

Key Findings and Recommendations from the Oklahoma City Community Foundation Donor Perception Report

Prepared by the Center for Effective Philanthropy

In May and June of 2019, The Center for Effective Philanthropy conducted a survey of Oklahoma City Community Foundation's ("the Foundation") donors, achieving a 32 percent response rate. The memo below outlines the key findings and recommendations from the Foundation's Donor Perception Report (DPR). Oklahoma City Community Foundation's donor perceptions should be interpreted in light of the Foundation's goals, strategy and context.

This memo accompanies the comprehensive survey results found in the Foundation's interactive online report at <https://cep.surveymaterials.org> and in the downloadable online materials.

The Foundation's full report also contains more information about survey analysis and methodology.

Overall

- ▶ Similar to 2013, donors rate their overall satisfaction with the Foundation and the likelihood they will recommend it to a friend or colleague higher than typical. Overall, donor perceptions of the Foundation are more positive than those of donors at the typical funder in CEP's dataset.
- ▶ Donors describe the Foundation as "a tremendous resource" for their community. Their ratings place the Foundation in the top 15 percent of CEP's comparative dataset for several key measures including: its impact on the community, the responsiveness of its staff, and the extent to which the Foundation makes donors feel more connected to their community.

Highly Positive Perceptions of Impact on the Community

- ▶ Donors' ratings reflect highly positive perceptions of the Foundation's impact on and understanding of their local communities. This is represented in donors' comments, which describe the Foundation as "helping [to] fulfill needs in the city" as well as having the "ability to reflect the interest of all sectors of OKC."
 - Donors' ratings place the Foundation in top 10 percent of CEP's dataset for its impact on their local communities.
 - Similarly, donors' rate the Foundation in top 20 percent of CEP's dataset for both its understanding of their local community and the extent to which it makes them feel connected to their community.



"I am able to increase my own impact in my neighborhood through donations to our fund at the Foundation. I've seen the Foundation work with schools, parks, and neighborhoods to help increase green spaces, plant trees, etc."

Positive Interactions and Communications with Staff with Requests to Increase Presence in the Community

Donor Interactions

- ▶ CEP's research shows that one of the top predictors of donor satisfaction is the responsiveness of a community foundation's staff. Donors now rate the responsiveness of Foundation staff in the top 10 percent of CEP's dataset, which is significantly higher than in 2013.
- ▶ As in 2013, three-fourths of donors, a similar to typical proportion, report having a designated contact at the Foundation.
 - The feedback suggests that having a designated contact makes a difference in donors' experiences. Donors who report having a designated contact rate significantly higher for several measures in the survey including: their satisfaction with the Foundation, their likelihood to recommend it to a friend or colleague, the Foundation's impact on the community, and the responsiveness of staff.
- ▶ Generally, donors see the Foundation as understanding their charitable goals, with a rating that is higher than that of 85 percent of funders.
 - However, a smaller than typical proportion of donors report having communicated their charitable goals to Foundation staff. Donors who *do* report having communicated their charitable goals to staff rate significantly higher for several measures across the survey, including their likelihood to recommend the Foundation to a friend or colleague, the Foundation's impact on the community, and the extent to which the Foundation makes them feel more connected to the community.

Communications

- ▶ Donors' ratings are more positive than typical for the clarity with which the Foundation communicates its goals and its overall transparency.
- ▶ Over 90 percent of donors report that they are satisfied with the frequency of communication materials they receive.
 - In a custom question asking about donors preferred communication resource for receiving information from the Foundation, the annual report was rated the most preferred (6.11 out of 7) and social media was rated the least preferred (1.62 out of 7).
 - Donors, on average, did not indicate a strong preference for any specific types of information about the Foundation's work. Each type of information received an average rating between a 4 and 5 out of 7.
- ▶ Yet, when asked to provide suggestions for how the Foundation could improve, nearly one third of donors (the largest proportion of comments) make suggestions related to the quality and frequency of the Foundation's communications.
 - Despite ratings that are more positive than typical for how well-known the Foundation is among donors' friends and colleagues, seven donors ask for the Foundation increase its presence in the region. One donor writes that outside of "TV ads, there isn't much publicity about what [the Foundation] accomplishes." Another donor notes that the Foundation should "provide more press releases on [their] activities."

