

DONOR ENGAGEMENT SURVEY 2024

COMMUNITY FOUNDATION OF PORTAGE & DISTRICT





INTRODUCTION

The CFPD Fund Development Committee identified a need to reach out to donors (specifically fundholders) to find out whether or not they are satisfied with the level of engagement they currently experience with CFPD; to find out whether we need to improve in this area, and how we might do so; as well as offer our assistance in providing them with more information. They also wanted to find out how people are hearing about us, to adapt our marketing and promotional practices to attract more, and a greater variety of, donors. The Committee felt the best way to do so was through engaging in a survey with all of our listed fundholders. At the same time, this survey was used as an opportunity to confirm and update our contact information with fundholders, ask if they want to subscribe to our newsletter, and inquire as to whether they would like to participate in planned monthly “donor features”. The contents of this report include a compilation and review of the results of the 2024 CFPD Donor Engagement Survey.





RESULTS & DISCUSSION

In total, 89 individuals were contacted. Of the 89 individuals, we were able to complete surveys for 67 over the phone, and we received 10 completed surveys via email, for a total of 77 completed surveys.

In addition to asking the questions on donor engagement (see Appendix A), the survey was a useful tool to update our contact information, ask if fundholders would like to subscribe to our newsletter (if they weren't already subscribed), as well as to inquire whether they'd like to partake in monthly "donor features" on social media. The "donor feature" is a marketing tool we are planning to implement, whereby fundholders (or just donors in general) will be featured in a write-up (with or without photos) or video to be publicized on social media and our website. The intent is to highlight why people donate and the resulting impacts, which is not only favourable to donor engagement, but also for publicity for CFPD. Thirteen fundholders indicated they would like to participate in this, and another 12 said they would think about it. Several fundholders were not already subscribed to our monthly newsletter, or had subscribed with an old email address, so this survey allowed us to obtain current email addresses and ensure those that want to receive our newsletters get subscribed to them.

With respect to the donor engagement questions, most (97%) of respondents answered in a positive manner about CFPD. Three respondents indicated either "no" or "yes and no" when asked if the CFPD does enough to make donors feel valued, and gave an explanation as to why, or how they feel we might improve upon this. One of the fundholders (Field of Interest Funds) who indicated "no", explained he would like us to let donors know where their specific funds went. Another indicated she was not pleased about not receiving a thank-you card or call after donating in 2023. Yet another suggested that we should recognize smaller donations as well, by providing cards or placing thank-you calls to those donating under \$100.

One bursary fundholder explained she would like to receive a thank-you card from the students who receive her bursary. It should be noted that for the PCI bursaries, we are provided with thank-you notes (with photos) of the students who received them, but they currently only go into the fund files.



RESULTS & DISCUSSION

Some fundholders had other suggestions for us on how we might improve our donor engagement practices. One respondent said she previously appreciated seeing the annual rate of return on her annual fund statement as well as the CFPD Annual Report, so she wants to see that included again (as “any investor would like to know this”). Another indicated she would like to see the list of donations that have come in for particular funds included on fund statements. One respondent said she likes receiving hard copy invitations in the mail for the annual celebration, whereas another indicated he would like to see most of the resources going towards grants and bursaries and doesn’t think much should be spent on donors.

Despite the few negative comments or the suggestions provided, most respondents indicated that CFPD is “doing a great job” all around, with respect to making donors feel valued and in providing information.

With respect to our marketing and promotion practices, some fundholders felt CFPD doesn’t do enough to get our name out there and that many don’t even know about CFPD. The suggestions provided to improve upon this mainly centered on publicizing more impact stories and using more variety of technology for promotion and publicity. For example, one respondent felt we should be making more use of videos in marketing and promotion, and that we should make it easier for people to donate using more up-to-date technology (such as including QR codes that people can link to our videos or donation page quickly). She also felt we should provide links to specific fund donation pages when publicizing funds (so that people don’t have to search a drop-down and find this fund, if reading about it inspired them to donate on the spot). Finally, some respondents also felt we should also be reaching a younger audience to try to get the younger generations interested in donating. This ties into the use of video and QR codes as younger generations are also more likely to use those.

One of the survey questions asked how fundholders initially heard about the CFPD, and the responses show that most are hearing about us through word of mouth, mainly from other board members or agencies.

