

THE GREATER NEW ORLEANS FOUNDATION

Donor and Grantee Customer Satisfaction Survey Findings



GREATER NEW ORLEANS
FOUNDATION

For a vibrant region.

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INTRODUCTION

As a central part of our commitment to a quality donor experience and as an effective grantmaker, the Greater New Orleans Foundation (GNOF) conducted its first donor and grantee surveys in December 2012. Designed to gather data from key stakeholders, the survey findings will support and inform specific improvements in the ways the Foundation creates value for its donors and meets the many needs of its grantees.

This report represents a summary of key findings presented with selected supporting data. Our intent is to more effectively serve our donor community and steward our region's philanthropic resources. The results of the surveys will build on the strengths of the foundation and address areas of improvement. We are grateful for the thoughtful contributions of each survey participant and are pleased to share the following findings with you.

BACKGROUND

In the Fall of 2012, The Greater New Orleans Foundation hired Alan Brickman, an independent New Orleans consultant, to help formulate survey questions, and create, implement and evaluate the resulting data from the two survey instruments. The donor survey was targeted to individual and family donors who work with the Foundation through donor advised funds or support organizations. The grantee survey focused on recent grantees who received funds through our unrestricted program areas.

The surveys consisted of a series of questions to solicit feedback on numerous aspects of the Foundation's interaction with these key stakeholders. The surveys were distributed electronically to maximize the ease of response and to minimize cost. Links to the surveys were emailed to 407 donors identified by the GNOF Development Department, representing 77% of GNOF's active donor pool and 183 grantees, representing 89% of GNOF's 2012 discretionary grant recipients. The data in this report is based on the responses of 86 grantees (47% response rate) which far exceed the reported benchmark of 15% for surveys of this nature. 36 donors responded for a response rate of 9%.

With regard to the survey respondents, it is important to characterize both the individuals and the organizations. The donors respondents tended to be older (75% of the respondents were age 55 and older), overwhelmingly Caucasian (87.5%), and roughly evenly split between male and female.

Many different nonprofit fields were represented among the grantee respondents; health and human services (19.8%), education (14.0%), and affordable housing (11.6%) (see **Chart 1** below).

