

Donor Advisor Survey Results

Survey Name: Community Foundation Spring 2019 Survey of Donor Advisors

Response Status: Partial & Completed

Filter: Report download 7/12/19

1. Please rate your agreement with each of the following statements. In my own charitable giving, this population is a high priority:

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
Children, youth	0 0%	2 8%	2 8%	7 29%	13 54%
Women	0 0%	3 13%	7 29%	10 42%	4 17%
Men	0 0%	5 22%	15 65%	3 13%	0 0%
Low-income	0 0%	1 4%	5 20%	11 44%	8 32%
Communities of color	0 0%	1 4%	5 21%	14 58%	4 17%
Special needs, disabilities	0 0%	2 8%	7 29%	9 38%	6 25%
LGBTQ	0 0%	3 13%	10 43%	8 35%	2 9%
Rural	0 0%	2 8%	11 46%	7 29%	4 17%
Elderly, seniors	1 4%	1 4%	12 52%	5 22%	4 17%
Other (write in below)	0 0%	0 0%	2 33%	1 17%	3 50%

9 Comment(s)

Issues oriented rather than population or identity oriented. For example, independent media, reproductive rights, groups promoting systems change for workers, environment.

Food preparation and nutrition education in the Elementary Schools.

Will look into opportunities of connecting folks together and building capacity in organizations.

Giving is not really focused on any segment of the population.

This survey may be less relevant to my organization.

All of the above.

Communication/literacy skills for children birth to 5.

Animal welfare

Homeless/food insecure

2. Please rate your agreement with each of the following statements. Within my charitable interests, this is a high priority for me:

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
Arts and culture	0 0%	1 4%	6 25%	13 54%	4 17%
Education	0 0%	1 4%	3 12%	9 36%	12 48%
Environment and/or animal welfare	1 4%	0 0%	6 25%	9 38%	8 33%
Hunger and food security	0 0%	0 0%	5 21%	8 33%	11 46%

Spring 2019 Donor Advisor Fund Survey Report (data)

	0	2	9	9	4
Housing	0%	8%	38%	38%	17%
Health and human services	0%	8%	33%	21%	38%
Social justice	0%	0%	28%	28%	44%
Community building	5%	0%	32%	41%	23%
Religious	26%	26%	22%	13%	13%
Other (write in below)	0%	0%	60%	20%	20%

4 Comment(s)

The definitions of these words matter! This terminology is so generalized I hesitate to submit.

I have yet to fund any habitat restoration projects or truly regenerative activities but I have some thoughts/ideas for how to go about it in the future.

Leadership development for girls

collaborative philanthropic strategic grant-making; basic needs, quality childcare and education/career

3. Please rate your agreement with the following statements. I prefer to provide this type of funding to organizations:

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree
Unrestricted or general funding	1 4%	2 8%	3 12%	10 40%	9 36%
Regular programs and services	0 0%	0 0%	11 48%	9 39%	3 13%
New programs and services	0 0%	0 0%	9 39%	11 48%	3 13%
Capital campaign	1 4%	2 9%	11 48%	9 39%	0 0%
Capacity building	0 0%	2 8%	11 44%	10 40%	2 8%
Matching funds	1 4%	1 4%	8 32%	8 32%	7 28%
Multi-year funding	0 0%	3 13%	13 57%	5 22%	2 9%
Community Foundation Grant Cycle requests	0 0%	2 9%	10 45%	7 32%	3 14%
Scholarships	1 5%	1 5%	9 41%	9 41%	2 9%
Other (write in below):	0 0%	0 0%	1 50%	1 50%	0 0%

2 Comment(s)

CFTC itself is probably the only organization to which I make unrestricted or general fund contributions. As to new programs or services, it would depend very much on what they were. Newness alone is not a draw.

The above are all valid types of funding to consider --- depends on the design, short & long-term goals, specific implementation steps, benchmarks and timetable.

