



## MEMO

To: ACF Board of Trustees  
From: Marisa Magallanez, COO  
Date: September 25, 2024  
Re: Values-Based Donor Engagement Operations Improvement Plan Summary

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### Summary

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.

Provided is a summary of the four main areas comprising our values-based donor engagement operations improvement plan. Staff have been prioritizing this Donor Engagement plan since February 2024.

### 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
- 14 of 14 Donors have been communicated and/or met with between March – August 2024
  - Staff will continue proactive engagement with these donors – this is not a one-time engagement. Processes are in place to ensure regular communications, and donors have been assigned a relationship manager from the Leadership Team
- Staff are not aware of additional donor issues as of the date of this memo.

### 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**
- Establish response standards
  - Status: In process.



- Completion date – October 2024
- Donor Communication & Engagement Survey + Donor Call Plan
  - Status: **Complete**
  - Completion date August 30, 2024.
  - Goal is to identify 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.
  - Many positive interactions!
  - First time Advancement Committee engaged in call process along with Staff.
- 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 – 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, estimated start date – September 2024
    - Next Steps: Initial cost analysis and determination of timeline.
    - This study will analyze 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: In Progress. Relationship mapping based on Donor Call plan initiative to be completed by October 2024.
    - Initial DAF relationship mapping of key donors completed in August 2024
  - 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.

#### **Infrastructure & Staffing**

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

- Identify timeline & budget for Major Gift Officer hire



- Status: Job description in process, posting anticipated in October 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/early Fall in concert with budget development.
- Assess capacity in Community Impact department, in particular as it pertains to donor-led grant programs and scholarship programs; staff accordingly.
  - Status: **Complete**, resulting in adding an additional Grants Associate position. .

### **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.
  - Customer Service Expectations & Norms.
    - Status: Currently in Leadership Team development
  - VOSA (Values, Opportunity, Solution, Action) frameworks.
    - Status: to be scheduled.
  - Group/meeting management & facilitation.
    - Status: Ongoing training
  - Supporting uncomfortable interactions.
    - Status: Ongoing training

Note – we are developing a schedule for more consistent learning/training in 2025.
- Board/Committee Supports
  - VOSA (Values, Opportunity, Solution, Action) framework.
    - Status: On hold to accommodate GGG Reimagining process.
  - 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: On hold to accommodate GGG Reimagining process.