

# The 2010 Nonprofit Fundraising Survey

## Funds Raised in 2010 Compared with 2009

March 2011

### The Nonprofit Research Collaborative



With special thanks to the representatives of 1,845 charitable organizations who took the survey in February 2011, and in gratitude for the time and careful work of the many individuals who worked on this project.

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## Key Findings

### Overall contributions received in 2010 compared with 2009

More organizations saw growth (43 percent) than declines (33 percent). Combined, two-thirds of respondents said they saw contributions increase or stay about the same as in 2009. This is an improvement over a year ago at the same time, when 46 percent reported a decline and only 54 percent saw growth or stable contributions levels.

A far larger share in 2010 saw stable amounts of contributions received (24 percent versus 11 percent last year at this time). The shift between 2009 and 2010 is from “decreased” to “about the same”.

The results in this wave are an improvement over the November 2010 survey conducted by the Nonprofit Research Collaborative. At that time, 36 percent of responding charities reported an increase and 37 percent reported a decrease in the first nine months of 2010. This suggests that the “uptick” in giving anticipated in the last weeks of 2010 might have occurred, but nonetheless, the growth in contributions received did not match expectations for the year.

#### By region of the country

There were few meaningful differences in the changes in amounts received when organizations were grouped by region of the United States.

#### By size (expenditure amount)

Larger organizations were more likely to see growth than were very small organizations. This is consistent with November 2010 results, as well.

#### By type of recipient

Changes across types of recipients are fairly consistent with the general trend.

### Share of funds raised by donor type (source of contribution)

Just 45 percent of organizations received more than 50 percent of their contributions from individual donors. Most organizations received 1 to 10 percent of their revenue from other fundraising sources. The survey included as sources individuals, bequests, foundations, corporations, and other charities.

### Changes in contributions received by fundraising vehicle

Internet/online giving rose at 58 percent of the organizations that reported using it—and more than three-quarters reported online or Internet fundraising. Major gifts and events proceeds rose at half of the organizations using them, but for most other fundraising vehicles, the picture was mixed.

Organizations, on average, used six of the 10 vehicles studied. Organizations that raised more used a higher number of techniques, on average.

### Fundraising investment linked to fundraising results

Most organizations held their investment in fundraising steady in 2010. However, those that increased expenditures, staffing, or volunteer engagement were more likely to see increases in funds raised. There is also a relationship between failing to invest in fundraising and failing to meet goals. That is, investment doesn't guarantee increases, but decreased investment is associated with not meeting goals.

### **Funding received was mostly for general operating expenses**

About half of the organizations (51 percent) reported that 75 percent or more of the funds raised in 2010 supported operations (rather than capital, investment, or endowment).

### **Last quarter fundraising is important but not dominant at many charities**

Many charities do receive a significant share of their funding in the last quarter, but this survey finds that it is not overwhelmingly the most important part of the year for fundraising. About 50 percent say they receive more than one-quarter of the year's contributions in the last quarter of the year. For the other 50 percent, giving is spaced out over the entire year.

### **Expectations for 2011**

Charities expect giving in 2011 to increase and are likely to hold staffing and expenditures for fundraising at 2010 levels.

## Contents

Key Findings .....	1
Summary of the study.....	5
Changes in total contributions received .....	6
2010 is slight change from 2009, with more seeing “same” results than declines .....	7
Regional variation in changes in giving modest.....	8
Larger organizations more likely to see increased contributions amounts.....	9
Changes were consistent across all types of charities.....	10
Fundraising success linked with effective communications .....	11
Changes in 2010 did not meet expectations stated in late 2009 .....	11
Even while anticipating increases, organizations budgeted conservatively for 2010 fundraising goals....	12
Half of organizations met fundraising goal for 2010 .....	13
Percentage of contributions from each donor type .....	14
Percentage of contributions from each donor type, by size .....	15
On average, charities use six fundraising vehicles.....	17
Results by type of fundraising vehicle show strength in online, major gifts, events .....	19
Online giving tops list of vehicles showing growth; results mixed for most fundraising techniques.....	19
Some subsectors more likely to report success with some vehicles .....	21
Comparison of 2010 results to prior State of Fundraising Survey results .....	22
Conditions that affected fundraising .....	25
Exploration of relationship between fundraising investment and changes in fundraising .....	26
Funding for general operating support.....	27
Giving in the last quarter of the year.....	29
Large charities most likely to raise 25% or more of dollars in last months .....	30
Anticipated changes for 2011 .....	31
Challenges ahead .....	32
Changes in revenue from government grants .....	33
The Nonprofit Research Collaborative.....	34
Methodology.....	35
Appendix A: Tables of Changes by Fundraising Vehicle by Subsector	
Appendix B: Survey	

## List of Figures

Figure 1: Percentage of organizations by size and direction of change in philanthropic contributions, FY 2010 compared with FY 2009.....	6
Figure 2: A decade of changes in philanthropic gifts .....	7
Figure 3: Percentage of organizations by direction of change in contributions received, 2010 compared with 2009, by region .....	8
Figure 4: Percentage of organizations reporting direction and magnitude of change in philanthropic contributions, 2010 compared with 2009, by size of organization (expenditures).....	9
Figure 5: Percentage of organizations by direction of change in contributions received, .....	10
Figure 6: Comparison of predicted change and actual change .....	11
Figure 7: Percentage of organizations by direction and magnitude of change in fundraising goal, .....	12
Figure 8: Percentage of organizations that met or did not meet fundraising goal for FY 2010 .....	13
Figure 9: Ranges for the percentage of contributions from each donor type, 2010.....	14
Figure 10: Ranges for the percentage of contributions from each donor type for very small organizations (expenditures in 2009 < \$250,000) .....	15
Figure 11: Ranges for the percentage of contributions from each donor type for small organizations (expenditures \$250,000 to \$999,999 in 2009) .....	15
Figure 12: Ranges for the percentage of contributions from each donor type for medium-sized organizations (expenditures of \$1 million to \$2.99 million in 2009).....	16
Figure 13: Ranges for the percentage of contributions from each donor type for large organizations (expenditures of \$3 million or more in 2009).....	16
Figure 14: Frequency of use of different fundraising vehicles .....	17
Figure 15: Number of fundraising vehicles used by range of amount raised in contributions .....	18
Figure 16: Fundraising vehicles used in 2010 and changes in the amounts raised through each.....	20
Figure 17: Ten years of survey results about amounts received through direct response fundraising ....	22
Figure 18: Ten years of survey results about amounts received from online giving .....	23
Figure 19: Ten years of survey results about special events net proceeds .....	23
Figure 20: Ten years of survey results about amounts received from planned giving.....	24
Figure 21: Ten years of survey results about amounts received from telephone fundraising.....	24
Figure 22: Changes in financial resources, staffing, and volunteers for fundraising, 2010 compared with 2009 .....	25
Figure 23: Share of organizations by percentage of funds raised that were for operations.....	27
Figure 24: Percentage of organizations by share of funding for operating expenses, by type of charity .	28
Figure 25: Percentage of organizations by what share of contributions revenue arrived from October through December .....	29
Figure 26: Percentage of charities reporting that they receive up to 25 percent or 25 percent or more of their contributions from October through December, by charity budget size .....	30
Figure 27: Percentage of charities reporting the share of contributions that arrive from October to December, by type of charity.....	30
Figure 28: Predictions for changes in funds raised, expenditures for fundraising, and staffing levels in 2011 .....	31
Figure 29: Percentage of organizations by direction and magnitude of change in government grant revenue, 2010 .....	33

## Summary of the study

More than 1,840 people took this online survey in February 2011. Most (93 percent) were CEOs, directors of development, finance officers or other members of a management team.

Questions focused on several areas. These included:

- Magnitude and direction of change in contributions received in 2010, compared with 2009 (fiscal year was permitted) and magnitude and direction of change in funds received for 10 fundraising vehicles.
- Whether or not the organization met its fundraising goals for 2010.
- Direction and magnitude of change in resources available in 2010 for fundraising, including staff, financial support, and volunteers.
- The share of funds raised that were:
  - Received from different types of donors
  - Available for current expenditures (operations)
  - Received from October through December
- Changes in government grant dollars received in 2010 compared with 2009.
- Anticipated changes in funds raised and expenditures for fundraising in 2011.

Survey respondents could enter either their Employer Identification Number or the organization's name and zip code. These responses allowed the research team to use data from IRS Forms 990 to classify organizations by size, location (region of the country), and subsector (major category of the National Taxonomy of Exempt Entities).

Appendix A contains data tables providing more detail for some of the cross-tabulations.

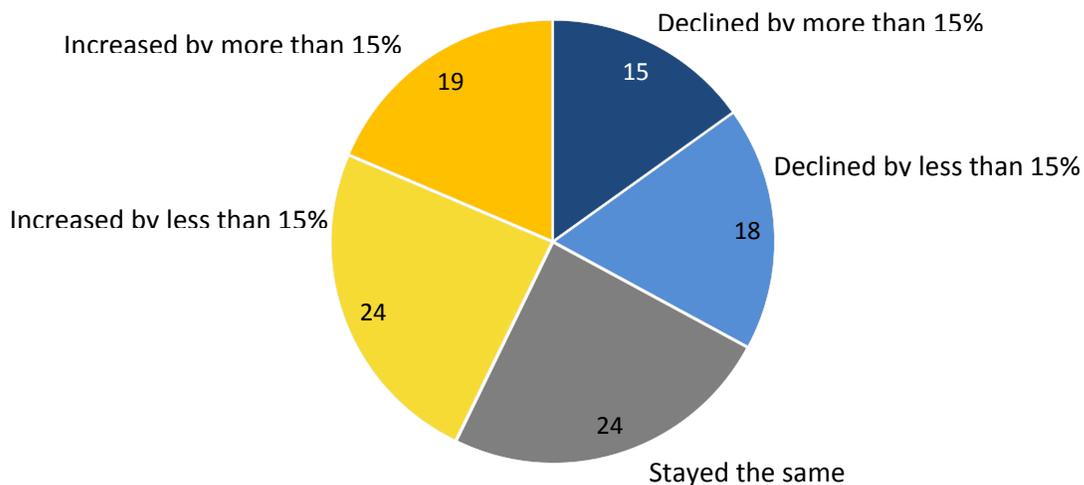
Appendix B contains the questions and response counts for charities that received gifts, before data cleaning.

## Changes in total contributions received

Just over four in ten charities (43 percent) reported that philanthropic contributions in 2010 rose above their 2009 level. Almost one-quarter (24 percent) found that contributions were about the same as in fiscal year 2009. One-third (33 percent) saw some level of decline. See Figure 1.

The February 2011 results for all of 2010 show an improvement over the November 2010 survey conducted by the Nonprofit Research Collaborative. In that November study, covering the first nine months of 2010, 36 percent of responding charities reported an increase and 37 percent reported a decrease. This early 2011 survey asked for results through December, and 43 percent reported an increase. This suggests that the “uptick” anticipated in the last weeks of 2010 might have occurred.

Figure 1: Percentage of organizations by size and direction of change in philanthropic contributions, FY 2010 compared with FY 2009



A year ago, the Association of Fundraising Professionals found that 43 percent of responding organizations saw an increase in 2009, 11 percent had contributions at about the same level and 46 saw an increase. AFP surveyed its members; this study reached a larger group of charities, including AFP members.

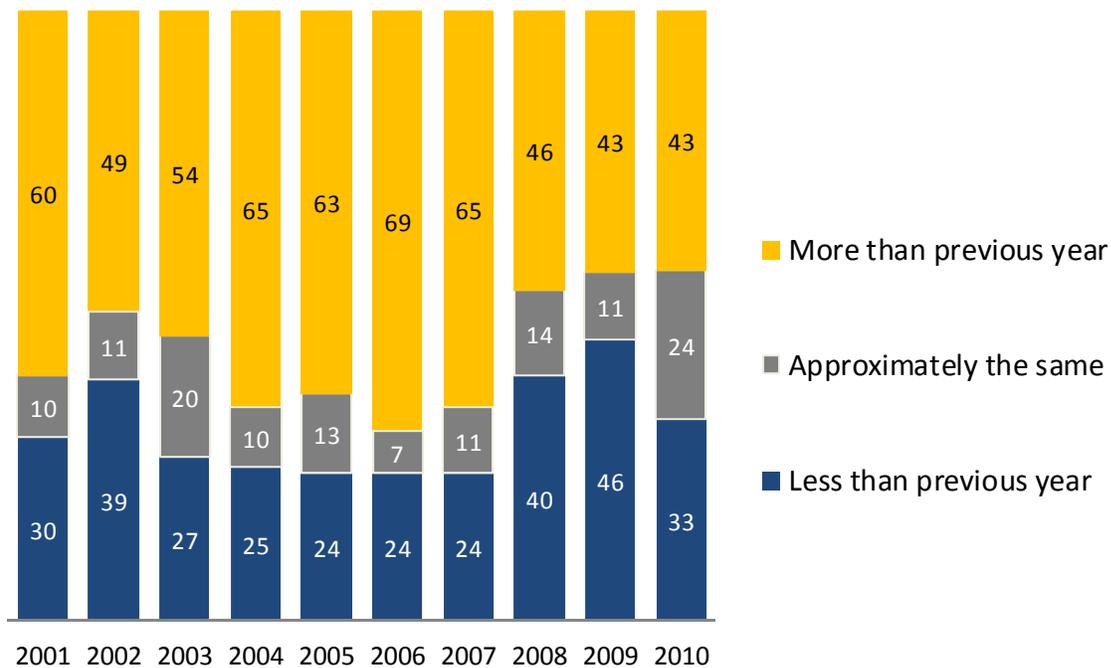
This study finds that the shift in 2010 is from declines in giving to no change. There is no difference between 2009 and 2010 results in the percentage of charities that saw giving increase.

However, in this study, a larger share (19 percent) of charities saw giving increase by more than 15 percent than was the case a year earlier, when just under 14 percent said giving grew by 20 percent or more. That is, while the same overall percentage of organizations saw some increase in the two years, more charities surveyed this spring saw a higher rate of growth than a year ago.

## 2010 is slight change from 2009, with more seeing “same” results than declines

More charities reported increased philanthropic contributions in 2010 than declines. This is a shift from 2009, when more charities surveyed in February 2010 by the Association of Fundraising Professionals saw declines compared with 2008. Responses in 2010 are distinct, in part, because about one-quarter (24 percent) of organizations saw giving remain approximately the same as in the year before. This is more than twice the percentage that saw giving remain about the same in 2009. Thus the shift in 2010 is from “decreased” as in 2009 to “about the same.” See Figure 2.

