

Nonprofit Fundraising Survey and Donor Survey

about Charitable Gifts in the United States, 2018



Nonprofit Research Collaborative

Nonprofit Research Collaborative Sponsors



For permission to cite

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Melissa S. Brown, manager and co-founder of the NRC
Sean Taylor, project management and website design.

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July 2019

Dear Reader,

This issue of the Nonprofit Fundraising Survey covers “interesting times,” especially for the United States. We asked the same questions we have asked twice a year since 2011 and found that **2018 ended with higher funds raised at 63 percent of survey participants.**

This is the **same result that we found for funds raised in 2017.** We were surprised, because of concerns throughout 2018 about changes in the tax law for Americans and a volatile stock market that ended the year down from prior years. We looked specifically at

- a) Comparison of AMOUNT raised for FY 2018 compared with FY 2017; and
- b) Whether an organization met its fundraising goals.

We also found that **73 percent met their fundraising goals.** Another study in the field at the same time also concluded that a significant majority (80 percent) met or exceeded fundraising goals for 2018.¹

To explore the potential tax implications for donors in 2018, we worked with Melissa S. Brown & Associates (MSBLLC), the NRC management partner, to survey a random sample **of U.S. individuals who are in charge of the financial decisions in their household.** With more than 800 responses, MSBLLC found **75 percent of respondents said they gave something to charity in 2018,** which included in-kind gifts to resale charities.²

Of the individuals who gave to charity in 2018:

56 percent said they did not change their giving amount from 2017.

33 percent said their giving was higher than in 2017.

11 percent said they gave less.

1 Povaado, 2019 Fundraising Productivity and Effectiveness Report. Salesforce.org. Accessed April 15, 2019. <https://www.salesforce.org/nonprofit/fundraising-productivity-effectiveness-report-download/>

2 This percentage of donors as part of the general population is in line with national results from other research, albeit higher than the most recent results from the Philanthropy Panel Study (fifty-five percent gave \$25 or more).

The NFS has participants among the largest organizations, those with operating budgets above \$50 million and hundreds in the smaller categories, such as organizations with operating expenses of less than \$1 million or from \$1 million to \$3 million. **Throughout ALL size groups, at least 60 percent reported increased receipts** from fundraising activities compared with 2017.

Giving USA will have estimates of total 2018 giving available in June 2019, but results based on tax returns will not be available until 2021. In the meantime, we have some limited information that **the majority of people in this survey believe that they gave the same amount in 2018 as in prior years** and the majority of surveyed organizations say they raised more, even if it was just 1 percent more, than they did in 2017.

This document presents results for individual donors who participated in an online survey fielded in March 2019 using a random panel of people identified by Survey Monkey to represent financial decision-makers in American households. We **follow with the results from a convenience sample of nonprofit organization in the U.S.** based on a survey open in February and part of March. Our coverage for organizations **includes reported changes in amounts raised by fundraising method or vehicle.**

A noticeable difference compared with last year at this time is a **reduction in the share of organizations seeing growth in direct mail giving**, from over 50 percent for all of 2017 down to 41 percent for all of 2018, which is the lowest share of organizations reporting growth in direct mail contributions since 2010. We also note that charitable receipts from most other fundraising methods stabilized around the rates observed from 2016 and 2017. This is consistent with what donors said, that they held giving the same.

We asked organizations about specific steps they take to raise funds, such as identifying donors who have given frequently, tracking certain metrics, and other tactics. More than half of the charitable groups in this study used each method except benchmark. **Only reviewing data to identify donors with strong interest in the group linked to a higher chance of meeting fundraising goal.**

This edition of the NFS also asked about the **frequency of contact with donors after the first gift in a year.** On average, organizations send about 3 more appeals by mail, an average of 4 appeals by email, and invitations to events, including stewardship/ recognition activities. The activities strongly associated with meeting goal are **stewardship communications that explain the impact of a gift without asking directly for more financial support.**

Thank you for your interest in what works in fundraising.

Section One: Tax Law Implications



What donors said about the tax law impact on their giving

We asked donors in a random sample:

A) The level of knowledge they had about their deduction status during 2018.

Options were:

- i) Knew for sure,
- ii) Didn't know at all, or
- iii) Had a suspicion but were not sure

B) How their giving changed, if at all, in 2018 compared with the prior year.

C) What they did or intended to do about deductions for the 2018 tax year when they filed returns in early 2019. Options were:

- i) Itemize deductions for sure.
- ii) Standard deduction for sure.
- iii) Didn't know yet.

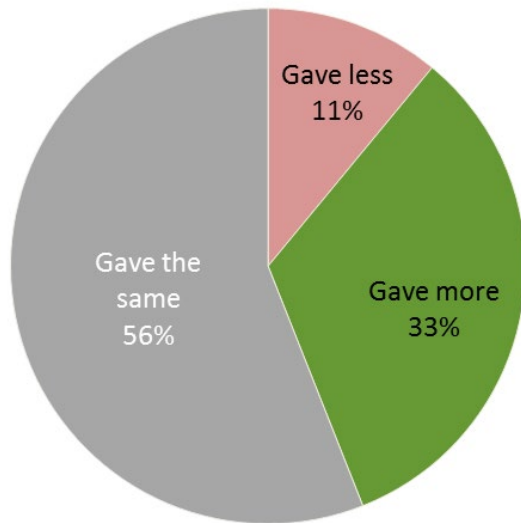
These three questions permit comparison of those who did know and did claim itemized deductions with those who knew in 2018 that they would claim the standard deduction.

A majority of donors report giving the same as in 2017; very few report giving less.

Nearly 6 in 10 (56 percent) said they gave more in 2018 than they did the prior year. **We did not ask how much people gave**, only about how their giving in 2018 compared with 2017.

Figure 1: Reported change in charitable giving in 2018, compared with 2017

Random sample, U.S. financial decision makers
N = 640



From comments entered, we know that at least some of the people give very modest amounts; yet others say they tithe and provided income levels of \$100,000 and up. The survey is representative by U.S. income level (see Appendix A for demographics).

Women and men were equally likely to report holding giving level in 2018. (Table 1). Similarly, there was no **statistically significant difference by gender reporting plans to change charitable giving in 2019.**

Table 1: Reported change in charitable giving year-on-year, by gender

		Giving in 2018 compared with 2017*			2019
Gender	n =	More	Same	Less	Will change
Men	331	32%	54%	11%	17%
Women	310	32%	55%	10%	15%

*Rows do not add to 100% because they exclude "I don't know"

People of **across income groups were equally likely to report keeping their giving the same.** The differences in Table 2 are not statistically significant.

Table 2: Reported change in charitable giving year-on-year, by income range

		Giving in 2018 compared with 2017*			2019
Income/year	n=	More	Same	Less	Will change
>\$75,000	262	32%	57%	9%	14%
\$50,000-\$74,999,	167	27%	57%	13%	19%
<\$50,000	210	34%	50%	10%	17%

*Rows do not add to 100% because they exclude "I don't know"

Early career individuals (ages 25-45) were the most likely to increase giving in 2018



By age range, **individuals from 25 to 45 years old were more likely than those 65 years old or over to report that they gave more in 2018**. This might be **due to income changes**, in addition to tax considerations. People 45 years old or more held giving steady more often (58%) compared with just half (50%) of people less than 45 years old. (Table 3)

Table 3: Reported change in charitable giving year-on-year, by age range

Bold green value is larger than the values in the same column that are indicated by the arrow. *Italic grey* value is smaller than the values indicated by the arrows.

Arrows denote values that are statistically significantly different from the **bold** or *italic* value.

Age range	n=	Giving in 2018 compared with 2017*			2019
		More	Same	Less	Will change
< 25	40	30%	50% ↑	9%	20% ↑
25-45	233	39% ↓	50% ↑	9%	19% ↑
45-64	252	29%	58% ↓	10%	16%
65+	112	23% ↓	61%	13%	8% ↓

*Rows do not add to 100% because they exclude “I don’t know”

16% say they will change their charitable giving next year

We also asked if individuals **intended to change their giving in 2019 based on anything they had learned about the tax law**. About one in seven (16%) said they plan some kind of change. Although we did not ask about how people intended to change their giving, some offered comments, that illustrate the dual impact of the tax law: some plan to give less and others intend to give more.

Intend to Give Less in 2019

“I may not give to some of the smaller charities next year.”

“Once I’ve completed my 2018 taxes, I may end up reducing my 2019 charitable giving because it may not benefit me from a tax standpoint in 2019.”

Intend to Give More in 2019

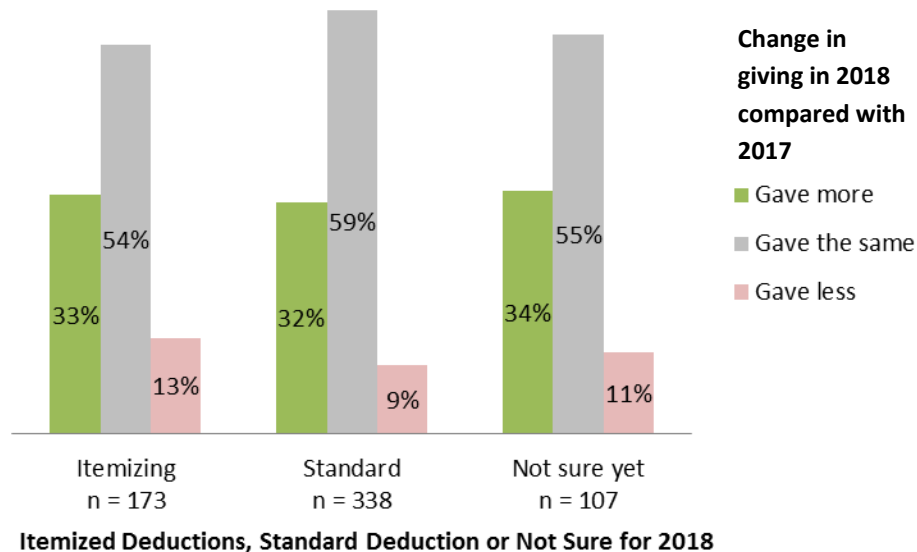
“Will be giving more due to increased income, and due to calculating donations on gross income instead of net income”

“Yes, will give more because of more expendable income”

No statistically significant difference in giving changes based on reported tax deduction status

Reported changes in charitable giving, based on the deductions claimed on tax returns filed in spring 2019 were distributed in a very similar way: the majority said they gave the same amount in 2018, compared with 2017.

Figure 2: Most held giving steady across all types of deduction statuses as of spring 2019



However donors who knew in 2018 that they would itemize were more likely to give more

In 2018, when people made gifts, they might or might not have known what their deduction status would be when filing tax returns. We asked specifically about the knowledge or suspicions people had in 2018 about the type of deduction they would take. A cross-tabulation of actual deduction status with knowledge of that status when gifts

were made shows that people who knew in 2018 that they would itemize for 2018 were more likely to report increased giving (22%) when compared with people who knew they would take a standard deduction (14%). These results are statistically significantly different, as shown in Table 3.

Table 4: Among itemizers, 22% said they increased giving compared with 14% taking standard deduction

		Deductions taken in 2018		
		Itemized, n = 172	Standard, n = 336	Not sure yet, n = 107
Said they knew tax status at time of giving				
Change in giving	Increased	22%	14%	8%
	Same	27%	28%	8%
	Decreased	8%	3%	3%
Didn't know tax status				
Change in giving	Increased	5%	14%	14%
	Same	21%	20%	30%
	Decreased	2%	4%	4%
Suspicion about tax but not certain				
Change in giving	Increased	6%	4%	11%
	Same	6%	11%	18%
	Decreased	3%	2%	4%
		100%	100%	100%
Totals as in Figure 1				
Increased		33%	32%	33%
Same		54%	59%	56%
Decreased		13%	9%	11%



Statements people made about their giving, taxes, income, and more

People could write in anything they wanted to tell us about their giving. Of the 640 respondents, 48 percent wrote something. Nearly 3 in 10 (29 percent) wrote about **changing the amount given because of a change in discretionary income**. Most of those who indicated a change in income wrote of a new job with higher earnings or receiving a raise. Quotations follow.

“I donate 10% of my income to charity - if my income increases so does the amount I contribute. Not all of donations made are tax-deductible, though a large proportion are.”

“Pay was higher so I was able to give more.”

“I do not base my giving on taxes. I base my donations on the amount I am financially able to give in a given year.”

“I gave less because my expenses went up.”

44 percent said they because they are moved to give by reasons other than taxes.

This includes people who tithe to their congregation.

“I understand the tax implications of giving but that has nothing to do with how much I give. It is about helping when I can.”

“I don’t give to get money off taxes. I give because it feels good to help.”

“We give because we feel it is the right thing to do.”

“I made charity distributions to help other people.”

“I give a tenth of my income to my church.”

Thirteen percent wrote explicitly that they do not take taxes into consideration.

“My giving is not dependent on the tax deduction, and has stayed relatively constant over the years. I budget my giving, and give to the same causes every year.”

“Don’t care about it on my taxes I don’t itemize”

Eleven percent wrote that tax implications did or will affect their charitable decisions, with most of those indicating they will give less.

“Won’t save me anything on taxes so less likely to donate.”

“Giving more is great for the charities and for my tax break.”