CONCLUSION



The 2024 CFPD Donor Engagement Survey was a useful tool to gauge how fundholders perceive CFPD to be doing with respect to making them feel valued and keeping them informed, as well as to update contact information, and to engage fundholders by inquiring whether they'd be interested in having their specific fund featured in our promotional material. The open-ended responses gave us some ideas on how we might adapt and improve our practices with respect to donor engagement, and promotion and marketing.

TAKEAWAY #1

Donors would like to be better apprised of the impact their funds are having, and would like to see more impact stories be publicized as well. This could be done through providing student thank-you cards to bursary fundholders and through indicating, in more detail, on annual fund statements where particular funds went to or what difference they made.

TAKEAWAY #2

Further inquiry should be done with the general public/donors to obtain a more unbiased view of our marketing competence, so that we may further adapt our practices to ensure CFPD is reaching as wide of an audience of potential donors as possible.

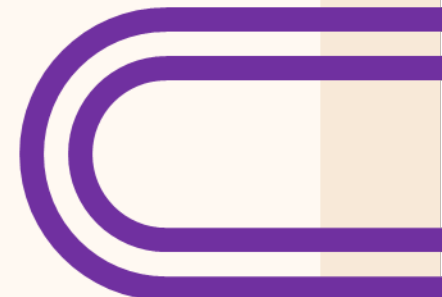
TAKEAWAY #3

Newer technology and methods of promoting The Foundation are advised, particularly use of visual content like videos, to promote CFPD and attract a greater variety of donors. Newer technology like QR codes will also make it easier for people to learn more about CFPD and our impact in the community, and/or links to donation pages will allow people to donate immediately.





APPENDIX A



DONOR ENGAGEMENT EMAIL SURVEY

Re: Fund Name: _____

Dear Valued CFPD Fundholder,

We are reaching out to you today for two reasons: 1) To update the contact information we have on file for the above-named Fund, and 2) To ask a few questions related to donor engagement, so that we may understand our donors better, and to improve upon our communication practices. If you would kindly complete this form and return it to us at your earliest convenience, it would be greatly appreciated.

1. CONTACT INFORMATION

Primary Contact Name(s): _____

Primary Contact Address: _____

Primary Contact Phone Number(s): _____ (indicate if mobile/home/business)

Secondary Contact Name(s): _____

Secondary Contact Address: _____

Secondary Contact Phone Number(s): _____ (indicate if mobile/home/business)

Primary Contact E-mail Address: _____

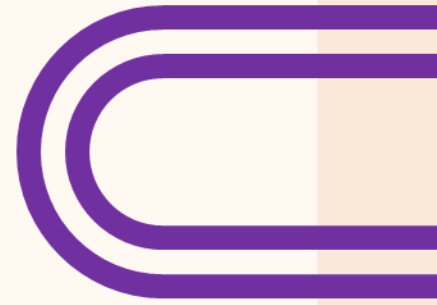
- I would like to subscribe to CFPD's monthly newsletter
- I already subscribe to CFPD's monthly newsletter

Correspondence preference:

- E-mail (Annual Fund Statements will continue to be sent via postal mail even if e-mail is checked)
- Postal Mail
- I do not wish to be contacted at all regarding this Fund

2. DONOR ENGAGEMENT SURVEY

- a. How did you initially hear about the Community Foundation of Portage & District?



b. Do you feel you know enough about CFPD? Yes No

If not, what information can we provide you?

c. Do you feel CFPD does enough to make donors feel valued? Yes No

Do you have any suggestions on how we can do a better job at this?

d. Would you like the Executive Director or a Board Member to contact you? Yes No

e. Lastly, if you are interested in being featured in our upcoming donor features, please email us at info@cfpdi.ca with a short write-up on why you started a fund or donated through CFPD and how the experience has been for you (this can be a few sentences or paragraphs, and a photo if you like). We also welcome short videos if you prefer to send one.

I am interested in participating in this and will provide a write-up and/or video.

Thank you for taking the time to complete this survey, and for being a valued fundholder with CFPD. *Your past and current support continues to make a difference in our community, and will do so for generations to come.* If you indicated you'd like someone to contact you with more information, someone will be in contact with you shortly. Alternatively, you can always visit our website at www.cfpdi.ca, follow us on Facebook and Instagram, or subscribe to our newsletter as mentioned above.

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