Figure 2: A decade of changes in philanthropic gifts  
Percentage of responding charities reporting change in contributions received



Note: 2001 and 2010 have different methods from 2002-2009. Results are not directly comparable.

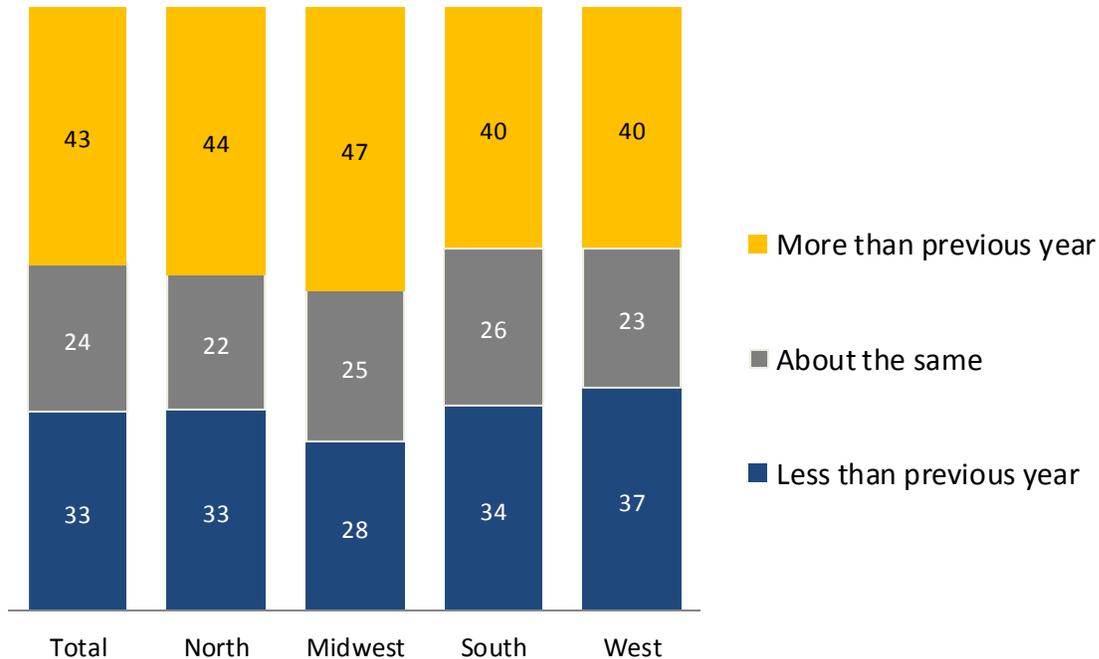
The results for 2010 are not as strong as in the economic “boom years” of the mid-2000s when 60 percent or more of charities responding to a similar survey reported increased giving.

2010 is marked, in part, by the unusually large percentage of responding charities that noted that contributions were approximately the same as the prior year. In no other year does the share of charities with giving “about the same” approach one-quarter, as it did for 2010.

### Regional variation in changes in giving modest

The variation in changes in giving by region was slight. The Midwest showed a somewhat higher percentage of organizations reporting growth (47 percent compared with 43 percent nationally) and a lower percentage with declines (28 percent compared with 33 percent nationally). See Figure 3.

Figure 3: Percentage of organizations by direction of change in contributions received, 2010 compared with 2009, by region



Regional definition in Methodology section.

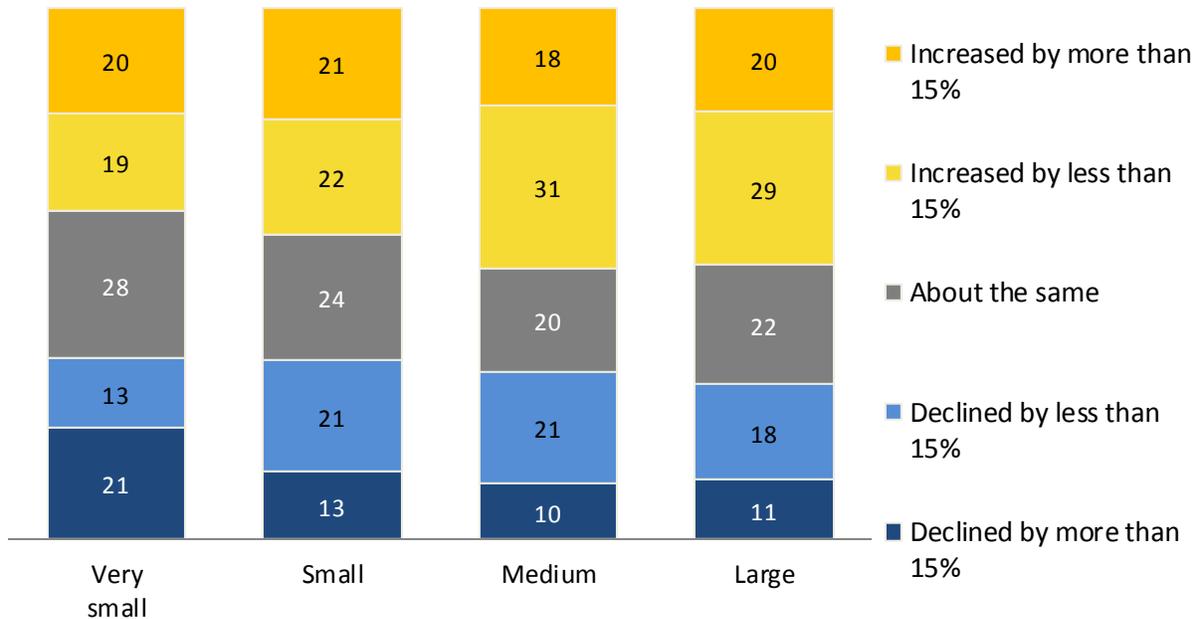
In the West, a slightly higher percentage reported drops (37 percent compared with 33 percent nationally) and a lower percentage reported increases (40 percent compared with 43 percent nationally).

These results are based on responses received and might not reflect all charities in each region.

## Larger organizations more likely to see increased contributions amounts

In general, organizations with higher expenditures in 2009 were more likely to see increases in philanthropic contributions received in 2010, compared with 2009. See Figure 4.

Figure 4: Percentage of organizations reporting direction and magnitude of change in philanthropic contributions, 2010 compared with 2009, by size of organization (expenditures)



Very small = Expenditures < \$250,000; Small = Expenditures of \$250,000 to \$999,999  
 Medium = Expenditures of \$1 million to \$2.99 million; Large = Expenditures of \$3 million or more

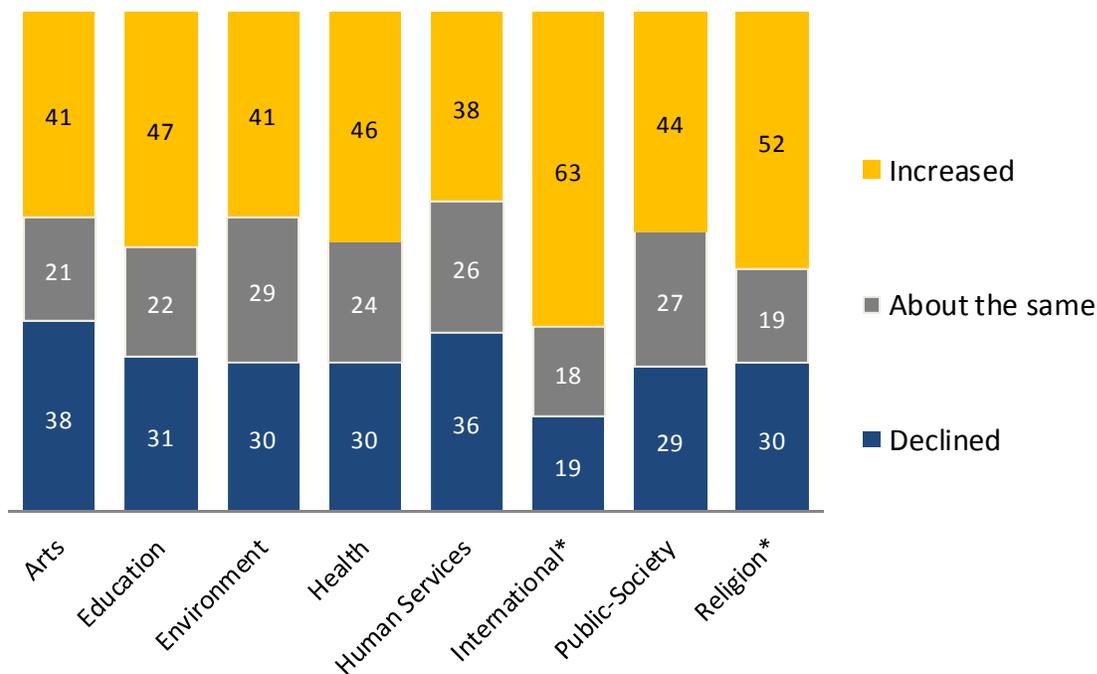
Just 39 percent of very small organizations (expenditures less than \$250,000 in 2009) saw an increase in contributions in 2010, compared with 49 percent of large organizations (expenditures of \$3 million or more in 2009). Note that the size definitions are based on total organizational expenditures, not simply fundraising expenditures.

However, instead of seeing a greater probability of declines in 2010, the very small organizations were more likely to see contributions stay the same. The percentage of organizations seeing declines was similar across all organizational sizes, between 34 percent (very small) and 29 percent (large).

## Changes were consistent across all types of charities

Every subsector saw more respondents reporting growth in giving in 2010 than a decline. Most subsectors saw between 20 and 30 percent of organizations reporting that giving stayed about the same in 2010 as it had been in 2009. See Figure 5.

Figure 5: Percentage of organizations by direction of change in contributions received, 2010 compared with 2009, by type of recipient (subsector)



\* 100 or fewer respondents. Use caution when interpreting results.

Human services organizations showed the lowest percentage of organizations gaining in 2010 compared with 2009, with just 38 percent. Nearly as many, 36 percent, reported a drop, and 26 percent said giving was about the same. Human services organizations tend to be small, and small organizations in general were likely to see giving fall in 2010.

Just 41 percent of arts organizations and 41 percent of environment/animals organizations reported growth, although 38 percent of arts organizations saw a drop, compared with 30 percent of environment/animals organizations.

International organizations were highly likely to report growth, with 63 percent saying giving increased in 2010. Note, however, that there were only 43 organizations responding from the international subsector, so it is very difficult to use this result to generalize for all international organizations in the United States.

## Fundraising success linked with effective communications

In open-ended responses about what most affected fundraising results in 2010, survey participants noted the importance of effective communications. When clustered by theme, these five were often cited:

1. Communicating the organization's mission, impact, and needs.
2. Increased efforts by staff and board members.
3. Donor optimism about the economy.
4. Donors' recognition of others' needs due to the recession.
5. Increased focus on grants and grant writing.

### What single issue most positively affected your fundraising in 2010?

"Awareness of our cause brought on by increased media coverage"

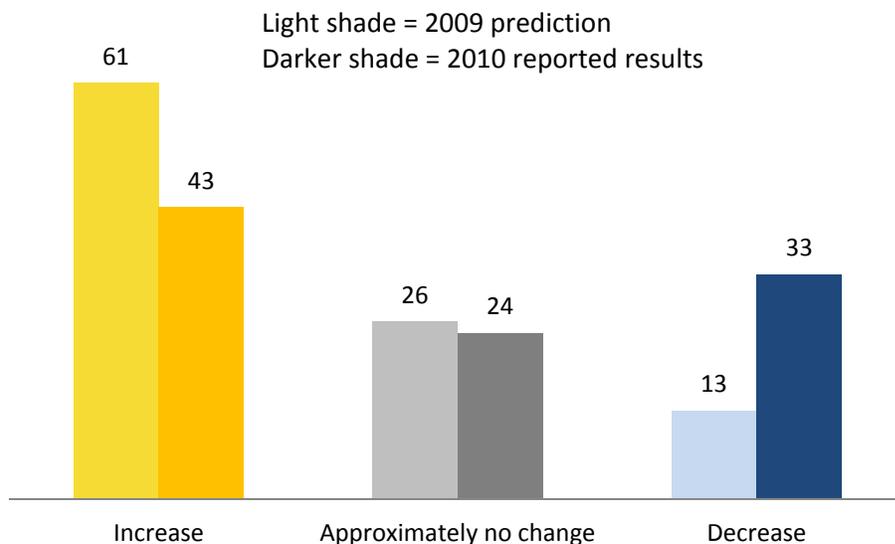
"We were able to describe the impact in specific and accountable ways to the donors."

"The Board's commitment to increasing their fundraising efforts and adding administrative and fundraising staff to accommodate the new era that is upon us."

## Changes in 2010 did not meet expectations stated in late 2009

A year ago, 61 percent of organizations surveyed by the Association of Fundraising Professionals (AFP) anticipated increases in charitable giving in 2010. Among charities that participated in this year's survey, 43 percent reported an increase in FY 2010 compared with 2009. See Figure 6.

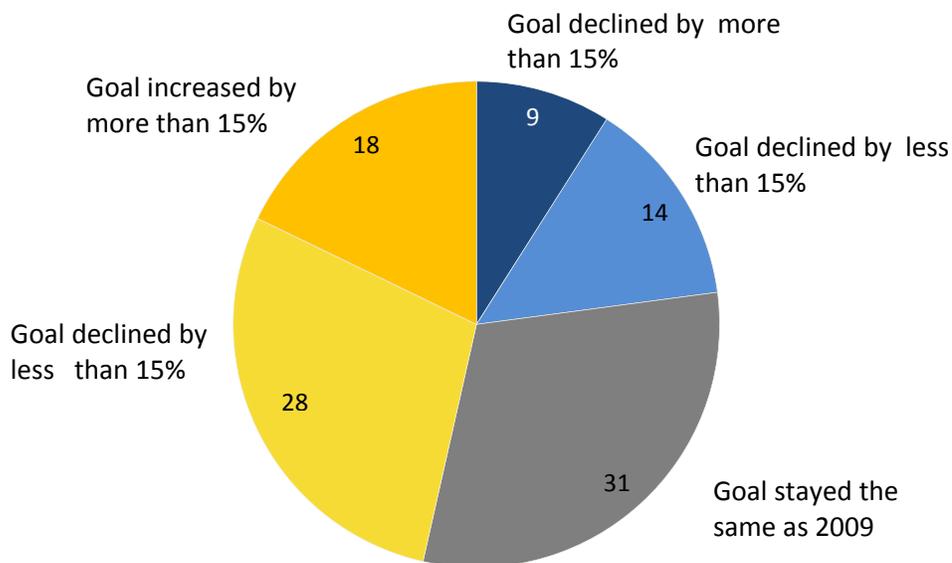
Figure 6: Comparison of predicted change and actual change  
Percentage of responding organizations indicating predicted or actual change



## Even while anticipating increases, organizations budgeted conservatively for 2010 fundraising goals

Even though many fundraising professionals early in 2010 anticipated growth in giving during the year, charities prepared budgets reflecting slow growth in giving for the year. About one-third set goals at 2009 levels (31 percent). Another 23 percent projected a decline in giving. Less than half (46 percent) set a budget that reflected an increase in funds raised. See Figure 7 for a breakdown of the direction and magnitude of change in budgeted fundraising goals in 2010, compared with 2009.