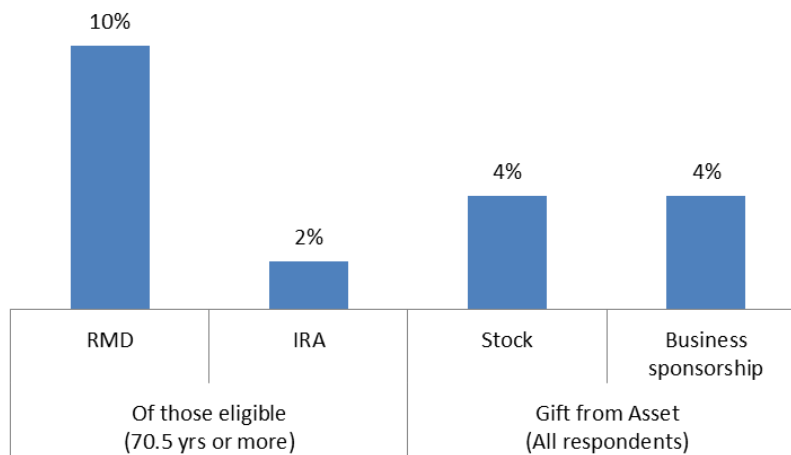
Three percent of comments were very specific, such as “My tax advisor tells me what to do” or “I gave less because I am saving for _[FILL IN THE BLANK]_.”

Nine percent made tax-advantaged charitable gifts other cash

Under the Tax Cuts & Jobs Acts people at least 70 ½ years old transfers from retirement accounts to charity are exempt income from federal income tax, including required minimum distributions (RMD) or transfers from an IRA. Donors can also give appreciated stock to a charity and avoid income tax on the increased stock value. Business owners can sponsor an activity as a marketing expense that is deducted from business income.

Among the 637 surveyed individuals who answered questions about tax-advantaged gifts, 9 percent took at least one of the options. The survey found RMDs to be the most popular among those age 70 ½ or more, as reported by 10 percent of the individuals eligible to make gifts of this type. Four percent of all donors in the study reported making a stock transfer to a charity or supporting an organization through a business expense.

Figure 3: Percentage of eligible donors reporting gifts to charity made in a form that reduced income subject to federal taxes



See Appendix ___ for age, income and geographic information about respondents.

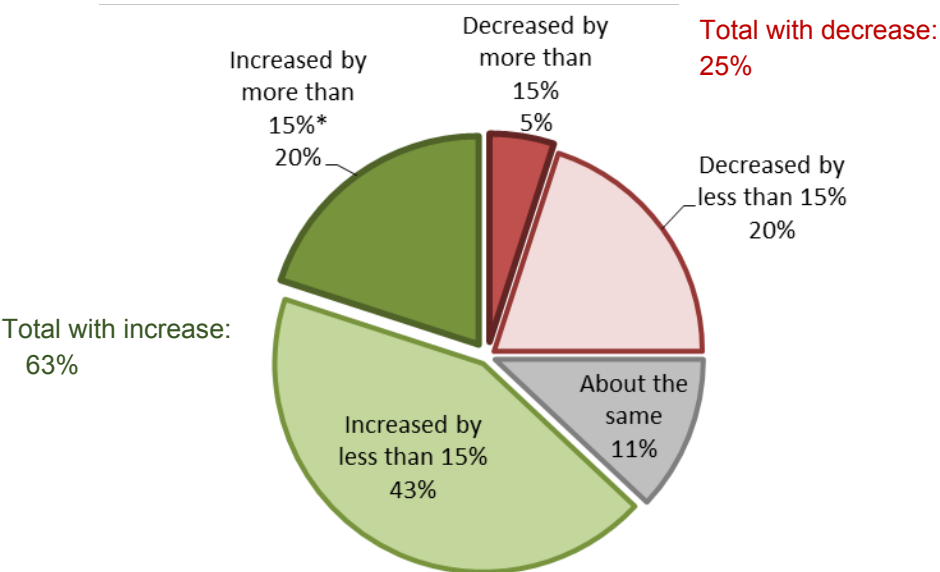
Section Two: Changes in Amounts Raised



In the U.S., 63 percent of organizations reported increased gift dollars received

This result is the same as 2017 and the **U.S. and Canada results are at very similar levels**. **Figure 1** shows responding organizations by the change in the amount raised. These are the **same percentages that reported these levels of change in 2017**. We interpret these **data to suggest that the tax law had little impact on charitable receipts for the majority of charities**. There are likely changes in the total amounts across all organizations, because of reported lower contributions to foundations and the cumulative effect of lower giving at a quarter of charities.

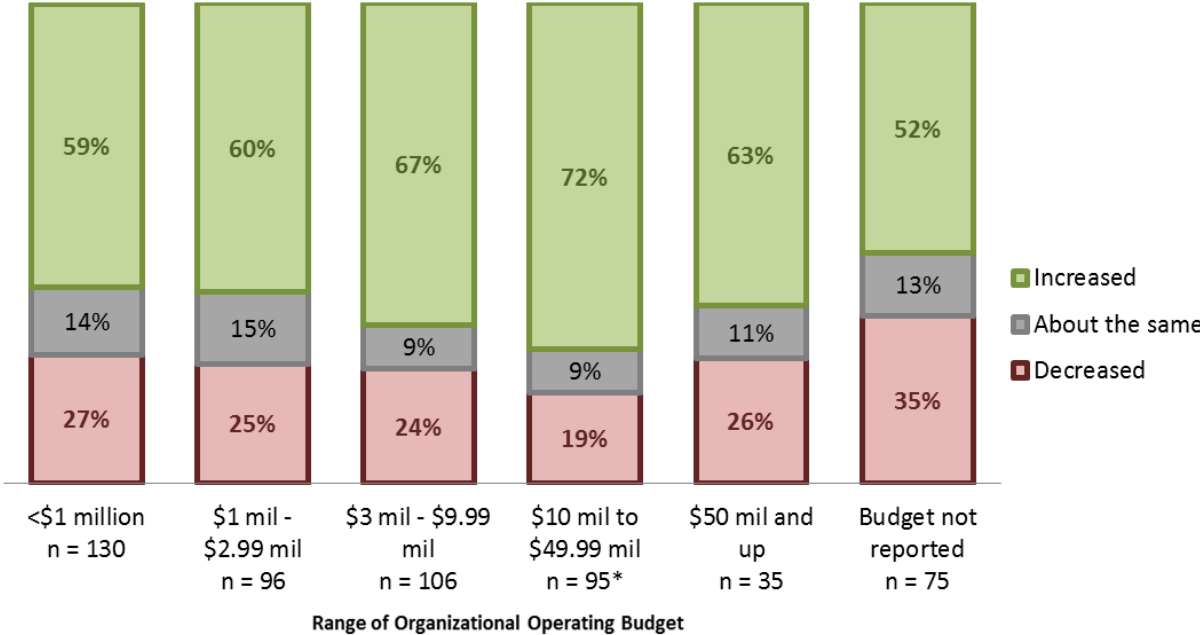
Figure 4: Percentage of responding organizations reporting change 2017 to 2018



Changes in charitable receipts differed by organization size in 2018, breaking a two-year trend.

In 2018, mid-sized organizations (with operating budgets of \$3M to \$49.99M) were more likely to report an increase in charitable giving. Increase in charitable receipts did not vary dramatically among the smallest and largest organizations in 2018.

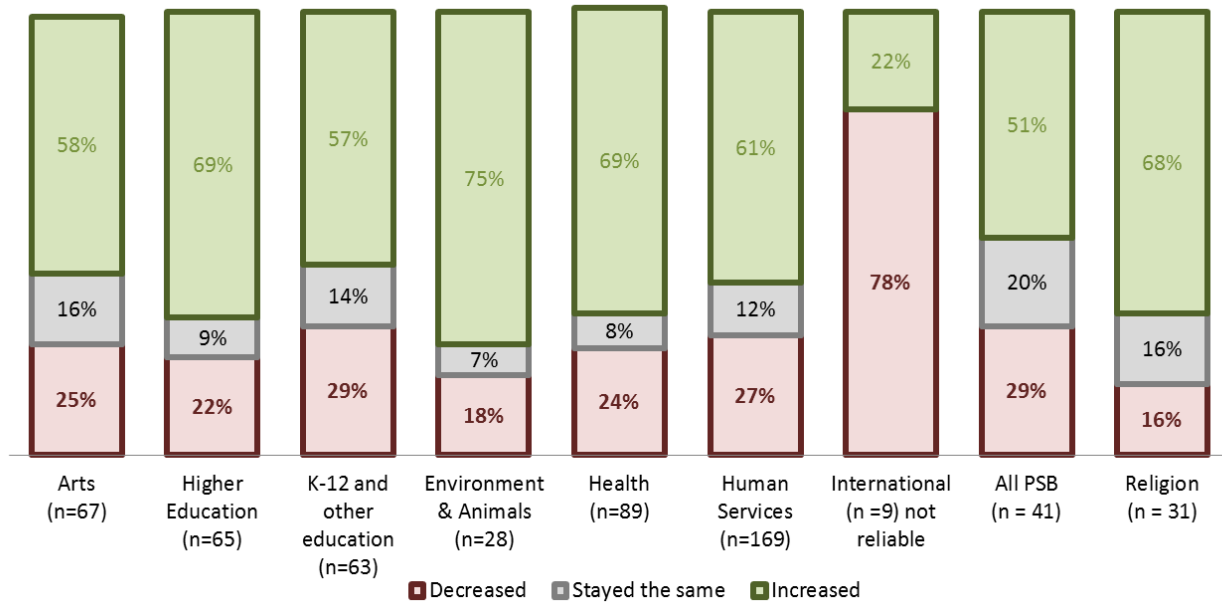
Figure 5: Percentage of responding organizations reporting change in charitable receipts by size, 2018 v. 2017



Equivalent changes in charitable receipts by type of organization and by region

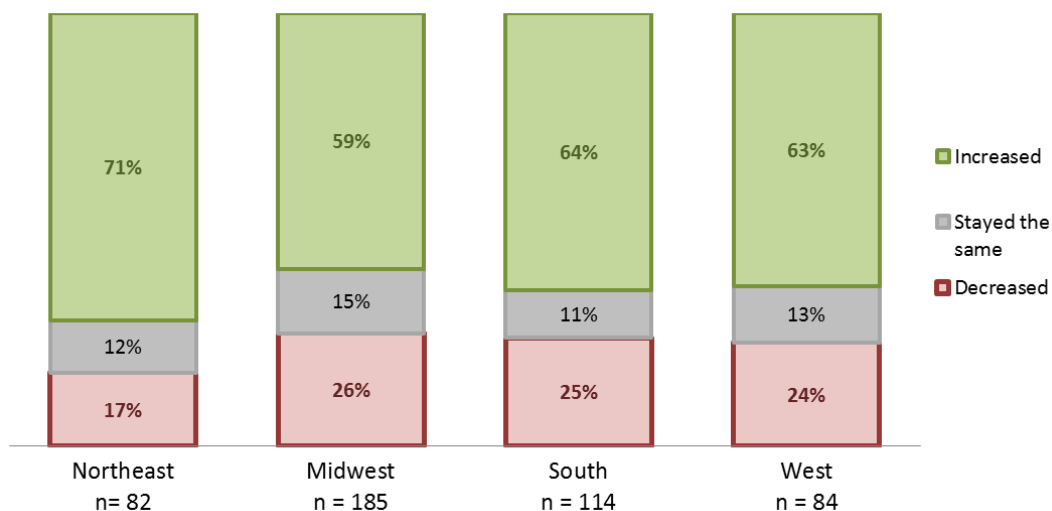
With the available data, there are **no meaningful differences by type of organization** in the changes in charitable receipts for 2018. The visible differences below are not statistically significant.

Figure 6: Percentage of responding organizations reporting change in charitable receipts by subsector, 2018 v. 2017



Note: Where the number of respondents is less than 30, results should be interpreted with caution.

Figure 7: Percentage of responding organizations by region reporting changes in charitable receipts by region, 2018 v. 2017



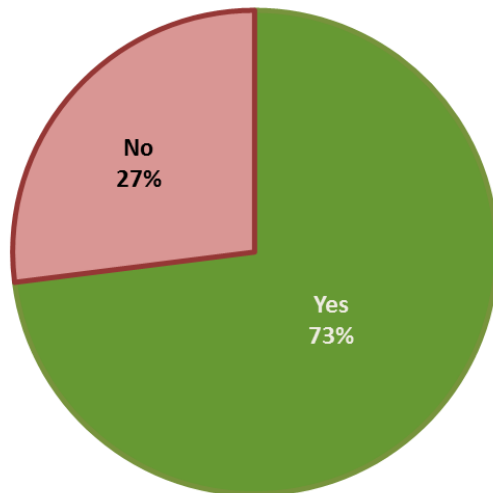


73 percent met goal in 2018, nearly the same as in 2017.

For the 2018 fiscal year, almost three-quarters (73 percent) of participants said their organization met the fundraising goal (if they had a goal). This is the same, statistically speaking, as the seventy-five percent (75 percent) who reported meeting goal in 2017.

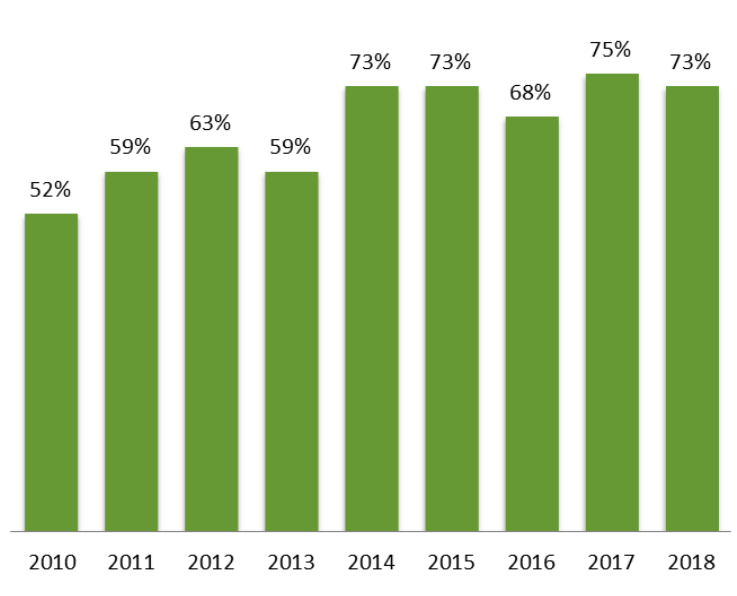
The NFS is the only annual survey that asks charities to report funds raised based on whether the organization met its fundraising goal.³

Figure 8: Did your organization meet its fiscal year 2018 fundraising goal?



