



## YKDWIP Dec 2018/Jan 2019 Survey Summary

In December 2018/January 2019, the YKDWIP giving circle conducted a check-in with members using SurveyMonkey. The check-in was designed to gauge member satisfaction with the current formula we use for allocating funds: 24.5% to South Sudan Medical Relief for immediate use, 24.5% to SSMR to build an endowment (permanent source of funding) for their efforts, 24.5% for the giving circle's own endowment, and 24.5% for immediate local grantmaking (image depicting the allocation at end of summary).

Member response rate was high, with 62% of members (48 of 78) responding.

**If you have time to read nothing else except this paragraph, here's the takeaway from the survey results:** Overall, YKDWIP members are very satisfied by what we are collectively doing as a giving circle and how we are doing it. Members believe in our vision statement, and believe in building permanent wealth while also giving money away immediately. Members still wish to choose South Sudan Medical Relief as the global project. In three years- 2021- we need to check in again with a similar survey. That may be a good time to examine more closely our global/local % allocation. While the vast majority of our members agree with the way we are dividing up funds, this is the largest opportunity area for more discussion in the 3-year timeframe identified by respondents- especially as we move closer to our endowment goals.

In summary, the results of the survey on a question-by-question analysis are as follows:

- 1) **Nearly every single member (98%) agrees with our original value statement.** Our value statement says that we care about both our local and global communities and want to make a positive impact.
- 2) **The majority of members (about 80%) agree with or don't have a strong opinion about our current allocations between local and global funding.** This is the section that solicited the most written feedback from members- about ¼ of our survey participants made a comment in this section. For those that commented, the overwhelming trend was to express support of South Sudan Medical Relief and that work, but to suggest that in the future we look at changing the formula to more heavily favor local projects. Suggestions ranged from 70% local/30% global, 60% local/40% global, 65% local/35% global, to finish building the endowment for SSMR and then allocate that 24.% to local work, to non-specific comments suggesting a higher percentage of local funding in the future.

**It is clear that while the majority of members still like or support our current formula, that giving this some additional future consideration will be important for our group as we evolve.**

- 3) Nearly every respondent (95%) agrees with or doesn't have a strong preference about the balance of immediate grantmaking and creating/building future wealth through the endowments.** We only received five comments in this section, and those comments made suggestions around building endowments for local groups or using funds raised for more immediate local giving once our endowment-building phase is complete.
- 4) We set an initial endowment goal of \$100,000 for South Sudan Medical Relief (this would mean \$5,000 annual grants to SSMR each year from the endowment); we also said we would re-visit this at year 3, which we have just reached. At the time of the survey, we had about \$20,000 in the endowment (that number is \$24,000 as of Jan 2019). We asked members if we should continue to build the fund for SSMR. More than 80% of our members agreed with (or don't have a strong preference about) continuing to build the endowment fund for SSMR.** We only received about five comments in this section. In those comments, members suggested contributing less to the global endowment, building endowments only for local projects going forward, continuing the effort to reach the \$100,000 goal, and considering keeping building the endowment for SSMR but putting some of the SSMR immediate-use funds to a local project.
- 5) We asked members if they are comfortable continuing to have South Sudan Medical Relief selected as the global project for now. More than 95% of respondents wish to keep SSMR as the global project.**
- 6) We asked members if we should continue building our own giving circle's endowment fund. 98% of respondents wish to continue building our giving circle's own endowment fund.**
- 7) We asked members when we should revisit our funding allocation structure again- in 2, 3 or 5 years. The most popular response was 3 years with 43% of respondents selecting this timeframe.** Two and 5 years were each selected by about ¼ of respondents.
- 8) We gave members an opportunity to make additional comments. We received 19 comments in this section. For the most part, members took this opportunity to express gratitude for the questions asked in the survey and efforts to engage member opinions and feedback. Two of the comments again expressed interest in increasing the local portion of our allocation; three comments inquired about hearing more of the outcomes from funding spent. Other comments ranged from member recruiting to newer members asking questions about how the giving circle works.**