- The remaining comments are varied, with six donors asking for more clarity in the Foundation's communications, among other suggestions.



“The Foundation stays in touch with donors and beneficiaries closely. My hypothesis is that both those groups could be expanded and enhanced if the Foundation and its good work was more widely recognized in Oklahoma City and the region....”



“More press releases on the activities and support the Foundation allows everyday Oklahoman's to help support their organizations of interest.”

Typical Use of Resources by Foundation Donors

- ▶ In 2019, a similar to typical proportion of donors report using at least one Foundation resource, 78 percent. Donors' resource use is associated with more positive perceptions of the Foundation.
 - Donors who report using at least one resource at the Foundation rate significantly higher across many measures in the report, including key measures such as: their likelihood to recommend the Foundation to a friend or colleague, the clarity with which the Foundation communicates its goals to donors, as well as the Foundation's impact on the community and the extent to which it makes donors feel more connected to the community.
- ▶ On average, donors find Online Giving and customized reporting for their charitable giving to be the most helpful compared to other resources at the Foundation. However, these resources are not as frequently used by donors as the website and the Foundation's annual report.
- ▶ When asked to provide suggestions for how the Foundation could improve, over one-quarter of donors commented on the availability of resources at the Foundation, the second largest theme among their suggestions.
 - Six donors asked for more informational materials for their charitable giving. One donor writes, for example, that they would like “more information on donation options” while another would like to know more “about treatment of [their] real estate.”
 - Five donors ask for donor gatherings and three donors reference the need to provide new donors with resources. One, for example, writes that first-time donors “need to be walked through the process” and that it is “not intuitive [to those] that are not familiar [with] it.”
 - The remaining three donors make varied suggestions.



“[I would like to see] more information/workshops so that personal attendance can ease the challenges of keeping up with charitable giving options.”



“Better understanding of how I can leverage my giving & gifting with other matching funds [and] since this is my first year with a family fund, more information on gifting strategies would be helpful.”

Expected Future Giving at the Foundation

- ▶ Eighty-six percent of donors indicate that they will give to the Foundation in the future, a similar to typical proportion.
 - Thirty-seven percent of those donors who *do* plan to continue giving to the Foundation report they are likely to increase their contribution levels, a larger proportion than in 2013 and now similar to typical.
 - Most donors, 78 percent, who *do* plan to give in the future report that they will make additional contributions to a previously established fund.
- ▶ That said, nearly half of donors report giving less than one-fifth of their total charitable giving through the Foundation, illustrating a potential opportunity to capture a larger slice of donors' "wallet-share."



"[The Foundation's greatest strength] is the ability to consolidate charitable gifts to one central entity and decide later how to specifically distribute those funds. Also, those funds are invested conservatively with fairly good returns..."



"The Foundation provides multiple options for meeting charitable objectives and its staff is well versed and accessible to answer questions and deliver reliable advice."

CEP Recommendations

Based on its donor feedback, CEP recommends that Oklahoma City Community Foundation consider the following in order to address potential areas for improvement:

- ▶ Examine opportunities for more outreach efforts in order to **enhance awareness of the Foundation and its work in the community.**
- ▶ Considering donors who either have a designated contact *or* communicate their personal goals to staff have significantly more positive perceptions of the Foundation,
 - Determine staff capacity to **provide even more donors with designated contacts.**
 - Provide additional opportunities for donors to **share their personal charitable giving goals** with staff.
- ▶ Encourage donors, especially new donors, to use more Foundation resources, particularly **resources perceived as highly helpful like Online Giving or customized reporting.**
- ▶ Emphasize the value of the Foundation's services to donors and leadership in the community, particularly for donors who may have **a greater capacity to give in the future.**

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