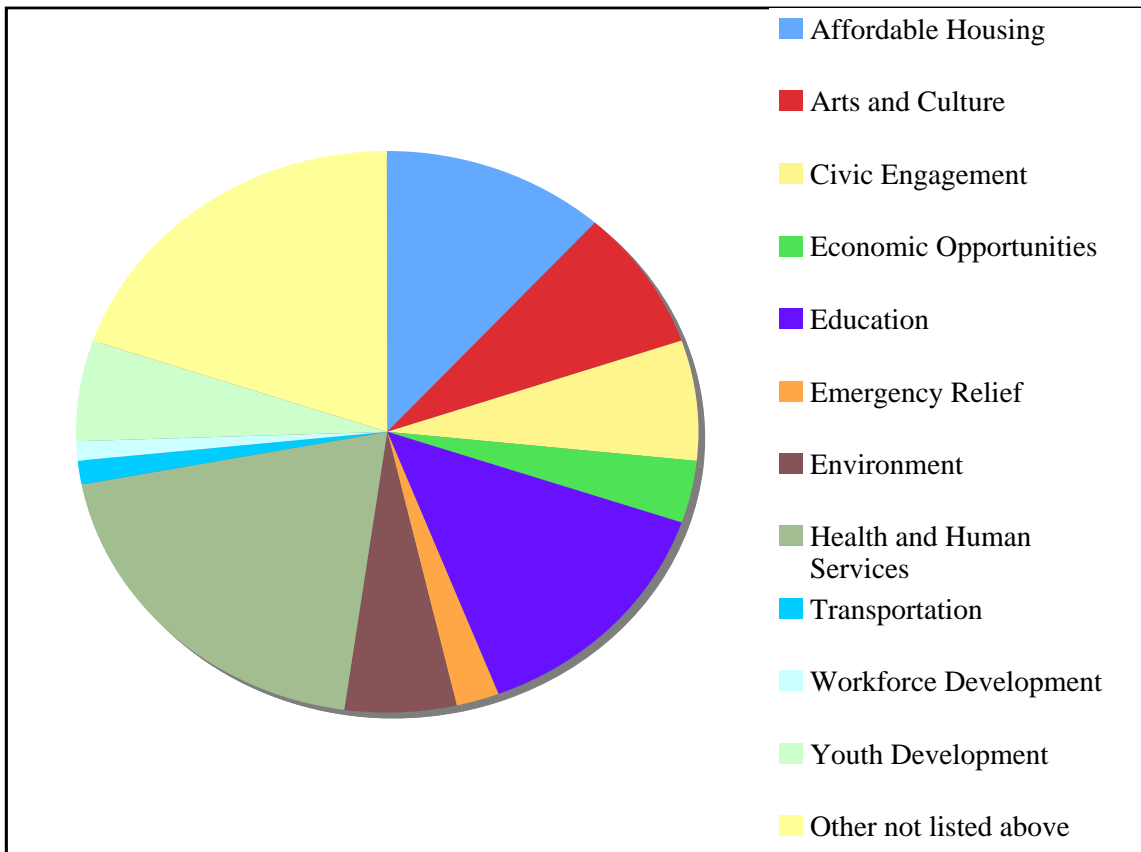


Chart 1: Education, Health and Human Services, and Affordable Housing grantees made up almost half of the respondents.

There was broad diversity in the Foundation’s grant programs from which the responding organizations had received funds. The largest percentage of respondents, 26%, was comprised of Impact grantees, followed by Coastal Communities Fund grantees (16.5%), and Community Revitalization Fund award recipients (11.5%). The grantee respondents were diverse by budget size, including 16.3% of respondents with budgets over \$5 million (see **Chart 2** below).

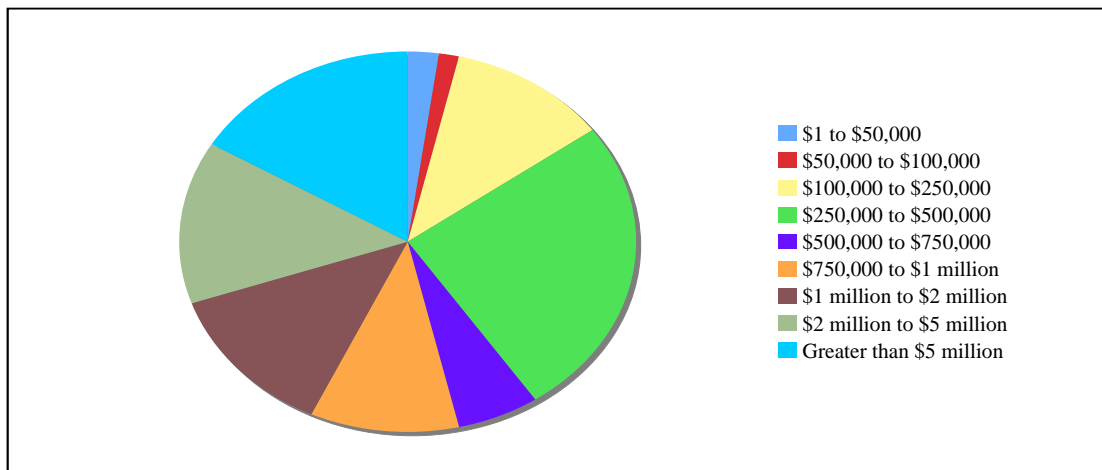
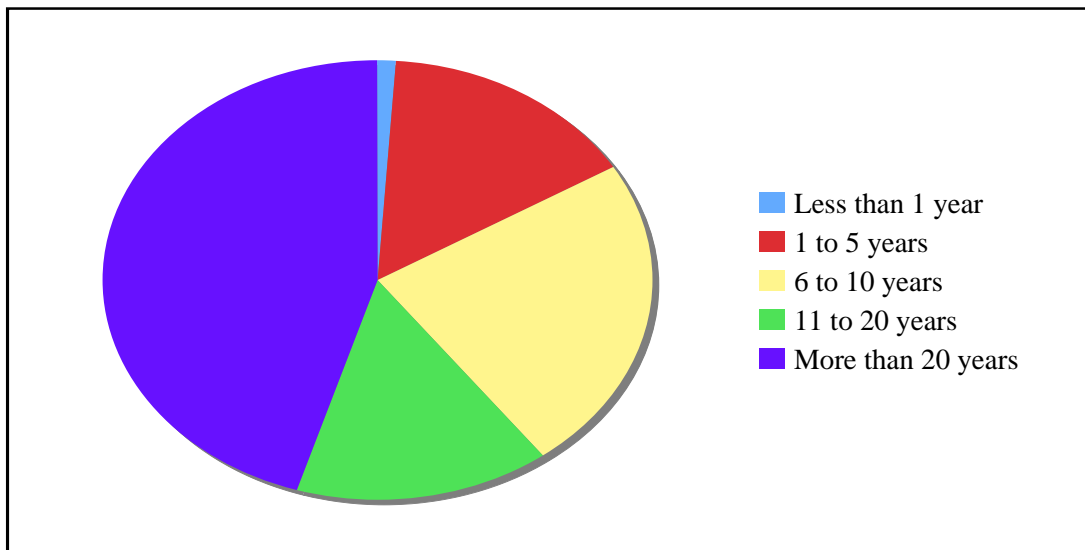


Chart 2: The majority of grantee respondents had budgets in the \$250,000 to \$500,000 range.

