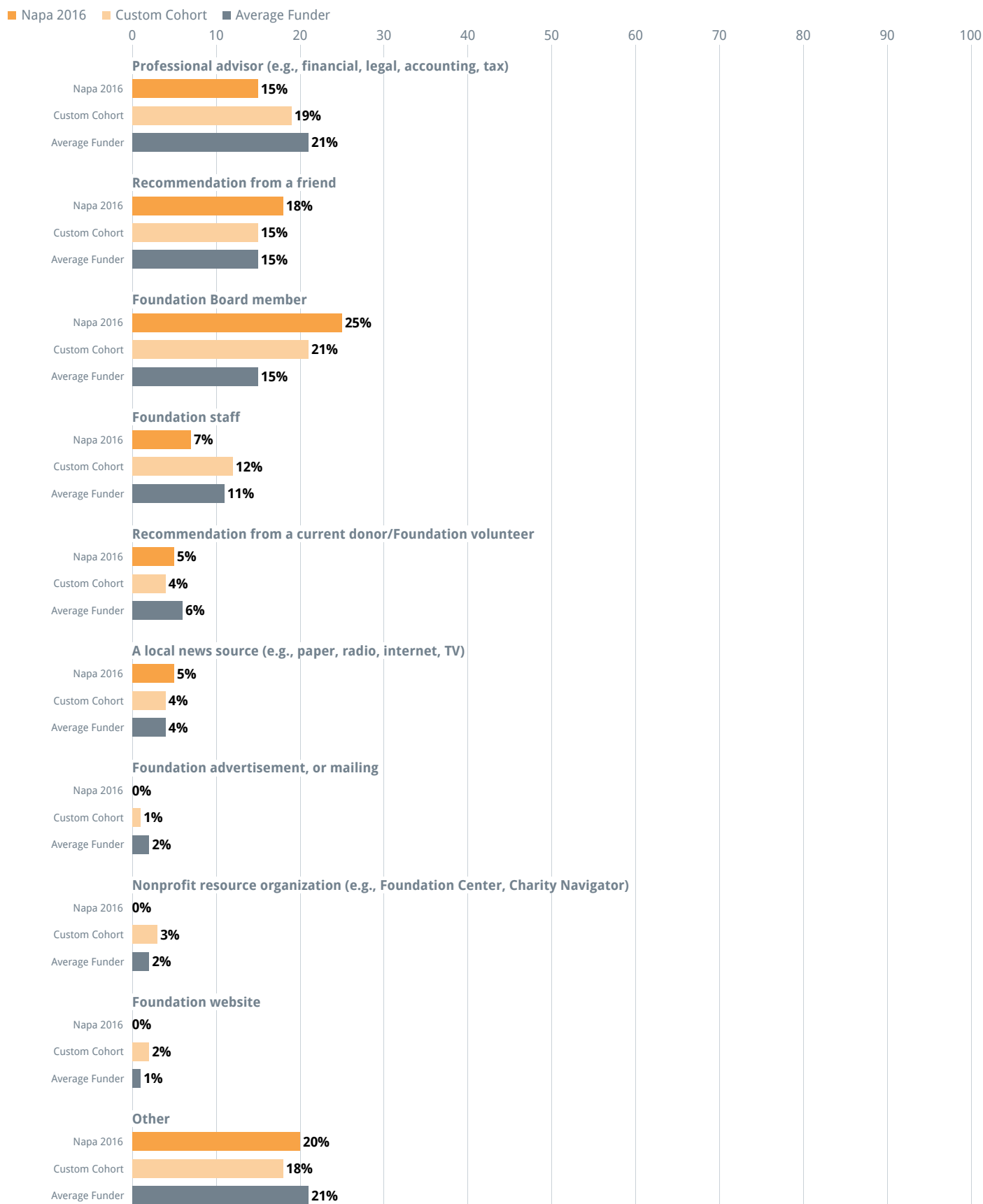




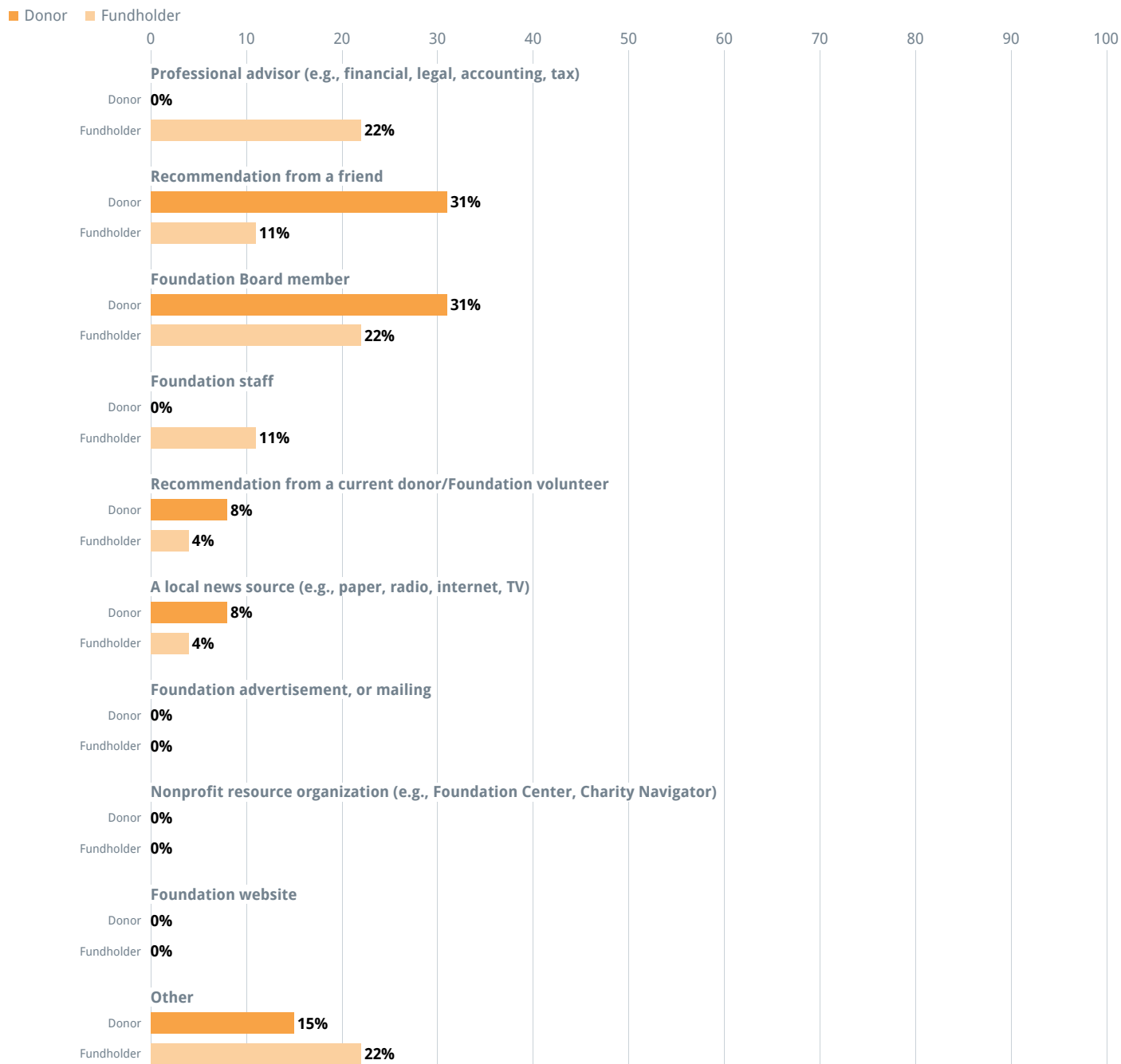
## Motivation for Initial Contribution - By Subgroup



## Donors' First Source of Information on the Foundation - Overall



## Donors' First Source of Information on the Foundation - By Subgroup



## 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 (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Likely to decrease contribution level	12%	15%	11%	11%
Likely to continue giving at the same contribution level	50%	62%	55%	55%
Likely to increase contribution level	38%	23%	34%	34%

Future Giving Relative to Past Contributions (By Subgroup)	Donor	Fundholder
Likely to decrease contribution level	0%	17%
Likely to continue giving at the same contribution level	60%	46%
Likely to increase contribution level	40%	38%

"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?"

