About PCF

With roots reaching back 70 years to 1948 when Auburn Community Foundation was created as a private foundation, it was restructured in 2005 and became Placer Community Foundation (PCF) 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 nonprofit endeavors.

Mission

PCF 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

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.

"I'm very pleased with what PCF does for the community and taking this survey has helped me realize I need to get more involved and educated."
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, 90% 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 their relationship with PCF to date. We received a very high response rate, with 54% 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 PCF 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 PCF. In particular, donors rate PCF very highly in overall satisfaction and would readily recommend PCF to a friend or colleague. Attributes donors most commonly use to describe PCF are “trustworthy,” “community,” “professional,” and “caring.”

When asked what is “most important” when deciding to give through PCF, donors indicated PCF’s integrity and trustworthiness is of the highest importance, followed by quality of staff, and 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 are considered very helpful. Positive emphasis was made on staff’s advice and expertise, the information on nonprofits provided by PCF, as well as PCF’s annual events and educational programs.

"PCF is a well-run organization that ensures donors’ needs are met."
Key Finding

HOW DONORS TO PCF WILL BASE THEIR FUTURE GIVING

Donor Engagement
A key finding in this survey revealed continued giving through PCF centers on donor satisfaction regarding PCF’s integrity and trustworthiness, paired with the quality and responsiveness of PCF and its staff. This includes educational 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 to or through PCF. While 24% were initially influenced by financial or tax benefits, the majority of donors (60%) wanted to give back to their community, with 40% also indicating they wanted to start a charitable legacy. In total, 100% of donors indicated they would recommend PCF to a friend or colleague; therefore, PCF 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 60% of individuals who inherently have a desire to give back to their community. Professional advisors continue to recommend and refer potential donors to PCF because of the high-quality donor services provided, with 38% of donors first learning about PCF through their advisor. This large percentage of referrals confirms there is a strong relationship between PCF staff and professional advisors in the community who see the long-term value of PCF and its mission to grow local giving.

What one word best describes PCF?

Donor Satisfaction

100% satisfied
Satisfied Donors

DONORS HAVE EXCEPTIONALLY POSITIVE PERCEPTIONS OF PCF 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 the quality of the PCF staff (81% very satisfied), followed by PCF’s integrity and trustworthiness (77% very satisfied) and PCF’s knowledge of, and experience working with, local nonprofits (77% very satisfied).

The Percentage of Donors Satisfied* with Particular Aspects of PCF:

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<thead>
<tr>
<th>LEADERSHIP AND KNOWLEDGE</th>
<th>PCF’s investment strategy and investment performance</th>
<th>PCF’s administrative fees or costs</th>
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<tr>
<td>97%</td>
<td>88%</td>
<td>79%</td>
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<th>FINANCE AND ADMINISTRATIVE SERVICES</th>
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<tr>
<td>98% PCF’s integrity and trustworthiness</td>
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<th>REPUTATION AND DONOR SERVICES</th>
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<td>98% PCF’s ability to make an impact on a specific issue</td>
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PCF 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.

“PCF staff are well aware of what my interests are and are very good about bringing those projects to my attention.”
What PCF Donors Care About

It is important to understand what it takes to satisfy donors because their satisfaction directly relates to the likelihood of whether they will continue to give in the future or recommend PCF to others. The following areas were rated highly in satisfaction:

- Connecting donors to needs and issues in the community
- Reporting back to donors on impact from collective grants
- Engaging in leadership activities that affect the whole of our county, such as PCF’s current work to advocate for affordable, workforce housing
- Maintaining the highest standard of donor stewardship through ongoing analysis of PCF’s investment performance

PCF will continue its focus on these quality donor services.

PCF Responsiveness

Donors who find staff to be more responsive tend to be more satisfied with PCF overall. Donors were asked to rate how responsive the staff members of PCF are when they have a question or need assistance. The majority (75%) of those surveyed have contacted PCF in the past year with a question or request, with 80% of those stating PCF has been "extremely responsive" and 20% indicating PCF was "responsive."

PCF staff members are the BEST! Always respond quickly—and in an efficient manner—warm, friendly, and helpful."
Impact on the Community

Another strong predictor of how satisfied donors are is the extent to which they believe PCF is making an impact on the community. The vast majority of donors (95%) believe that PCF is making a positive impact on the community, and 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: 49%
- Good impact: 46%
- Moderate impact: 5%
- Low impact: 0%
- No impact at all: 0%

“I had no idea that there were so many needy family and individuals in Placer County that needed our support.”

Community Leadership

EIGHTY-FIVE PERCENT OF DONORS SAY PCF EXHIBITS A STRONG LEADERSHIP ROLE IN THE COMMUNITY.

All donors who have communicated their charitable goals to PCF also rate PCF’s understanding of their goals very highly (54% as significant understanding and 46% as good understanding). They also give exceedingly positive ratings on the quality of the staff, with 93% 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: 49%
- Contributes to my ability: 40%
- Somewhat contributes: 9%
- Contributes little: 0%
- No contribution at all: 2%
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 PCF’s responsiveness, impact, and community leadership activities. Eighty-eight percent of donors state they are satisfied with PCF’s investment strategy and investment performance. Three out of four PCF donors (75%) also say that they plan on continuing to give to PCF in the next five to ten years.

“I’m very happy with all aspects of PCF and believe they have performed above all expectations I had when I invested in my Fund. The staff are the best!”

Placer Community Foundation

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