³ For 2018, Salesforce.org commissioned a random sample of charities and found that more than 80% reported meeting goal. <https://www.salesforce.org/nonprofit/fundraising-productivity-effectiveness-report-download/>

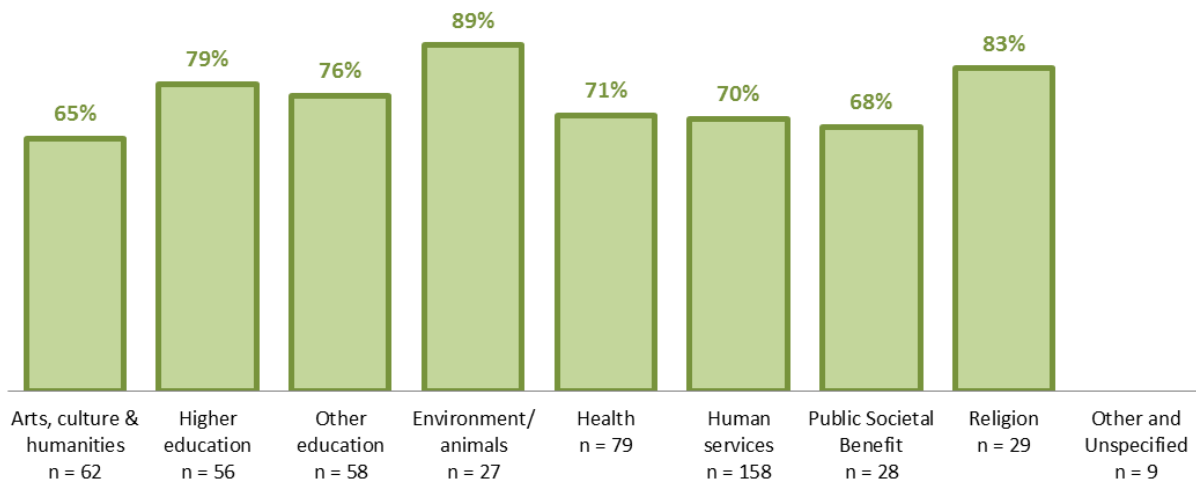
Figure 9: Trend in percentage of organizations meeting fundraising goal



Higher education organizations were most likely to meet goal.

Organizational budget (size) is frequently associated with either meeting a fundraising goal or not. For 2018, the NFS also found that **Higher Education (79%) was more likely to meet goal than Health (71%) and Human Services (70%)**. The observed difference is equivalent statistically between Higher Education and Other Education (76%) and between Higher Education and Arts, culture & humanities (65%). Subsectors with fewer than 30 responses are not analyzed.

Figure 10: Percentage of organizations meeting fundraising goals by subsector

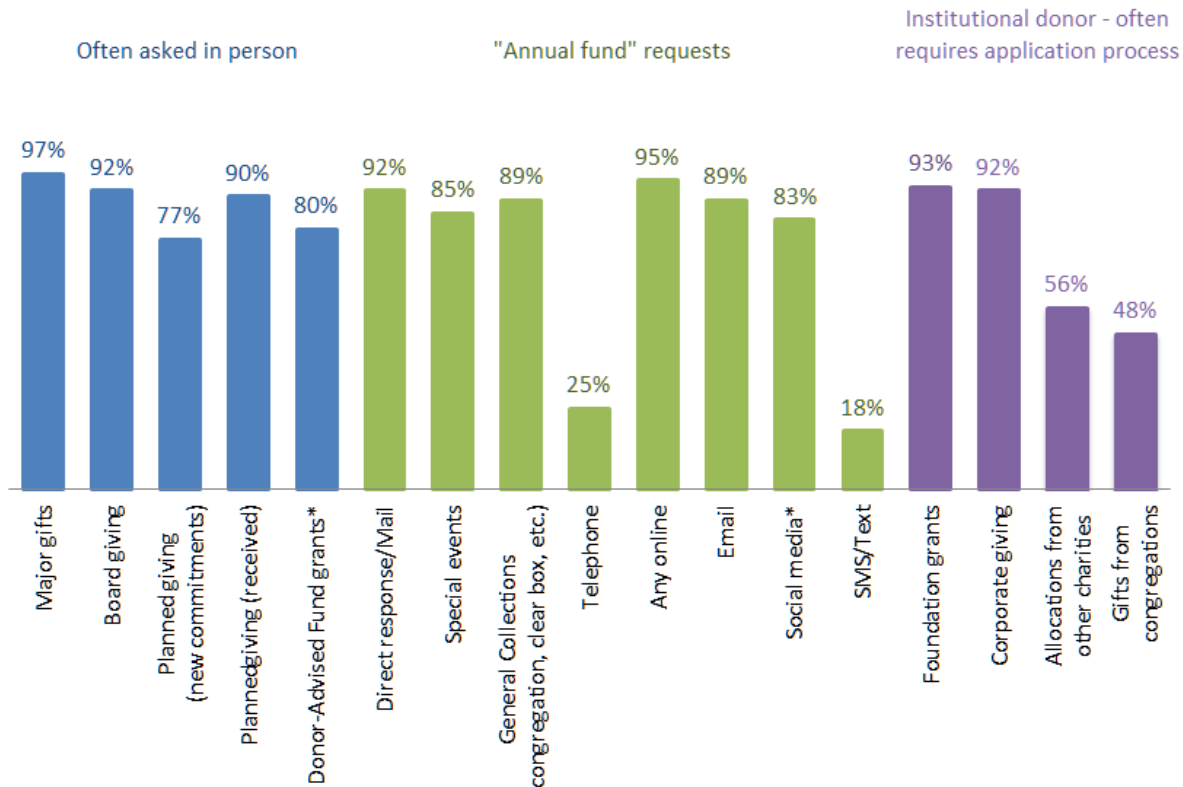


Note that Public-society benefit combines community foundations, United Way, Jewish federations, with organizations focused on economic or community development, voter registration, social policy or scientific research, and other types of organizations included according to the National Taxonomy of Exempt Entities.

Section Three: Fundraising Methods for 2018

Overall use of methods

The NRC added Donor-Advised Fund Grants as a type of receipt in summer 2018. In this first full-year result for DAFs, 80 percent of survey participants reported receiving funds via this type of transfer from one charity to another.



2018 sees growth in most “face to face” methods of fundraising.

Over **50 percent of all respondents reporting increased receipts from Major Gifts, Donor-Advised Fund Grants, Planned Giving (received), and Planned Giving (new commitments)**. Just 44 percent of respondents reported increasing the receipts from Board Giving. Compared with FY 2017, results from FY 2018 are comparable for all these methods.

This is the first year the NFS has tracked donor-advised funds. For those organizations receiving this type of transfer, 92 percent reported an increase compared with 2017.

Figure 11: Percentage of organizations reporting change in charitable receipts by most frequently used fundraising methods, methods of asking in person, 2018

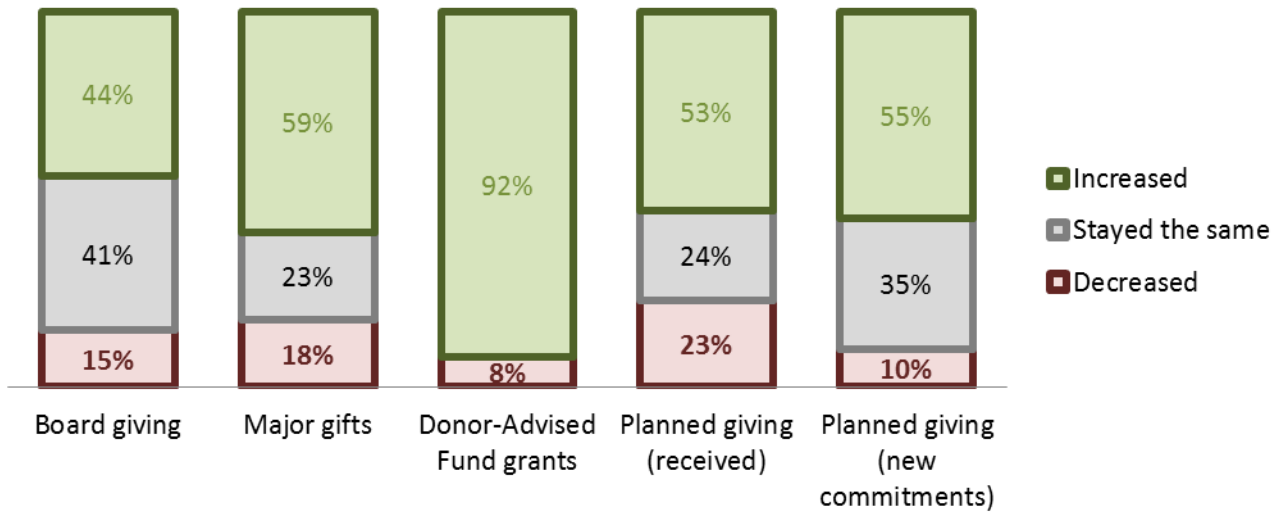
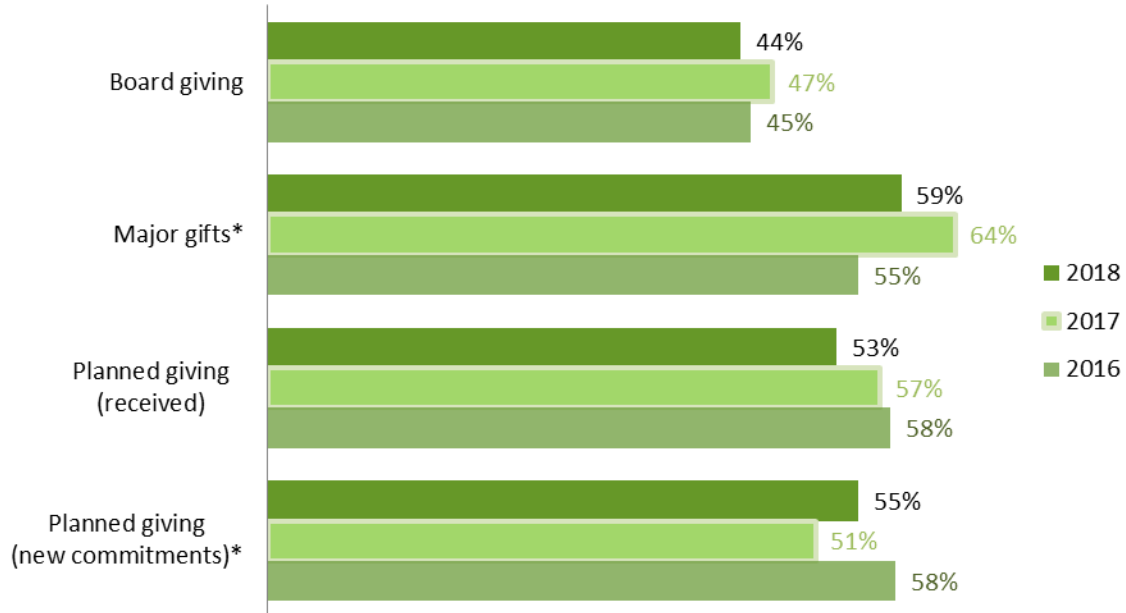


Figure 12: Trends in percentage of organizations reporting an increase in funds received from methods of asking in person



Leveling off or decline in direct response and other methods.

For 2018, just **42 percent of organizations reported an increase in funds received for direct mail**. The last time NFS reported less than 50 percent with growth from direct mail was 2012, when 47 percent of respondents said funds received increased contributions. The rates below 50 percent for cash and telephone-generated contributions are consistent with prior years, as is the 60 percent for events.

Figure 13: Percentage of organizations reporting change in charitable receipts by fundraising method, non-electronic methods of requests

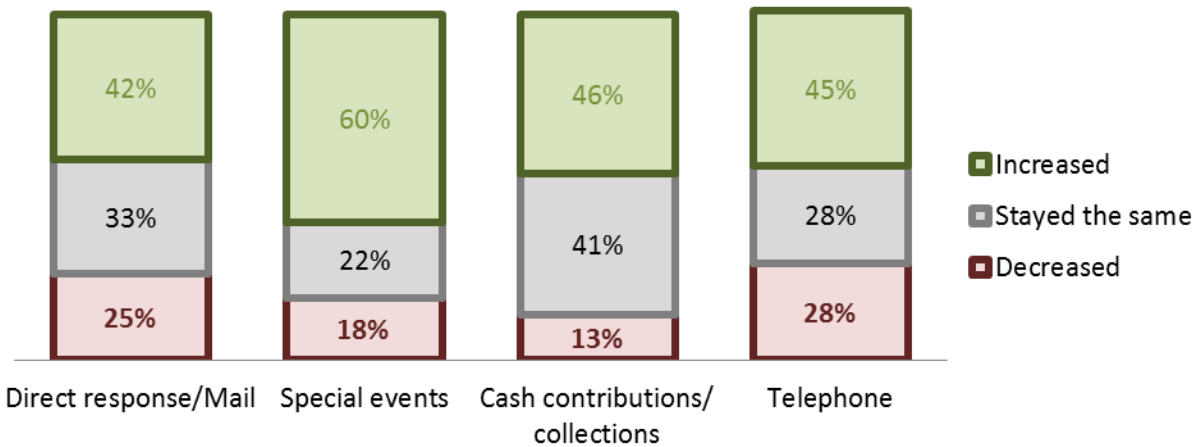
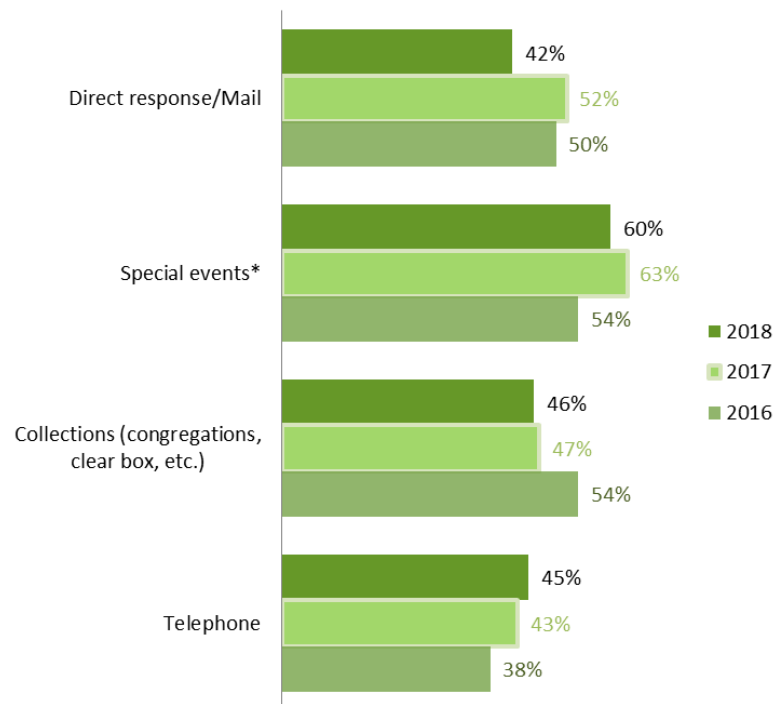


Figure 14: Trend in increase in charitable receipts by fundraising method, non-electronic methods of requests



Technology assisted methods stabilized at 2016 and 2017 growth rates except general online .