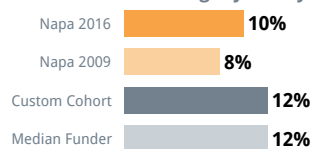
## Type of Future Giving

■ Napa 2016 ■ Napa 2009 ■ Custom Cohort ■ Median Funder

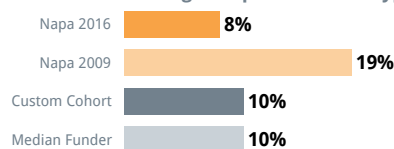
### Making additional contributions to a previously established fund



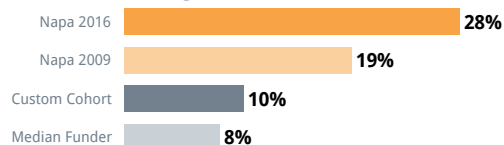
### Involving my family in a program of giving



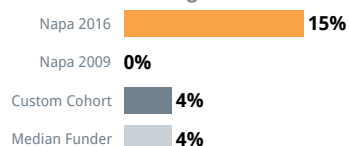
### Making a bequest or other type of planned gift to or through the Foundation



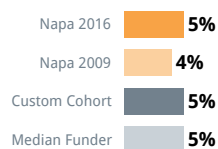
### Making additional contributions to an unrestricted or field of interest fund



### Starting a new fund at the Foundation

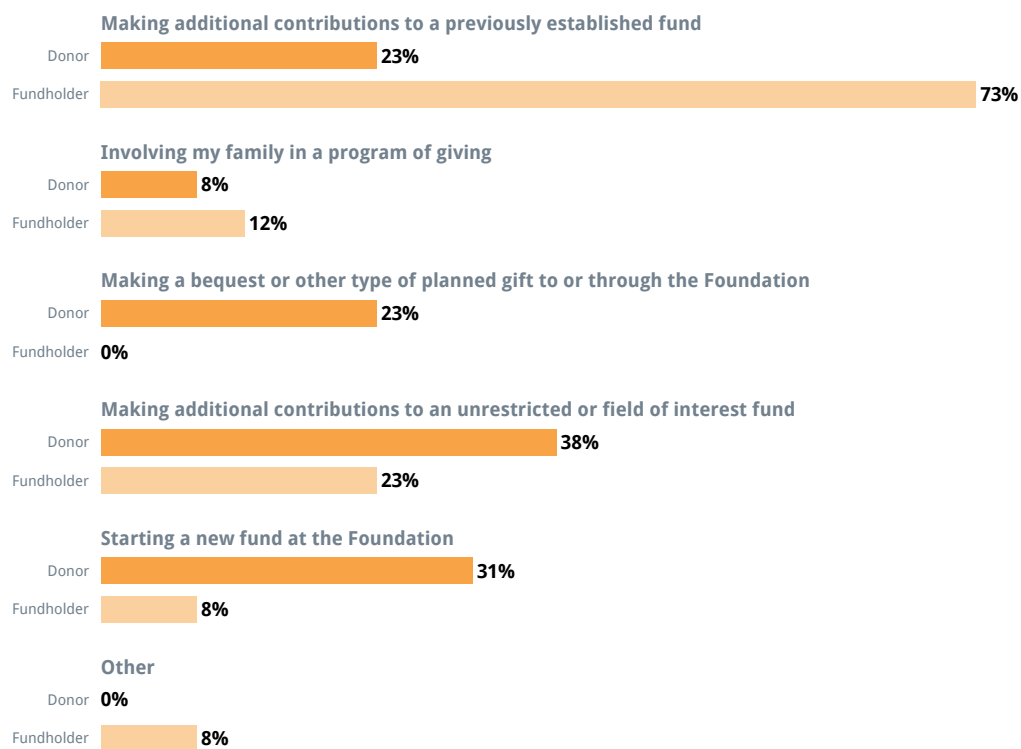


### Other



## Type of Future Giving - By Subgroup

Donor Fundholder



## 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?"

\*Less than five respondents selected "I do not plan on giving to the Foundation or to my fund in the next five to ten years," so information is not available for this question.