With regard to the size of the grants the respondent organizations received, there was a good variety including 11.4% who received grants under \$10,000 and 32.9% who received grants of \$100,000 or more.

Over three-quarters of the grantee respondents held senior management positions within their organizations-63.9% were executive directors and 12.5% held other senior management positions. In contrast to the donors, who were approximately evenly split between males and females, the grantee respondents were 76.4% female. The grantee respondents were somewhat more racially diverse than the donors, with 55.6% Caucasian and 23.6% African-American. Most of the grantee respondents were from organizations that have been in existence for 20 or more years (see **Chart 3** below).



FINDINGS FROM THE DONOR SURVEY

The feedback from donors has been divided into three sections:

- Overall donor satisfaction
- Donors' perception of Foundation's value to them
- Donors' perceptions of the Foundation's impact

OVERALL DONOR SATISFACTION

The degree of overall satisfaction with the Foundation among the donor respondents was extremely high.

When asked to rate their overall satisfaction on a 7-point scale (1 = not at all satisfied, 7 = extremely satisfied), the average rating was 6.22, and over half the respondents indicated, "Extremely satisfied." When asked about their satisfaction with several specific aspects of their interaction with the Foundation, respondents were also very positive. For example, the respondents' ratings of the

Foundation's overall "responsiveness" averaged 6.47 on the 7-point scale, and the Foundation's understanding of the respondents' charitable goals had an average rating of 6.5.

"Thanks for making it easy and fun to be a philanthropist."

Over 70% of donors indicated that when asked, they plan to continue giving to the Foundation. Similarly, when asked about the likelihood that they would recommend the Foundation as a philanthropic vehicle to friends and colleagues, the respondents rated it extremely likely, i.e., an average of 6.31 on the 7-point scale. *(Note: Among the respondents indicating they would discontinue giving through the Foundation in the future, their reasons appear to be related to their own personal plans or resources, rather than the costs, benefits, or level of satisfaction derived from working with the Foundation.)*

Overwhelmingly the donors indicated that they *first* learned about the Foundation from a personal contact (professional advisor, Foundation staff or board member, personal friend, or other GNOF donor or volunteer) rather than from any formal Foundation outreach efforts or materials.

DONORS' PERCEPTION OF FOUNDATION'S VALUE TO THEM

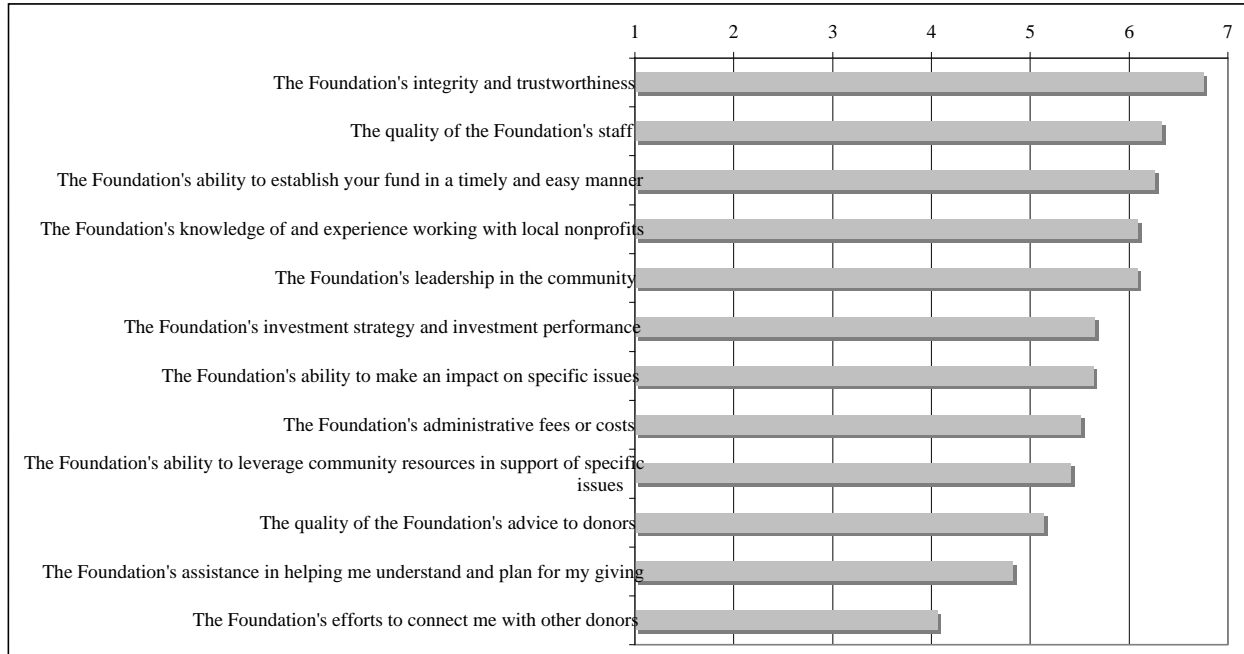
"GNOF—a wise and wonderful avenue to establish a legacy."