In 2018, online giving rose at 56 percent of the organizations reporting use of online fundraising, which is consistent with 2016 and 2017. General online receipts (such as from a website ‘give now’ button) increased at 59 percent of organizations using that method—which is a drop from 2016, when it rose at 69 percent.

Figure 15: Percentage of organizations reporting changes in charitable receipts by fundraising method, electronic methods

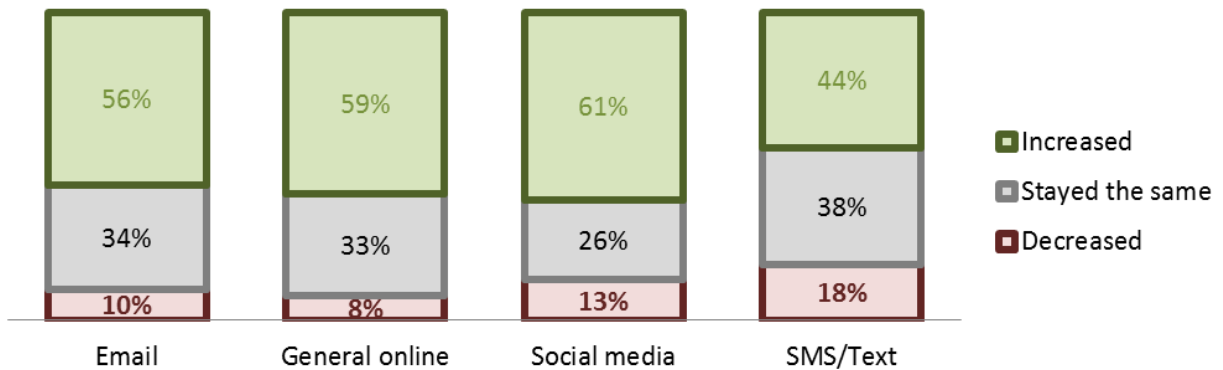
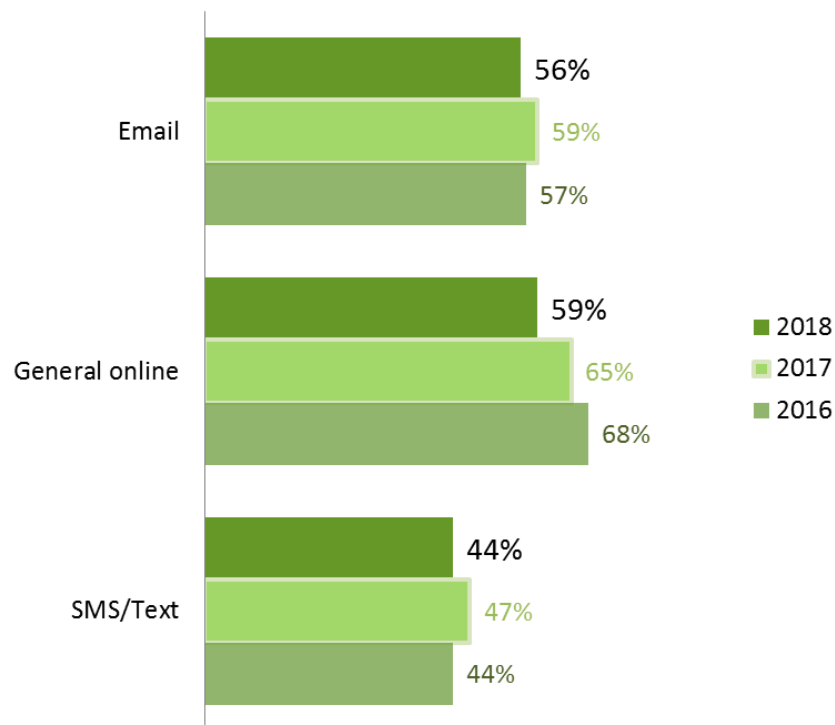


Figure 16: Trends of organizations reporting an increase in charitable receipts, electronic methods



Social media, such as Facebook Cause, was added in Winter 2018 and cannot be compared with prior years.

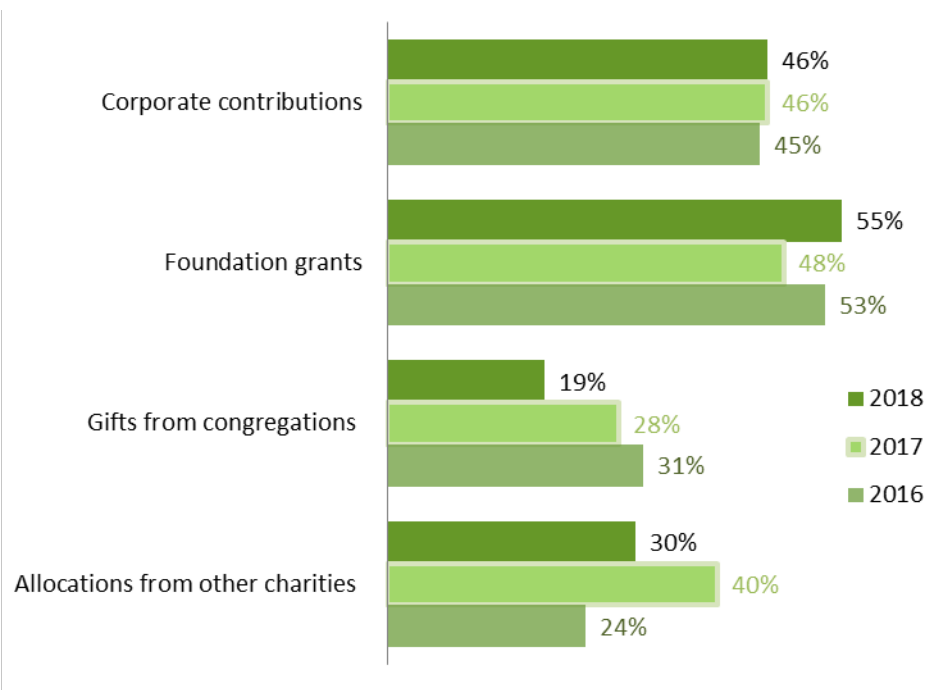
Funds received from foundations rise at 55 percent of surveyed.

Most organizations (90 percent or more) seek support from foundations and from corporations. A comparatively lower share (less than 60 percent) receive transfers from other charities (such as United Ways or Jewish federations) or from congregations. Among those using these approaches, **only foundation grants increased at a majority of charities (55 percent)**. Corporate giving was about equally divided between increasing (46 percent) and staying level (36 percent).

Figure 17: Percentage change in charitable receipts from institutional donors



Figure 18: Trends in increased charitable receipts from institutional donors, 2018



Section Four: Bequests & Planned Giving

The NFS asks several questions about bequests, including how many organizations received gifts through bequests and the average amount of bequests. This section summarizes findings about bequests from the Winter 2019 and Winter 2018 surveys.



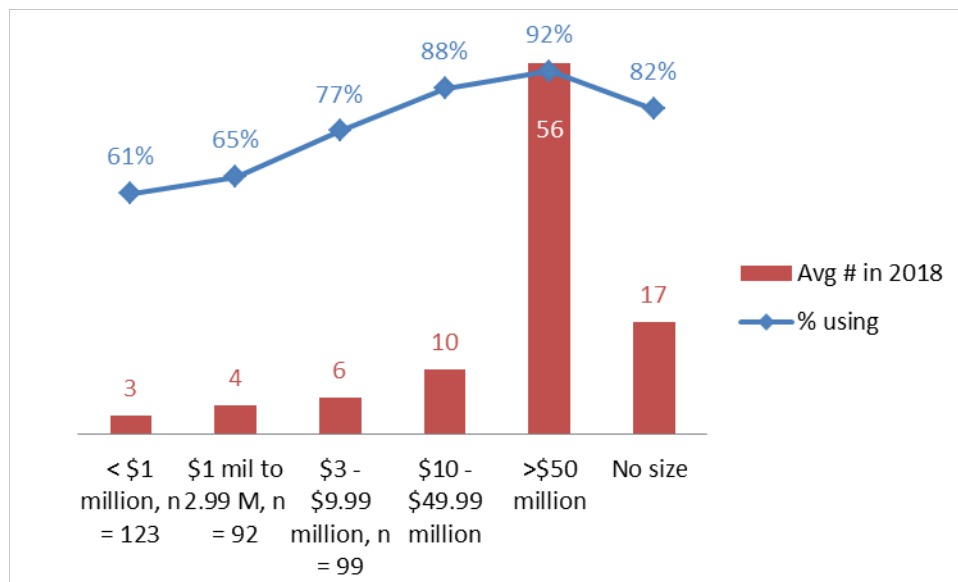
More than 90 percent of organizations receive bequests; Receipts increased at 53 percent of those receiving bequests

Of all survey respondents, 90 percent reported receiving bequests and 77 percent actively sought new planned gift commitments. Fifty-three of responding organizations reported increased planned gift receipts in 2017, which is consistent with the past three years (FY 2015, FY 2016 and FY 2017). **Fifty-five percent said they had an increase in the number of planned gift commitments received in 2018 compared with 2017.**

Organizations reported an average of 8 bequests received, with the largest organizations receiving an average of 56

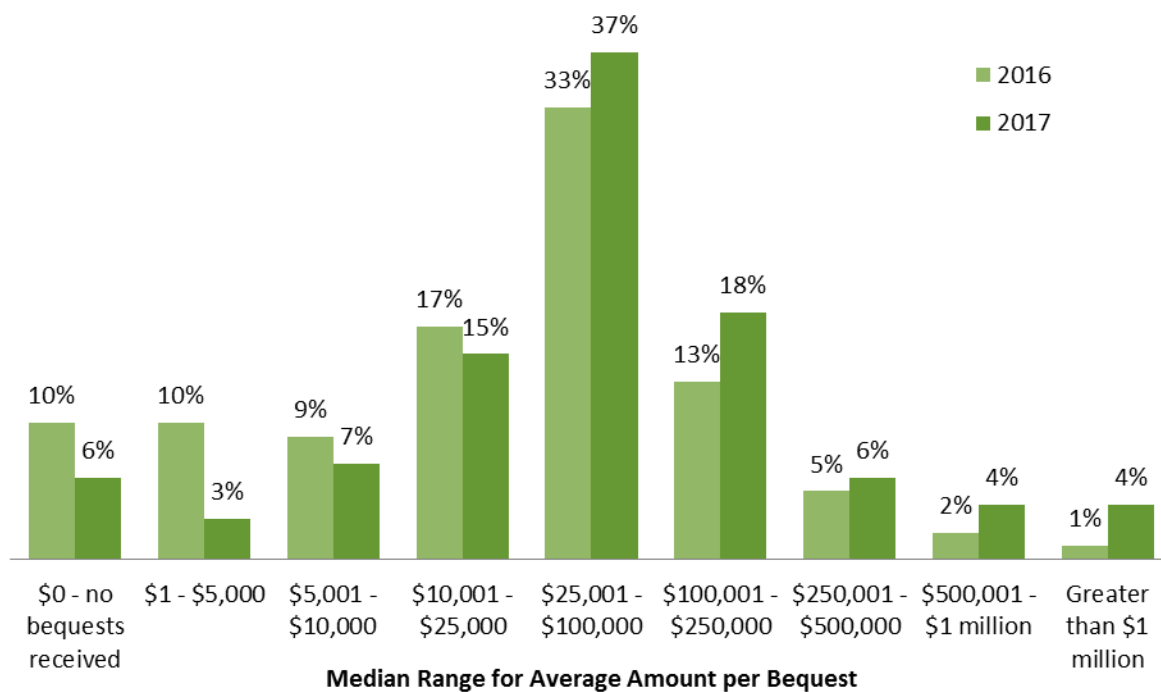
On average, organizations reported receiving funds from eight bequests in a year. The number varied by the overall organizational budget.

