



CALGARY
FOUNDATION
FOR COMMUNITY, FOREVER

FUNDHOLDER PERCEPTION SURVEY RESULTS

In September and October of 2021, Calgary Foundation re-engaged the Center for Effective Philanthropy for the third time (previously in 2014 and 2017) to survey Calgary Foundation Fundholders and received a 34% response rate. Your feedback helps us better serve your philanthropy and our community; thank you for taking the time to contribute your thoughts!

Calgary Foundation received the results in early 2022 and we are pleased to share the key findings with you:

What you said we're doing well:

Reputation

Cited as top strengths for giving to, or through Calgary Foundation was our reputation in the community and our administration of Funds, with many respondents highlighting Calgary Foundation's cost recovery structure and strong investment performance.

Designated contacts

Having a designated contact with whom you can discuss your philanthropy continues to be the most helpful resource in achieving your charitable goals. Some respondents describe staff as being "excellent" and "knowledgeable".

Resources

We continue to see high levels of engagement and satisfaction with our resources including Community Knowledge Centre, Donor Central, and the Calgary Foundation website, with 80 percent of respondents using one or more to inform and inspire their philanthropy and support their grantmaking.

Key Ratings (on a 7-point scale):

Overall Satisfaction



5.81

Responsiveness of Staff



6.19

Likelihood to Recommend the Foundation



5.78

Foundation Understanding of Donor's Goals



5.71

Impact on the Community



5.82

Clarity of Communication about Foundation's Goals



5.02

Where you feel we can improve:

Communications

Given your comments and suggestions, we will seek to enhance the clarity of communications about our goals and community impact, and how they relate to your goals as a Fundholder. You also indicated you would like to see us increase our visibility among your friends and colleagues in Calgary and area.

Understanding your charitable goals

While you gave us a rating of 5.71 on a 7-point scale, this is lower than we had expected. We value the opportunity to learn what's important to you and your family and how you wish to see your philanthropic legacy take shape.

Connecting you with community

You would like to see us expand our reach with respect to the charities we grant to, particularly environmental charities, and those that align with your interest areas to enhance your understanding of, and connection to the community.

What you said about our Racial Equity work:

Broadly, your feedback on Calgary Foundation's racial equity work indicates you understand and value our commitment to the work of anti-racism, believing it makes an important contribution to community. You would however like to better understand how it is embedded in our work while maintaining our commitment to being a 360-degree grant maker.

Moving forward, we commit to:

- Clearly articulate our goals, and why they're important for our community.
- Continue to strengthen our relationship with you, provide opportunities for you to share your goals with us, and reflect those goals in our service to you.
- Enhance resources used by you such as Donor Central, Community Knowledge Centre, and the Calgary Foundation website.
- Expand our team to ensure all Fundholders have a go-to designated contact.

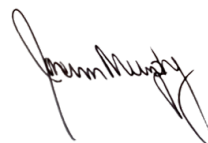
Thank you for sharing this incredibly important and valuable feedback. If you didn't get a chance to complete the survey, and have questions or thoughts to share, we welcome the opportunity to connect with you.

Sincerely,



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