In the survey, donors were asked to rate the importance to them of various aspects of the Foundation's reputation, capacity, and program activities. While most of the items listed were highly rated in terms of their importance to donors, there were several noteworthy differences.

Integrity and trustworthiness, quality of foundation staff and the timeliness and ease of establishing a fund at the Foundation were rated as most important aspects. Only two items in the list received an average rating fewer than 5 on the 7-point scale: the Foundation's efforts to connect donors with other donors and the Foundation's assistance to donors with understanding and planning for their giving. (See **Chart 1** for a compilation of responses to this question.)

CHART 1

Donor Q3: 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.



1=Not at all important, 7=Extremely important

Chart 1: The Foundation's integrity and trustworthiness were the most cited factor in the decision to establish a fund by donor respondents.

There were a number of other questions in the donor survey addressing the donors' perception of the value of the Foundation's efforts to them. When asked to rate the extent to which the Foundation "enhanced your knowledge of the issues you care about," donors responded with an average rating of 4.21 on the 7-point scale.

When asked to rate the extent to which the Foundation has "contributed to your ability to make an impact on the issues you care about," donors responded with a slightly higher average rating of 4.94.

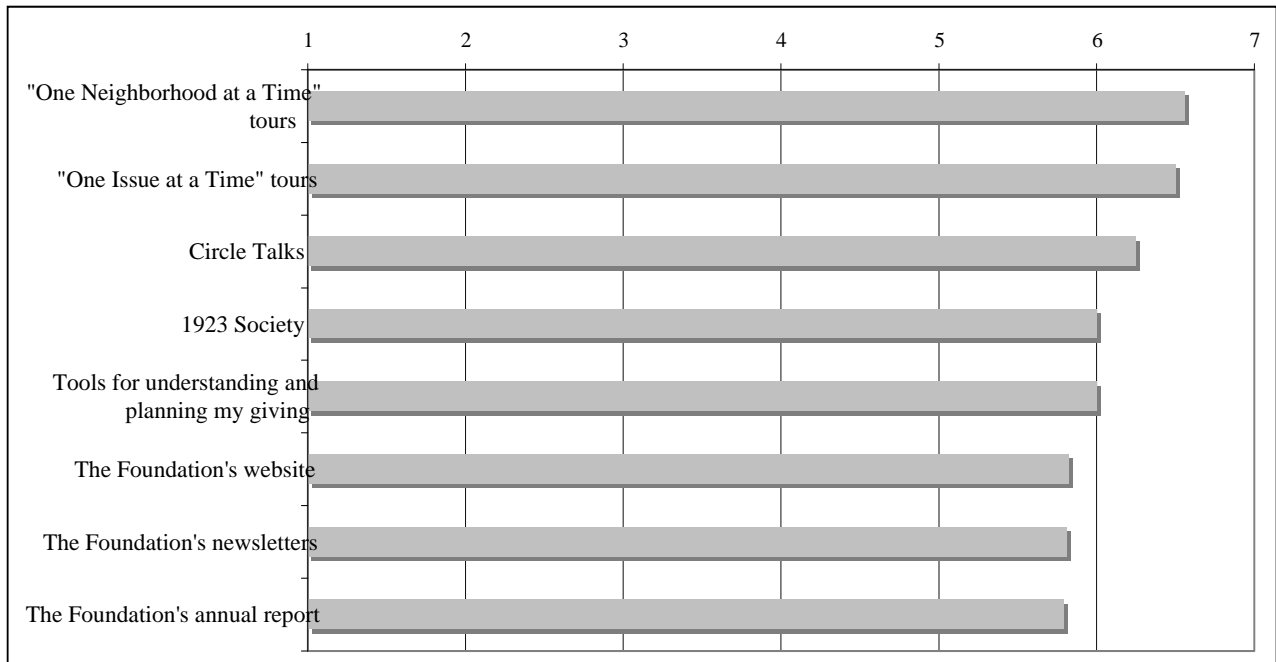
“Because the Foundation has clearly communicated their goals, I understand many community issues I would not otherwise without their input, influence, and information.”