Figure 19: Average number of bequests received by organization size, plus percentage of organizations in size range that receive bequests at all, in 2018



Prior editions of the Nonprofit Fundraising Survey reported that a **typical bequest size was most commonly between \$25,000 and \$100,000** in both the U.S. and Canada (NRC, Winter 2018, Figure 24). Just over one-third (37%) indicated this as the average size of bequest for their organization in 2017 and 33 percent indicated that range for 2016. The NFS covering 2018 did not ask the same question about amount.

Figure 20: 2017 and 2016 data for amounts received by bequest



Selected comments about receipts of planned gifts

“We expect to launch a planned giving initiative, though this will not affect the bottom line immediately.”

“3 large gifts are expected in 2019 - but it takes a LOOOOONG time to work through the lawyers and courts to actually receive the funds”

“Not all bequest gifts are tracked as bequests.”

“Planned and estate giving have been down for us the past few years, some of which can be attributed to us no longer fundraising in support of a nonprofit hospital, due to the hospital's sale/conversion to a for-profit.”

Section Five: Fundraising Readiness & Stewardship Capacities

The Winter 2019 wave of the Nonprofit Fundraising Survey included questions about fundraising “readiness” based on some commonly recommended practices and asked about stewardship and frequency of contact for a “typical donor.

For readiness, we asked which activities the organization does “routinely,” which we specified was once every three months or more often. **Only one of these is associated with a greater probability of meeting goal: Reviewing data to identify donors indicating a strong interest** (see Table 5). Results show that at least half of organizations use most of these strategies, with the exception of using benchmarks.

Major gift strategies

- ★ 70% review data to identify donors who indicate strong interest through their gifts and actions
- 57% assign major gift prospects to a specific staff member for further engagement and cultivation.

Annual fund/direct marketing strategies

- ★ 67% evaluate renewed and lapsed donor records.
- 57% review segmentation strategy for email and mail appeals.
- 48% Monitor trend data such as response rate and average gift amount (over time, not per appeal).

Assessment of ROI for direct response

- 63% assess the responses to emailed pieces (click/open rates, gifts received, amount raised compared with amount spent).
- 60% assess the return on investment of mailed pieces (amount raised compared with amount spent).

Use of metrics and benchmarks

- 23% review an external resource, such as the Fundraising Effectiveness Report, to benchmark the organization’s retention and upgrade rates.

We then looked closely at whether organizations were more or less likely to meet their fundraising goal depending upon which methods they use.

Table 5: Percentage using tactic based on whether the group met goal or not

MAJOR GIFT TACTICS	Met Goal	
	Yes	No
Review data to identify donors with strong interest	63%	52%
Assign major gift prospects to a staff member	49%	49%
ANNUAL FUND/DIRECT RESPONSE		
Evaluate lapsed donors	59%	53%
Segment mailing lists	47%	49%
Monitor trend data	42%	35%
ROI FOR DIRECT RESPONSE		
Assess responses for email	54%	53%
Track ROI for direct mail	51%	48%
EXTERNAL BENCHMARKING		
Review external resource	20%	17%

Only “use of data to identify donors with a strong interest” was different with statistical significance for those who met goal compared with those who did not. “Evaluating lapsed donors” and “monitoring trend data had p values < .10.” It is possible that with more respondents these would also appear as significant differences.

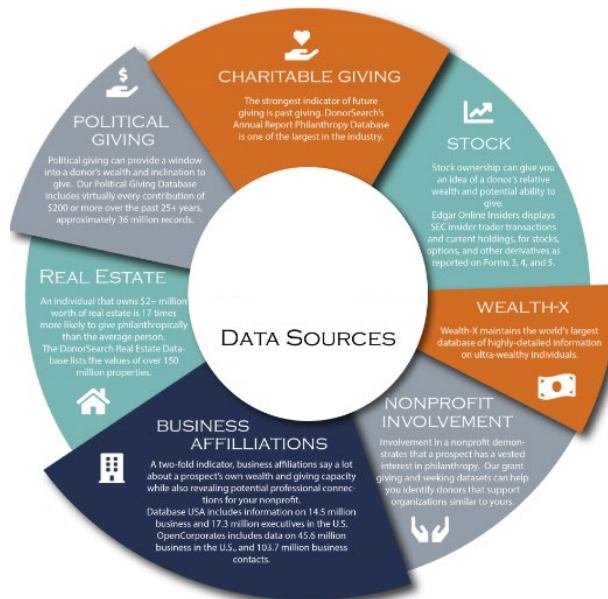


Image from DonorSearch.net. DonorSearch sponsors APC and is a member of the Giving Institute, the affiliated organization of Giving USA Foundation.

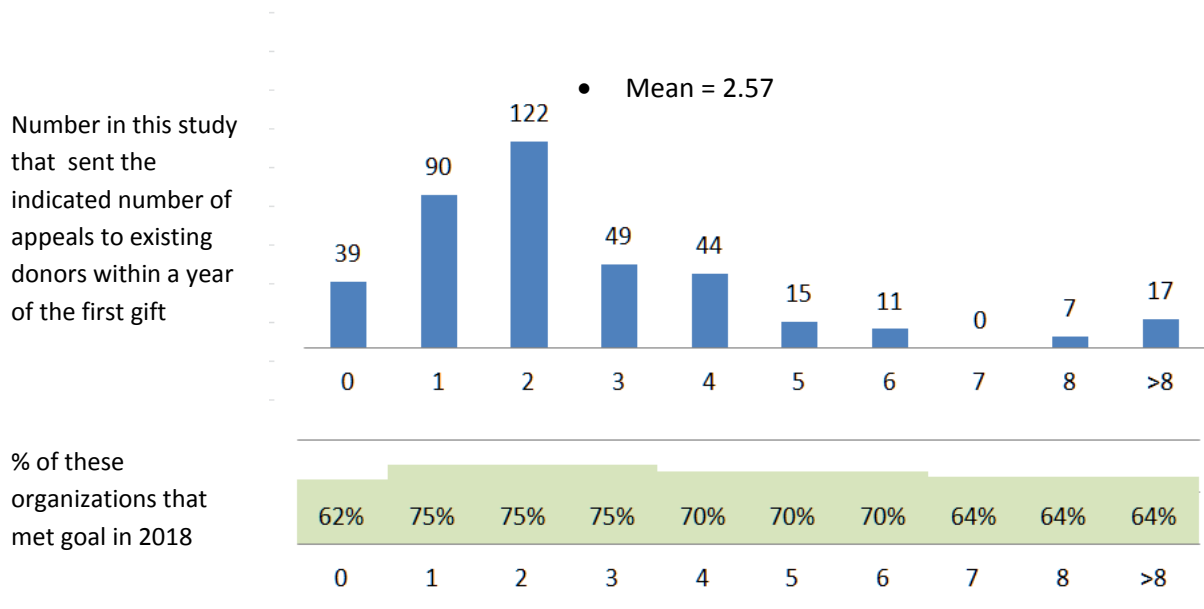
Frequency of contact with donors including appeals and stewardship

We asked about the number of appeals, communications, and event invitations donors would receive in a year. With the exception of stewardship communications, discussed below, there are no differences in the averages reported based on the budget size of the organization. There is a **trend, although not statistically significant**, that organizations that met goal were more likely to have a mid-range (near the average) of appeals and a higher number (above the average) of stewardship communications (see Table 6 on page 4). This is a preliminary finding that needs additional research with a random selection of a large number of charities before conclusions can be drawn with certainty.

Appeals by Mail

On average organizations of all sizes sent 2.57 additional appeals within a year after the first gift. More organizations sent exactly two more appeals, as shown in Figure 20. While there is no statistically significant difference in the percentage meeting goal, there is a general trend in both direct mail and email that NO additional appeals and a number that is substantially above the average are both associated with a lower percentage of these respondents meeting goal.

Figure 21: Number of direct mail appeals sent in a year after the 1st gift paired with the percentage of organizations sending that number that met goal for 2018

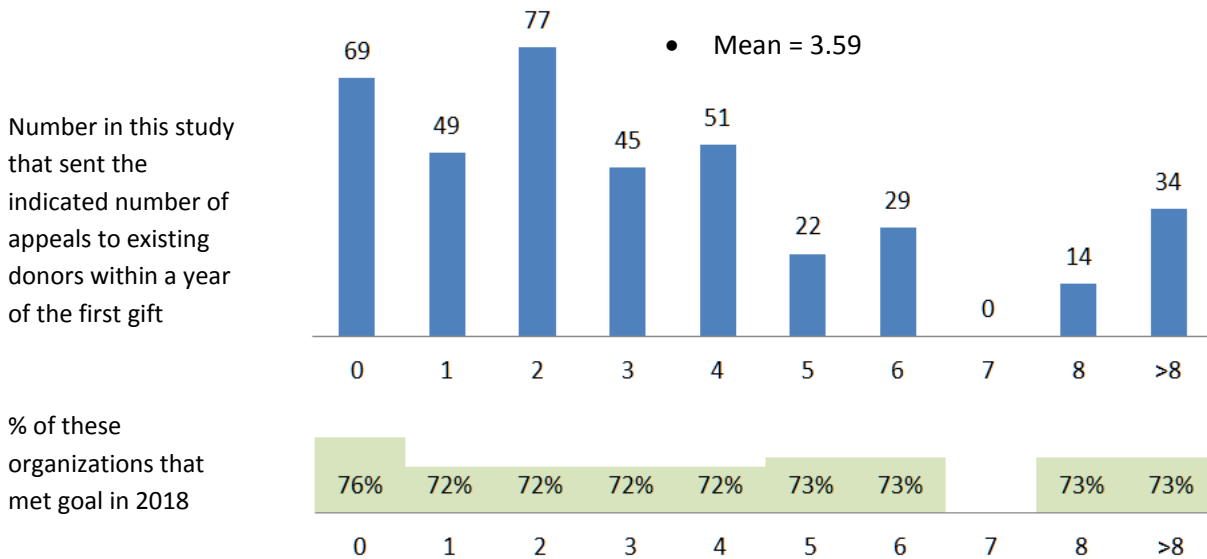


This analysis removes one outlier organization that sent 30 or more appeals after the first gift. There is no meaningful difference in the percentage that met goal based on the number of appeals sent.

Email appeals

Additional appeals by email occurred more frequently, **averaging 3.59 in the year after the first gift.**

Figure 22: Number of direct mail appeals sent in a year after the 1st gift paired with the percentage of organizations sending that number that met goal for 2018



This analysis removes four outlier organizations that sent 30 or more appeals after the first gift.

There is no meaningful difference in the percentage that met goal based on the number of email appeals sent.

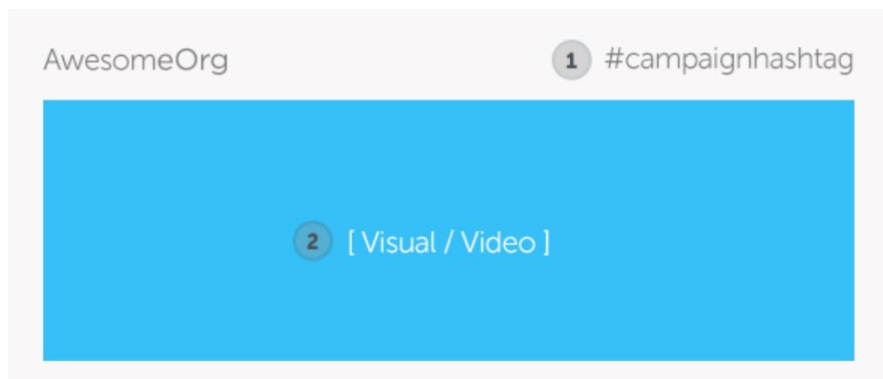
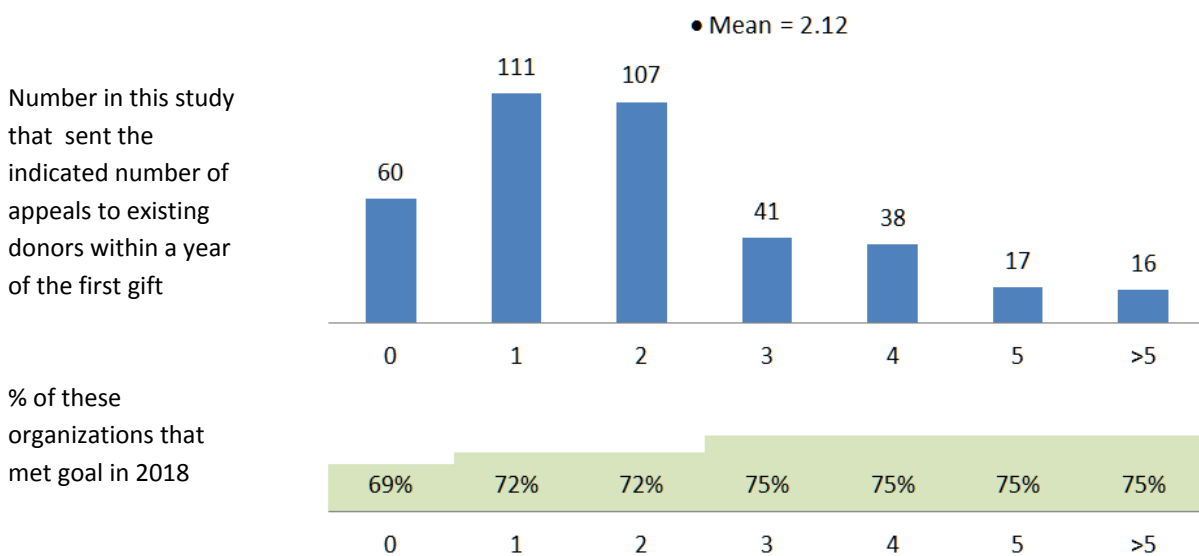


Image from Classy.org, which has no affiliation with the NRC.