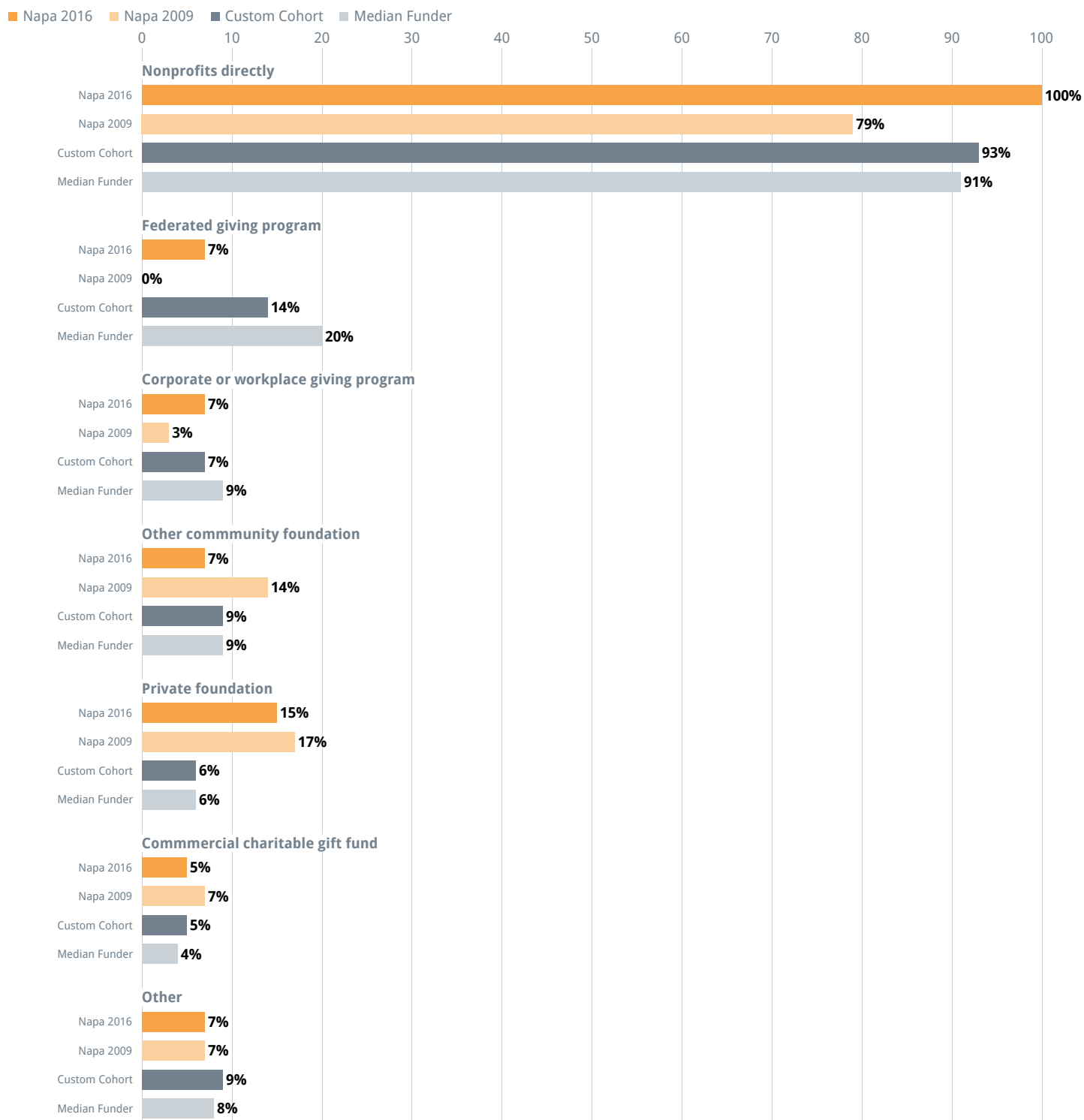
## Giving Outside the Foundation

Total Size of Annual Giving Outside the Foundation (Overall)	Napa 2016	Average Funder	Custom Cohort
<\$1K	3%	8%	5%
\$1K - \$9K	10%	31%	28%
\$10K - \$49K	38%	37%	37%
\$50K - \$99K	18%	10%	11%
\$100K - \$249K	21%	7%	9%
\$250K - \$499K	8%	3%	4%
\$500K - \$1MM	3%	2%	2%
>\$1MM	0%	2%	2%

