

Q1 Community Foundation name

Answered: 25 Skipped: 0

#	RESPONSES	DATE
1	Hamilton Community Foundation	2/2/2018 9:08 AM
2	Community Foundation of Tampa Bay	1/30/2018 5:30 PM
3	Southwest Florida Community Foundation	1/29/2018 8:34 PM
4	Seattle Foundation	1/29/2018 7:21 PM
5	Foundation For The Carolinas	1/29/2018 4:02 PM
6	Greater Milwaukee Foundation	1/29/2018 3:56 PM
7	Petoskey-Harbor Springs Area Community Foundation	1/29/2018 3:07 PM
8	f	1/29/2018 2:48 PM
9	Community First Foundation	1/29/2018 1:51 PM
10	Hawaii Community Foundation	1/29/2018 1:38 PM
11	Triangle Community Foundation	1/29/2018 12:49 PM
12	Essex County Community Foundation	1/29/2018 12:36 PM
13	Community Foundation for Greater Atlanta	1/29/2018 12:03 PM
14	The NY Community Trust	1/29/2018 11:51 AM
15	Community Foundation for the Fox Valley Regions	1/29/2018 11:47 AM
16	North Texas Community Foundation	1/29/2018 11:08 AM
17	Chester County Community Foundation	1/28/2018 8:06 PM
18	Minneapolis Foundation	1/26/2018 1:11 PM
19	Greater Houston Community Foundation	1/25/2018 5:54 PM
20	Greater Cedar Rapids Community Foundation	1/25/2018 11:07 AM
21	Community Foundation of Elkhart County	1/24/2018 5:03 PM
22	EBCF	1/24/2018 11:15 AM
23	Arizona Community Foundation	1/24/2018 11:05 AM
24	Calgary Foundation	1/24/2018 9:55 AM
25	Akron Community Foundation	1/24/2018 9:37 AM

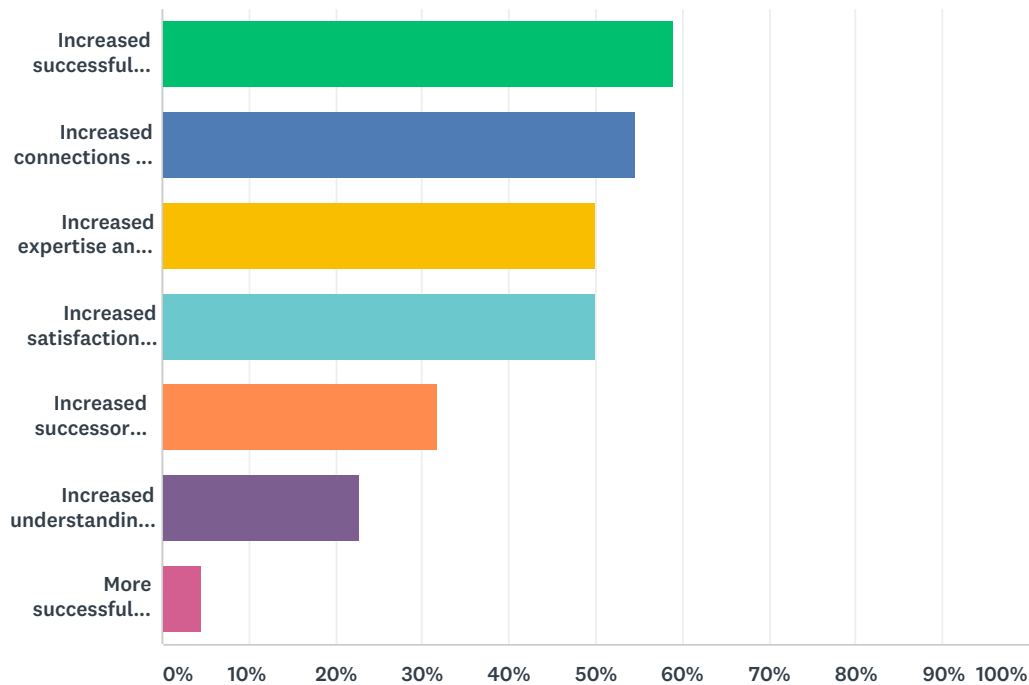
Q2 Your name (in case we wish to follow up for additional insights)

