

Philanthropic Giving Index

Summer 2009



**We gratefully acknowledge
The staff of the Center for Survey Research at Indiana University,
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to our panel of professional fundraisers who make this study possible.**

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The Philanthropic Giving Index (PGI), which reports on the fundraising climate for the U.S., remained stable for the first half of 2009, while the Present Situation Index (PSI) fell to its lowest levels since the study began in summer of 1998. The PGI index is 65.4 which is a 0.9 percent increase from just six months ago and a 21 percent decrease from one year ago (see Table 1). The PSI is 58.0, an 8.7 percent decrease from December of 2008 and a 28.9 percent decrease from one year ago. The Expectations Index is 72.8, a 10.2 percent increase from six months ago and a 13.2 percent decrease from a year ago.

Key Findings for the Summer 2009 Philanthropic Giving Index, which included a series of questions on the economy and giving:

- The PSI reached an all time low in the first half of 2009 to 58.0, which is an 8.7 percent decrease from six months ago and a 28.9 percent decrease from one year ago.
- Fundraisers are more optimistic about the future fundraising climate, rating the EI at 72.8.
- Public benefit, environment/animal, and international (PEAI) and arts, culture, and humanities organizations (ACH) and nonprofits reported the worst fundraising climate. The PGI for PEA I organizations was 57.8 while the PGI for human services was 58.6.
- Fundraisers from religious organizations (PGI of 70.0) and from educational organizations (PGI of 69.7) had the highest index of any type of organization.
- For three consecutive periods, fewer fundraisers are reporting success with major gifts and foundation grants – reaching all time lows since the study began in 1998. The reported success with major gifts and foundations grants has fallen since December 2008, a decrease of 23.1 percent and 39.2 percent, respectively.
- Fundraisers reported statistically significantly less success with major gifts, planned giving, corporate gifts, Internet, and e-mail solicitations than they predicted just six months ago.
- Nearly 72 percent of fundraisers reported the economy was having a negative impact on fundraising, while 14.4 percent reported a very negative impact. Fundraisers, however, have more negative views about the current impact than they do about the near future.
- More than 39 percent of fundraisers reported that they raised fewer dollars in 2008 than in 2007. However, approximately 57 percent raised about the same amount or more dollars when comparing 2008 fundraising totals to 2007.
- Over 43 percent of development officers working in PEA I organizations and 40 percent in human service organizations are projecting a decrease in revenue when preparing their budgets for next fiscal or calendar year.
- Nearly two thirds of fundraisers, 62.2 percent, reported the **timing** of scheduled pledge payments has remained the same this past year, while 67.2 percent said the **payment** of pledges in the full amount has remained the same.
- While 42.9 percent of arts, cultural, and humanities organizations reported that the number of full-time fundraising staff stayed the same in the past six months, they were statistically significantly more likely to report a decrease (57.1 percent) than other types of organizations.

About the Philanthropic Giving Index

The Philanthropic Giving Index (PGI) is a semiannual study of the climate for charitable giving and fundraising in the United States. It is similar to the Consumer Confidence Index, but for charitable giving. The survey was fielded between June and July of 2009 and mailed to a panel of 394 fundraising executives of nonprofits and fundraising consultants nationwide by the Indiana University Center for Survey Research in Bloomington, Indiana, on behalf of the Center on Philanthropy. Initially the panel was contacted by mail and then by follow-up e-mails. Of the fundraisers and consultants receiving the survey, 188 returned the questionnaire, 2 were not eligible, and 5 refused to participate; making the overall response rate 49.2 percent. The panel represents a cross-section of the nonprofit sector in terms of subsectors (e.g., health, education, or arts organizations), revenue size, and donor base.

The study produces three indexes. The Philanthropic Giving Index is the overall assessment of the fundraising climate in the U.S. The Present Situation Index reflects professional fundraisers' view of the current fundraising climate, and the Expectations Index indicates what the panel of fundraisers thinks the philanthropic climate will look like in the upcoming six months.

As with the Consumer Confidence Index, the PGI indexes range from 0 to 100, with higher scores indicating more optimistic attitudes about the climate for giving. Table 1 lists the indexes for the Summer 2009 wave and shows the percentage change from the two previous waves. Table 2 shows the changes since the survey began; these changes are graphed in Figure 1.

Detailed Findings for the Summer 2009 Philanthropic Giving Index

The Philanthropic Giving Index for Summer 2009 is 65.4, an increase of 0.9 percent from six months ago. However, fundraisers around the country are notably less optimistic in their attitudes about the climate for philanthropy in the U.S. – a 21 percent decrease from one year ago (see Table 1). The Present Situation Index is 58.0, an 8.7 percent decrease from December of 2008 and a 28.9 percent decrease from one year ago. The Expectations Index is 72.8, a 10.2 percent increase from six months ago and a 13.2 percent decrease from a year ago.