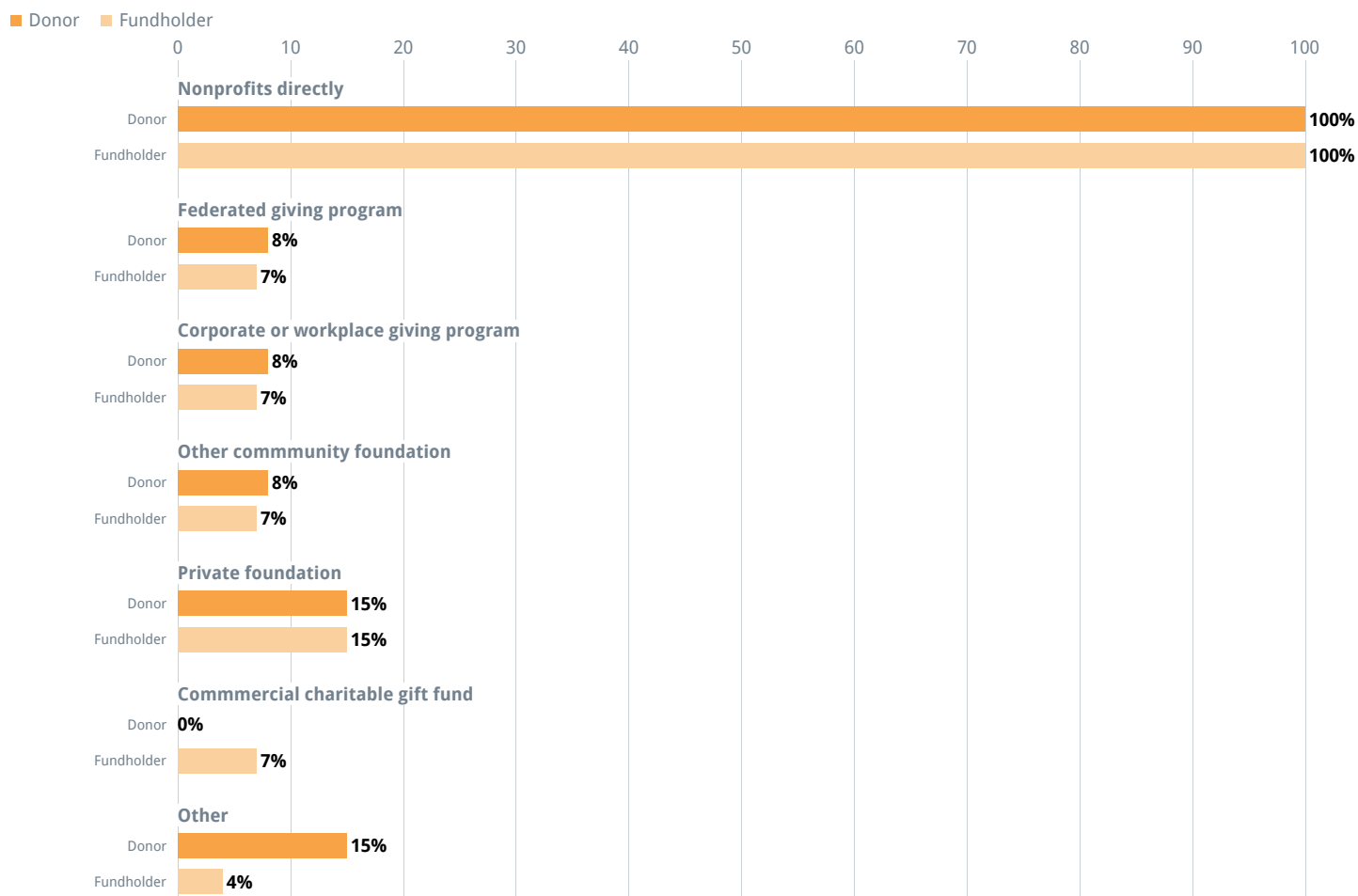
Giving To or Through Foundation As a Percentage of Total Giving (Overall)	Napa 2016	Average Funder	Custom Cohort
1% to 20%	54%	50%	53%
21% to 40%	10%	14%	14%
41% to 60%	8%	11%	11%
61% to 80%	8%	12%	10%
81% to 100%	21%	13%	13%



