Donor Survey
2015 SATISFACTION AND IMPACT FINDINGS
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About PCF
With roots reaching back 67 years to 1948 when Auburn Community Foundation was created as a private foundation, it was restructured in 2005 and became Placer Community Foundation to broaden its philanthropic mission. PCF has for many years had an outstanding reputation in this community. Its existence has enabled the support and funding of countless non-profit endeavors.

Mission
Placer Community Foundation is a nonprofit community corporation created by and for the people of Placer County. We are an enduring organization that grows local giving to strengthen our community.

Acknowledgments
Placer Community Foundation would like to give a special thanks to Dave Cassafer, an Independent Management Consulting Professional, for his expert advice and input on the survey instrument and consequent analysis of its data.

This report was inspired by the Center for Effective Philanthropy's (CEP's) report What Donors Value: How Community Foundations Can Increase Donor Satisfaction, Referrals, and Future Giving. We would like to express our gratitude to CEP and our community foundation colleagues for their insight.
Summary

Placer Community Foundation (PCF) manages charitable funds, which are tailored to the giving interests and strategies of individuals, families, nonprofit organizations and businesses. Grants from these funds support programs and services locally, nationally and even abroad to address the needs of seniors, underserved families, displaced and struggling youth, neglected animals, scenic open space and endangered habitats and a vibrant arts community.

PCF seeks to provide high-quality services to donors during their lives, and above all, honor their legacy and intentions for giving after they have passed. Of the funds under PCF management, 82% are in service to living individuals, families and agencies who have established and contributed to these funds. Additionally, PCF maintains regular contact with members of its Legacy Society. These are people who have informed PCF of their intent to contribute to, or establish, funds through their bequest.

PCF fundholders and legacy donors responded to a series of quantitative questions covering numerous aspects of the relationship between them and the Foundation to date. We received a very high response rate, with two-thirds (64%) of donors completing the survey. Goals for the survey were to:

- Provide a better understanding of what donors value and which donor services and programs are most relevant and effective.
- Provide valuable perspective on the aspects of the Foundation that most distinguishes its work from other charitable giving options.
- Help PCF identify patterns or trends in the philanthropic giving of their donors.

Overall, the survey findings indicate that donors have exceedingly positive perceptions of Placer Community Foundation. In particular, donors rate PCF very highly in overall satisfaction and would readily recommend PCF to a friend or colleague. Donors defined PCF as “professional,” “trustworthy,” “conscientious,” and “compassionate.”

When asked what is “most important” when deciding to give through PCF, donors indicated PCF’s integrity and trustworthiness, the quality of its staff, and the Foundation’s knowledge and experience working with local nonprofits. These same factors were ranked very high in overall satisfaction.

Regarding education of community needs, the majority of donors believe PCF contributes to their ability to have impact on the issues they care about most. Additionally PCF’s resources are widely used by its donors and considered very helpful. Positive emphasis was made on the Foundation staff’s advice and expertise, the information on nonprofits provided by PCF, as well as the Foundation’s annual events and educational programs.
Key Finding

**DONORS TO PLACER COMMUNITY FOUNDATION WILL BASE THEIR FUTURE GIVING ON THE QUALITY AND RESPONSIVENESS OF PCF AND ITS STAFF.**

Donor Engagement

A key finding in this survey revealed continued giving through PCF centers on donor satisfaction in the quality and responsiveness of PCF and its staff. This includes education opportunities on the nonprofit sector and the causes they are addressing, reports of impact made through their giving, and overall responsiveness to their questions and needs. Also important to note are donors’ initial motivations for giving. They are not typically caused by financial or tax benefits (8%) but by a desire to give back to their community (67%). With 89% of its donors indicating they would recommend PCF to a friend or colleague, the Foundation can conclude that services to its donors continue to offer opportunities that connect their deep-rooted charitable interests with their grant-making. The result is engagement in meaningful giving that offers intrinsic, personal and life-long benefits.

Advisor Referrals

Donor engagement and their motivations for giving touch on an important aspect of PCF’s outreach to professional advisors in the region who work with clients wishing to give back (i.e., estate planning attorneys, accountants, and financial advisors). Charitable giving conversations beginning at the early stages of the financial planning process work to address the 67% of individuals who inherently have a desire to give back to their community. However, survey results showed only 23% of donors first heard of the PCF through their professional advisor. PCF reports that advisors who refer clients continue to do so and believe it to be an important value-added service. Furthering PCF’s mission to grow local giving, it is clear greater messaging among the professional advisor community on the high-quality of donor services at PCF is required to engage more individuals and families in their philanthropy.