Figure 7: Percentage of organizations by direction and magnitude of change in fundraising goal, 2010 compared with 2009

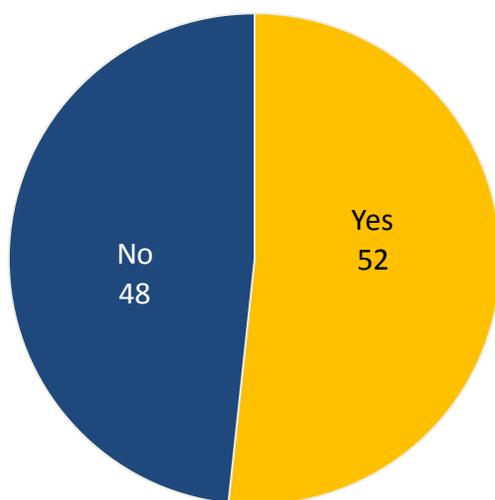


When an organization set a higher goal than 2009, it was most likely (29 percent of all responding charities) to set a goal reflecting less than 15 percent increase.

## Half of organizations met fundraising goal for 2010

Just over half (52 percent) of responding organizations said they met their 2010 fundraising goal. This is essentially no change from the 53 percent who reported meeting their goal in 2009 in AFP's study from a year ago. Different charities participated in the survey in the two years: AFP members in early 2010 and a larger group contacted by the Nonprofit Research Collaborative members in early 2011.

Figure 8: Percentage of organizations that met or did not meet fundraising goal for FY 2010



While a higher percentage of charities in the Midwest (55 percent) met their goals than the 52 percent result nationally—and a lower share of those in the South (48 percent) met their goal— there is no statistically meaningful difference in these percentages.

Very small organizations (expenditures of less than \$250,000 in 2009) were the least likely to meet their fundraising goals. Just 38 percent said they did so in 2010, compared with 52 percent for all respondents. The majority (62 percent) said they did not meet their goal.

Among medium-sized organizations (expenditures of \$1 million to \$3 million) and large organizations (expenditures of \$3 million or more), roughly 64 percent met their goal and 37 percent did not. These same percentages were reported by organizations in both size categories.

As with region, there were differences by subsector, but the differences are not meaningful given the low number of respondents. For example, 59 percent of health charities said they met their goal, and 46 percent of religion charities. Across all subsectors, roughly half of the participating organizations met their goal and roughly half did not.

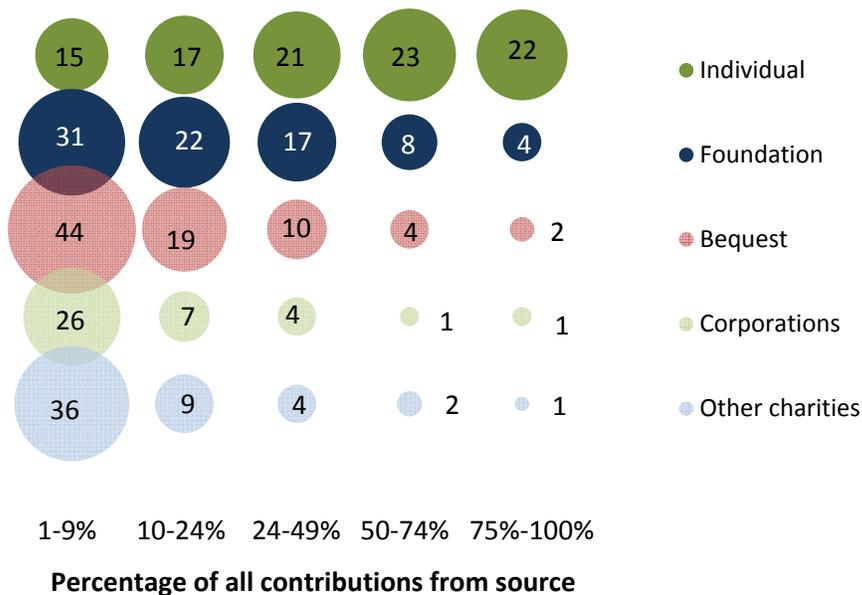
## Percentage of contributions from each donor type

*Giving USA* has reported since its first publication in 1956 that individual donors contribute the largest share of the total in the United States. To test this national result at the organizational level, this study asked about the share of funding from individuals, foundations, corporations, and through bequests. While not a majority of all giving except at very small organizations, individual giving is the largest single source of contributions in the majority of organizations participating in this survey.

Figure 9 shows how participants in this survey responded when asked about the percentage of funding that comes from various donor types. About one-quarter (22 percent) of organizations reported receiving 75 to 100 percent of their total contributions revenue from individuals. Another quarter (23 percent) said they received 50 to 75 percent from individual donors. Institutional donors such as foundations and corporations most often accounted for less than 10 percent of contributions, and bequests overwhelmingly (for 44 percent of respondents) were less than 10 percent of the total raised in 2010.

Figure 9: Ranges for the percentage of contributions from each donor type, 2010

(The size of the circle and the number indicate the percentage of organizations that responded. Thus, 15 percent of participants said Individuals gave 1 to 9% of their organization's total philanthropic contributions in 2010. Not shown are the percentages of organizations that left the question blank.)



Not shown on the graph are charities that reported no funding from the donor type. Just 3 percent received no donations at all from individuals, and 18 percent of survey participants said they had no foundation grants. About 20 percent of the charities reported no gifts from bequests in 2010. More than 60 percent of charities had no corporate funding. About half of the responding organizations (49 percent) do not receive funding from other charities.

## Percentage of contributions from each donor type, by size

There is not much difference by size, except a larger share of very small organizations in this study received 75 percent or more of their contributions from individuals donors than was the case in organizations with higher expenditure levels.

Figure 10: Ranges for the percentage of contributions from each donor type for very small organizations (expenditures in 2009 < \$250,000)

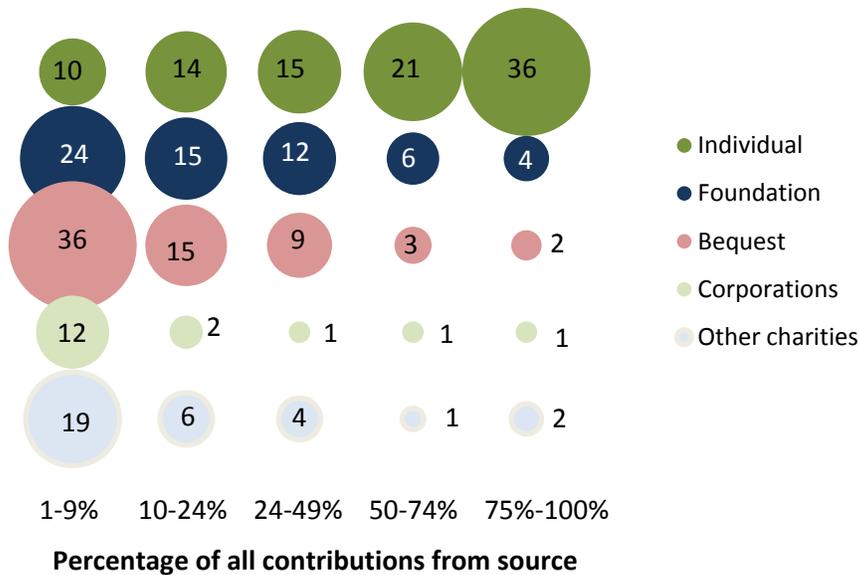


Figure 11: Ranges for the percentage of contributions from each donor type for small organizations (expenditures \$250,000 to \$999,999 in 2009)

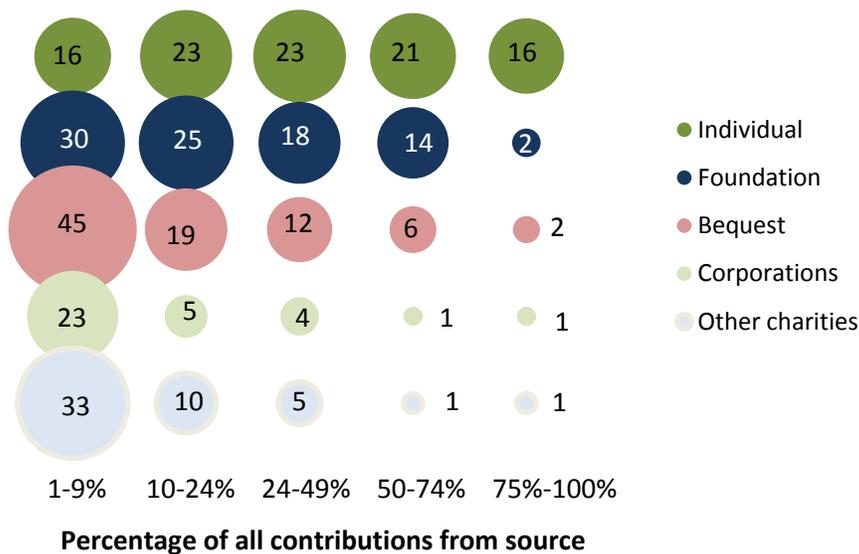


Figure 12: Ranges for the percentage of contributions from each donor type for medium-sized organizations (expenditures of \$1 million to \$2.99 million in 2009)

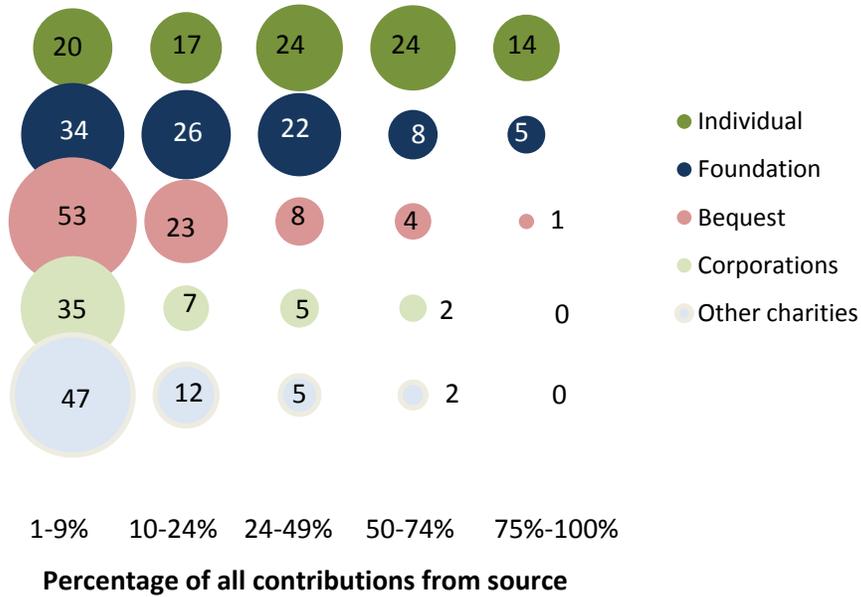
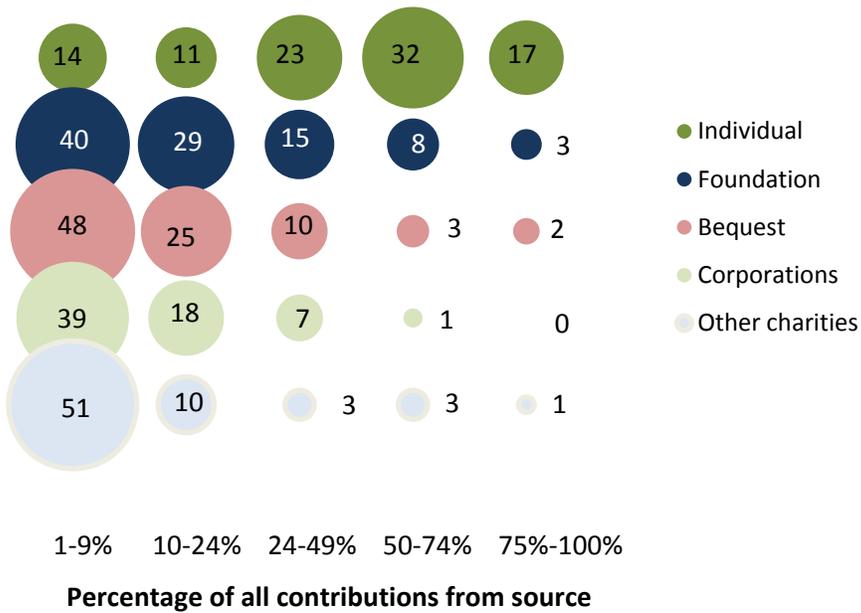


Figure 13: Ranges for the percentage of contributions from each donor type for large organizations (expenditures of \$3 million or more in 2009)

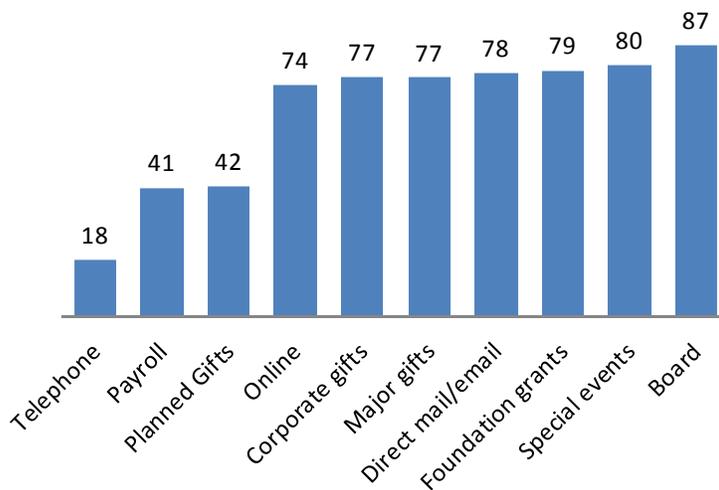


## On average, charities use six fundraising vehicles

Most charities responding to this survey used multiple fundraising vehicles. The average, mode (most frequent answer) and median (midpoint) are all six. That is, respondents to this study are highly likely to report use of six different fund raising vehicles.