When asked to rate the extent to which the Foundation has made them feel more connected to the Greater New Orleans community, the average rating was a significantly higher 5.9.

Responses to a question about the helpfulness of various Foundation resources (e.g., Circle Talks, neighborhood tours, etc.) in “achieving donors’ charitable goals” revealed that among those donors who have accessed these resources, the ratings are extremely high. However, the overwhelming majority of respondents indicated that they have not accessed these resources or participated in these programs. (See **Chart 2** for a compilation of the responses to this question.)

CHART 2

Donor Q16: Where applicable, indicate the helpfulness of the following Foundation resources or services to achieve your charitable goals. If you do not use a resource or service, indicate "not applicable."



1=Not at all helpful, 7=Extremely helpful

Chart 2: “One Neighborhood at a Time” tours were frequently cited as helpful in helping donor respondents achieve their charitable goals.

Overall, it appears that the “value proposition” for the Foundation’s donors centers on the quality and integrity of the Foundation and its staff with regard to grantmaking, as opposed to the Foundation as a resource for donor education and planning.

DONORS’ PERCEPTIONS OF THE FOUNDATION’S IMPACT

“Since I’m not in the city anymore, I rely on GNOF to help direct my giving, both from my fund and direct giving—so hearing about effective nonprofits really helps.”

Donors responding to the survey perceive the Foundation’s overall impact in the community to be extremely high, with an average rating of 6.48 on a 7-point scale. Similarly, they rate the Foundation leadership in the community to be high as well at 6.32. In the respondents’ comments regarding the Foundation’s community impact, donors highlight the quality of the Foundation’s grantmaking process, and the degree to which the Foundation strategically targets resources to critical community needs.

FINDINGS FROM THE GRANTEE SURVEY

The feedback from grantees presented below has been divided into three sections:

- Grantees’ assessment of their interactions with the Foundation
- Grantees’ assessment of the Foundation’s organizational effectiveness activities
- Grantees’ perceptions of the Foundation’s impact

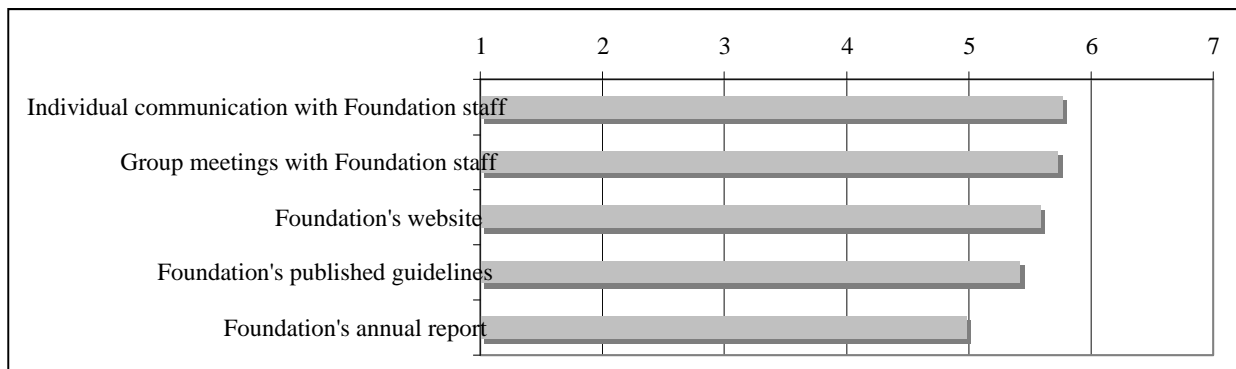
GRANTEES’ ASSESSMENT OF THEIR INTERACTIONS WITH THE FOUNDATION

In the survey, grantees were asked to rate the “helpfulness” of various resources for learning about the Foundation. As shown in **Chart 3**, the listed resources were rated highly for helpfulness.

“I think the Foundation is doing a great job and we appreciate your willingness to fund organizations and provide trainings that will help build sustainable organizations.”

CHART 3

Grantee Q17: Indicate how helpful each of the following was to you in learning about the Foundation. If you did not use a particular resource, so indicate.



1=Not at all helpful, 7=Extremely helpful

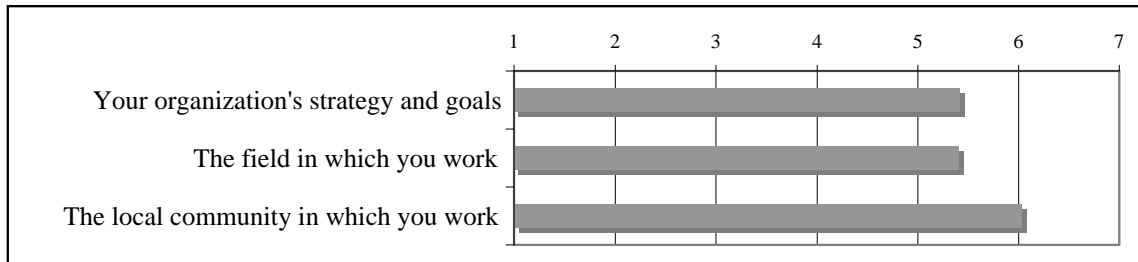
Chart 3: Individual communication and group meetings with Foundation staff were both frequently cited as helpful in learning about the Foundation by grantee respondents.