Invitations to fundraising special events

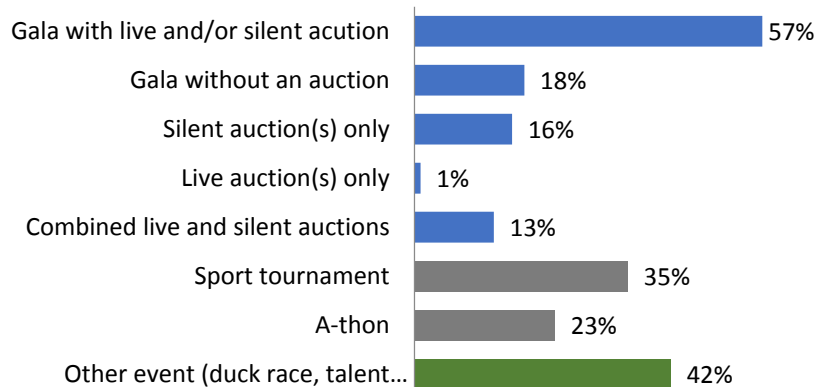
On average, participants in this survey sent just over two invitations to events to donors within 12 months after the first gift. The highest number of event invitations, after excluding one outlier, was 12. There is no meaningful difference in meeting goal based on the number of events to which donors are invited.

Figure 23: Number of fundraising special event invitations sent in a year after the 1st gift paired with the percentage of organizations sending that number that met goal for 2018



This analysis removes one outlier organization that sent 30 or more invitations after the first gift. There is no meaningful difference in the percentage that met goal based on the number of invitations sent.

Figure 24: Percentage holding type of event, AFP Special Events⁴

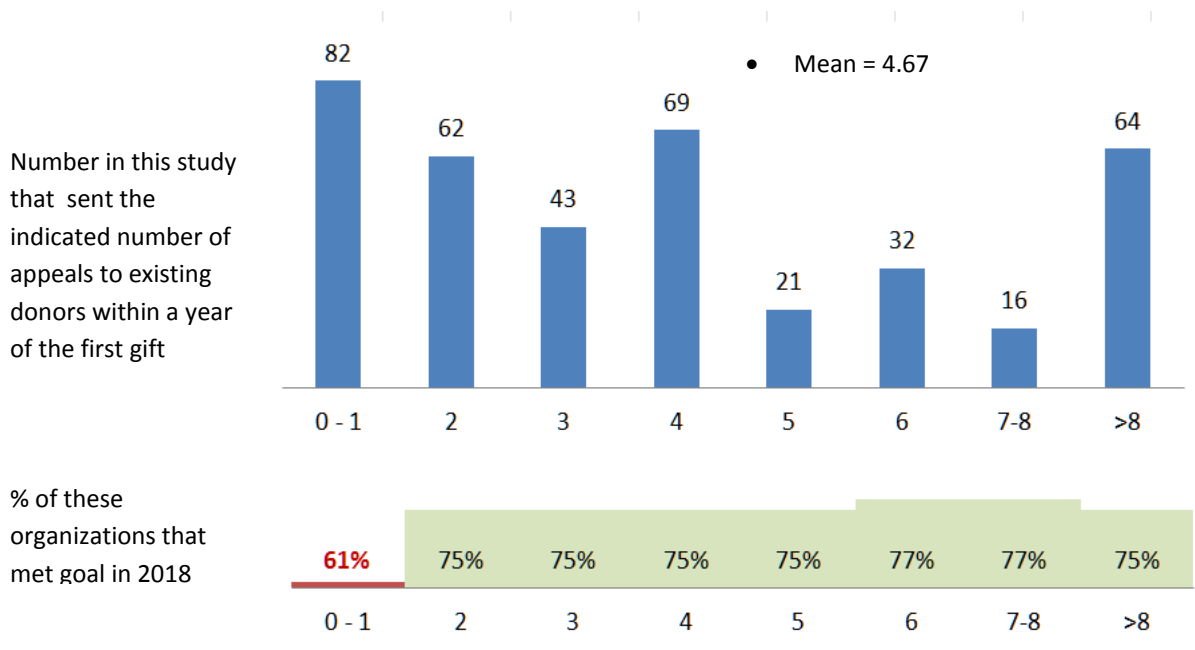


⁴ AFP Foundation, 2014 Special Events Report: USA & Canada, issuelab.org/resources/18408/18408.pdf

Stewardship communications

This question asked specifically about communications sent to donors, such as “a stewardship communication focused on the organization's work and how gifts help (but not directly asking for more giving)?” On average, **organizations in this study sent 4.67 stewardship communications** in the year after the first gift. Sending **no such communications or just one is associated with a lower likelihood of meeting goal.**

Figure 25: Number of stewardship communications sent in year after the 1st gift, paired with percentage sending that number that met goal for 2018



This analysis removes one outlier organization that sent 30 or more invitations after the first gift. The difference in the probability of meeting goal is statistically significant between sending none to 1 communication (61%) and sending any number more than one (75% to 77%)



Newsletter masthead from Second Helpings, Indianapolis, IN
Used with permission

Stewardship events for selected donors

Prior research has found that donors appreciate “special status” such as tours, invitations to meet with organizational experts and leadership, and advance knowledge of upcoming activities and events.⁵ We asked how many times a donor would be invited to a stewardship event for current donors, based on dollar amount contributed.

Figure 26: Number of stewardship events for selected donors in year after the 1st gift paired with the percentage sending that number that met goal for 2018

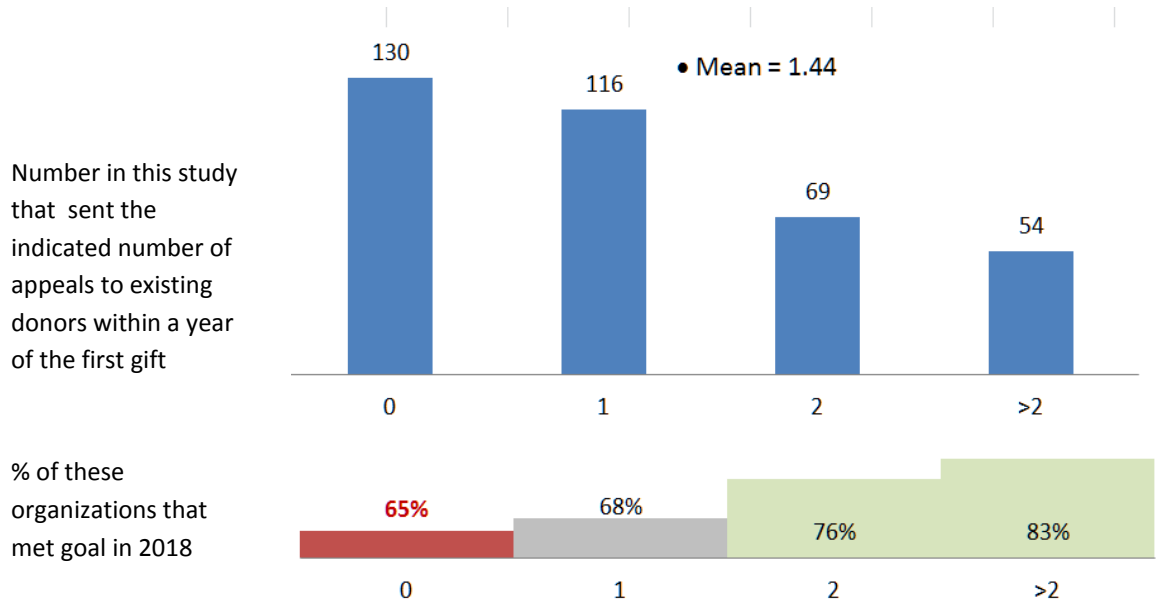


Figure 27: Percentage inviting donors, type of event, AFP > 3,700 members, 2014⁶



⁵ See, for example, Nonprofit Research Collaborative, 2014. *Special Report about Annual Funds*. https://static1.squarespace.com/static/5baac8ebe666691ace309ac7/t/5c0c47c46d2a737876d64204/1544308679388/NRC_AnnualFund_SpecialReport_July_2014.pdf

⁶ See note 4 for source.

More research needed

Across all organizations, **organizations that met goal averaged slightly fewer direct mail appeals after the first gift.** Similarly, **organizations that met goal averaged slight more stewardship activities—both communications and event invitations.** This analysis excludes organizations that reported no additional appeals or stewardship contacts and those that had more than 30 of either, which are considered outliers.

Table 6: Fewer direct mail appeals, more stewardship, on average, for organizations that met goal*

Goal	Average number of appeals by		Average number of stewardship contacts	
	Direct mail	Email	Communications	Restricted event invitations
Met	2.95	4.34	5.38	2.35
COMPARE WITH				
Did not meet	3.16	4.35	4.55	1.78
Range for number of activities for both met and did not met	1 to 18	1 to 25	1 to 25	1 to 15

*excludes groups reporting no additional appeals, stewardship communications or events and outliers reporting 30 or more of any of these

It is quite likely that organizations that know they are not on track to meet goal increase the number of appeals they send. They might consider increasing communications with donors to explain the impact of contributions without actually asking for a gift.

Section Six: Tax Code Impact as Observed at Organizations

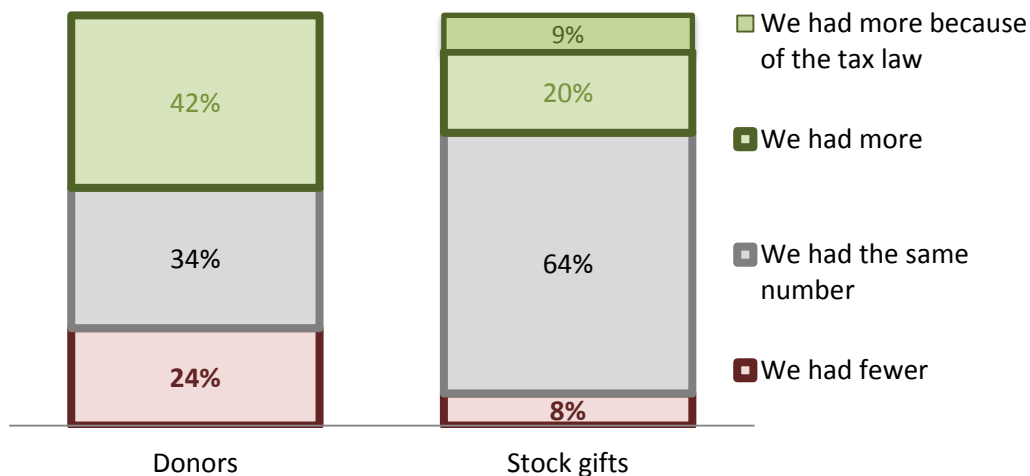
In December 2017, the Tax Cuts and Jobs Act changed the number of tax filers who would be likely to claim itemized deductions versus those who would find a standard deduction more appropriate. In addition, individuals age 70.5 or more can make a “Required Minimum Distribution” from retirement accounts directly to a charity, avoiding income tax on that amount. Under the new tax code, stock gifts maintained a tax advantaged status because the donor can avoid income tax by giving a charity appreciated stock, instead of cash.

One-quarter (24 percent) of organizations reported fewer donors and 29 percent saw increased numbers of stock transfers

Forty-two percent reported an **increased number of donors in 2018 compared with 2017** and just over one-third (33 percent) said they had the same number of donors. About one-quarter (24 percent) reported a decline in the number of donors (and 25 percent reported a decline in the dollar amount received).

Twenty percent of organizations reported an increase in the number (not dollar value) of stock gifts, and another **nine percent reported an increase in the number of stock gifts received specifically due to the tax law**.

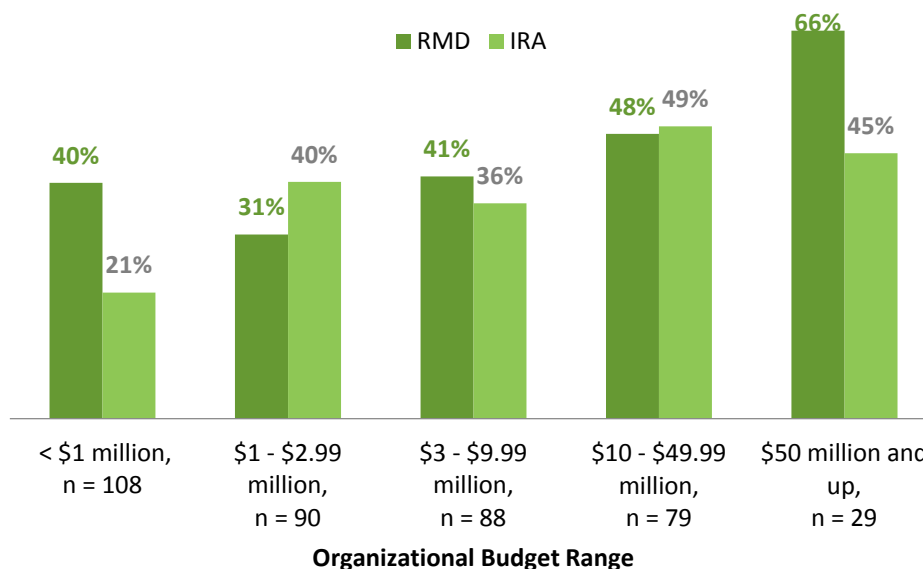
Figure 28: Changes in numbers of donors of cash and non-cash and change in number of stock gifts at participating U.S. charities, 2018 compared with 2017



About 4 in 10 organizations reported tax-advantaged gifts from donors at least 70 1/2 years old and above

Ten percent of eligible donors who were 70 ½ years old or more reported making required minimum distributions or transferred IRA assets to a charity. Forty percent of surveyed charities reported receiving gifts of these types, with the largest organizations most likely to receive these (and other) gifts. There are no comparative data for earlier years.