The most frequent source of donations was board members, reported by 87 percent. Major gifts were reported by 77 percent of respondents. Methods of engaging donors from online through special events and direct mail were reported by approximately three-quarters of respondents. Telephone appeals were infrequent, used by just 18 percent. Note that direct mail and email appeals are considered together as direct response appeals. See Figure 14.

Figure 14: Frequency of use\* of different fundraising vehicles



\*Survey participants could select NA or skip the question. Both were considered evidence of not using the fundraising vehicle.

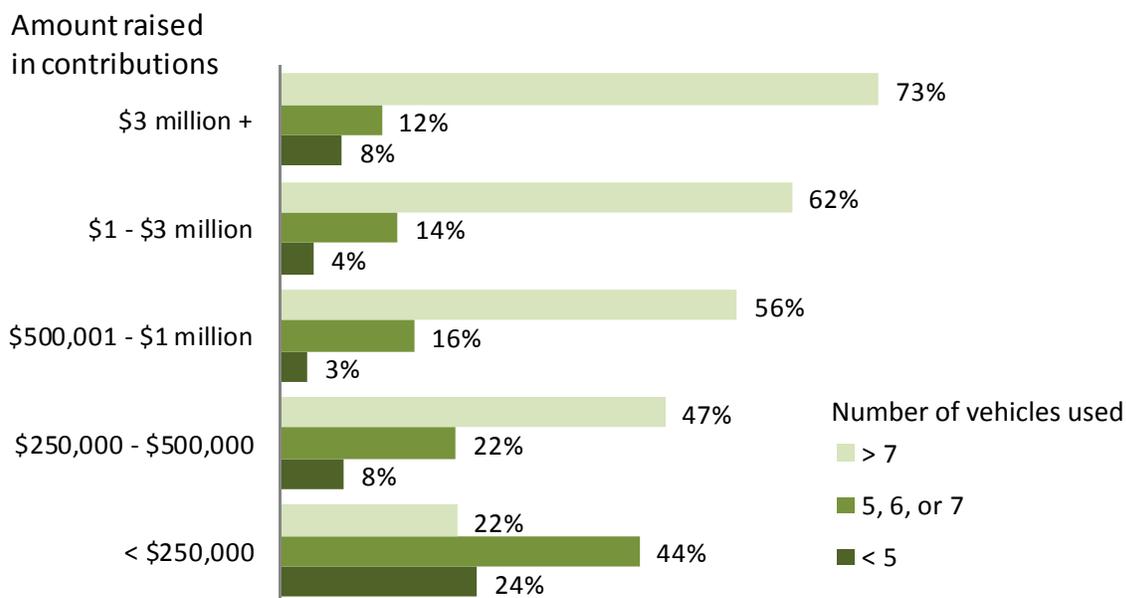
Some survey participants reported that their organizations increased focus on grants and proposal writing in 2010.

One wrote, "We received grants received from foundations that were not available in 2009."

Another said: "We are starting to write our own grants internally - less expensive, more effective and timely."

The number of fundraising vehicles used rises with the amount the organization raises (not organization size by expenditure but amount raised). Organizations that raise less than \$250,000 are most likely to use between five and seven fundraising vehicles, of the 10 included in the study. In contrast, organizations that raised \$3 million or more were highly likely to use more than 7 of the vehicles included. See Figure 15.

Figure 15: Number of fundraising vehicles used by range of amount raised in contributions



For analysis, fundraising techniques were divided into three groups:

1. Acquisition or renewal giving: requests via mail/email, Internet/online, special events, telephone appeals, and payroll campaigns
2. Major gift giving: requests to board members, major gift prospects, and in seeking planned gifts
3. Institutional giving: requests to foundations and corporations

By amount raised, there is no statistically meaningful difference based on how many of the five acquisition or renewal methods were used. Whether responding organizations used one or two or all five methods had no relationship with whether organizations met their fundraising goal.

The result for major gift giving is different. For organizations raising less than \$250,000, between \$500,000 and \$1 million, or between \$1 million and \$3 million, the more of the three major gift methods that the organization used, the more likely it was to meet its fundraising goal. There was no relationship, however, for the other two categories of amount raised: \$250,000 - \$500,000 million and over \$3 million.

Organizations that raised less than \$250,000 in 2010 were more likely to meet their goal when they used both institutional fundraising strategies (corporate and foundations).

## Results by type of fundraising vehicle show strength in online, major gifts, events

### Online giving tops list of vehicles showing growth; results mixed for most fundraising techniques

Figure 16 compares increases, decreases, and stable amounts raised by type of vehicle used. For three of the more commonly used fundraising vehicles, at least half of the organizations that used the vehicle saw giving increase. These include:

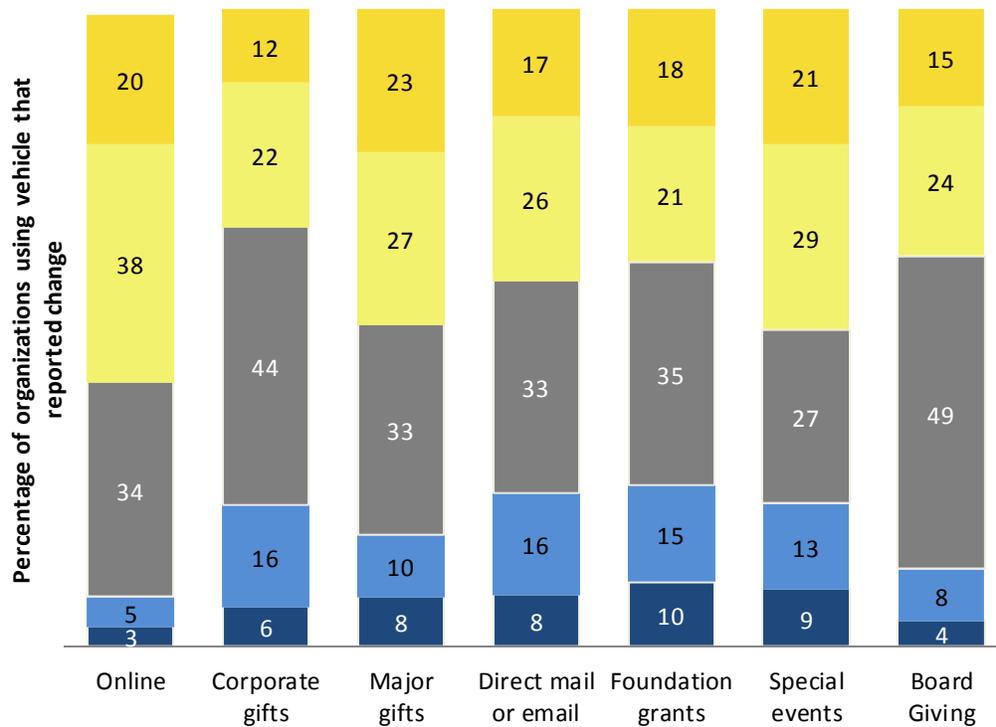
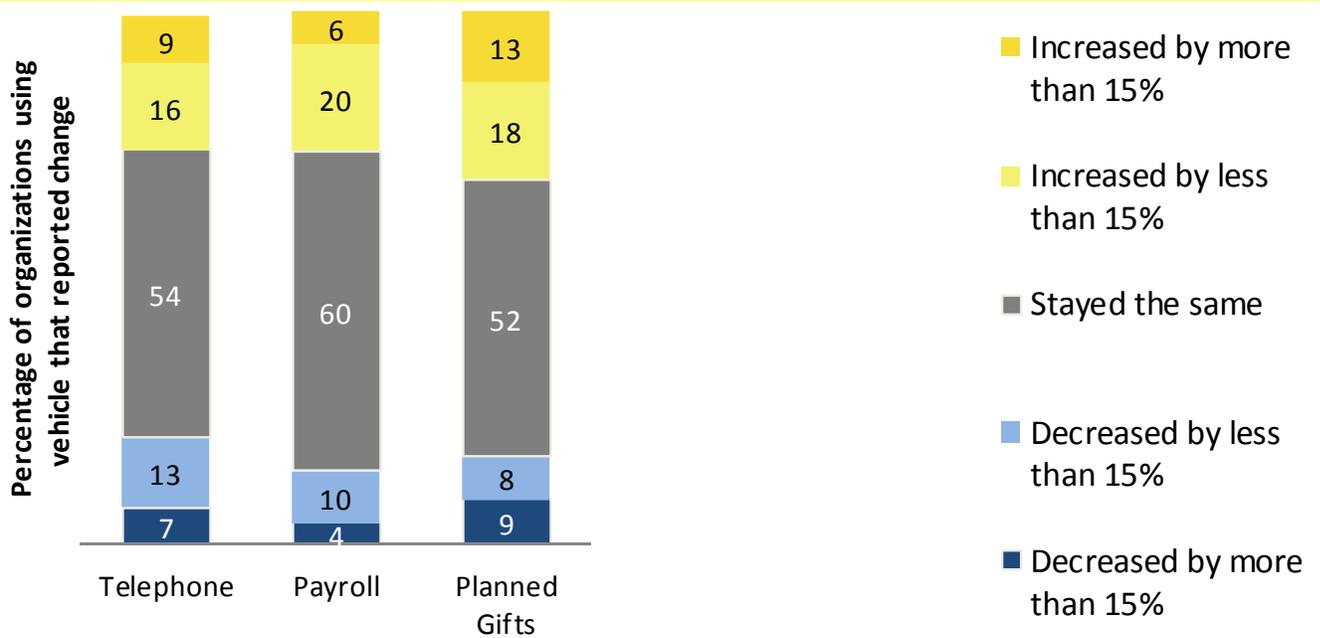
- Online/Internet giving, which rose for 58 percent of the organizations using it, and
- Major gifts and special event net proceeds, which both rose for 50 percent of the organizations using them.

Although online giving rose at more organizations using it than other types of fundraising vehicles did, online has been reported elsewhere as accounting for 10 percent or less than total contributions received at most charities that use it. (*Giving USA 2009*, *Giving USA 2008*, Blackbaud in November 2010)

Less than half of organizations saw growth in four other commonly used fundraising vehicles.

- Direct response appeals yielded increased donations at 43 percent of the organizations using them. A third of organizations using direct response saw stable revenue, and nearly one quarter (24 percent) saw a decline.
- Forty percent of organizations using foundation proposals for fundraising reported increased contributions from this method in 2010, compared with 2009. A third saw foundation grants remain stable and nearly one-quarter (24 percent) saw a decline in revenue from this vehicle.
- Just 39 percent of organizations receiving gifts from board members saw an increase in contributed revenue from this source. Almost half (49 percent) using board giving saw it stay almost the same as in 2009.
- Just over one-third (34 percent) of organizations receiving corporate contributions (grants or gifts) saw an increase from this fundraising vehicle. Almost 4 in ten (44 percent) saw revenue from this vehicle remain stable, but nearly one-quarter (22 percent) saw a decline.
- The three least-used methods—telephone appeals, payroll giving, and planned giving—were among the most likely to stay at the same levels as in 2009. For charities using them, half to 60 percent said these vehicles generated the same amount as in the prior year.

Figure 16: Fundraising vehicles used in 2010 and changes in the amounts raised through each



## Some subsectors more likely to report success with some vehicles

Some types of charities showed results different from the overall findings by type of fundraising vehicle. Tables for the results by subsector are in Appendix A. Of particular note are the following:

- Arts charities:** 59 percent of participating arts organizations that used planned giving reported that revenue from this vehicle remained the same in 2010 as in 2009. This is higher than the 52 percent of charities using planned giving that reported stable revenue from this source. Note that the difference reflects only the respondents to this survey so is not generalizable to all arts charities.
- Education charities:** 55 percent using major gifts said that gifts from this vehicle rose in 2010, compared with 50 percent for all charities.
- Environment/animals:** These charities were more likely to see board giving remain the same—and not increase—than all charities were. About 69 percent of environment/animals charities said board giving was stable in 2010, compared with 49 percent of all charities.
- However, environment/animals charities were more likely to report growth in receipt of foundation grants than were other types of charities. Nearly half (47 percent) of the environment/animals charities said foundation grants rose in 2010 compared with 2009. This is higher than the 40 percent of all charities that said foundation giving was up. Again, this finding represents the charities that responded to this survey and might not be generalizable to all environmental/animals organizations.
- Health charities:** More health charities reported growth in revenue from events than did charities overall. Of the responding health charities, 56 percent said special events proceeds increased in 2010 compared with 2009. This is higher than the 50 percent of all charities that found growth in event fundraising. This result is based on responses received and might not be generalizable to all health organizations.
- Public societal benefit:** This category includes collective fundraising organizations such as United Way and Jewish federations as well as think tanks, policy centers, and more. A larger percentage of respondents in this category than among all charities reported increases for three fundraising vehicles: events, corporate giving, and planned gifts. For events, 55 percent of organizations in this group saw an increase (compared with 50 percent overall). For corporate gifts and grants, 44 percent of organizations in this group saw an increase (compared with 34 percent overall), and for planned giving, 39 percent saw an increase (compared with 31 percent overall). These differences reflect responses received and are not necessarily generalizable.

## Comparison of 2010 results to prior State of Fundraising Survey results

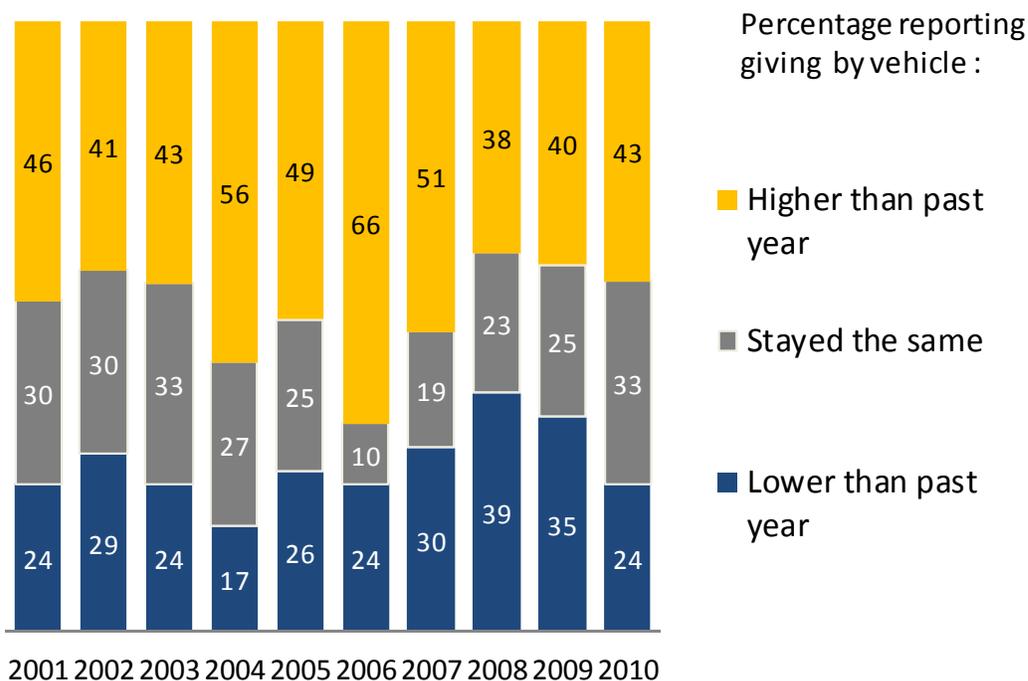
The Association of Fundraising Professionals (AFP) began the State of Fundraising Survey in early 2002, in order to gauge the response of donors in the wake of the attacks of September 11, 2001. AFP continued to survey its members early each year through 2010 and now joins the Nonprofit Research Collaborative (NRC). Many of the questions used in this report are drawn from AFP's most recent State of Fundraising Survey. However, this year, the invitation to the survey was distributed widely, reaching nonprofit organizations without personnel who are AFP members. Thus, while shown here for informational purposes, results should not be used to draw conclusions based on this year compared with prior years.