“The pre-proposal meeting where all potential grantees were invited was helpful in understanding the grant framework. This was helpful in informing program design and clarifying the intent of the funds to be awarded.”

Grantees were asked to rate how well the Foundation understands their organization, their field, and their local community. As shown in **Chart 4**, while the average ratings are high overall, the responding grantees indicated that they think the Foundation has a significantly greater understanding of the local community than it does the individual organizations or their fields.

CHART 4

Grantee Q19: How well does the Foundation understand the following?



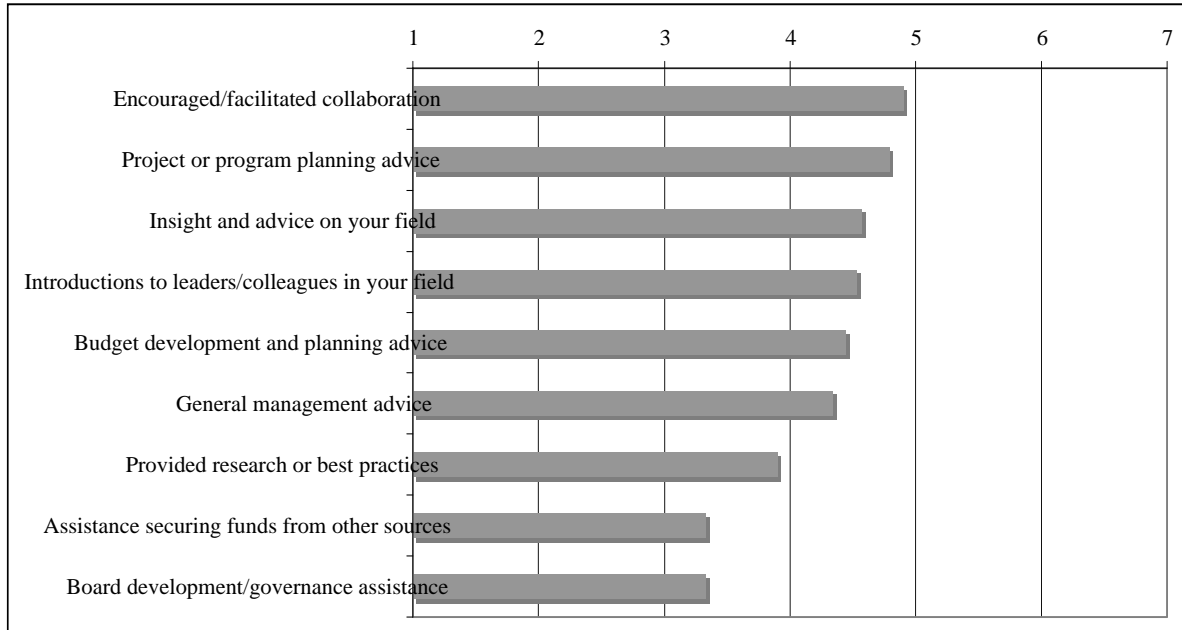
1 = Limited understanding, 7 = Thorough understanding

Chart 4: Grantee respondents rated highly the Foundation’s understanding of the local community in which they work.

The grantees rated the general “responsiveness” of Foundation staff as 5.79 on a 7-point scale, with 46% of the respondents indicating "extremely responsive." Respondents were asked to rate the level of helpfulness of their program officer with regard to various aspects of the application and selection process. As shown in **Chart 5**, for those who received help or advice from their program officer, that assistance was rated only moderately helpful. It is noteworthy that a significant number of respondents indicated that help was not offered or needed in most of these areas.

CHART 5

Grantee Q12: Specifically with regard to this grant, how helpful was YOUR PROGRAM OFFICER in the following areas.



1 = Not at all helpful, 7 = Extremely helpful

Chart 5: Grantee respondents consistently answered that their program officer was helpful in encouraging and facilitating collaboration.

The grantees rated their level of comfort with approaching the Foundation if a problem arises as 5.59 on a 7-point scale, with almost half (33 out of 74, or 44.6%) indicated “extremely comfortable.”

“The documents and best practices the program officer shared with us were extremely helpful.”