Figure 29: Share of organizations reporting tax-advantaged gifts in 2018, Required Minimum Distributions and transfers from Individual Retirement Accounts (IRA)



What surveyed charitable organizations observed

The survey gave participants an opportunity to comment about what they observed at their own organization about the impact of the tax law. **Thirty percent observed “bunching” or donors giving a larger amount in one year**, with plans to give nothing the following year. This tactic can help a donor accumulate enough deductions to make the itemized deduction advantageous in alternate years. **More than a quarter (26 percent) said the tax law made NO IMPACT on the gifts** (amount, number or type) that they received. **Seventeen percent reported an outright negative impact.** The following are selected comments from the 54 provided.

Saw little change from tax law

“Many of our donors are 70.5 or older and we had more direct conversations with donors about changing their annual giving to come out of their RMD.”

“At least one donor told us of his reservations about the tax law, and elected to give a larger stock gift than usual.”

“Based on many discussions with dozens of donors, we do not believe the new tax law had any kind of a negative impact. Overall, our giving was up 36% YoY.”

“More gave because of more money staying in their pocket because of the tax cuts.”

“Most donors have said that there was no impact on their giving. The stock market fluctuations had the most impact.”

Negative consequences from the tax law

“It affected the timing of their gift. Some gave more one year and not as much the other.”

“Several major donors told us they would wait until the end of the year to determine how they would give because of uncertainty over the tax law. A few others stopped giving monthly gifts and gave at one time at the end of the year because of the law changes and directed by their advisors.”

“I think the fourth quarter of 2018 was quieter than usual in terms of donor activity because of the impact of the tax law and the investment declines in December.”

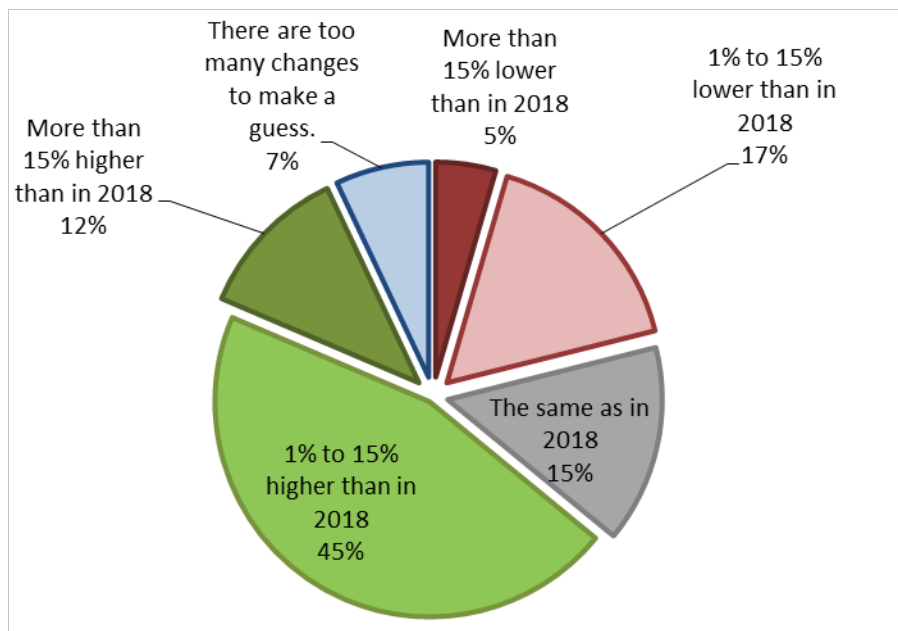
“Many donors are nervous about the impact of the tax law changes and have told us that they are reducing their charitable giving. Virtually all of our donors give < \$1,000 and state that they will no longer be itemizing and as a result feel that they have fewer dollars to give.”

Predictions for 2019

60 percent predict an increase in giving for 2019

When asked to predict the change in funds raised in 2019, a plurality (45 percent) indicated they expect 1 percent to 15 percent more than they raised in 2018. Another 12 percent expect to raise 15 percent more. A combined total of 22 percent anticipate receiving a lower amount in contributions for 2019, compare with 2018.

Figure 30: Estimated changes in charitable receipts, 2019 compared with 2018



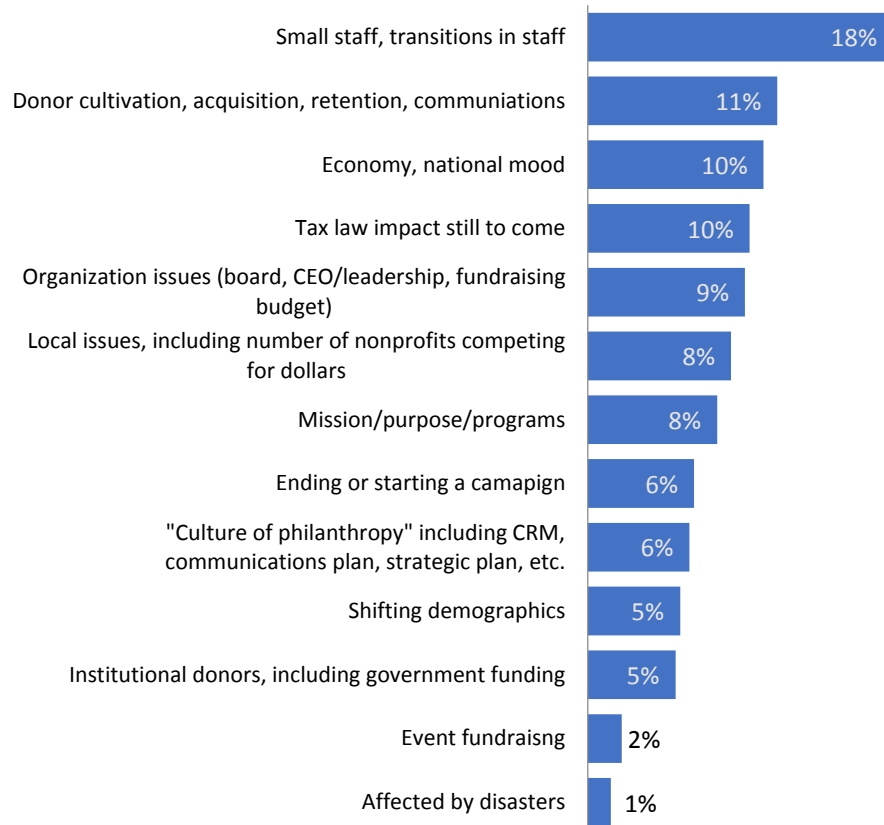
More than 360 study participants offered a comment to explain why they chose a given direction of change. When coded, these comments reveal concerns about small fundraising staff (18 percent); the importance of focusing on donors, including acquisition, cultivation, stewardship, and retention; and national-level concerns such as the economy, the political environment (including the 2020 elections) (10 percent).

One example of concerns

“We’re seeing increased giving from loyal donors, a decrease in number of donors of \$499 or less, and a lack of increased giving from mid-range donors (\$500 - \$4,999).”

Figure 31: Percentage of open-ended comments in each key theme area

N=368



Challenges for 2019

“Team is building capacity to acquire new donors. In the past, we really haven't needed to do this, because we have been heavily church supported. With that church support declining, we have to go out and find our own new donors now.”

“Individual donor amounts decreasing over concerns about changes in the economy, income tax reform (reports indicate donors who usually get healthy refunds now owe income taxes for the first time), and worries about a recession.”

“We are launching more targeted, donor-centric campaigns and dripping stewardship and stories of impact to help them understand and connect with their philanthropy. Additionally, we have shifted our focus to individual giving and using a proven framework to ensure every development team member is comfortable with a face-to-face visit. Bottom line, we are investing more resources in donor-centric communications and relationships.”

CONCLUSION

A majority (63 percent) of charitable organizations in the U.S. saw increases in charitable receipts for 2018, with one in five reporting a significant increase (more than 15 percent). **Mid-sized organizations (operating budget of \$3M – \$49.99M) were the most likely to report an increase (72 percent).**

Seventy-three percent (73 percent) of participants successfully met their fundraising goal for the fiscal year 2018. According to our sister effort with AFP, the Fundraising Effectiveness Project, this is likely **due to increases in receipts from major gifts.**⁷ The Nonprofit Fundraising Survey also finds **increased amounts received from major gift donors at 59 percent of participating organizations plus increased amounts received from donor-advised funds at 92 percent.**

Bequests continue to be an important factor, with 9 in 10 organizations reporting that they seek or receive bequests, and **over half reporting an increase in amounts received from legacies in 2018 (53 percent).**

However, **receipts from direct mail rose at only 41 percent of participating organizations, the lowest level since 2010.** This is consistent with declining dollars received from donors of \$250 or less reported by the Fundraising Effectiveness Project for 2018.⁸

A majority of donors surveyed in a random sample said they held their giving steady with 2017 levels, with about **one-third increasing the amount contributed and just 11 percent reporting a decrease.** This finding meshes with the reported percentage from the NFS that met goal (73 percent) and that raised more than in 2017 (63 percent). Donors and organizations remain uncertain about exactly what might yet change in charitable gifts for 2019. Based on this study, one thing organizations can do to help retain existing donors is prepare at least one, and even up to five or six, communications that share the type of impact a financial contribution can have, without directly asking for another gift.

⁷ Fundraising Effective Project, *Quarterly Fundraising Report*[™], Year to date nonprofit sector trends, 1/1/2018 – 12/31/2018, accessed April 29, 2019 at <http://afpfep.org/about/>

⁸ See note 7.

Methodology

The survey invitation was sent by email and through social media postings beginning on February 18, 2019. The online-only survey response remained open through March 15. Invitations were sent by email and using social media to several distinct groups:

- Prior participants in NRC surveys
- Individuals who have signed up to receive communications from NRC (sign up is at www.npresearch.org)
- Members of the Association of Fundraising Professionals (AFP) in the United States
- Members of AFP in Canada
- Individuals on the email lists maintained by CFRE International
- Constituents of consulting firms that are members of Giving Institute or members of the Association of Philanthropic Counsel
- A contact list for Melissa S. Brown & Associates

Email reminders were sent at least once, and sometimes twice or three times, to people on the email lists. By source of list, response numbers are as shown.

List source	Number Received*	Percentage of responses received	Sample size**	Approximate response rate*
Association of Fundraising Professionals	293	41%	Unknown	n/a
Association of Philanthropic Counsel	31	4%	Convenience	n/a
CFRE International	197	28%	Convenience	n/a
Giving U.S.A	79	11%	Convenience	n/a
NRC list	109	15%	1,840	6%
Other	1	.14%	Convenience	n/a
Total	715	100%		

* Includes Canada

** Where a sponsor used a mailing list with a known number, we reported the response rate based on recipients of the invitation.

The Winter 2019 Nonprofit Fundraising Survey received more than 715 non-duplicated responses representing organizations with more than \$6.6 billion in annual expenditures (including estimates from Canadian respondents about total expenditures).

Statistical Significance

The respondents form a convenience sample. There is no margin of error or measure of statistical significance using this sampling technique, as it is not a random sample of the population studied. Chi-square tests were used throughout the analysis to compare differences between larger responding organizations and smaller responding organizations. Results included here are statistically significant using that approach.

About the Nonprofit Research Collaborative

Several organizations formed the NRC. These entities have a decade or more of direct experience collecting information from nonprofits concerning charitable receipts, fundraising practices, and/or grantmaking activities. The collaborating partners are:

- Association of Fundraising Professionals, which surveyed members for an annual state of fundraising study from 2002 through 2010.
- Association of Philanthropic Counsel, an international professional association of consultants whose members survey nonprofit organizations as part of their services.
- CFRE International, which encourages research that helps fundraising professional achieve the highest standards of professional competence and ethical practice.
- Giving U.S.A Foundation, which has published the Giving U.S.A Annual Report on Philanthropy for more than 60 years.

The collaborative effort reduces the burden on charities, which 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 Nonprofit Research Collaborative (NRC) conducts surveys twice a year.

Melissa S. Brown & Associates manages the NRC.

She can be reached at Melissa@NPRResearch.org or at 530-690-5746.