This section includes 10-year comparisons of survey results for fundraising vehicles that were included in the AFP State of Fundraising Surveys and in the NRE Nonprofit Fundraising Survey. Methods not shown were not included in both.

### Direct response appeals most often increased at 50 percent or less of charities

Direct response appeals, including mail and email messages, were used by 78 percent of charitable organizations that participated in the 2011 survey. Of those using direct response appeals, 43 percent saw an increase in funds raised in 2010 compared with 2009. See Figure 17.

Figure 17 : Ten years of survey results about amounts received through direct response fundraising

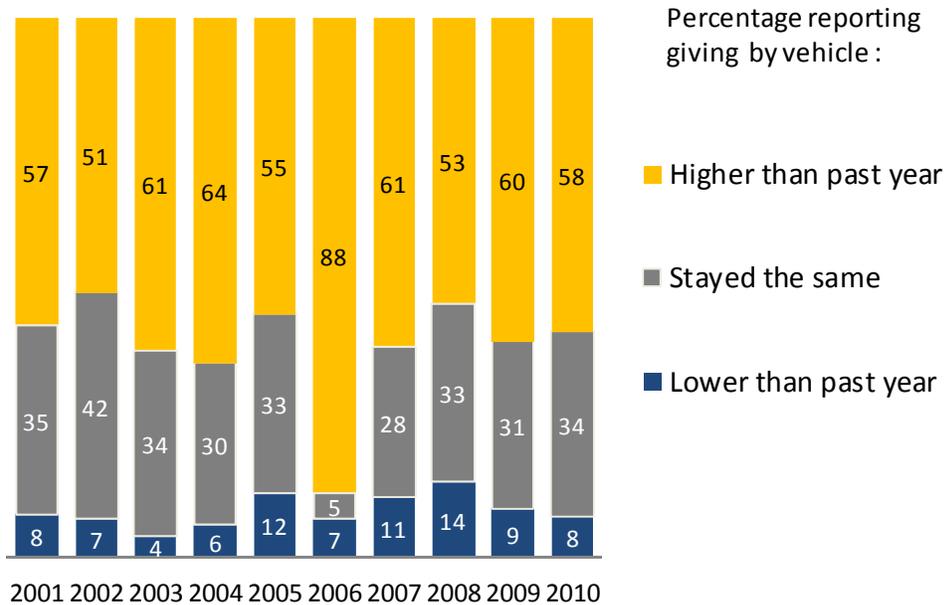


Note: There were methodological differences in the composition of the sample in 2001 and 2010. There is no statistical validity in comparisons that include either of those years.

## Online giving shows more organizations had increases than decreases in all years studied

A majority of respondents reported increases in online giving in every year. See Figure 18.

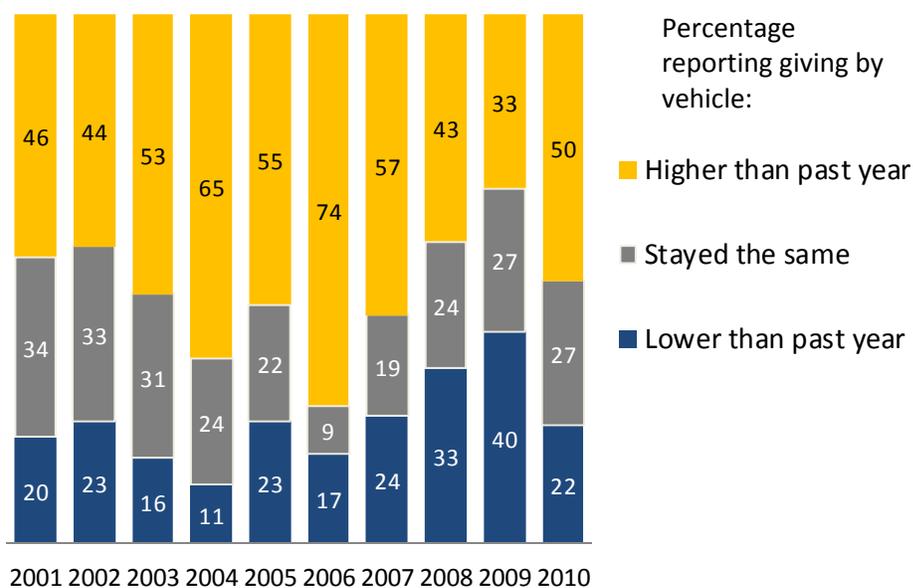
Figure 18: Ten years of survey results about amounts received from online giving



Note: There were methodological differences in the composition of the sample in 2001 and 2010. There is no statistical validity in comparisons that include either of those years.

## Special events results among the most variable

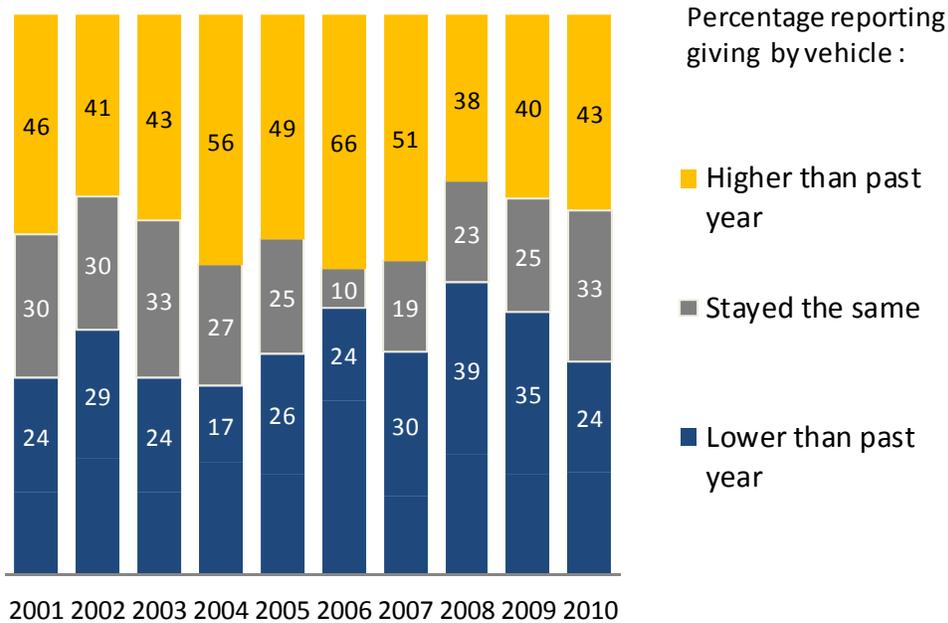
Figure 19: Ten years of survey results about special events net proceeds



Note: There were methodological differences in the composition of the sample in 2001 and 2010. There is no statistical validity in comparisons that include either of those years.

## Planned giving

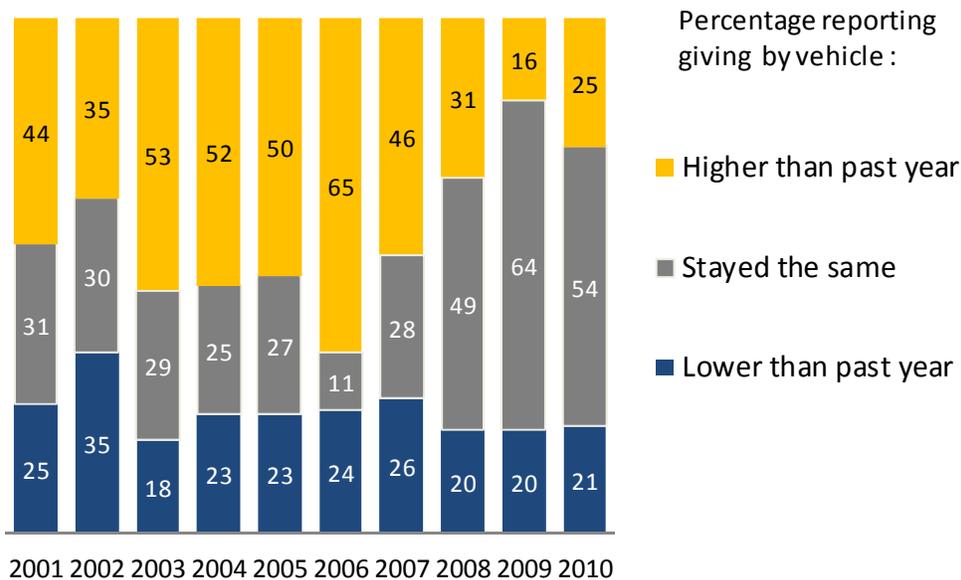
Figure 20: Ten years of survey results about amounts received from planned giving



Note: There were methodological differences in the composition of the sample in 2001 and 2010. There is no statistical validity in comparisons that include either of those years.

## Telephone fundraising shows lowest percentage of response with increase, 2009 and 2010

Figure 21: Ten years of survey results about amounts received from telephone fundraising

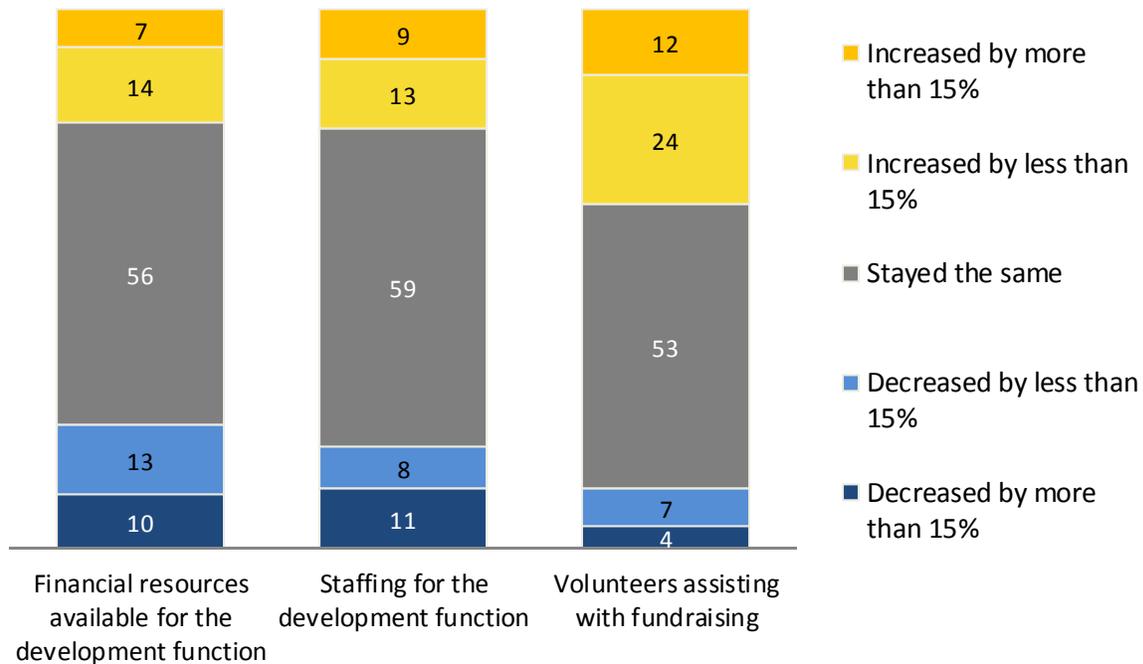


Note: There were methodological differences in the composition of the sample in 2001 and 2010. There is no statistical validity in comparisons that include either of those years.

## Conditions that affected fundraising

Nonprofit managers determine the investment of resources possible for fundraising efforts in the context of the organization's program activities and other financial needs. In 2010, most organizations maintained stable levels of funding, staffing, and volunteer engagement in fundraising. See Figure 22.

Figure 22: Changes in financial resources, staffing, and volunteers for fundraising, 2010 compared with 2009



The biggest increase in investment came from an increased use of volunteer time for fundraising. That rose by more than 15 percent in 12 percent of the responding organizations and by 1 to 15 percent at another 24 percent of survey participants.

An adage says that it takes money to make money, and this study confirmed that.

Increased investment in fundraising and development correlated with meeting a fundraising goal. The strongest correlation is for financial investment (.0226,  $p < .01$ ) followed by staffing (0.174,  $p < .01$ ). The correlation was weakest for volunteers assisting with fundraising (0.147,  $p < .01$ ).

Note, however, that just investing will not make fundraising successful. An organization needs a strong case for support, a communications strategy that can be implemented, and staff and volunteers to carry out the plans.

## Exploration of relationship between fundraising investment and changes in fundraising

This survey analysis includes 1,616 participants, more or less equally distributed across the nation's four regions. Respondents, like charities in the country, were overwhelmingly from organizations with relatively low budgets (under \$1 million). The participating organizations are not a random sample of charities, so statistical analysis will not generate results that can be applied to all charities. Nonetheless, by examining in more detail specific results, this report explores further some ideas about how fundraising is conducted and how changes in fundraising affect total contributions.

### Investing in fundraising correlated positively with increased fundraising proceeds

- Almost half (48 percent) of the organizations that increased financial support for fundraising by 15 percent or more saw contributions increase by 15 percent or more. About a quarter (27 percent) saw giving rise, although by less than 15 percent. Combined, three quarters (75 percent) of organizations that increased their financial support for fundraising in 2010 saw an increase in funds raised. Less than a quarter (24 percent) saw giving remain flat or fall.
- Organizations that kept financial investment in fundraising the same were more likely to see contributions decline or stay the same (56 percent) than they were to see contributions increase (44 percent).
- About four in 10 (43 percent) organizations that allowed fundraising expenditures to decline by 15 percent or more saw contributions decline by 15 percent or more. Just over a third of these organizations (36 percent) saw giving stay the same or increase.