4. Please rate the importance of the following resources and/or activities that Community Foundation provides to help fund advisors stay informed regarding local community philanthropy:

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	Should NOT provide	Not important	Somewhat important	Important	Very important
E-newsletters (monthly) providing Community Foundation updates	0 0%	2 9%	9 41%	9 41%	2 9%
Community Foundation's website information and resources	0 0%	0 0%	6 25%	15 63%	3 13%
Online DonorCentral portal, providing 24/7 access to fund information	0 0%	5 21%	7 29%	10 42%	2 8%

Spring 2019 Donor Advisor Fund Survey Report (data)

Host events and forums on community issues	0	1	12	9	1
	0%	4%	52%	39%	4%
Sharing Grant Cycle requests with fund advisors	0	2	6	10	7
	0%	8%	24%	40%	28%
Learning opportunities, offering philanthropy education on various topics	0	3	11	9	1
	0%	13%	46%	38%	4%
Site visits to grantee organizations	0	5	11	7	1
	0%	21%	46%	29%	4%
Social media posts (such as on Facebook, Twitter, etc)	1	14	7	2	0
	4%	58%	29%	8%	0%
One on one meetings or phone calls to fund advisors	0	8	10	4	2
	0%	33%	42%	17%	8%
Other (please write in below)	0	0	1	0	0
	0%	0%	100%	0%	0%

1 Comment(s)

* online site visit/progress reports demonstrating how funding achieved goals;
 * timeline of how strategic funding and partnerships impacted a specific issue/community problem

5. Please share how useful each of the following general resources and activities have been in helping you make decisions about your charitable giving.

Top number is the count of respondents selecting the option. Bottom % is percent of the total respondents selecting the option.

	Not useful	Have not used	Somewhat useful	Useful	Very useful
My own knowledge of community needs	1	0	2	11	11
	4%	0%	8%	44%	44%
Information from family members and friends	2	2	8	6	6
	8%	8%	33%	25%	25%
Volunteering in the community	1	2	6	9	8
	4%	8%	23%	35%	31%
Community Foundation's events, communications, or resources	1	3	10	9	2
	4%	12%	40%	36%	8%
Print media (magazines, newspapers, etc)	1	5	12	5	0
	4%	22%	52%	22%	0%
Traditional electronic media (TV, radio)	1	13	8	2	0
	4%	54%	33%	8%	0%
Internet and social media (websites, podcasts, social media apps)	1	11	6	5	1
	4%	46%	25%	21%	4%
Other nonprofits	1	2	12	8	2
	4%	8%	48%	32%	8%
Other (please specify below)	1	1	1	0	0
	33%	33%	33%	0%	0%

3 Comment(s)

WRFI news and programs; HSC listserv
 I don't live in Tompkins County, so this isn't really relevant.
 Mostly I donate to organizations I already know about

6. How likely are you to donate to your fund in the future?

	Number of Response(s)	Response Ratio
Very likely	16	61.5%
Somewhat likely	6	23.0%
Not sure	2	7.6%
Somewhat unlikely	1	3.8%
Very unlikely	1	3.8%
No Responses	0	0.0%
Total	26	100%

0 Comment(s)



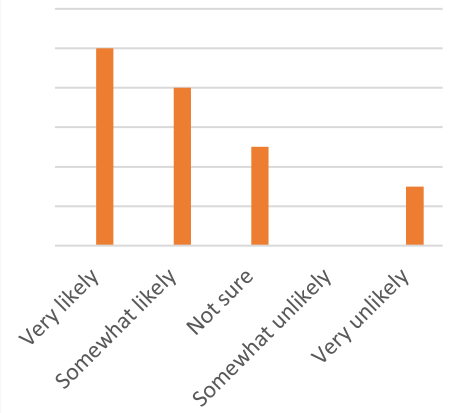
7. How likely are you to donate to the Community Foundation's operational programs and services in the future?

	Number of Response(s)	Response Ratio
Very likely	10	38.4%
Somewhat likely	8	30.7%
Not sure	5	19.2%
Somewhat unlikely	0	0.0%
Very unlikely	3	11.5%
No Responses	0	0.0%
Total	26	100%

1 Comment(s)

Keep asking.

Giving to foundation programs and services?

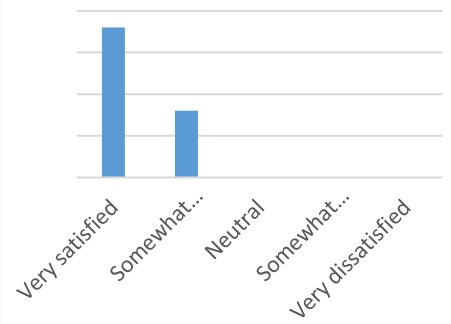


8. Overall, how satisfied are you with the organization?

	Number of Response(s)	Response Ratio
Very satisfied	18	69.2%
Somewhat satisfied	8	30.7%
Neutral	0	0.0%
Somewhat dissatisfied	0	0.0%
Very dissatisfied	0	0.0%
No Responses	0	0.0%
Total	26	100%

2 Comment(s)

How satisfied are you with Community Foundation?



