

Donor Advised Fund Holders Survey

Headline: Fund holders are older and more affluent than ACT donors. They are very satisfied with ACT’s service and support. They value ACT’s support for the community and the ease in making grants and want more of both. Areas for improvement include increased engagement and information about nonprofits and community needs.

Details:

- Twenty-three fund holders completed the survey. Compared to the respondents from the giving survey, fund holders are more likely to be men, are older and have a higher net worth.

Survey	Gender		Age		Net worth	
	Male	Female	Under 40	65+	Under \$1M	\$5M+
Giving Survey	14%	83%	10%	33%	45%	19%
Fund Holder Survey	40%	60%	7%	50%	12%	44%

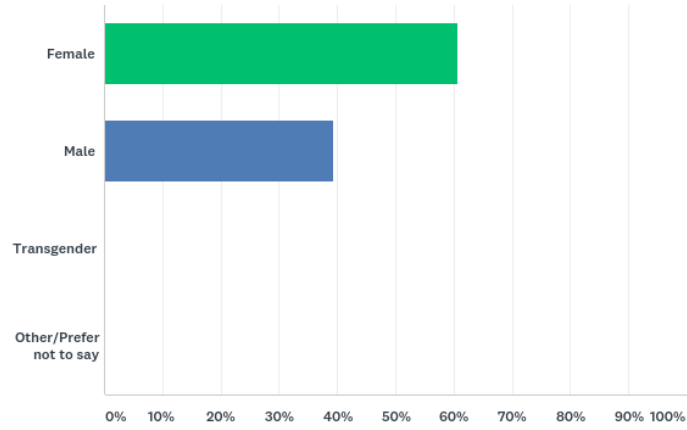
- Respondents are generally motivated both by a personal connection to ACT and a desire to give back to the community.
 - Relationships matter! Nearly a third of the responses come from a referral or personal connection.
 - However, there is a distinction in the top motivators by net worth.

Net worth	Most frequently identified motivator
Under \$1M	Trusted organization
\$1 - \$5M	Tax deduction
\$5 - \$10M	Referred by a friend/advisor
\$10M +	Personal connection to ACT

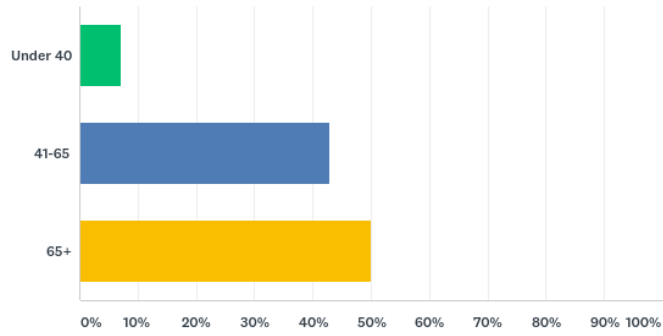
- Eighty-six percent (86%) of fund holder survey respondents are very or extremely satisfied with their experience and 89% would recommend ACT to a friend.
 - Customer service, professionalism and quality of support were the most common drivers of satisfaction.
 - Mistakes, frustration with the process and lack of engagement were listed as reasons for dissatisfaction.
- Respondents value ACT’s support for local nonprofits and community needs the most.
 - This trend holds across net worth segments.
 - Older respondents are more likely to value the ease in making charitable gifts.

- In order to better help fund holders as donors, respondents suggested additional services/programming in the following areas:
 - Connections to other donors and nonprofits
 - Information about issues, community needs and nonprofits
 - Learning sessions/technical assistance
 - Better online processes

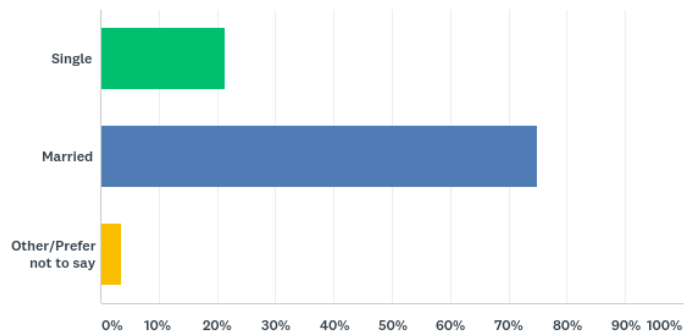
Q1 What is your gender?



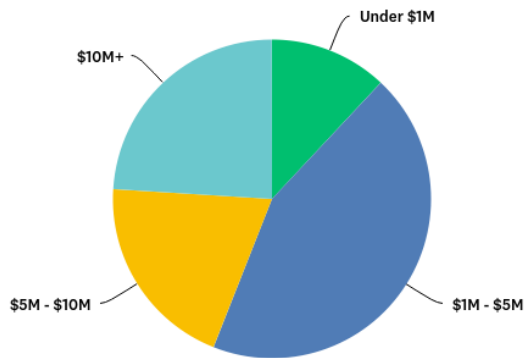
Q2 What is your age?



Q3 What is your marital status?