### Investing in fundraising associated with greater likelihood of meeting fundraising goals

Findings were consistent for all four organizational sizes. For very small, small, medium, and large organizations\*:

- Declines of any amount in financial investment and declines in staffing were both associated with a lower probability of meeting the fundraising goal.
- For very small and small organizations, a reduction in volunteer engagement in fundraising was also associated with a lower probability of meeting the organization's fundraising goal.

The Nonprofit Overhead and Administrative Cost Study ([www.coststudy.org](http://www.coststudy.org)) found that raising funds for administrative expenses, including fundraising, was difficult in all sizes of organizations. This repeatedly compromised organizational effectiveness in meeting the charitable mission, as the charities "made do with less" in numerous ways.

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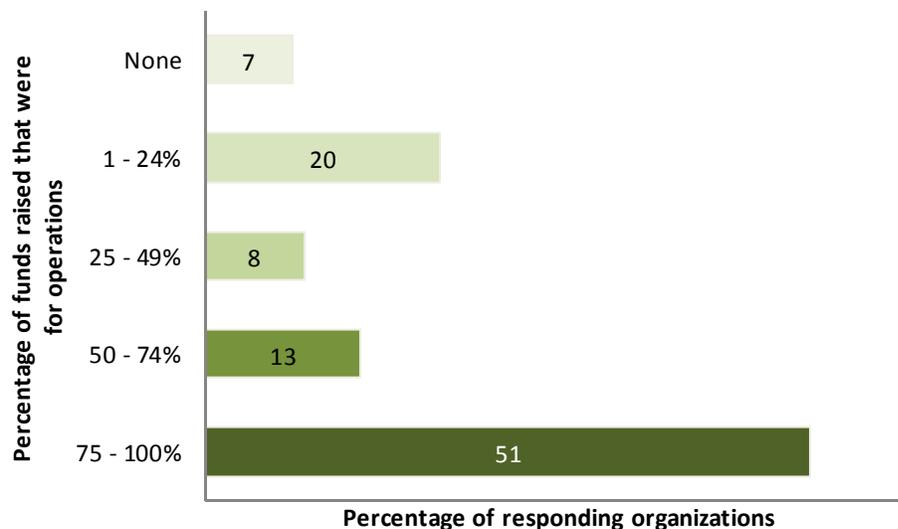
\* Very small: Expenditures of \$250,000 or less in 2009; Small: Expenditures of \$250,000 to \$999,999 in 2009; Medium-sized: Expenditures of \$1 million to \$2.99 million in 2009; Large: Expenditures of \$3 million or more in 2009.

## Funding for general operating support

Total charitable contributions were \$304 billion in 2009, according to *Giving USA 2010*. Of that, approximately \$31 billion went to grantmaking and operating foundations. The Council for Aid to Education reports that \$11 billion of the \$28 billion in giving for higher education was for endowment or capital purposes. Few other studies have previously asked about the purposes of charitable contributions received at most types of charities.

This survey finds that more than half of the organizations participating (51 percent) received 75 percent or more of their contributed dollars for operating support. Another 13 percent said between 50 percent and 74 percent of contributions were for operating expenses. Combined, 64 percent said that half or more of the contributions received were for general operations. See Figure 23.

Figure 23: Share of organizations by percentage of funds raised that were for operations



NOTE: Different shades are used to demonstrate the share of funding for operations, with the lightest shade indicating that no funds raised were for operations. As the shade gets darker, the share for operations increases.

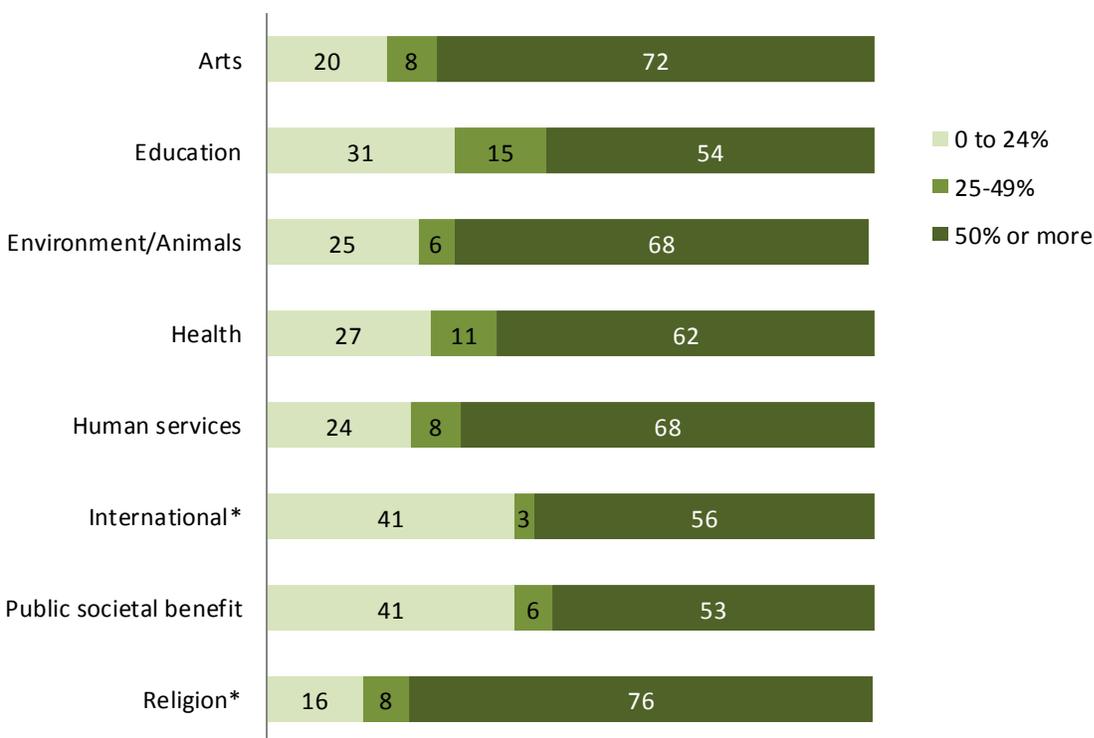
Just 7 percent reported that none of the funds received in 2010 were for operating expenses.

There is no meaningful difference by region, even though different percentages of organizations in the South and the West reported receiving 75 percent or more of their contributions for operations. In the South, the percentage was lower, at 48 percent, than the 51 percent found generally. In the West, the percentage was higher, at 55 percent.

## Operating expenses lower share of total at education and public societal benefit organizations

By type of charity, this survey finds that among all organization types, a majority said that 50 percent or more of their contributions received were for funding operating expenses. Arts organizations and religion-related organizations were most likely to report this, 72 percent and 76 percent, respectively. (Note that to facilitate understanding across eight types of charities. Figure 24 combines categories that are reported separately above.) The least likely to report that 50 percent or more was for operating expenses were education organizations (at 54 percent) and public societal benefit organizations (at 53 percent).

Figure 24: Percentage of organizations by share of funding for operating expenses, by type of charity



By subsector, these results cannot be directly compared to other studies, in part because the question is different. The Council for Aid to Education, in its study of higher educational institutions, found that approximately 60 percent of an estimated \$28 billion in giving for the 2009-2010 fiscal year was for current operations. This is not the same as asking whether the percentage of contributions for operating support falls in range a, b, or c, as this study does.

## Giving in the last quarter of the year

Nonprofit managers and members of the media often want to know how much of the year's giving occurs in the last few months of the year, the so-called "giving season." This survey is one of the first to ask that question of a large number of charities in all subsectors.

Figure 25: Percentage of organizations by what share of contributions revenue arrived from October through December

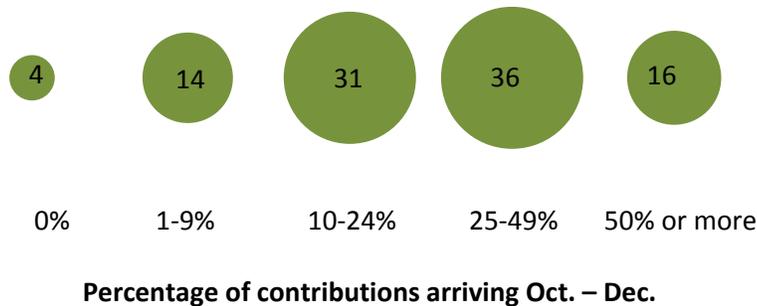


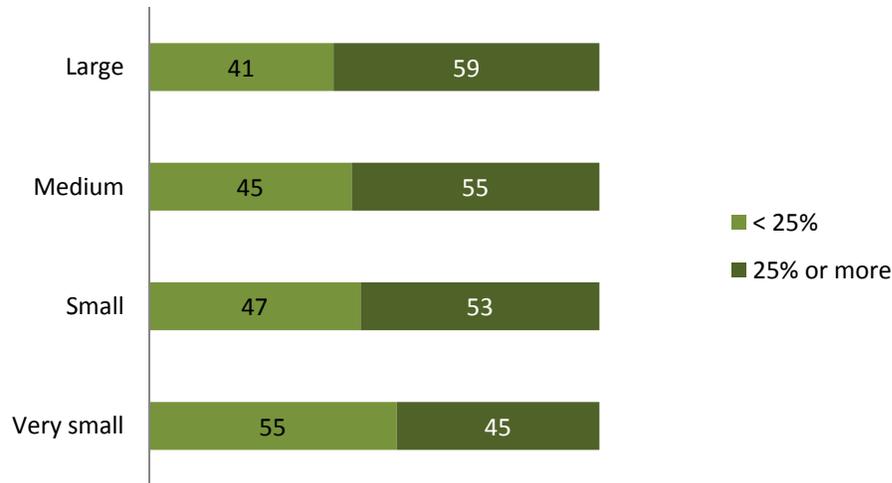
Figure 25 shows five levels of contributions revenue, from none to 50% or more. The size of the circle represents the percentage of organizations that said they received that percentage of contributions revenue in the last three months of the calendar year.

The largest share of charities in this study (36 percent) said they receive 25 percent to 49 percent of their total contributions in the last three months of the year. Only about one in six (16 percent) reported receiving 50 percent or more of their total contributions in the last three months. However, about half of the charities receive more than one-quarter of their contributions in the last quarter of the year. If contributions were evenly spaced, we would expect each calendar quarter to account for roughly 25 percent of philanthropic dollars received.

## Large charities most likely to raise 25% or more of dollars in last months

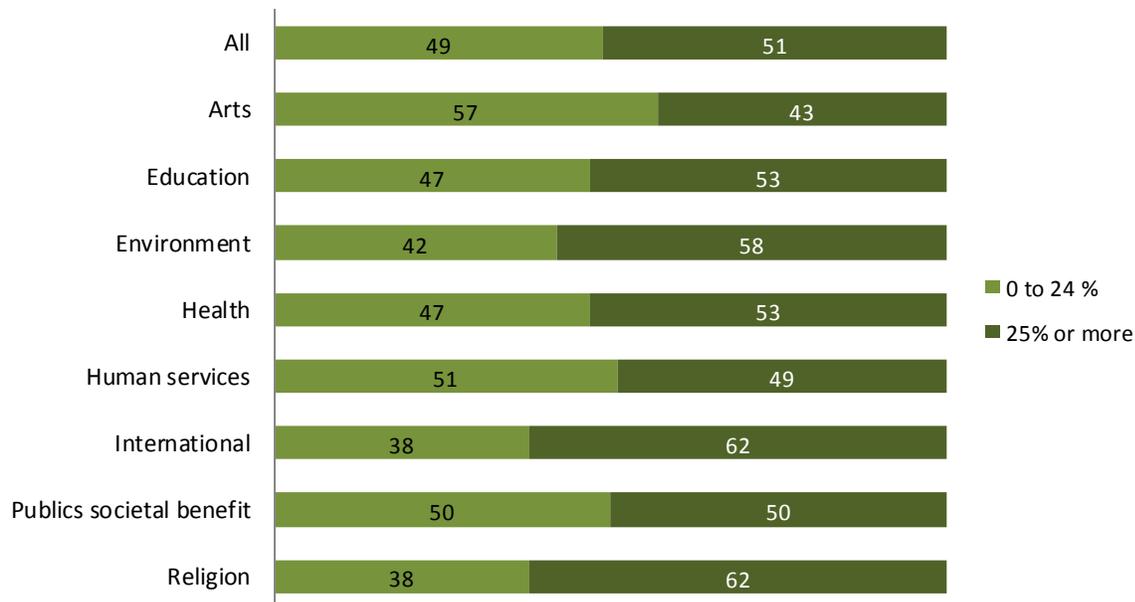
Results are virtually the same in the geographic regions (North, Midwest, South, and West) as for all responding charities. However, there is variation by size of charity. Smaller organizations are more likely to see their contributions arrive throughout the year, but 59 percent of the largest charities said that they receive 25 percent or more of their gift dollars in the last few months of the year. See Figure 26.

Figure 26: Percentage of charities reporting that they receive up to 25 percent or 25 percent or more of their contributions from October through December, by charity budget size



There is some variation by type of recipient organization. See Figure 27: Percentage of charities reporting the share of contributions that arrive from October to December, by type of charity.