## Use of Charitable Giving Vehicles Outside the Foundation - Overall



## Use of Charitable Giving Vehicles Outside the Foundation - By Subgroup



## NVCF-Specific Questions

"How have the Foundation's efforts to raise money for a specific issue (e.g. earthquake relief, scholarships, immigration and citizenship) changed your opinion of the Foundation?" - Overall

1 = Significantly more negative    4 = No change in opinion    7 = Significantly more positive

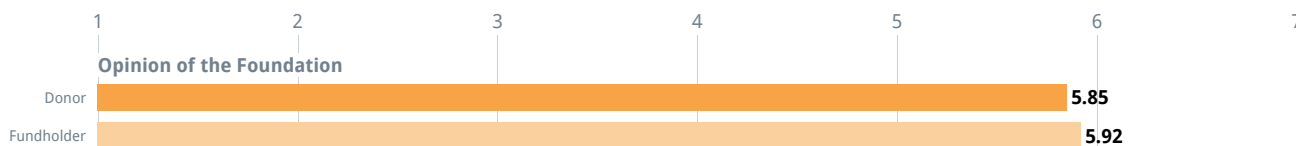
■ Napa 2016



"How have the Foundation's efforts to raise money for a specific issue (e.g. earthquake relief, scholarships, immigration and citizenship) changed your opinion of the Foundation?" - By Subgroup

1 = Significantly more negative    4 = No change in opinion    7 = Significantly more positive

■ Donor    ■ Fundholder



"Please identify your interest in engaging in the following philanthropic services" - Overall

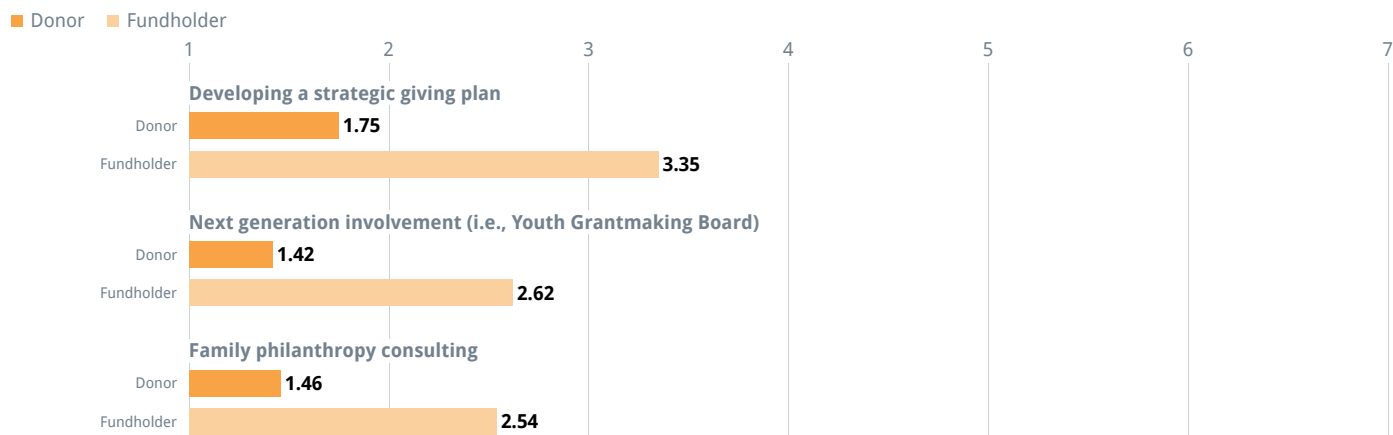
1 = Not at all interested    7 = Extremely interested