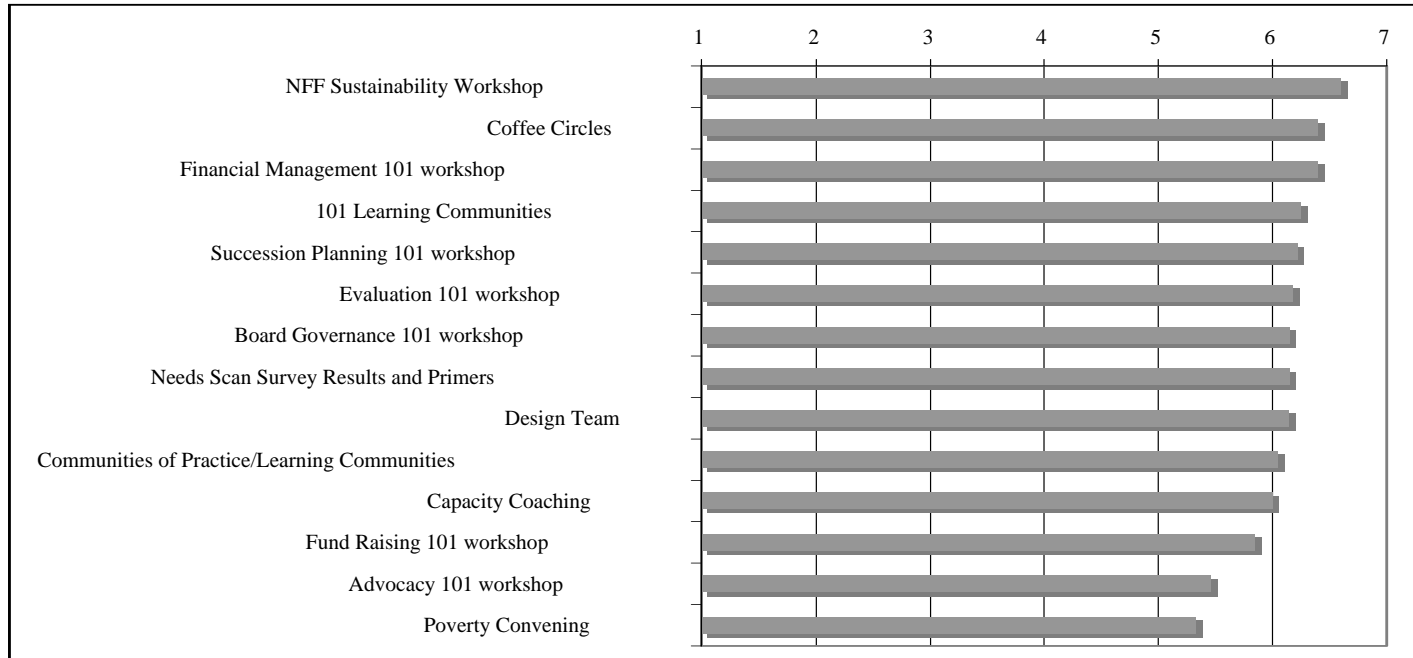
Finally, when asked to comment on the “quality of the Foundation's processes, interactions, and communications,” the respondents were overwhelmingly positive. However, there were isolated concerns about Foundation staff responsiveness and follow-through, and there were several comments that expressed a concern about the lack of alignment of the Foundation’s giving with current or emerging community priorities.

GRANTEES’ ASSESSMENT OF THE FOUNDATION’S ORGANIZATIONAL EFFECTIVENESS ACTIVITIES

There was a question in the grantee survey about the helpfulness to the responding organizations of the Foundation’s Organizational Effectiveness (OE) activities, e.g., workshops, coaching, convening, etc. Among the grantees that have participated in these programs, the ratings were extremely high. (See **Chart 6** for a compilation of the responses to this question.

CHART 6

Grantee Q23: For each of the following GNOF Organizational Effectiveness programs and services indicate how helpful it was to your organization.



1 = Not at all helpful, 7 = Extremely helpful

Chart 6: The NFF Sustainability Workshop was ranked to be the most helpful Organizational Effectiveness workshop by grantee respondents.

“As a young organization, the opportunity to participate in various workshops and coaching sessions with GNOF has been instrumental to ensuring we establish policies, procedures, and strategies to ensure our long-term success.”

There was a question in the grantee survey about the helpfulness to the grantee organizations of aspects of their experience with the Foundation’s OE staff. Specifically, respondents were asked to rate the OE staff’s knowledge of nonprofit management issues, promising practices, etc.; understanding and empathy; and responsiveness. Among respondents who had interacted with OE staff, the ratings of all three were very high. Significant numbers of respondents indicated “Not applicable/Don’t know,” reflecting their lack of interaction with OE staff.