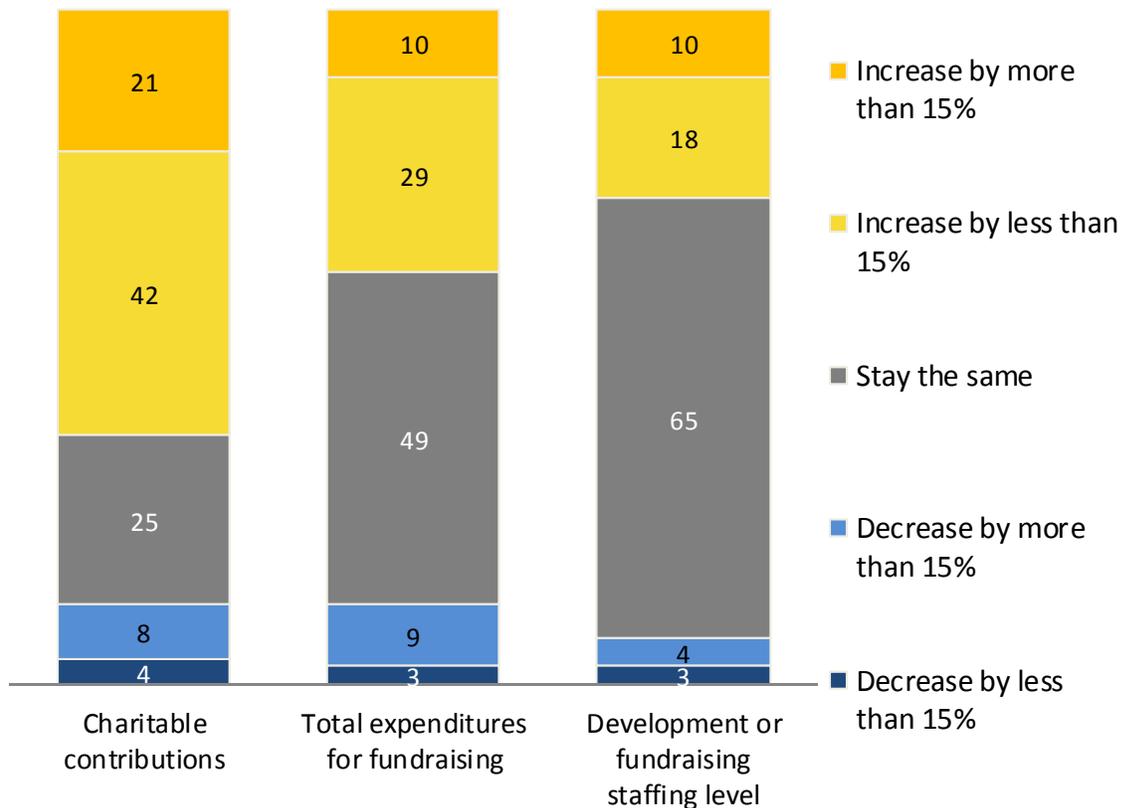
Figure 27: Percentage of charities reporting the share of contributions that arrive from October to December, by type of charity



## Anticipated changes for 2011

Budgets and plans for fundraising for this year were drafted in mid- to late-2010. Organizations participating in this survey were generally optimistic about increased contributions this year but the largest portion anticipated that staffing and expenditures for fundraising will remain the same as for 2010. A combined total of 63 percent project that contributions will increase in 2011. Thirty-nine percent anticipate increases in expenditures for fundraising, compared with 49 percent that say expenditures will remain the same. Nearly two-thirds (65 percent) say that development and fundraising staffing levels will remain the same as in 2010. See Figure 28.

Figure 28: Predictions for changes in funds raised, expenditures for fundraising, and staffing levels in 2011



## Challenges ahead

Respondents to the survey could write in responses to the question: What is the single biggest challenge, or issue, or trend that will affect fundraising for your organization in 2011?

While some responding staff at nonprofit organizations saw optimism for the economy in 2010, it was still the most commonly named challenge for 2011. A few comments from the respondents:

- “Because of the economy, donors do not want to commit to multi-year pledges.”
- “People's confidence in the economy and their willingness to give.”

Respondents feel that their organizations are understaffed for 2011. One survey respondent noted: “I am a one person operation—too many projects/challenges for one person.”

Respondents would like board member to be more involved in 2011.

- “Lack of board involvement/board not sufficiently poised to do major gift fundraising.”
- “Getting our board to get involved in give/get fund raising. Has never been done before and I am trying to get this implemented for 2011.”

Communicating the organizations’ mission and impact is also seen as an area needed for success in 2011.

- “Our biggest challenge will be PR, getting the word out about our project.”
- “Success of a new marketing/communications plan which includes increasing financial stability.”

The economy limited the amount some donors were comfortable contributing in 2010, but it also helped donors feel a connection to nonprofit organizations’ work. Perhaps the connections made during the recession will turn into contributions as confidence in the economy grows.

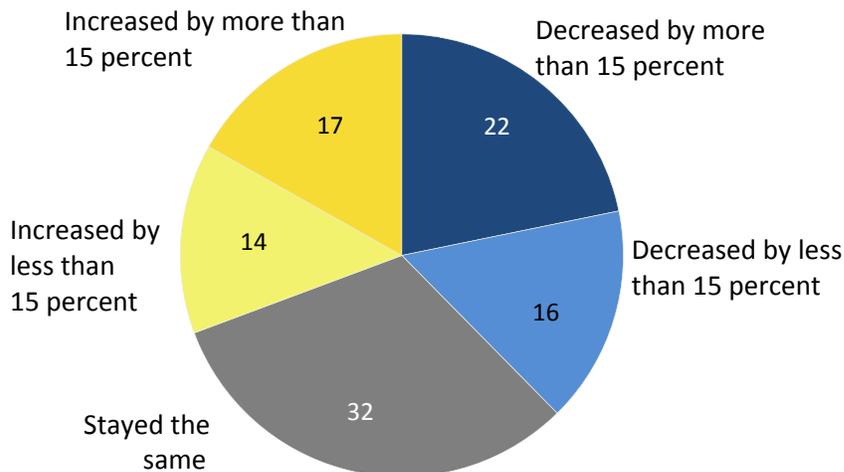
## Changes in revenue from government grants

While not tax-deductible philanthropic contributions, government grants are a major source of funding for many charities and are reported as a form of “public support” on IRS Forms 990. Many development offices have responsibility for preparing proposals for federal and state funding and are held accountable for their results in this area as they are for gifts received from individuals, estates, foundations, corporations, and other charities.

This survey asked about changes in amounts received in grants from government sources in 2010, following on the November 2010 survey that also asked about grant revenue.

About 45 percent of organizations reported receiving government grants, and of those, more saw a decline (38 percent) than saw stable government funding (32 percent) or increases (31 percent). This is consistent with earlier assessments and with media reports about government budget cut-backs. To the extent that 2011 state and federal government budgets are further cutting expenses, nonprofit organizations are bracing for further declines from this revenue source. See Figure 29.

Figure 29: Percentage of organizations by direction and magnitude of change in government grant revenue, 2010  
(Only organizations reporting government grant revenue changes are included.)



## The Nonprofit Research Collaborative

Six organizations have formed the Nonprofit Research Collaborative. Each of these entities has, at a minimum, a decade of direct experience collecting information from nonprofits concerning charitable receipts, fundraising practices, and/or grantmaking activities.

The collaborative effort reduces the burden on charities, which will receive fewer requests for survey participation. Survey respondents will form a panel over time, allowing for trend comparisons among the same organizations. This approach provides more useful benchmarking information than repeated cross-sectional studies.

The collaborating partners to date are:

- Association of Fundraising Professionals, which surveyed members for an annual state of fundraising study;
- Blackbaud, Inc., which publishes The Blackbaud Index and prepares a report about the State of the Nonprofit Industry;
- The Center on Philanthropy at Indiana University, which conducts a wide range of studies on philanthropy and giving;
- The Foundation Center, which provides services to nonprofit organizations and documents trends in foundation giving worldwide;
- GuideStar USA, Inc., which has issued annual reports about the impact of the economy on the nonprofit sector since 2002; and
- The National Center for Charitable Statistics at the Urban Institute, which tracks the finances and activities of nonprofit organizations and prepares the *Nonprofit Almanac* and other publications and resources.

Additional organizations may join the collaborative. For more information, please contact Reema Bhakta, [rtbhakta@iupui.edu](mailto:rtbhakta@iupui.edu).

## Methodology

The online-only survey was fielded from February 10 to February 28, 2011. Invitations to participate were sent by each of the collaborating partner organizations to its own “house list,” and communications from the partner organizations went out through social media (Twitter, Facebook, LinkedIn) messaging to reach as wide a group of charities as possible. No estimate of the number of recipients of the invitation to participate is possible given this “viral” distribution method.

A total of 1,845 responses were submitted. Not all were eligible to complete the entire survey, as 173 did not accept contributions. Of the 1,673 who did report accepting contributions, not all completed enough questions to be analyzed. Results are based on 1,616 responses.

Reported values are always percentages of respondents, and the denominator excludes non-respondents for each question.

Because the sample is not random, results are not generalizable to all nonprofit organizations in the United States. Some types of organizations might have been systematically excluded from participating. These could include very large organizations where responsibility for taking online surveys is not assigned, organizations that folded during the year because they did not have sufficient fundraising revenue, organizations facing severe weather in February 2010 as the Midwest and East experience numerous storms, or organizations that do not use email or Internet connections.

With a convenience sample, no measures of error can be calculated. While use of statistical procedures does assume a random sample, analysis did include Chi-square tests for differences for this set of respondents. When a difference is reported among these respondents, the p-value is always 0.05 or lower.

## Region

The regional definitions are those of the U.S. Census Bureau. The National Center for Charitable Statistics provided state information based on the Employer Identification Numbers submitted with the surveys (or with organizational names and zip codes, for those respondents who did not include an EIN). Coding for regions was done at the Center on Philanthropy at Indiana University.

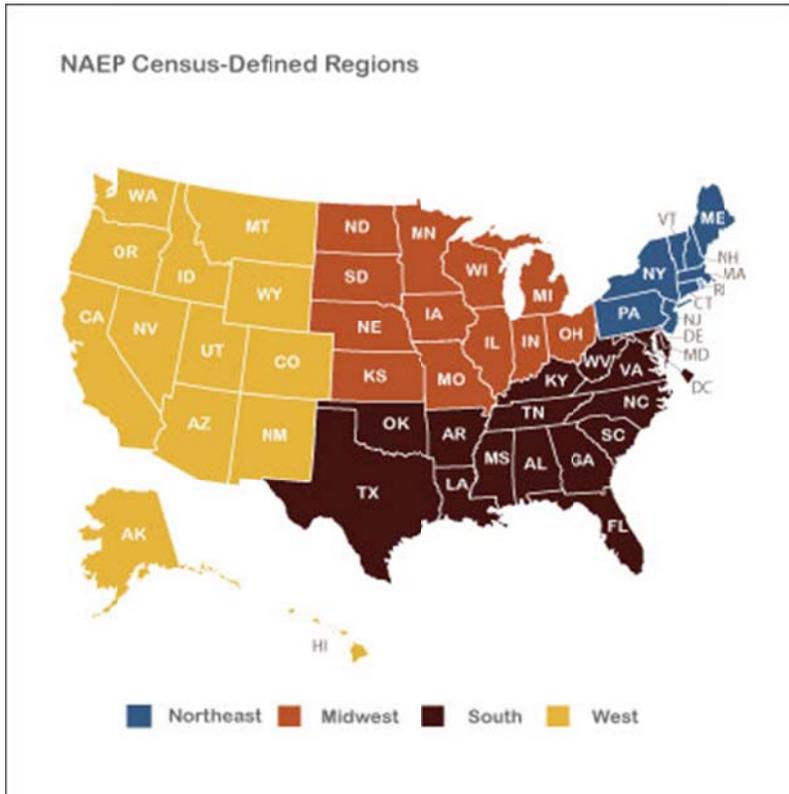
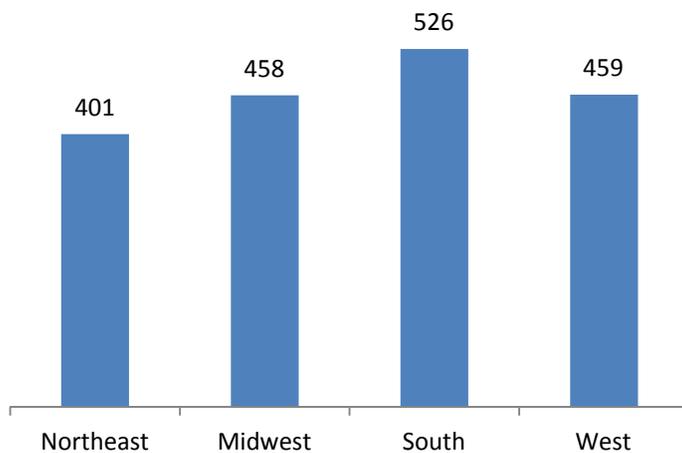


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### Distribution of respondents by region



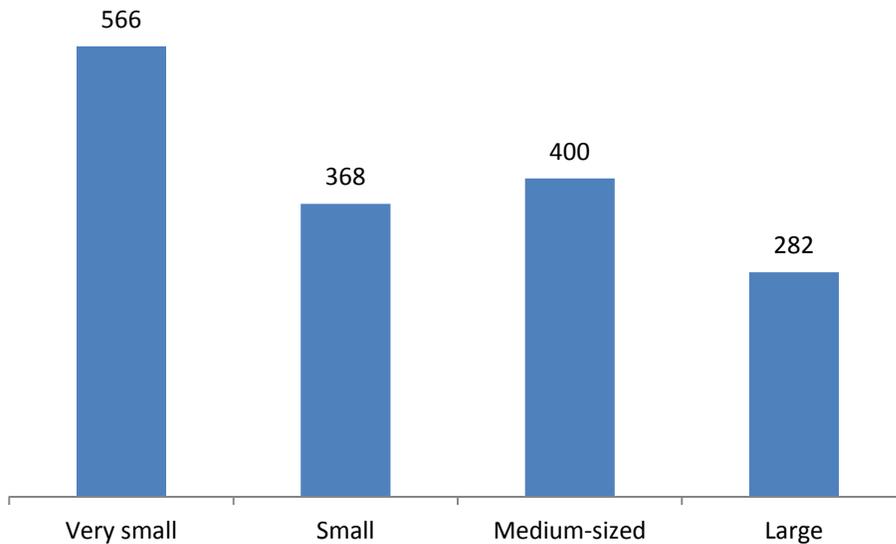
## Size

Size is based on expenditures reported on IRS Forms 990 for 2009. The National Center for Charitable Statistics matched 990 data with Employer Identification Numbers submitted with the surveys (or with organizational names and zip codes, for those respondents who did not include an EIN). The sizes used are as follows:

- Very Small: expenditures less than \$250,000
- Small: expenditures of \$250,000 to \$999,999
- Medium-size: expenditures of \$1 million to \$2.99 million
- Large: expenditures of \$3 million or more

These categories were selected in part on the distribution of the sizes of the participating charities, so that the four categories have roughly similar numbers of respondents.