■ Napa 2016



### "Please identify your interest in engaging in the following philanthropic services" - By Subgroup

1 = Not at all interested    7 = Extremely interested



**"If you have a donor advised fund at NVCF and make an annual allocation to the Foundation's Community Impact Funds (e.g., In School & Out of School Fund; One Napa Valley Initiative Fund; Capacity Grants Fund, etc.), would you say that this practice makes you more or less likely to grow the size of your fund?"**

Likelihood to grow size of fund (Overall)

Napa 2016

Far less likely	10%
Less likely	10%
Neither more or less likely	52%
More likely	19%
Far more likely	10%

Likelihood to grow size of fund (By Subgroup)

Fundholder

Far less likely	10%
Less likely	10%
Neither more or less likely	52%
More likely	19%
Far more likely	10%

## Donor Suggestions for the Foundation

Donors were asked to provide any suggestions for how the Foundation could improve. These suggestions were then 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 Donor Suggestion	Number of Comments
Communications	5
Outreach Efforts	2
Funding Strategy	2
Visibility	2
Evaluation	1
Interactions	1
Staff	1

## All Suggestions

Grantees were asked to provide any suggestions for how the Foundation could improve. These suggestions were then categorized by CEP and grouped into the topics below.

### Communications (N=5)

- **Investments (N=2)**
  - "...I can find nowhere in the online material for my account where there is any investment or investment performance information. The Foundation manages the funds in our account and yet it's been since I've received any information on how our funds are invested, how they're performing, what ability I have to dictate investment changes or any other subject related to the financial performance of the funds managed by the Foundation for us. This is EXTREMELY IMPORTANT to me and I would think the Foundation would have a legal, if not fiduciary, obligation to provide this information regularly."
  - "My only concern is the financial health of the Foundation's investments. It seems they lag behind the markets, which perhaps is expected with conservative investing, but I would like to know more. I would like to receive regular updates, just like I would on my personal investments. How are the funds performing compared to market rates/other charitable foundations? How are the funds invested? What are prospects for future growth?"
- **More Frequent (N=2)**
  - "Would love to receive more frequent Community Link issues profiling local non-profit organizations and their needs."
  - "Send out funding requests from their nonprofit organizations quarterly."
- **Clarity (N=1)**
  - "Although Terence and the staff work constantly to explain what the Foundation is and how it works, there is unfortunately still some lack of focus as to its mission and how it operates."

### Outreach Efforts (N=2)

- "A large percentage of high net worth individuals don't make the Napa Valley their primary residence. The NVCF would be well served to develop some innovative outreach programs to directly ask this large contingent of 2nd home owners to contribute to their Napa community as they do within their primary communities."
- "More outreach to build the assets."

### Funding Strategy (N=2)

- "More emphasis on avoiding duplication of efforts among non-profits."
- "Staff that interacts with nonprofits and determines giving priorities seems to have some personal biases that get in the way of objective assessment of needs and the most effective potential recipients of donations."

### Visibility (N=2)

- "Increased community visibility; far easier said than done."
- "More publicity on services."

### Evaluation (N=1)

- "Needs assessment and common attainable goals with evaluation of community efforts to meet its needs with."

### Interactions (N=1)

- "...It might be good to have a non-speaker event where the board and staff can interact with the donors."

### Staff (N=1)

- "Getting a strong #2 to back up Terence Mulligan."

## Donor Characteristics

Age of Respondents (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Under 25	0%	0%	0%	0%
25-34	0%	0%	1%	1%
35-44	3%	7%	4%	5%
45-54	13%	28%	13%	15%
55-64	18%	28%	28%	29%
65-74	45%	34%	32%	31%
75 or over	23%	3%	23%	19%