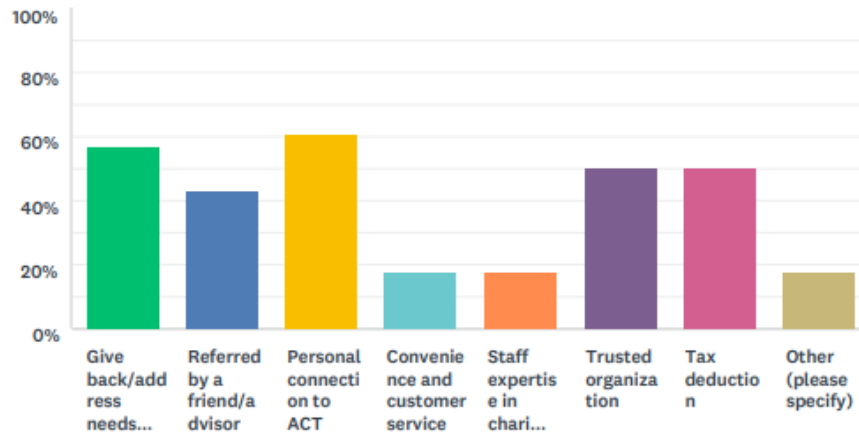


Q4 What is your approximate household net worth (i.e. annual salary, real estate, investments, etc.)?



Q5 What motivated you to open your donor advised fund with ACT? Check all that apply.

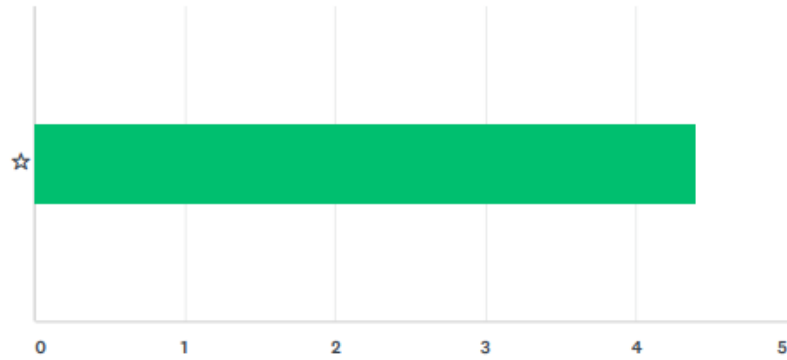
Answered: 28 Skipped: 0



ANSWER CHOICES	RESPONSES
Give back/address needs in my community	57.14%
Referred by a friend/advisor	42.86%
Personal connection to ACT	60.71%
Convenience and customer service	17.86%
Staff expertise in charitable giving	17.86%
Trusted organization	50.00%
Tax deduction	50.00%
Other (please specify)	17.86%

Q6 How satisfied are you with your experience as a donor advised fund holder?

Answered: 28 Skipped: 0



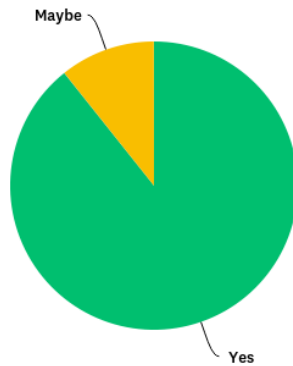
EXTREMELY DISSATISFIED	(NO LABEL)	(NO LABEL)	(NO LABEL)	EXTREMELY SATISFIED	TOTAL	WEIGHTED AVERAGE
3.57%	0.00%	10.71%	25.00%	60.71%	28	4.39
1	0	3	7	17		

Q7 What is the reason for your score?