**Distribution of respondents by size category, based on 2009 total expenditures**

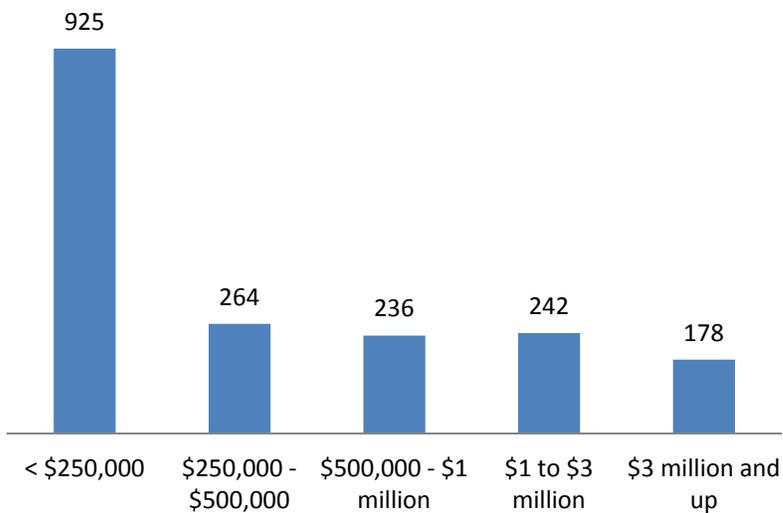


## Organizations by amount raised

In addition to looking at total expenditures, organizations were also organized by amount raised. Some large organizations receive significant portions of their revenue from fees for service or government contracts, so do not raise a majority of their funding through philanthropic gifts. Thus, an organization in the large expenditure category might raise less than \$250,000. However, when analyzing the number of fundraising vehicles used based on organizational characteristics, we used the amount raised rather than the overall expenditure level.

Most organizations that participated in this survey raised less than \$250,000 in 2010.

### Distribution of respondents by 2010 amounts raised



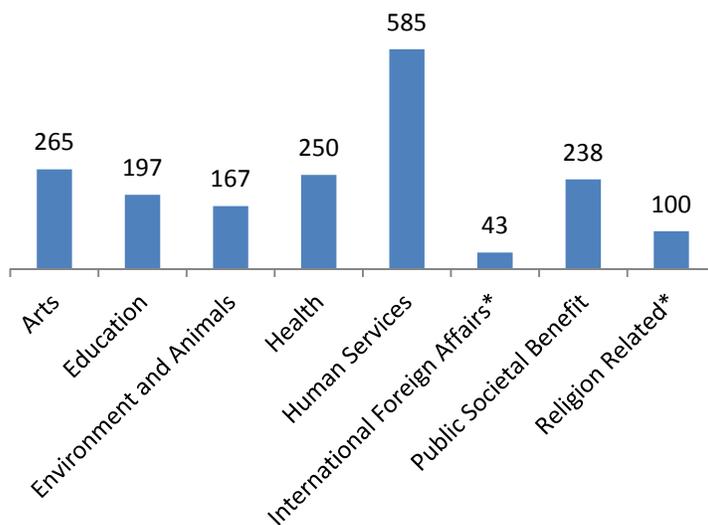
## Sub-sector codes

Because organizations could provide their Employer Identification Numbers (EIN), subsector assignment was based on classification done at the National Center for Charitable Statistics following the National Taxonomy of Exempt Entities. Some organizations did not provide an EIN and as part of the survey, they could identify their organizational type by selecting from a list of 26 categories, which are used by the IRS for classification. Related categories were then aggregated into subsectors (or “major groups”) to provide a broader view of the nonprofit world.

The major groups used by the National Taxonomy of Exempt Entities correspond to subsectors tracked by other publications, including Giving USA. They are

- I. Arts, Culture, and Humanities
- II. Education
- III. Environment/Animals
- IV. Health
- V. Human Services
- VI. International, Foreign Affairs
- VII. Public Societal Benefit
- VIII. Religion Related
- IX. Mutual/Membership Benefit
- X. Unknown, Unclassified

### Distribution of participants by NTEE major category/subsector



\* Low number of responses. Of limited use in interpreting results.

## Appendix A

### Data tables showing results by subsector by fundraising vehicle

Not shown are two fundraising vehicles: Payroll deductions and telephone. Also not shown are organizations in the International and Religion subsectors, due to a low numbers of respondents in each.

#### ARTS

Percentage using vehicle and percentages reporting direction of change in contributions in 2010 compared with 2009

Percentage Using	57	69	80	68	75	28	77	75
	Mail	Internet	Board	Major gifts	Events	Planned Gifts	Foundations	Corporations
Increased	44	51	45	48	49	30	38	34
Stayed the same	34	41	40	36	29	<b>59</b>	34	39
Decreased	22	9	15	16	23	11	29	27

#### EDUCATION

Percentage using vehicle and percentages reporting direction of change in contributions in 2010 compared with 2009

Percentage Using	68	65	76	66	69	37	65	66
	Mail	Internet	Board	Major gifts	Events	Planned gifts	Foundations	Corporations
Increased	41	57	39	<b>55</b>	48	32	32	30
Stayed the same	34	35	47	23	32	45	40	42
Decreased	25	8	14	22	21	23	28	27

#### ENVIRONMENT/ANIMALS

Percentage using vehicle and percentages reporting direction of change in contributions in 2010 compared with 2009

Percentage Using	71	74	71	68	76	37	71	62
	Mail	Internet	Board	Major gifts	Events	Planned gifts	Foundations	Corporations
Increased	42	61	27	46	43	27	<b>47</b>	32
Stayed the same	37	28	<b>61</b>	37	37	53	30	43
Decreased	21	11	12	17	20	20	23	25

## HEALTH

Percentage using vehicle and percentages reporting direction of change in contributions in 2010 compared with 2009

Percentage Using	74	70	81	70	74	42	73	75
	Mail	Internet	Board	Major gifts	Events	Planned gifts	Foundations	Corporations
Increased	41	60	40	50	<b>56</b>	32	43	33
Stayed the same	35	34	48	33	18	58	32	48
Decreased	24	6	12	17	25	10	25	19

## HUMAN SERVICES

Percentage using vehicle and percentages reporting direction of change in contributions in 2010 compared with 2009

Percentage Using	68	64	79	69	76	40	75	72
	Mail	Internet	Board	Major gifts	Events	Planned Gifts	Foundations	Corporations
Increased	43	57	38	45	49	29	41	32
Stayed the same	31	33	52	35	27	51	36	47
Decreased	27	10	10	20	24	19	23	22

## PUBLIC SOCIETAL BENEFIT

Percentage using vehicle and percentages reporting direction of change in contributions in 2010 compared with 2009

Percentage Using	66	61	80	67	67	34	63	66
	Mail	Internet	Board	Major gifts	Events	Planned gifts	Foundation	Corporations
Increased	44	57	42	53	<b>55</b>	<b>39</b>	38	<b>44</b>
Stayed the same	37	40	47	32	25	50	38	37
Decreased	19	3	11	15	20	11	24	19

## Appendix B

# The 2010 Nonprofit Fundraising Survey



### Preliminary Results of the 2011 Nonprofit Fundraising Survey

These figures are based on the respondents who answered the questions to date. The final results will be released in March.

#### What were your organization's cumulative gross dollars raised in FY 2010 from all private philanthropic sources?

	Count	Percent
Less than \$250,000	925	50.1
\$250,001 - \$500,000	265	14.3
\$500,001 - \$1 million	236	12.8
\$1,000,001 - \$3 million	242	13.1
\$3,000,001 - \$5 million	59	3.2
\$5,000,001 - \$10 million	48	2.6
\$10,000,001 - \$50 million	50	2.7
\$50,000,001 - \$75 million	6	0.3
More than \$75 million	16	0.9
Total:	1,847	100.0

#### How have your organization's gross dollars raised from all philanthropic sources changed from FY2009 to FY2010?

	Count	Percent
declined by more than 15%	278	15.1
declined by less than 15%	329	17.8
stayed the same	449	24.3
increased by less than 15%	448	24.3
increased by more than 15%	343	18.6
Total:	1,847	100.0

#### Did you reach your fundraising dollar goal in 2010?

	Count	Percent
Yes	870	47.1
No	811	43.9
Not applicable	166	9.0
Total:	1,847	100.0

#### How did your fundraising dollar goal in 2010 change from your goal in 2009?

	Count	Percent
declined by more than 15%	154	9.2
declined by less than 15%	233	13.9
Stayed the same	515	30.6
increased by less than 15%	479	28.5

## Appendix B

increased by more than 15%	300	17.8
Total:	1,681	100.0

### Approximately what percentage of your organization's total contributions in FY 2010 arrived from October through December?

	Count	Percent
None	66	3.6
1-9%	263	14.4
10-24%	562	30.8
25-49%	647	35.5
50% or more	285	15.6
Total:	1,823	100.0

### Approximately what percentage of your organization's contributions received in FY 2010 came from the following sources?

	0%	1-10%	10-24%	25-49%	50-74%	75-100%	N/A
Individuals	43 (2.48%)	250 (14.41%)	288 (16.60%)	353 (20.35%)	403 (23.23%)	385 (22.19%)	12 (0.69%)
Foundations	300 (17.29%)	512 (29.51%)	377 (21.73%)	279 (16.08%)	142 (8.18%)	62 (3.57%)	46 (2.65%)
Corporations	344 (19.83%)	740 (42.65%)	327 (18.85%)	164 (9.45%)	73 (4.21%)	27 (1.56%)	43 (2.48%)
Bequests or from trust distributions from estates	978 (56.37%)	400 (23.05%)	109 (6.28%)	55 (3.17%)	19 (1.10%)	8 (0.46%)	136 (7.84%)
Other charities (such as United Way, congregations or Combined Federal Campaign)	767 (44.21%)	562 (32.39%)	146 (8.41%)	65 (3.75%)	28 (1.61%)	13 (0.75%)	122 (7.03%)

### Please indicate how amounts received in FY 2010 changed from those received in FY2009 from the following sources:

	Decreased by more than 15%	Decreased by less than 15%	Stayed the same	Increased by less than 15%	Increased by more than 15%	N/A
Direct mail/e-mail	103 (6.21%)	204 (12.30%)	434 (26.18%)	335 (20.21%)	217 (13.09%)	365 (22.01%)
Telephone fundraising	22 (1.33%)	40 (2.41%)	161 (9.71%)	48 (2.90%)	25 (1.51%)	1357 (81.85%)
Online/Internet giving	38 (2.29%)	58 (3.50%)	418 (25.21%)	464 (27.99%)	250 (15.08%)	422 (25.45%)
Board giving	55 (3.32%)	116 (7.00%)	708 (42.70%)	341 (20.57%)	219 (13.21%)	211 (12.73%)
Major gifts*	98 (5.91%)	123 (7.42%)	418 (25.21%)	342 (20.63%)	287 (17.31%)	385 (23.22%)
Special events/net-event proceeds	119 (7.18%)	180 (10.86%)	364 (21.95%)	387 (23.34%)	284 (17.13%)	320 (19.30%)
Planned gifts: estates, trust distributions, annuity distribution	59 (3.56%)	56 (3.38%)	356 (21.47%)	127 (7.66%)	90 (5.43%)	965 (58.20%)
Foundation grants	123 (7.42%)	202 (12.18%)	460 (27.74%)	281 (16.95%)	242 (14.60%)	345 (20.81%)

## Appendix B

Corporate gifts or grants	77 (4.64%)	206 (12.42%)	555 (33.47%)	286 (17.25%)	149 (8.99%)	378 (22.80%)
Payroll giving	28 (1.69%)	66 (3.98%)	411 (24.79%)	138 (8.32%)	43 (2.59%)	967 (58.32%)

\*MAJOR GIFT: An order of magnitude higher than the organization's usual range of gift amount (e.g., \$1,000 if typical is \$100) and has the potential to have a significant impact on the organization.

**Approximately, what percentage of the total amount raised in contributions was for annual operations (as distinct from endowment gifts, capital expenditures)?**

	Count	Percent
None	122	7.4
1-24%	327	19.8
25-49%	137	8.3
50-74%	216	13.1
75 -100%	847	51.4
Total:	1,649	100.0

**How did the following conditions affect your fundraising efforts in FY2010, compared to 2009?**

	Decreased by more than 15%	Decreased by less than 15%	Stayed the same	Increased by less than 15%	Increased by more than 15%	N/A
Financial resources available for the development function	142 (8.66%)	187 (11.41%)	790 (48.20%)	193 (11.78%)	97 (5.92%)	225 (13.73%)
Staffing for development function	142 (8.66%)	110 (6.71%)	781 (47.65%)	176 (10.74%)	116 (7.08%)	303 (18.49%)
Volunteers assisting with fundraising	54 (3.29%)	101 (6.16%)	724 (44.17%)	327 (19.95%)	169 (10.31%)	250 (15.25%)
Other (please specify):	10 (0.61%)	7 (0.43%)	27 (1.65%)	12 (0.73%)	22 (1.34%)	521 (31.79%)

**How do you anticipate the following conditions will change in FY2011 compared to FY2010?**

	Decrease by more than 15%	Decrease by less than 15%	Stay the same	Increase by less than 15%	Increase by more than 15%	N/A
Income from charitable contributions	67 (4.10%)	134 (8.19%)	392 (23.96%)	662 (40.46%)	338 (20.66%)	43 (2.63%)
Total expenditures for fundraising	48 (2.93%)	149 (9.11%)	780 (47.68%)	449 (27.44%)	163 (9.96%)	47 (2.87%)
Development/fundraising staffing level	52 (3.18%)	55 (3.36%)	965 (58.99%)	263 (16.08%)	142 (8.68%)	158 (9.66%)

**How have your organization's gross dollars raised from government grants changed from FY2009 to FY2010?**

	Count	Percent
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## Appendix B

declined by more than 15%	179	11.0
declined by less than 15%	130	8.0
stayed the same	260	16.0
increased by less than 15%	115	7.1
increased by more than 15%	140	8.6
N/A, do not receive government grants	797	49.2
Total:	1,621	100.0

### For classification purposes, what is your primary responsibility with the organization?

	Count	Percent
CEO/Executive Director/President	625	38.6
Chief Financial Officer/Organization Treasurer	114	7.0
Executive Officer (other than CEO/Executive Director or CFO/Treasurer)	121	7.5
Fiscal/Finance (Other than Chief Financial Officer or Organization Treasurer)	26	1.6
Board Member/Board Director/Trustee	73	4.5
Development/Fundraising	547	33.8
Programs and Services	25	1.5
Communications	7	0.4
Marketing	12	0.7
Technology	2	0.1
Volunteer	12	0.7
Other (please specify):	56	3.5
Total:	1,620	100.0

### What was your organization's annual operating budget in FY2010?

	Count	Percent
Less than \$25,000	170	10.5
\$25,000 - \$99,000	195	12.1
\$100,000 - \$249,999	202	12.5
\$250,000 - \$499,999	179	11.1
\$500,000 - \$999,999	188	11.6
\$1,000,000 - \$2.99 million	296	18.3
\$3,000,000 - \$4.99 million	104	6.4
\$5,000,000 - \$9.99 million	101	6.2
\$10,000,000 - \$49.99 million	142	8.8
\$50,000,000 - \$75 million	18	1.1
More than \$75 million	22	1.4
Total:	1,617	100.0