![What one word best describes Placer Community Foundation?](image)

*We have great confidence in the board and staff and feel the donations are responsibly administered for community needs.*
Satisfied Donors

Placer Community Foundation Donors have exceptionally positive perceptions of the Foundation on nearly every measure of the report.

Donors are satisfied with PCF, both overall and with respect to specific aspects of their experiences. When rating the satisfaction level of various factors of PCF’s work, donors gave the highest marks to PCF’s integrity and trustworthiness (86% very satisfied) and the quality of the PCF staff (83% very satisfied), followed by PCF’s knowledge of, and experience working with, local nonprofits (77% very satisfied).

The Percentage of Donors Satisfied with Particular Aspects of Placer Community Foundation.

Donors were asked to rate their satisfaction with various factors of Placer Community Foundation’s work as being Very Satisfied, Satisfied, Mostly Satisfied, Slightly Satisfied or Not At All Satisfied. The ratings above are a combination of those who rated each factor as either "Very Satisfied" or "Satisfied."

PLACER COMMUNITY FOUNDATION DONORS ARE MOST SATISFIED WITH THE FACTORS THAT ARE MOST IMPORTANT TO THEM.

We compared these satisfaction responses to the donors' ratings of how important each of these factors are to them and the findings show a very high correlation between each one of the factors queried.

"We have been very, very satisfied with all aspects of PCF and the impactful work the staff is doing to improve our community."
PCF Responsiveness and Impact

The strongest predictors of donor satisfaction are the donors’ sense of the Foundation’s level of responsiveness when they need assistance and donors’ perceptions of the Foundation’s leadership and impact on the community.

It is important to understand what it takes to satisfy donors because their satisfaction matters for their likelihood to continue giving in the future and their likelihood to recommend the Foundation to others. The strongest predictors of how satisfied donors are with PCF are listed in the graphic below.

What Predicts Donor Satisfaction at Placer Community Foundation.

- Responsiveness of foundation staff when a donor has a question or needs assistance
- The extent to which the foundation is making an impact on the community
- Satisfaction with the foundation’s leadership in the community

Satisfaction with the foundation’s financial practices:
- Investment strategy and performance
- Administrative fees or costs

Donors who find staff to be more responsive tend to be more satisfied with the Foundation overall. Donors were asked to rate how responsive the staff members of the community foundation are when they have a question or need assistance. The majority (76%) of those surveyed have contacted Placer Community Foundation in the past year with a question or request, with 100% of those stating PCF has been "extremely responsive."
Impact on the Community

Another strong predictor of how satisfied donors are is the extent to which they believe the Foundation is making an impact on the community. The vast majority of donors believe that Placer Community Foundation is making a positive impact on the community, and they feel PCF contributes to their ability to make an impact on the issues they care about most.

**To what extent is PCF making an impact on the community?**

- **Significant impact**: 57%
- **Good impact**: 32%
- **Moderate impact**: 6%
- **Low impact**: 5%
- **No impact at all**: 0%

**NINE OUT OF TEN DONORS (89%) SAY PCF EXHIBITS A STRONG LEADERSHIP ROLE IN THE COMMUNITY**

All donors who have communicated their charitable goals to PCF also rate the Foundation’s understanding of their goals very highly (62% significant understanding, 38% good understanding). They also give exceedingly positive ratings on the quality of the staff, with 100% stating that PCF’s advice and expertise is helpful to them.

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

- **Significantly contributes**: 47%
- **Contributes to my ability**: 35%
- **Somewhat contributes**: 12%
- **Contributes little**: 3%
- **No contribution at all**: 3%

“For its size, PCF accomplishes much that is positive in the community.”
Investment Performance

While the majority of donors are satisfied with PCF’s investment performance and administrative fees, the major indicators of their satisfaction are with the Foundation's responsiveness, impact and community leadership activities. Eighty-nine percent of donors state they are satisfied with PCF’s investment strategy and investment performance. Nine out of ten (88%) of PCF donors also say that they plan on continuing to give to the Foundation in the next five to ten years.

“The PCF staff fully understand our interests and goals, and make every effort to align our donations accordingly.”

Placer Community Foundation

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