When asked to report on the “quality of the Foundation’s Organizational Effectiveness work, processes, interactions, communications, and staff,” there were consistently positive and appreciative comments from respondents who have participated in OE programs. In addition, some respondents who had not participated in

OE activities voiced support for the *potential* of the Foundation’s OE work. Finally, it is important to note that a number of respondents indicated that they have been unable to participate in some of the OE programs due to time or other constraints.

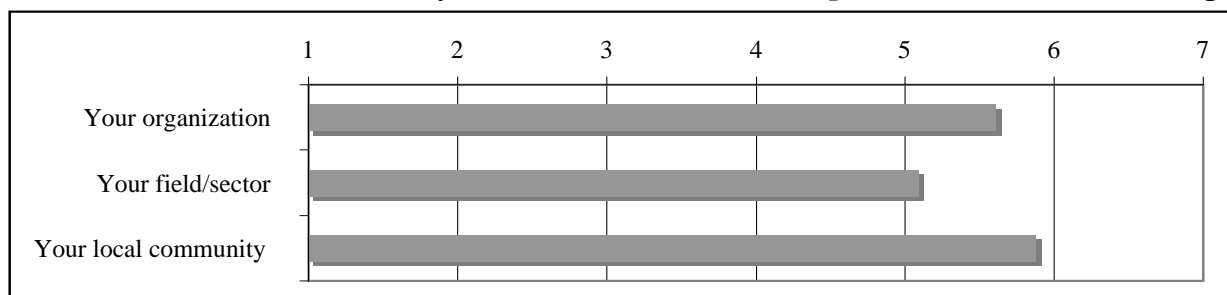
“I find the workshops to be timely, helpful, and really what organizations need to move forward and be sustainable.”

GRANTEES’ PERCEPTIONS OF THE FOUNDATION’S IMPACT

Grantees were asked to rate the Foundation’s impact on their organization, their field, and their local community. As shown in **Chart 7**, the ratings were high for all three, although higher for the organization and the community, as opposed to the respondents’ field or sector.

Chart 7

Grantee Q5: Overall, how would you rate the Foundation's impact on each of the following:



1 = no impact, 7 = significant positive impact

Chart 7: Grantee respondents indicated the Foundation had the most impact on their local communities.

Grantees were asked to comment on the most important impacts the Foundation has made on their organizations, their fields, and/or their communities. The comments were generally very positive, with three recurring themes: Foundation support enabled the grantees to initiate, maintain, and expand programs; reach new populations; and leverage funds. There were also a number of positive references to the Foundation's OE programming.

“GNOF has steadily been our most supportive, engaged, and helpful funder. Organizational Effectiveness has been incredibly helpful as well.”

In response to a question about whether the Foundation grant helped to leverage other funding to sustain their organizations’ work in the future, over two-thirds of the respondents (67.1%) indicated that the Foundation grant had leveraged additional funding. In their comments, the respondents gave several specific examples of funding leveraged from other sources (e.g., Surdna Foundation, BP America, and Baptist Community Ministries). There were also a number of

comments expressing that local support, especially from a community foundation, helps to leverage national funding.

In response to the question, “To what degree has your participation in the Foundation's Organizational Effectiveness opportunities made your organization more effective and sustainable?” grantee respondents gave an average rating of 5.28 on a 7-point scale.

“Our support from GNOF has increased considerably other recent years, which represents a stamp of approval for other funders. I think GNOF’s increasing emphasis on collaboration will have a significant impact in my field and in the larger community.”

NEXT STEPS

The Greater New Orleans Foundation’s Board of Directors and staff were briefed and discussed the survey findings identifying ways to address the findings and improve our practice as a foundation. The findings in this report are intended to serve as the basis of further discussion among Foundation board and staff members regarding future directions and initiatives through which the Foundation can enhance its value to donors and grantees, and thereby to the greater New Orleans community.

Thank you again to those who responded to our first donor and grantee surveys. Your honesty and interest in helping the community foundation understand your experience and expectations are deeply appreciated by the Foundation’s Board of Directors and the staff.

If you would like to discuss any aspect of the survey, please contact [Joann Ricci, Vice President of Organizational Effectiveness](#). We invite you to continue to provide insights and ideas to inform our work at any time. Our partnerships, and our service to you, are profoundly important to us all as we strive to serve the vibrant and diverse communities of the greater New Orleans region.

ABOUT THE GREATER NEW ORLEANS FOUNDATION

The Greater New Orleans Foundation is the community foundation serving the 13-parish Greater New Orleans metropolitan area. We design and lead initiatives that improve the region, connect donors to community needs, identify and support great nonprofits, and strengthen civil society.