US philanthropy is a strange beast because of who wields financial power to what ends and how the donor may benefit. I do not have a clue how class issues manifest for the CF but I expect that they are there.

Love the staff, love the leadership, don't really know the board.

9. What can Community Foundation do to improve your experience as a donor advisor?

16 Response(s)

Thanks for all that you do!

It would be helpful to know exactly how much is available in the fund to make sure the funds will be available every Fall when I make the donations.

Already doing a nice job of keeping us informed about the needs in the community. Great job of connecting people and interests.

Forget portal. Too confusing and intimidating. I will be less involved if I have to try to figure out the portal.

I rally can't think of anything

Allow use of funds with fewer restrictions.

You do a wonderful job!

The identification of funds by grantees is confusing - the thank you notes tend to go to the Foundation, but the grantor never hears from the grantee. There should be shared contact information, if desired, to all parties so the appropriate communication is done.

Keep me informed about grant requests in my areas of interest.

More both general and specific forums for DA's.

Speed up grant processing.

Improve information on Donor Central.

Nothing, thank you

Not sure at this time.

Keep up the good work

Keep it going.

"Donor Advised Fund" or DAF should be in the vocabulary of our culture, especially among those in the fund-raising dodge. It is not commonly understood. And many folks with money to spare do not use DAFs when it would in fact empower their giving! Let's talk about capacity-building...

Key Take-aways:

POPULATIONS are a HIGH Priority (top 5): **children/youth, low income, special needs, communities of color and women.**

CHARITABLE INTERESTS/ISSUES are a HIGH Priority (top 5): **education, social justice, hunger, health/human services, and environment.**

TYPE OF FUNDING I prefer to provide (top 5): **unrestricted or general funding, regular programs/services, new programs/services, matching funds, grant cycle requests**

TOP 5 COMMUNITY FOUNDATION RESOURCES/ACTIVITIES help donor advisors stay informed regarding local philanthropy:
grant cycles, website, monthly e-newsletter, hosting forums, learning/education.
Less useful: social media posts

TOP 5 USEFUL GENERAL RESOURCES/ACTIVITIES help donor advisors make decisions about charitable giving:
own knowledge, volunteering, family/friends, Community Foundation, other non-profits. Less useful: internet and social media, traditional electronic media (TV, radio), print media (newspapers, magazines, publications)

LIKELY FUTURE GIFTS TO OWN FUND **60% very likely, 23% somewhat likely** to donate in the future.

LIKELY FUTURE GIVING TO FOUNDATION OPERATIONAL PROGRAMS AND SERVICES **38% very likely, 31% somewhat likely, 19% not sure, 12% very unlikely** to donate in the future.

SATISFACTION WITH COMMUNITY FOUNDATION **70% very satisfied, 30% somewhat satisfied** with the organization.

SUGGESTIONS FOR IMPROVEMENT provide information and details regarding the fund. Continue information about the needs in the community and connecting people and interests. See details under question 9.

Survey notes:

More than one third (33%) of Community Foundation Donor Advised Funds were represented in the responses by fund advisors. (Additional details: see graphs and percentages in the DA 2019 Survey Results and Charts)

Additional resources provided to the community and to fundholders on Community Foundation of Tompkins County website www.cftompkins.org under the Resources tab.

PHILANTHROPIC SERVICES include: **Designed philanthropy** - effective giving strategies include consideration of purpose, control, tax benefits, and timeframe; providing flexibility and guidance. **Local connections** - matching donor interest with community needs, often leveraging the impact of initial available funding. **Education and advice** - events and programs cover a wide range of topics, issues, and interest, providing opportunities to listen and learn from one another and hear from experienced voices.

Our vision: Tompkins County thrives thanks to engaged philanthropy

Comments and questions may be directed to Amy LeViere, Chief Philanthropic Services Officer, 607-272-9333, aleviere@cftompkins.org

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