CUSTOMER SERVICE COMMITMENT

OVERVIEW

High quality, personal and professional customer service is essential to all activities of the foundation. Moreover, customer service is integral to the design, implementation and evaluation of all interactions, initiatives and programs. Our customer is every person we come in contact with in the context of our work with the foundation. These customers include but are not limited to donors, grantseekers, colleague foundations, referral sources, fellow employees at the foundation, board members and the inquiring public. We will strive to make our customers feel welcome, comfortable, understood and important.

Trustworthiness

We are committed to being trustworthy and honest individuals, especially when working with customers and colleagues. Customers should never feel as though we are 'hiding the ball' and should receive straightforward and thorough responses to inquiries.

Equity

We strive, through creative philanthropy, vision, and leadership, to build a better community in which every individual, regardless of where they start in life has the opportunity to be successful.

Responsiveness

We strive to act quickly and thoroughly in response to a request for information or action by our customer. If there are any obstacles impeding our ability to respond, we will garner all resources necessary to respond and clearly communicate the expected resolution and outcome.

Initiative

We strive to anticipate the needs and potential concerns of our clients and take the initiative in crafting solutions before problems occur. We use our experience, intuition and resources to create products and programs which will anticipate and address the changing needs of our customers.

Empathy

We continually strive to look at a situation through the eyes of our customers and their priorities. This entails the ongoing challenge of viewing these situations through different lenses than our own. We will assess customer needs and priorities along with their different styles of communication.

Team Approach

No one person or department owns a particular customer base or issue we are all responsible for our own and each other's concerns. We will never say to a customer, "That's not my area" or "That's not my fault." We will continually work to tear down individual and departmental silos in order to build a whole foundation working to serve our customers.

Open Communication

We work in a "Glass House" with an ongoing commitment to the values of education, honesty, and transparency. We will make every attempt to listen to our customers, assess their needs, anticipate future needs and fully express our services, knowledge, expectations and limitations.

Solution Broker

If we don't know the answer, we will find it. If we may know the answer, we will verify it. If we know the answer, we will know it completely. In order to fulfill these commitments, we know this will take creativity, extra effort, risk-taking and the willingness to work beyond the bounds of position, department or run-of-the-mill expectations.

Learning Organization

While striving to serve the customer, we understand the foundation is a human organization. Mistakes will be made, communication will slip and judgment will lapse. We seek to create a safe environment where these situations are learning opportunities, not only for the individual or departments involved, but also for the whole organization.

Attitude

We understand customer service without a friendly demeanor, a positive perspective and a sense of humor can be perceived as empty and superficial. We strive to outwardly experience the depth of our commitment to the community, the importance of our work and the joy of meaningful service and have this attitude readily apparent to our customers and the community we serve.

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COMMUNITY FOUNDATION OF TAMPA BAY

Customer Service Standards and Guidelines

General Customer Service

Access to foundation staff	Office hours: 8:30 am - 5:00 pm Monday through Friday
Emails and voicemails responded to in a timely manner	Administrative Support Staff - Within 2 hours Other Staff - Within 24 hours (minimum of an acknowledgment of receipt even if no resolution immediately available)
Email and voicemail indicating unavailable	If an employee will be unavailable to check and return emails and voicemails for 6 hours or longer, Outlook Out of Office Assistant should be on and voicemail should indicate unavailability, when a response will occur, and an option to reach someone immediately
Contacts entered in database	Within 2 days of significant contact - includes prospects, donors, fund reps, grantees, professional advisors, etc.
Answering phone calls	Phone calls should be answered within 3 rings. If no answer, the call goes to a voicemail box with a professional message (not an automated message)

Donor Relations

Primary Relationship Manager (PRM) welcomes new fundholders and offers orientation meeting or phone call	Within 1 day of welcome packet being sent
PRM completes Welcome Experience Checklist and saves in database	Within 2 days of orientation meeting/phone call or within 2 days of welcome packet being sent if no orientation meeting/phone call
PRM maintains contact with donor pursuant to Donor Journey standards	As needed

Fund Setup

Proposed fund documents reviewed by CFO	Prior to fund representative (donor's) signature
New fund agreement signed by President	Within 3 days of fund representative (donor's) signature
New fund documents to Finance Department from Advancement Team	Within 1 day of President's signature
New fund entered into FE and RE	Within 1 day of receiving fund documents
Welcome packet delivered by Advancement Team and PRM copied on e-mail	Within 5 days of receipt of gift

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Gifts Received

Cash or check gifts	Credited to fund daily
Online credit card gifts	Credited to fund weekly (2-3 day delay due to processing time by financial institution)
Stock gifts	Credited to fund as soon as credited to brokerage account
Non-traditional assets (ex. closely held stock, real estate, non-marketable securities, etc.)	Dependent upon asset type
Gift acknowledgement letters	Mailed within 2 days of gift being credited to fund for all gifts.
Memorial and honoraria gifts	Acknowledged to family upon request
Quid-pro-quo letters	Letter detailing deductible and non-deductible portion of contribution sent within one week of being credited to fund (exceptions will be made if adequate information on contribution is not available to Foundation staff)

Disbursements From Funds

Donor recommendation forms	Checks written on Fridays and mailed the same day for grants recommended by 12:00 pm on Tuesday. Some exceptions should be made when Advancement team must contact the donor because of issues with the grant
Online grant recommendation	Checks written on Friday and mailed the same day. Some exceptions should be made when Advancement team must contact the donor because of issues with the grant
Vendor invoices	Checks written on Fridays; mailed by the following day Finance Department may manage cash flow and pay when due

Fund Reporting

Quarterly fund statements provided	Mailed by 20th day of month following quarter end
Electronic access to fund through Donor Portal	24 hours a day; 7 days a week

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Investment of Fund Assets

New gifts invested in Long-Term Investment Portfolio	Within 15 business days of receiving available cash - normally 1st and 16th of the month.
Long-Term Investment Portfolio rebalanced for cash flow needs	Rebalanced bi-monthly on 1st and 16th of the month
Investment earnings allocated to each fund	12th working day of after month-end
Review of portfolios by investment consultant & committee	Investment consultant will review portfolio and manager's results monthly with report to the CF; investment committee will review quarterly. Reports are posted to Foundation website monthly

Community Investment Standards

Emails and nonprofit calls responded to in a timely manner	Within same business day (minimum of an acknowledgment of receipt even if no resolution immediately available)
Award letters and grant agreements sent to grantees	Within 1 week of approval
Award letters completed and on file	Within 30 days of grant award - reminder call 3 weeks following grant award if not received yet
Denial letters sent to grant applicants	Within 1 week of decision

Donor Satisfaction Survey

Survey	Foundation staff will evaluate need for customer satisfaction survey every 3 years