Answered: 25 Skipped: 0

#	RESPONSES	DATE
1	Sheree Meredith	2/2/2018 9:08 AM
2	Molly James	1/30/2018 5:30 PM
3	Carolyn Rogers	1/29/2018 8:34 PM
4	Lauren Domino	1/29/2018 7:21 PM
5	Catherine Warfield	1/29/2018 4:02 PM
6	Mary Kay Mark	1/29/2018 3:56 PM
7	Sarah Ford	1/29/2018 3:07 PM
8	f	1/29/2018 2:48 PM
9	Cheryl Haggstrom	1/29/2018 1:51 PM
10	Pam Funai	1/29/2018 1:38 PM
11	Treat Harvey	1/29/2018 12:49 PM
12	Carol Lavoie Schuster	1/29/2018 12:36 PM
13	Barrett Krise	1/29/2018 12:03 PM
14	Gay Young	1/29/2018 11:51 AM
15	Annamarie Engelhard	1/29/2018 11:47 AM
16	Vicki Andrews	1/29/2018 11:08 AM
17	Beth Harper Briglia	1/28/2018 8:06 PM
18	Robyn Schein	1/26/2018 1:11 PM
19	Jennifer	1/25/2018 5:54 PM
20	Michelle Beisker	1/25/2018 11:07 AM
21	Jodi Spataro	1/24/2018 5:03 PM
22	Nicole Kyauk	1/24/2018 11:15 AM
23	Morgan Bishop Fraser	1/24/2018 11:05 AM
24	Laily Pirbhai	1/24/2018 9:55 AM
25	Margaret Medzie	1/24/2018 9:37 AM

Q3 For your family philanthropy services, what impact on donors and fund advisors is most important to your board and CEO? (pick up to 3)

Answered: 22 Skipped: 3

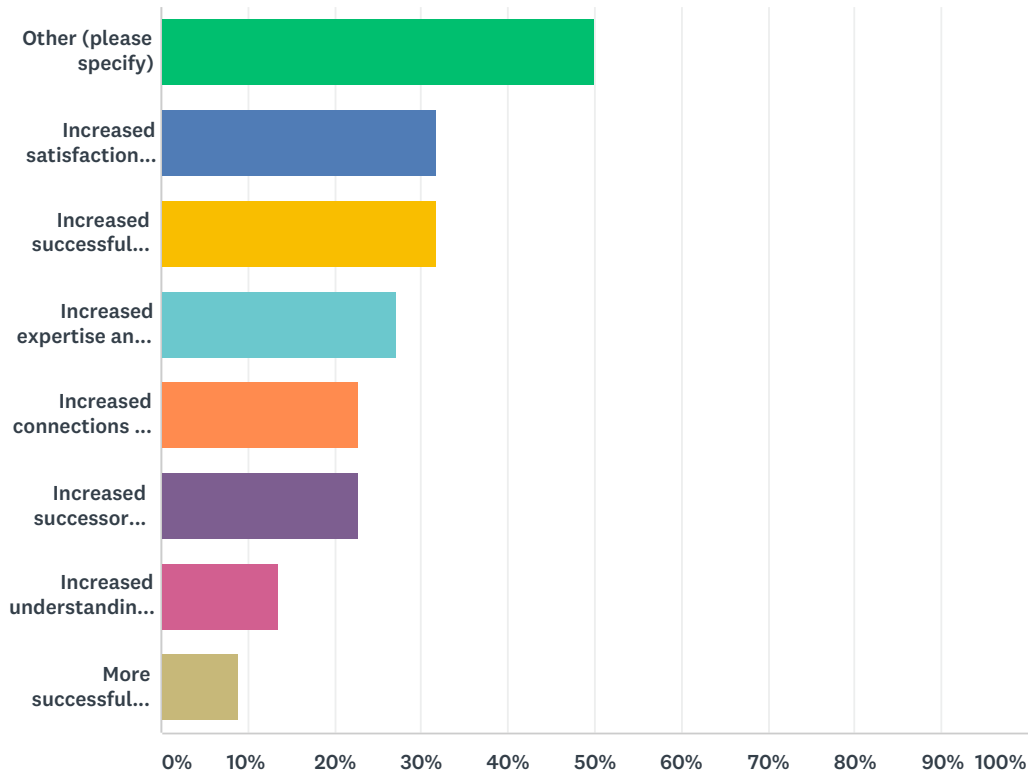


ANSWER CHOICES		RESPONSES	
Increased successful family participation in the philanthropy		59.09%	13
Increased connections to other donors, community		54.55%	12
Increased expertise and planning in philanthropy		50.00%	11
Increased satisfaction with own philanthropy		50.00%	11
Increased successor generation preparation for family philanthropy		31.82%	7
Increased understanding of the "why" of giving		22.73%	5
More successful family transitions		4.55%	1
Total Respondents: 22			

