

Family Philanthropy Services: Measures Benefitting the Community Foundation

How can a community foundation measure the progress and success of its suite of family philanthropy services – also known as its Social Value Proposition (SVP)? NCFP compiled this sample list of results and measures from documents by The Philanthropic Initiative, fundraising resources, and business resources on customer satisfaction and loyalty.

Result	Shorter-Term Measures	Longer-Term Measures
SVP Use (products, services, knowledge)	Founding generation and family attendance at programs, events In-bound requests for meetings, products, services In-bound requests for information, requests for continued engagement	Successor generation and extended family attendance at programs, events Next generation feels comfortable seeking out staff independently
Quality of SVP	Customer perception of quality and value of the experience Customer satisfaction rates – the SVP meets their self-defined needs and goals Meets internal benchmarks for quality Staff capabilities, skillsets, certifications grow	SVP has continuing education credits or other external certifications SVP is recognized as a benchmark by peers, adapted or licensed by peers Professional advisors request training in and/or use of SVP to better serve their clients (your SVP is seen as a better option than competitors' options)
Effectiveness or ROI of SVP	Continuous performance improvement processes in place Need for additional staff time and/or headcount to support family philanthropy	Increased % of break-even or profitable family funds Increased % of donor and professional advisor referrals that are profitable family philanthropy customers SVP generates financial, intellectual, and other resources needed for R&D, innovation of next SVPs
Impact on Relationships	% of next gen on CF email, social media lists % of next gen with one-on-one relationships with staff Participation by family members on foundation's board or committees	Trust built with successor gens Customer loyalty rates (drive by commitment, satisfaction, and trust in the CF)

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Impact on Brand/Reputation	<p>Visibility and branding for Center for Family Philanthropy</p> <p>Press coverage of foundation and family giving</p> <p>Net Promoter Score: donors talk up the program and talk up the foundation as a partner</p> <p>Donors and their advisors perceive that the family philanthropy package is a benefit, something special “whether they use it or not”</p> <p>Professional advisors perceive that the community foundation offers a breadth of services to their clients</p>	<p>Reputation as first and best resource for charitable advising</p> <p>Increased number of professional advisors referring HNW clients</p>
Impact on Assets	<p>More funds opened because of the SVP</p> <p>Engagement of new donors with significant financial capacity</p> <p>Private and family foundations sign on for family philanthropy services – contract revenue</p> <p>Increased number of private foundation conversions</p> <p>Current gifts to discretionary funds, operating funds, or other CF priorities</p>	<p>Increased lifetime value of family’s giving to and through CF</p> <p>Successor generations give to family fund</p> <p>Successor generations establish new funds</p> <p>Retention of large funds</p> <p>Conversions to permanent funds</p> <p>Bequests to the foundation</p>
Influence on Donor or Fund Advisor Behavior	<p>Positive feedback from grantees about their experience with family philanthropists</p> <p>Donor families suggest more general operating and multi-year grants</p> <p>Family members act on grant recommendations made by CF staff</p>	<p>Increased giving by donor families (% of their incomes or annual total amounts) to all causes (not just CF)</p> <p>Increased number of donor family gifts to foundation priorities</p> <p>Increased co-investment between donors and foundation</p> <p>New relationships with philanthropic leaders in region</p>