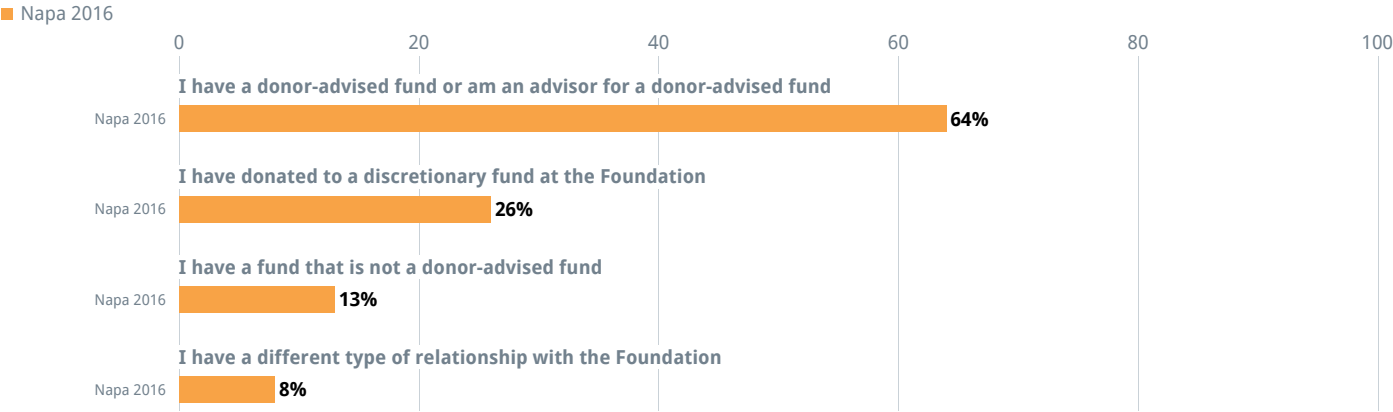
Gender of Respondents (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Female	48%	45%	43%	47%
Male	53%	55%	57%	53%

Race of Respondents (Overall)	Napa 2016	Napa 2009	Average Funder	Custom Cohort
Caucasian/White	95%	93%	95%	93%
African-American/Black	0%	0%	2%	1%
Hispanic/Latino	0%	0%	1%	2%
Asian (incl. Indian subcontinent)	0%	4%	1%	2%
Multi-racial	5%	0%	1%	1%
American Indian/Alaskan Native	0%	0%	0%	0%
Pacific Islander	0%	0%	0%	0%
Other	0%	4%	0%	0%

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

This question was recently added to the donor survey and does not yet have comparative data.

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 Napa's donor survey was 40.

Question Text	Count of Responses
Are you currently satisfied with the Foundation's leadership in the community?	39
Are you currently satisfied with the Foundation's ability to make an impact on specific issues?	38
Are you currently satisfied with the Foundation's knowledge of and experience working with local nonprofits?	37
Are you currently satisfied with the quality of the Foundation's staff?	38
Are you currently satisfied with the Foundation's investment strategy and investment performance?	40
Are you currently satisfied with the Foundation's administrative fees or costs?	40
Are you currently satisfied with the Foundation's integrity and trustworthiness?	39
Are you currently satisfied with the Foundation's efforts to connect me with other donors?	39
Are you currently satisfied with the Foundation's ability to mobilize community resources in support of specific issues?	39
Are you currently satisfied with the quality of the Foundation's advice to donors	39
Are you currently satisfied with the Foundation's willingness to take on difficult issues (e.g., earthquake relief, immigration & citizenship)	39
Are you currently satisfied with the Foundation's ability to leverage my resources by involving other donors	39
To what extent does working with the Foundation contribute to your ability to make an impact on the issues you care about?	37
In your opinion, to what extent is the Foundation making an impact on the community?	40
How well-known do you think the Foundation is among your friends and colleagues in the community?	40
How has your engagement with the Foundation changed in recent years?	39
Please think of your charitable giving over the past five years, excluding gifts you made to or through the Foundation. Approximately, what has been the size of your total charitable giving on an annual basis?	39
How have the Foundation's efforts to raise money for a specific issue (e.g. earthquake relief, scholarships, immigration and citizenship) changed your opinion of the Foundation?	38
If you have a donor advised fund at NVCF and make an annual allocation to the Foundation's Community Impact Funds, would you say that this practice makes you more or less likely to grow the size of your fund?	21

## 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. Over 50 community foundations of all sizes from across North America have commissioned the DPR, and thousands of 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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