#	OTHER (PLEASE SPECIFY)	DATE
1	Youth philanthropy	1/30/2018 5:33 PM
2	a positive connection to our foundation	1/26/2018 1:13 PM
3	sustainable long term relationships in the community for GHCF. More strategic philanthropy being practiced.	1/25/2018 5:58 PM

Q4 Which donor & fund advisor-focused outcomes are you already tracking? (pick as many as needed, but be honest)

Answered: 22 Skipped: 3



ANSWER CHOICES	RESPONSES	
Other (please specify)	50.00%	11
Increased satisfaction with own philanthropy	31.82%	7
Increased successful family participation in the philanthropy	31.82%	7
Increased expertise and planning in philanthropy	27.27%	6
Increased connections to other donors, community	22.73%	5
Increased successor generation preparation for family philanthropy	22.73%	5
Increased understanding of the "why" of giving	13.64%	3
More successful family transitions	9.09%	2
Total Respondents: 22		

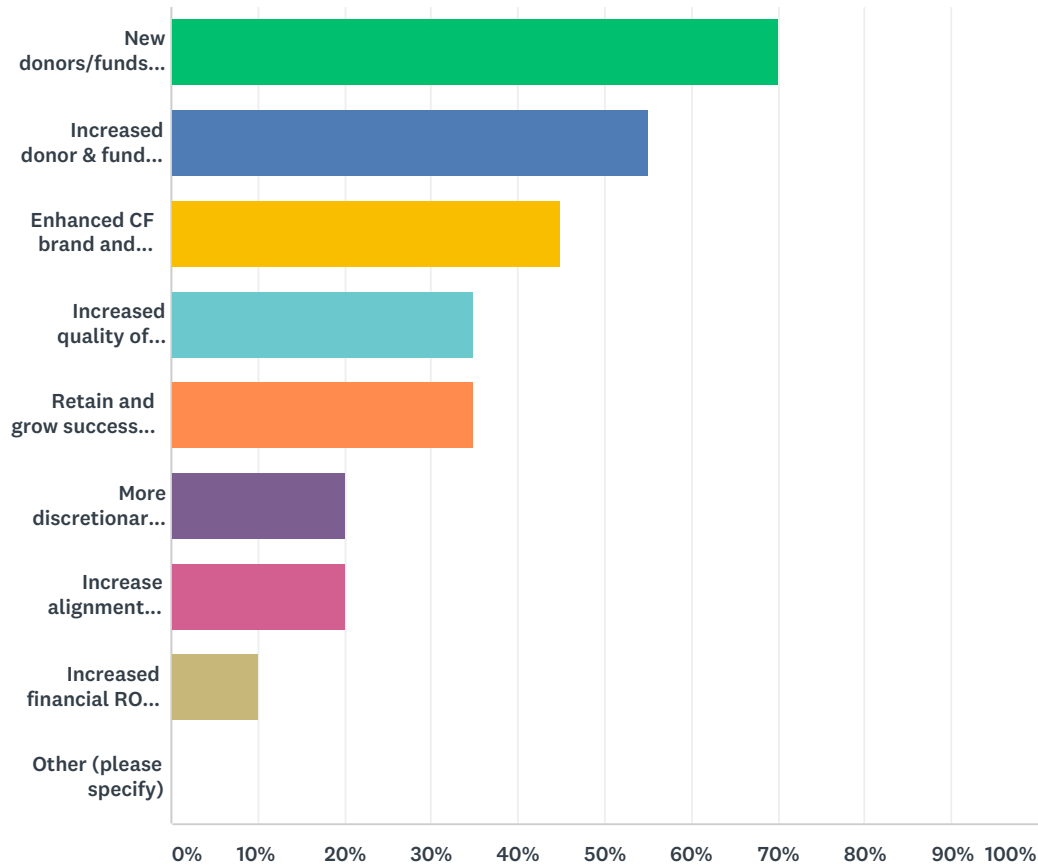
#	OTHER (PLEASE SPECIFY)	DATE
1	we aren't tracking any outcomes yet	1/30/2018 5:33 PM
2	we are tracking the cause areas and how they relate to our sustainability goals, we track referrals from prof advisors and connections of donors and prospects to our work -- you should see our map, it would make your eyes bleed - and we present a dashboard to board bi monthly on our work and its connection to our goals	1/29/2018 8:37 PM
3	Dollars out the door	1/29/2018 1:47 PM