Appendix A: Survey Questions

Introduction	
<p>Are you able to answer questions with knowledge about charitable receipts at and fundraising methods used by a specific U.S. charitable organization or Canadian registered charity or nonprofit that raises funds? You may respond as a volunteer, staff member, or consultant as long as you know how fundraising receipts changed in 2018 compared with 2017.</p>	Yes
	No

Your Organization	
<p>Which best describes the organization that you will use for answering questions?</p>	<p>Nonprofit organization registered in the U.S. as a 501(c)3 charity</p>
	Nonprofit organization or registered charity in Canada
	Charitable organization registered in the U.S. and in Canada
	501(c)3 private foundation (U.S.)
	Grantmaking foundation in Canada
	Group in the U.S. or Canada with a charitable purpose but not registered. Includes new charities and congregations, all volunteer-organizations that have not registered, and other types of groups.
	I am not affiliated with a charitable organization located in the U.S. or in Canada.
	Other (please specify in the text box below)
<p>What is the name and ZIP or postal code of the main office of your organization? We use this to evaluate what region your organization is in: Canada, Northeastern US, Southern US, Midwestern US, or Western US. Please note that all responses are kept confidential, and this is only for coding purposes.</p>	<p>Name:</p>
	Organization Name:
	Address 1:
	Address 2:
	City/Town:
	State/Province:
	ZIP/Postal Code:
	Country:
	Email Address:
	Phone Number:

Funds Raised in 2018	
<p>What were your organization's total gross philanthropic dollars raised in 2018 (or FY 2018 if you are answering for the fiscal year that ended in that year)? Please include gifts (funds or in-kind) that your organization received from all private philanthropic sources.</p>	Less than \$250,000
	\$250,000 - \$999,999
	\$1 million - \$2.99 million
	\$3 million - \$9.99 million
	\$10 million - \$49.99 million
	\$50 million or more
	Don't know
	Other (please specify)
<p>How did your organization's gross dollars raised from all philanthropic sources change when comparing 2018 with 2017?</p>	Dollars received decreased by more than 15%
	Dollars received decreased by 1% to 15%
	Dollars received stayed the same
	Dollars received increased by 1% to 15%
	Dollars received increased by more than 15%
	Don't know
<p>Did your organization meet fundraising goals for the year (or fiscal year) ending in 2018?</p>	Yes
	No
	We do not have a fundraising goal.
	Don't know
<p>What most affected your organization's fundraising results?</p>	Open Response

Methods: Changes in Amounts Received	
Board Giving	Gift amount received decreased
	Gift amount received stayed the same
	Gift amount received increased
	We use this method but do not track results.
	We began this method in 2018 so cannot compare with 2017.
	We do not use this method.
	Don't know
Major gifts from individuals who are not board members. A major gift is whatever size your organization determines is a major gift.	Amount received decreased
	Amount received stayed the same
	Amount received increased
	We use this method but do not track it separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know
Distributions from Donor-Advised Funds (DAFs)	Amount received decreased
	Amount received remained the same
	Amount received increased
	We receive funds in this format but do not track them separately
	We received our first-ever DAF distributions in 2018 so cannot compare.
	We do not receive funds in this format.
	Don't know
Methods: Typical Methods for Annual Giving	
Requests sent by regular mail	Amount received decreased
	Amount received stayed the same

	Amount received increased
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know
Requests sent by email	Amount received decreased
	Amount received stayed the same
	Amount received increased
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know
General collections. This could be cash or check. This could include offering plate contributions, "spare change" collection bins, or other approaches that do not fit in the above methods of direct mail or email, or in the next question about telephone appeals.	Amount received decreased.
	Amount received stayed the same.
	Amount received increased
	We use this method but do not track separately.
	We started using this method in 2018 so cannot compare with 2017.
	We do not received funds from this method.
	Don't know
Please add a comment if that would help you explain.	
Telephone appeals	Amount received decreased
	Amount received stayed the same
	Amount received increased
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know
Net proceeds from special events	Amount received decreased

	Amount received stayed the same
	Amount received increased
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know

Methods: Online, Social Media, Other “Technology Facilitated” Giving

Does your organization use "technology-assisted" fundraising methods? These would include online giving, social media requests (Facebook, etc.), Peer-to-Peer fundraising for 'athons', online auctions, sales related giving such as AmazonSmile, a "giving day" such as #GivingTuesday, Text to give/mobile giving, or crowdfunding.	Yes, we use online giving, mobile giving, or some other technology to help our donors make gifts.
	We do not have online or mobile giving but do sometimes receive gifts through a third party such as JustGive or Network for Good.
	No, we do not use any online or mobile ways for people to give.
	Don't know
	Other

Methods: Online Giving

Online gifts such as responses to "give now" on your website, gifts made due to links on a partner or sponsor organization's site, or through other channels that lead to your online giving portal (exclude gifts made in response to your organization's email appeals, if possible).	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
Don't know	

Appeals on Facebook, #Giving Tuesday, LinkedIn, Peer-to-Peer "athons" or other social media	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
Don't know	

Gifts via text message/SMS (short message service)	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
Other "technology assisted" giving - Amazon Smile, online auctions, etc.	Don't know
	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
We do not receive funds from this method.	
Don't know	
Methods: Institutional Giving	
Grants from private or community foundations	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
Corporate gifts or corporate foundation grants	Don't know
	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
We do not receive funds from this method.	
Funds from congregations or the governing bodies of faith communities (e.g. synod, diocese, association, union)	Don't know
	Amount received decreased
	Amount received stayed the same

	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know
Transfers from other charities that are not congregations or faith communities. This includes allocations from United Ways or the Combined Federal Campaign, or gifts made by giving circles or another collective giving entity.	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
	Don't know
Other (please specify)	
Method: Planned Gifts Received	
Planned gift amounts received in 2018 compared with 2017	Amount received decreased
	Amount received stayed the same
	Amount received increased.
	We use this method but do not track separately.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds from this method.
Don't know	

Bequests Received in 2018

How many bequest gifts (actual transfers of assets) did your organization receive in 2018 or FY2018? (Enter a number in digits, such as 0, 10, 10,000.)	Numerical
If you cannot say exactly how many bequest gifts your organization received in 2018 (or the fiscal year ended in 2018), please select a range from the values below. Please use your best approximation if you do not know. Answer options appear when you click the arrows.	0
	1 to 4
	5 to 10
	11 to 20
	21 to 50
	More than 50
	Don't know

Method: Planned Gift Commitments

Planned gifts: Change from 2017 to 2018 in new commitments	Number of commitments decreased
	Number of commitments stayed about the same
	Number of new commitments increased
	We use this method but do not track number of new commitments.
	We began this method in 2018 so cannot compare with 2017.
	We do not receive funds through this method.
	Don't know

Special Topic	
How often in a year would that typical donor...	Receive a direct mail appeal asking for a renewed or upgraded gift?
	Receive an EMAIL appeal asking for a renewed or upgraded gift?
	Receive a stewardship communication focused on the organization's work and how gifts help (but not directly asking for more giving)?
	Be invited to a fundraising special event?
	If qualified by dollar amount, be invited to a stewardship event for current donors?
Which of the following does your organization do routinely (once a quarter or more often)?	Review data to identify donors who indicate strong interest through their gifts and actions.
	Assign major gift prospects to a specific staff member for further engagement and cultivation
	Review your segmentation strategy for email and mail appeals.
	Monitor TREND data such as response rate and average gift amount (over time, not per appeal).
	Assess the return on investment of mailed pieces (amount raised compared with amount spent).
	Assess the responses to emailed pieces (click/open rates, gifts received, amount raised compared with amount spent).
	Evaluate renewed and lapsed donor records.
	Review an external resource, such as the Fundraising Effectiveness Report, to benchmark your organizations retention and upgrade rates.

Tax Law Changes & the Impact on Giving

<p>We are interested in exploring what might have been changes in giving related to the tax law change that took effect in 2018.</p> <p>Which of these apply to your organization.</p>	<p>We do not raise funds in the USA.</p> <hr/> <p>We raise funds in the USA.</p>
<p>Changes in Gifts Received in 2018 Compared With 2017</p>	
<p>Compared with 2017, which answer applies for 2018?</p>	<p>We had fewer donors overall.</p> <hr/> <p>We had more donors overall.</p> <hr/> <p>We had about the same number of donors.</p>
<p>With changes in tax rates and shifts in how people could claim deductions, some donors might have elected to give appreciated stock.</p> <p>For 2018, compared to 2017, which applies to your organization?</p>	<p>We saw an increase in gifts of appreciated stock and we think the tax law is part of it.</p> <hr/> <p>We saw an increase in gifts of appreciated stock, but we don't know if the tax law played a role.</p> <hr/> <p>We saw no change in gifts of appreciated stock.</p> <hr/> <p>We saw gifts of appreciated stock decline.</p>
<p>Some donors age 70.5 and over use retirement savings to make gifts. Which of these applied to your organization in 2018?</p>	<p>Donors gave as part of their Required Minimum Distribution (RMD)</p> <hr/> <p>Donors transferred funds from an IRA</p>
<p>If you have stories from donors about the impact of the tax law and how they changed their giving, please share some of the key information here. Your responses are confidential.</p>	<p>Open Response</p>

Projections for 2019	
Compared to 2018, what change do you anticipate seeing in the total amount of funds raised in 2019?	Will be more than 15% lower than in 2018
	Will be 1% to 15% lower than in 2018
	Will be the same as in 2018
	Will be 1% to 15% higher than in 2018
	Will be more than 15% higher than in 2018
	There are too many changes to make a guess.
	Don't know
Please note any special circumstances at your organization that help explain your answer to the prior question (e.g., ending or starting a capital campaign, knowing that a particular funder will or will not give in FY2019, etc.)	Open Response
What do you think will be the single biggest challenge/issue/trend to affect your organization and its fundraising in 2019, either positively or negatively?	Open Response

Your Role	
Which option best describes your primary role for the organization?	CEO or Executive Director
	Fundraising or development team member
	Finance or accounting team member
	Communications team member in a department separate from fundraising
	Program delivery-direct service team member
	Team member in an area other than one of the above
	Board member
	Volunteer but not on the board
	Other (please specify)

Organization Demographics	
What was your organization's annual operating budget in FY2018?	Less than \$250,000
	\$250,000 - \$999,999
	\$1,000,000 - \$2.99 million
	\$3,000,000 - \$9.99 million
	\$10,000,000 - \$49.99 million
	\$50 million or more
	Don't know
What is the name of your organization? We ask ONLY to remove duplicate entries.	Open Response
What is the main mission category in which your organization works?	Arts, Culture or Humanities - museums (including science museums), performing arts, cultural centers, entities to support or preserve cultural heritage or language, public broadcasting, nonprofit publishers.
	Citizenship/Civic Action - voter registration, civil rights advocacy, community or economic development, support for recognized groups based on identity or military service but not related specifically to health or human services. Also includes mutual benefit organizations.
	Higher Education - community college, college, or university; college preparatory program; or college scholarship program. Includes sorority and fraternity fundraising entities.
	Education - pre-school, K-12 schools, libraries, tutoring, literacy programs, vocational training, etc.
	Environment or animals - zoos and aquaria, conservation or habitat preservation, humane societies, advocacy on behalf of animals or the environment
	Health - providing care, research focused on health or disease, and support and advocacy for people living with health-related conditions. Includes mental health, dental or oral health
	Human Services - youth development, senior services not focused on health, helping to meet basic needs such as for housing, food, or employment services, legal aid, general social services, sports and recreation. Includes disaster preparedness or response.
	International Aid, Relief, Development
	Philanthropy, Fundraising, Voluntarism, or Grantmaking - community foundations, independent sponsors of donor-advised funds, United Ways, Jewish Federations, volunteer matching services, etc.
	Religion - houses of worship, media ministries, mission societies, organizing bodies of faith groups (synod, diocese, union, etc.)
	Scientific or Social Scientific Research - institutes and think tanks that are not part of universities
	Don't know
	Other Please specify in the text box below

Appendix B: Organization Participants

Figure 32: Responders by organization budget size

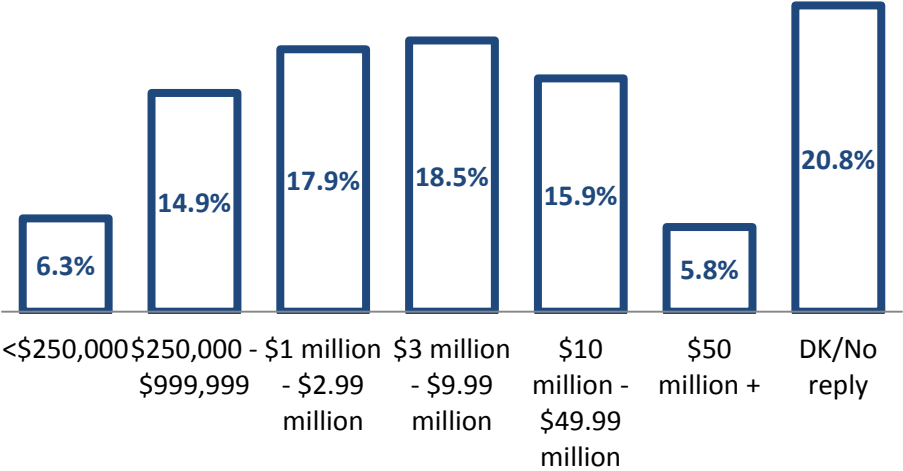
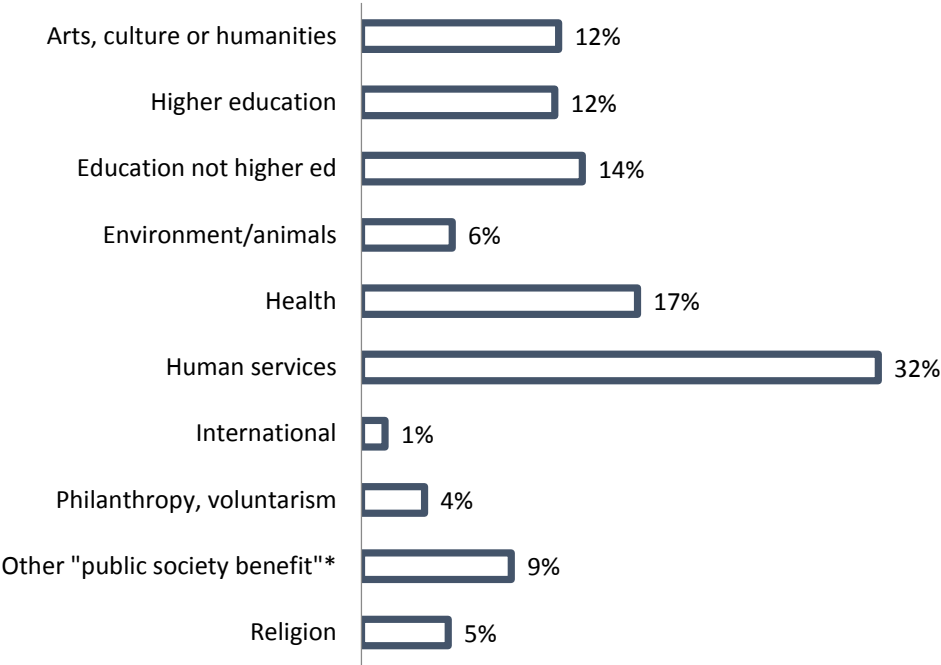


Figure 33: Responders by NTEE/subsector

Organizations could select up to 3, total will be more than 100%



* Public society benefit includes community foundation and independent DAFs plus scientific research organizations, voter registration initiatives, community development organizations, volunteer fire departments and more.

Figure 34: Responders by region of the U.S.

