



MEMO

To: ACF Board of Trustees
From: Marisa Magallanez, Acting President & CEO/COO
Date: July 31, 2024
Re: Values-Based Donor Engagement Operations Improvement Plan Summary

Overview

Through donor feedback in various formats, we have identified improvements that are necessary in key areas of relationship building, stewardship and general customer service. The consistent themes that have arisen through feedback include a decline in Staff responsiveness, accessibility, proactive outreach, general customer service and communication. In addition, a few donors conveyed a general feeling of dismissal, lack of appreciation and overall decline in engagement with the Foundation.

Our goal is to ensure that our development operations, donor engagement, cultivation efforts and overall organizational infrastructure is improved through these efforts, in particular as we prepare for key upcoming events, including the Endowment Growth Campaign and the CEO transition.

Provided is a summary of the four primary areas comprising our values-based donor engagement operations improvement plan. Randy, Nick, and I are happy to provide more details upon request.

Donor Rehabilitation

Objective: Identify donors with strained relationships with the Foundation, set up meetings with appropriate staff and potentially a Trustee(s) if necessary. Ensure donors have a dedicated relationship manager moving forward (currently identified as the CEO. Additional staff will be included as necessary to ensure effective relationship transitions through the CEO's upcoming retirement.)

- 14 Donors Identified through specific feedback and/or direct contact with the Foundation
 - Note - this number counts spouses as "one donor".
 - Initially, feedback was provided unsolicited, but more proactive outreach is in process to determine what efforts Staff should pursue to improve engagement.
 - Thus far, feedback has been provided from this small group of donors. As data becomes available to better understand donor satisfaction, Staff will have a better understanding of the level of satisfaction donors have with services provided by the Foundation.
 - Of the initial donor group, most individuals are past Trustees who have cycled off the board recently.

- All 14 Donors have been communicated and/or met with between March - July 2024



- Some of the group of 14 donors conveyed concerns regarding responsiveness, accessibility, communication, and proactive outreach.
- Some of the group of 14 donors have expressed dissatisfaction and/or concern with the Foundation's commitment to DEI, along with the mission statement. Some of this group indicated that they do not disagree with the Foundation's commitment to DEI but feel it's the only area addressed in the Foundation's communications.
 - (Related initiatives, for example Values Aligned Policy and Trust Based Philanthropy, also support "bridge building" with donors who are unclear or concerned about the Foundation's commitment to DEI.)
- Three donors expressed concern with the current staffing capacity, noting that more development staff may be necessary to provide appropriate stewardship.
- Two donors expressed concern with attention to detail in event coordination.
- One donor did not express any dissatisfaction with the Foundation. This donor indicated some dissatisfaction to another donor, however, did not express concern during a conversation directly with the Foundation.
- President & CEO is serving as main contact, with COO, CFO, Marketing & Development & Community Impact teams supporting.

As we conduct meetings with identified donors, the CEO and Staff will maintain appropriate follow-up & ongoing engagement activities. At this point, initial conversations have occurred with appropriate follow up in process. This will be a key area of focus before the CEO sabbatical begins, along with careful transition management during and after the sabbatical.

July 31 Update: Staff has continued proactive outreach with the identified donors, re-establishing positive relationships and engagement. No additional issues have surfaced.

Process & Protocols

Objective: Identify actions to address operational issues and areas of improvement.

Immediate Operational Items (Each of these items is currently underway)

- Restructure phone system to ensure individual is answering vs. automated directory
 - Status: **Complete as of June 2024.**
 - Implementation Date: June 2024.
- Establish response standards
 - Status: In process.
 - Completion date – **August 2024**
- Donor Communication & Engagement Survey + Donor Call Plan
 - Status: **In process as of July 31, 2024**
 - Completion date **August 30, 2024.**
 - The goal is to identify each donor's desired level of engagement, in particular to strengthen ongoing, long-term relationships with all donors, at a level of engagement that meets their expectations.
- Identify additional stewardship activities through Advancement Committee



- Status: Completed April 30.
- Next Steps: Develop “ACF 101 Key Messaging” with Committee for training with BoT, Committee members and other key stakeholder groups (Summer/Fall 2024).

Mid/Long-Term Operational Items

- Center for Effective Philanthropy’s Client Satisfaction Benchmark Survey
 - Status: Not Started, estimated start date – August/September 2024.
 - Next Steps: Establish costs and determine timeline for distribution, along with staff roles and capacity.
- Assessment of Current Efforts
 - Candid’s Capacity & Cost Assessment
 - Status: Not Started, start date TBD.
 - Next Steps: Initial cost analysis and determination of timeline.
 - This study will analyze the costs of each Foundation activity and assess staffing capacity & efficiency.
- Work with Development Team to establish “portfolio” style of relationship management (based on outcomes of Donor Communication & Engagement Survey).
 - Status: Initial relationship mapping through Donor Call plan initiative.
 - Next Steps: based on feedback from survey, analyze staffing/capacity needs based on number of high/medium touch donors. This structure will also support relationship management and succession through the CEO transition, while engaging more staff in donor management/relations.

July 31 Update: Staff is in the process of identifying initial “high-touch” donor list assigning specific relationship manager, as well as identifying donor-advised fundholders to proactively engage with regarding their grantmaking.

- Reassess donor communications plan to ensure appropriate audience segments and balanced approach to new and ongoing initiatives.
 - Status: Not Started. Timeline Sept - December
 - Next Steps: Schedule communications review & develop adjustments and new communication strategies.

Infrastructure & Staffing

Objective: Assess capacity, deficiencies, and readiness of our staff, particularly Marketing & Development department and all other departments related to donor development & stewardship (i.e. Community Impact, Scholarship, etc.).

- Identify timeline & budget for Major Gift Officer hire
 - Status: will begin in late summer 2024. The position is planned for the 2025 budget.



- Based on Donor Communication & Engagement survey, determine any other staffing needs in Development department.
 - Status: Will begin late summer 2024 in concert with budget development.
- Assess capacity in Community Impact department, particularly regarding donor-led grant programs and scholarship programs; staff accordingly.
 - Status: Will begin late summer 2024 in concert with budget development.

Culture & Training

Objective: Identify and address professional development and training needed for staff and Board to support donor relations and stewardship.

Training & Professional Development Focus Areas

- Staff Supports
 - Bridge Building Across Differences.
 - Status: Celia and Randy participating in cohort, national conference, respectively. Trainings in May, June, July
 - Customer Service Expectations & Norms.
 - Status: Currently in Leadership Team development, Staff implementation & training May - September.
 - VOSA (Values, Opportunity, Solution, Action) frameworks.
 - Status: to be scheduled.
 - Group/meeting management & facilitation.
 - Status: Ongoing training May – October.
 - Supporting uncomfortable interactions.
 - Status: Ongoing training May – October.
- Board/Committee Supports
 - VOSA (Values, Opportunity, Solution, Action) framework.
 - Status: Summer/Fall Advancement Committee Training (July & September meeting).
 - ACF 101 - important items board/committee members should be able to address in community, including list of our services, mission, vision, values etc., so ambassadors can speak about our work from a knowledgeable perspective.
 - Status: Summer/Fall Advancement Committee Training.