CF Family Philanthropy Services Success Measures

4	i am not certain that this question applies to us because we are early stages of	1/29/2018 12:39 PM
5	We are not "tracking" any perse but would be interested in learning how to do so!	1/29/2018 12:37 PM
6	currently not formally tracking any of this	1/29/2018 11:54 AM
7	increased grantmaking, increased addition to funds	1/26/2018 1:13 PM
8	We track whether multiple branches/generations are engaging with our services.	1/25/2018 5:58 PM
9	We do not have a developed center for Family Philanthropy and are looking to build a program in the near future, at which point we would begin tracking such data points.	1/24/2018 11:06 AM
10	Increased Knowledge of vital priorities	1/24/2018 9:57 AM
11	Fundholder engagement and education on funding opportunities	1/24/2018 9:41 AM

Q5 For your family philanthropy services, what impact on the foundation is most important to your board and CEO? (pick up to 3)

Answered: 20 Skipped: 5

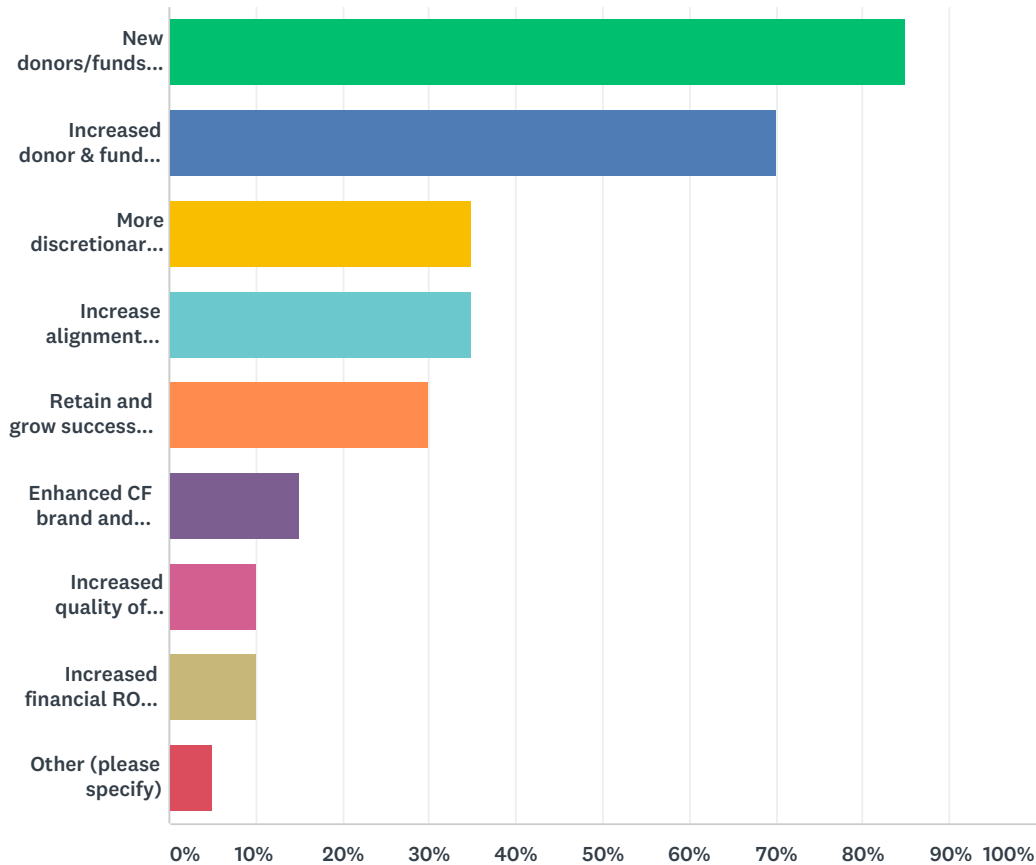


ANSWER CHOICES		RESPONSES	
New donors/funds attracted		70.00%	14
Increased donor & fund advisor use of foundation's services		55.00%	11
Enhanced CF brand and reputation		45.00%	9
Increased quality of family philanthropy services		35.00%	7
Retain and grow successor generation giving with CF		35.00%	7
More discretionary/permanent funds from family clients		20.00%	4
Increase alignment between donors and foundation priorities		20.00%	4
Increased financial ROI of family philanthropy services		10.00%	2
Other (please specify)		0.00%	0
Total Respondents: 20			

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q6 Which foundation-focused measures are you already tracking? (pick as many as needed, but be honest)