Answered: 25 Skipped: 3

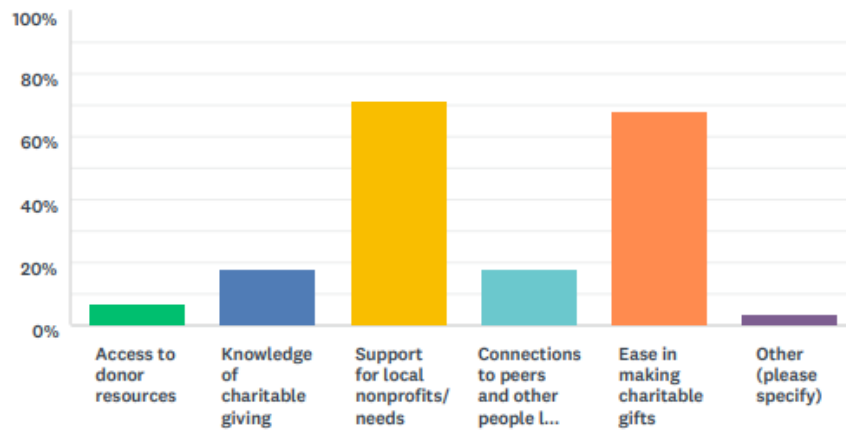
#	RESPONSES	DATE
1	Excellent customer service but there have been processing mistakes on the back end	6/13/2018 6:49 AM
2	Not sure, it seems to work easily	6/12/2018 11:54 PM
3	All good- Not connected to other donors for many things though and we give a monthly amount from our fund but are not really acknowledged. Otherwise great	6/12/2018 10:02 PM
4	Feel very engaged	6/12/2018 9:45 PM
5	I have received great support and help from ACT for the fund.	6/10/2018 12:33 PM
6	In addition to immediate local credibility, ACT provides great support, feedback, advice, and a community of like-minded philanthropists.	6/10/2018 9:52 AM
7	Deeper engagement would be helpful. Outreach from CEO and others about what both ACT and the community needs would be welcomed.	6/9/2018 6:30 PM
8	With a few hitches ACT has administered my fund in a very professional manner	6/9/2018 9:09 AM
9	Have had a great experience so far with the organization at events you set up and processing time for grants.	6/9/2018 8:59 AM
10	The fees seem to be a little high, and we do not live in Alexandria so aren't very interested in supporting the Alexandria charities that we get emails about from ACT.	6/8/2018 11:04 PM
11	Outstanding staff.	6/8/2018 10:18 PM
12	Downgraded because the online grant process is not very user friendly.	6/8/2018 9:36 PM
13	Act has always been very professional an efficient.	6/8/2018 9:03 PM
14	Although new to the organization, I've found the staff to be extremely competent and helpful. In addition, ACT was recommended to me by Tristan Caudron who I've known for many years and trust implicitly.	6/8/2018 7:52 PM
15	ACT provides an excellent service which makes possible my charitable giving. Without ACT I would definitely not be as active with my giving	6/8/2018 7:31 PM
16	I always got timely, and very professional advice and service from ACT	6/8/2018 4:25 PM
17	ACT has been a great resource in identifying organizations in the community that we would like to support. Also, we have learned to appreciate ACT's significant contribution to the community.	6/8/2018 4:09 PM
18	Poor customer service at year end	6/8/2018 4:08 PM
19	Connects to reputable local non profits and very efficiently allowed us to direct gifts to non profits of our choosing outside the Alexandria network.	6/8/2018 3:47 PM
20	Community foundation fits with my philosophy. ACT does a great job in many areas - investing, management, resources, community building.	6/8/2018 3:45 PM
21	The assistance and personal attention is outstanding!	6/8/2018 3:37 PM
22	The functionality works. Most of my interactions are either donation requests or reviewing quarterly activity statements...transactional more than other types of engagement.	6/8/2018 3:12 PM
23	x	6/8/2018 3:11 PM
24	No problems and prompt processing of requests	6/8/2018 3:05 PM
25	Confusion about how to make grants and needing to go on website to see my statements adds extra steps	6/7/2018 2:50 PM

Q8 Would you recommend ACT to a friend?



Q9 What is the greatest value that ACT provides to you? Choose two.

Answered: 28 Skipped: 0



ANSWER CHOICES	RESPONSES
Access to donor resources	7.14%
Knowledge of charitable giving	17.86%
Support for local nonprofits/needs	71.43%
Connections to peers and other people like me	17.86%
Ease in making charitable gifts	67.86%
Other (please specify)	3.57%

Q10 What else can ACT do to help you as a donor?

Answered: 19 Skipped: 9

#	RESPONSES	DATE
1	Bring together Alexandria's organizations to help them improve and gain from each other	6/13/2018 6:49 AM
2	Periodic review of investment mix in fund	6/12/2018 9:45 PM
3	Provide more information or learning sessions on how to market the fund for fundraising.	6/10/2018 12:33 PM
4	Would enjoy a (series of) workshops on how to maximize Spring2Action outreach and fundraising (each workshop focusing on specific aspects: effective grass roots campaigning techniques, social media, etc.). Perhaps develop or disseminate tools for participants to more easily exploit these suggestions.	6/10/2018 9:52 AM
5	Ask us to make donations to Alexandria non-profits.	6/9/2018 6:30 PM
6	Perhaps something on finances of organizations seeking grants; users of organizations receiving grants.	6/9/2018 9:09 AM
7	Hard to say - this is my first year as a member. But I won't hesitate to let you know.	6/9/2018 8:59 AM
8	nothing I can think of now	6/8/2018 11:04 PM
9	Keep up the great work!	6/8/2018 10:18 PM
10	better online experience	6/8/2018 9:36 PM
11	Just keep up the good service	6/8/2018 7:31 PM
12	Can't think of anything at the moment.	6/8/2018 4:25 PM
13	We are very satisfied and just hope that ACT can maintain the same level of service to DAFs and the community.	6/8/2018 4:09 PM
14	Keep me better apprised of what's going on in the Alexandria charitable world and a sense of what "official" Alexandria thinks of the organization and how it can help.	6/8/2018 4:08 PM
15	Centralize and or summarize top non profit events/needs each month. Advise on matching opportunities to ensure we maximize our gifts	6/8/2018 3:47 PM
16	I'd like material to help recruit others to invest in Alexandria through ACT	6/8/2018 3:37 PM
17	Connections to other donors and local charities	6/8/2018 3:11 PM
18	Nothing that I can think of	6/8/2018 3:05 PM
19	Directory of the best nonprofits in various categories, meeting other donors like me over interests we share.	6/7/2018 2:50 PM