Answered: 20 Skipped: 5

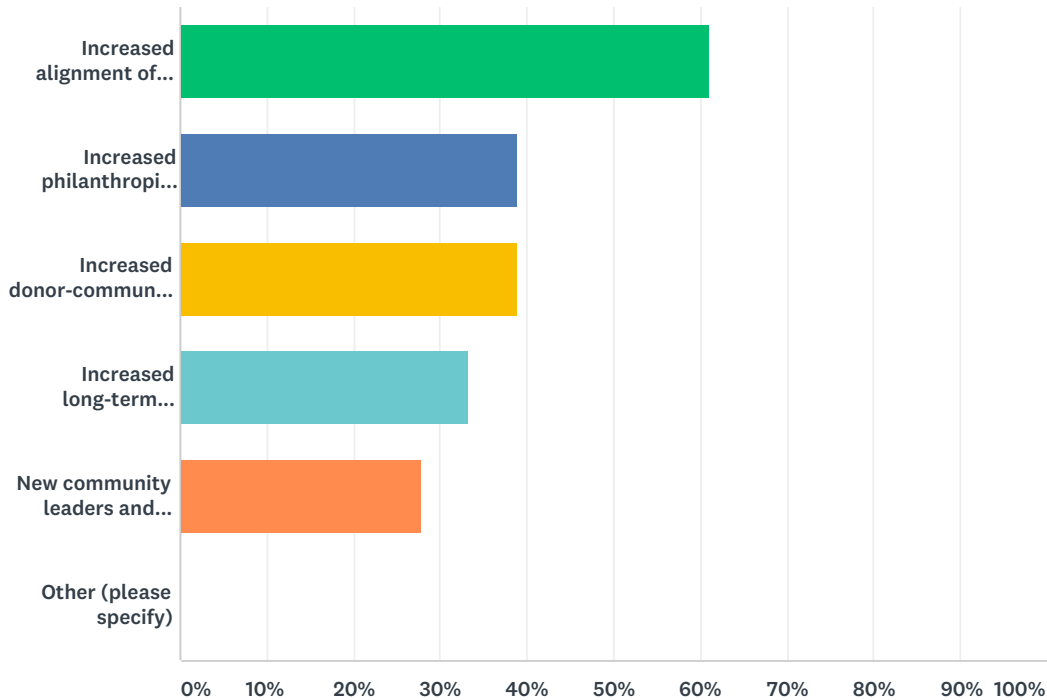


ANSWER CHOICES		RESPONSES	
New donors/funds attracted		85.00%	17
Increased donor & fund advisor use of foundation's services		70.00%	14
More discretionary/permanent funds from family clients		35.00%	7
Increase alignment between donors and foundation priorities		35.00%	7
Retain and grow successor generation giving with CF		30.00%	6
Enhanced CF brand and reputation		15.00%	3
Increased quality of family philanthropy services		10.00%	2
Increased financial ROI of family philanthropy services		10.00%	2
Other (please specify)		5.00%	1
Total Respondents: 20			

#	OTHER (PLEASE SPECIFY)	DATE
1	we are not currently tracking	1/29/2018 12:40 PM

Q7 For your family philanthropy services, what impact on the community is most important to your board and CEO? (pick up to 2)

Answered: 18 Skipped: 7

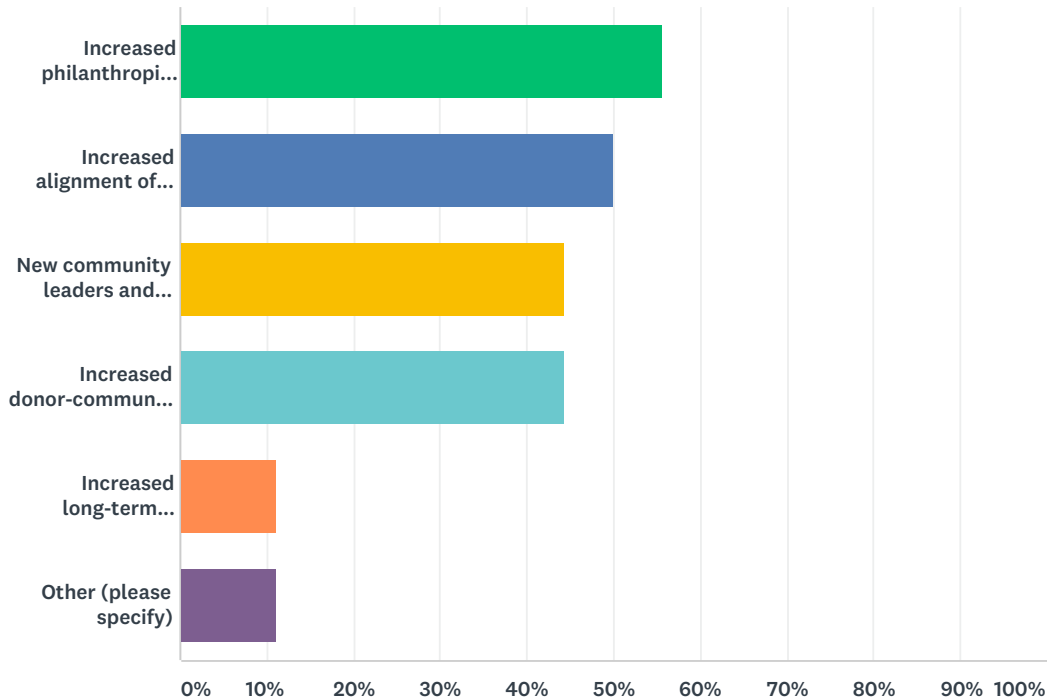


ANSWER CHOICES	RESPONSES	
Increased alignment of donor philanthropy with community needs	61.11%	11
Increased philanthropic resources flowing to our community	38.89%	7
Increased donor-community collaboration and learning	38.89%	7
Increased long-term philanthropic commitment of family to community	33.33%	6
New community leaders and donors activated	27.78%	5
Other (please specify)	0.00%	0
Total Respondents: 18		

#	OTHER (PLEASE SPECIFY)	DATE
	There are no responses.	

Q8 Which community-focused measures are you already tracking? (pick as many as needed, but be honest)

Answered: 18 Skipped: 7



ANSWER CHOICES		RESPONSES	
Increased philanthropic resources flowing to our community		55.56%	10
Increased alignment of donor philanthropy with community needs		50.00%	9
New community leaders and donors activated		44.44%	8
Increased donor-community collaboration and learning		44.44%	8
Increased long-term philanthropic commitment of family to community		11.11%	2
Other (please specify)		11.11%	2
Total Respondents: 18			

#	OTHER (PLEASE SPECIFY)	DATE
1	we are just now starting to establish strong community collaboration in our Collaboratory, a space for such - physically and virtually	1/29/2018 8:41 PM
2	Again, we are not tracking any at the moment perse. I am curious to know how other CF's are tracking!	1/29/2018 12:41 PM

Q9 What else should NCFP and your peers know about how you measure progress and success of your family philanthropy services?

Answered: 12 Skipped: 13

#	RESPONSES	DATE
1	WE are at the very early stages and exploring how to both record and evaluate the impact of our new expansion of services. We look forward to learning from others.	2/2/2018 9:16 AM
2	Some examples of matrices to measure outcomes would be helpful.	1/30/2018 5:36 PM
3	we use a PhD program evaluator to guide our process on measurement, as such we measure everything	1/29/2018 8:41 PM
4	I would love some simple tools (e.g. dashboards, standard evaluations) that I could take to our Leadership Team to better measure and track our impact!	1/29/2018 7:27 PM
5	We align all our work with our Strategic Plan, including how we shape our family services, so everything rolls up to our 3 big goals to increase philanthropic assets in the Foundation, increase Foundation grantmaking in the community and increase influence or leveraged grants in the community	1/29/2018 12:12 PM
6	CCCCF is working to identify the best metrics in the area of family philanthropy services	1/28/2018 8:12 PM
7	it is hard and a moving target	1/26/2018 1:16 PM
8	Right now we focus our metrics on looking at how engaged our donors are with GHCF. As a newer foundation and one that has spent the past 7 years trying to change from a transactional foundation to a relational one, that is what we have measured so far. We are in the process of completing our new strategic plan and some of our community work will be increased and we will continue to look at valuable metrics on our family work. We are in our third "pilot" year of our Center for Family Philanthropy and will be taking a step back this year to look at what we have accomplished and where we need to go/grow/change.	1/25/2018 6:06 PM
9	Information on how to engage the next gen	1/25/2018 11:15 AM
10	We are fairly new to this space as a defined service. Still learning and growing.	1/24/2018 5:10 PM
11	Donor satisfaction surveys done every 3 years with CEP.	1/24/2018 10:00 AM
12	We're just implementing - anxious to see results from the excitement of the community (Prof. Advisers, current fund holders, private family foundations/trusts)	1/24/2018 9:48 AM