Table 1
Values and Changes in Indexes Over the Past Year

	Summer 2009	Change Since December 2008	Change Since Summer 2008
Philanthropic Giving Index (PGI) (overall assessment of climate for fundraising)	65.4	0.9%	-21.0%
Present Situation Index (PSI) (assessment of current climate for fundraising)	58.0	-8.7%	-28.9%
Expectations Index (assessment of fundraising climate in the next six months)	72.8	10.2%	-13.2%

These fundraisers are less optimistic about the current climate for giving. The Present Situation Index (PSI) averages 82.1 which is fairly optimistic. This time, the PSI is 58.0, its lowest level since the study began in the summer of 1998.

Figure 1: Philanthropy Giving Index
Main Indexes Over Time

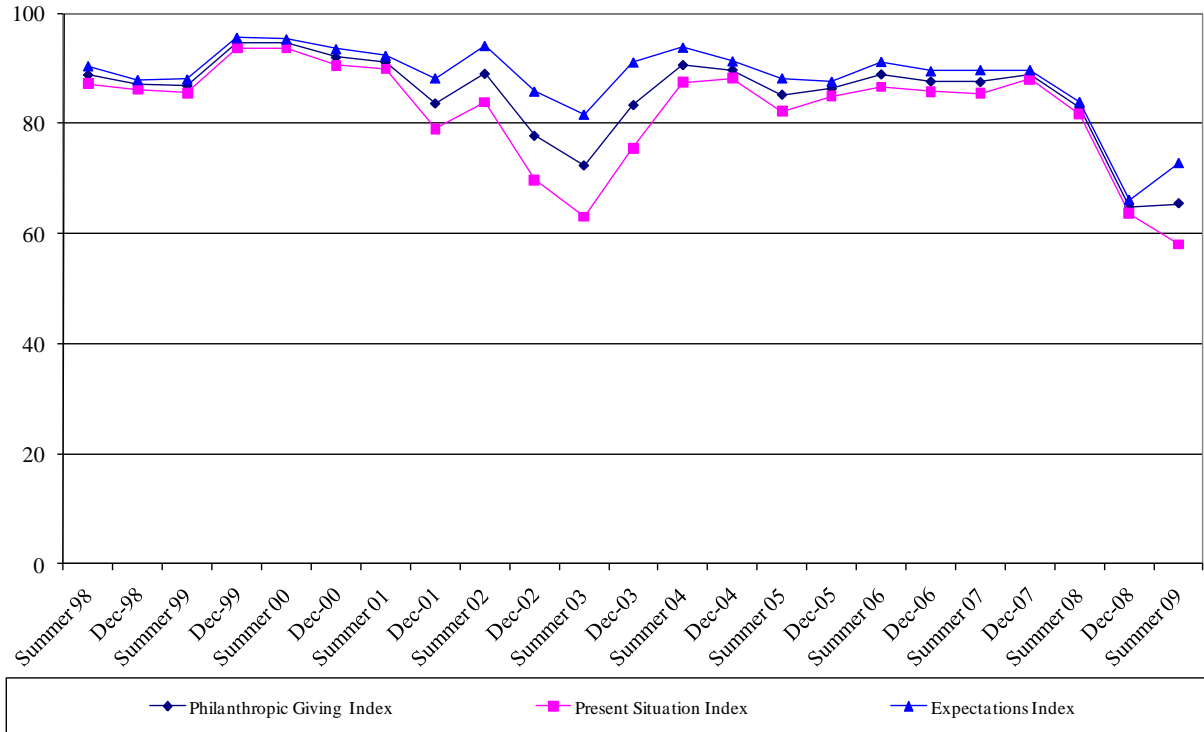


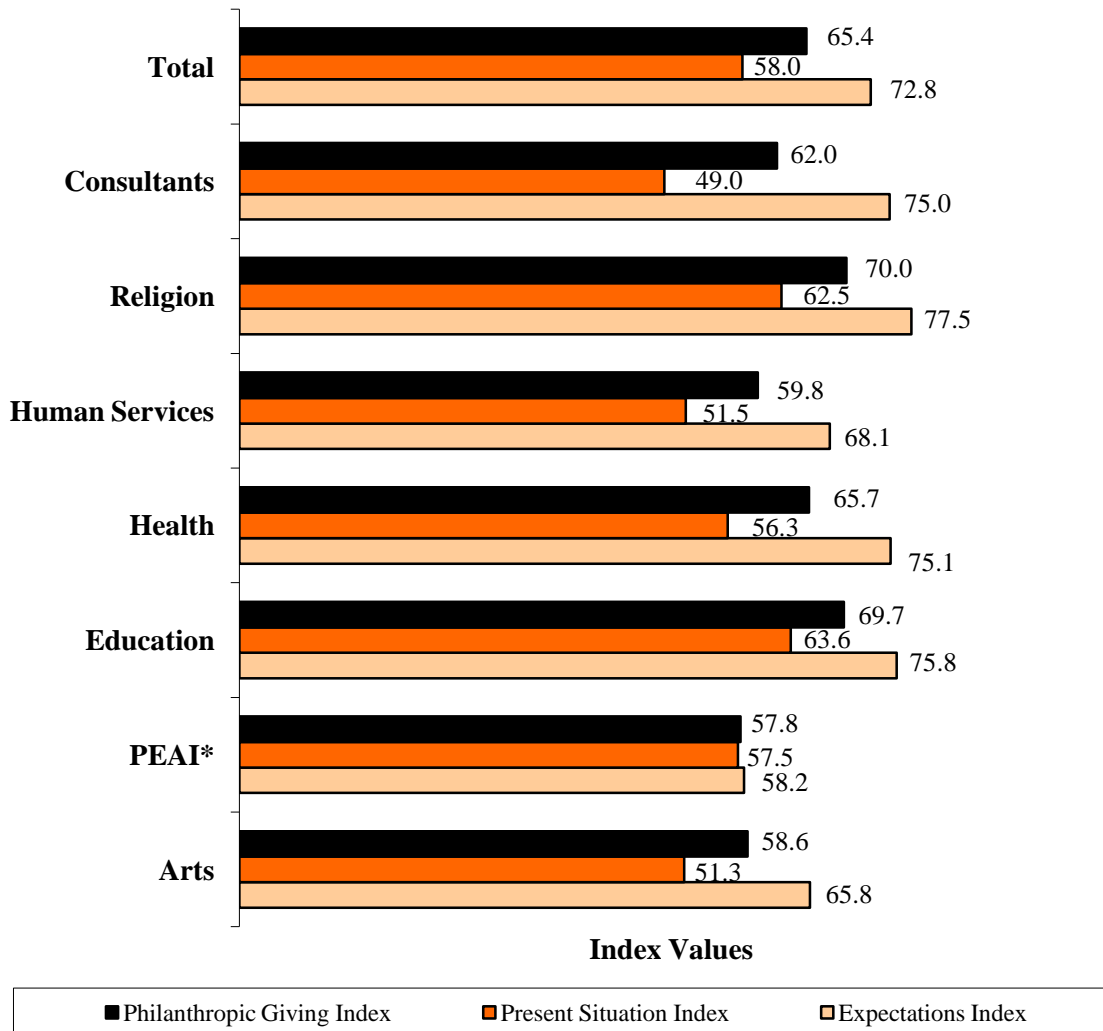
Table 2: Values of Philanthropic Giving Index Over Time

Report Date	Philanthropic Giving Index	Present Situation Index	Expectations Index
Summer 98	88.8	87.2	90.4
December 98	87.1	86.2	87.9
Summer 99	86.8	85.5	88.0
December 99	94.6	93.6	95.6
Summer 00	94.5	93.7	95.3
December 00	92.0	90.5	93.5
Summer 01	91.1	89.9	92.3
December 01	83.6	79.0	88.2
Summer 02	89.0	83.8	94.1
December 02	77.7	69.7	85.8
Summer 03	72.3	63.0	81.6
December 03	83.3	75.5	91.1
Summer 04	90.6	87.4	93.8
December 04	89.7	88.2	91.3
Summer 05	85.2	82.2	88.2
December 05	86.3	84.9	87.6
Summer 06	88.9	86.6	91.2
December 06	87.6	85.8	89.5
Summer 07	87.5	85.4	89.7
December 07	88.8	88.0	89.7
Summer 08	82.8	81.7	83.9
December 08	64.8	63.6	66.1
Summer 09	65.4	58.0	72.8

Indexes by Subsector

Overall, development officers from all subsectors are noticeably less optimistic about the current fundraising climate. Development officers working in arts, culture, and humanities organizations were noticeably less optimistic about the current fundraising climate, rating the Present Situation Index at 51.3, nearly 7 points lower than their peers in other organizations. On the other hand, fundraisers from arts, culture, and humanities organizations are more optimistic about the future fundraising climate (EI of 65.8). The indices for human services organizations, health organizations, and those working in public benefit, environment/animal, and international (PEAI) nonprofits were also lower than other subsectors, as shown in Figure 2. This indicates that uncertain economic conditions may be of particular concern for these organizations. Fundraising consultants that serve nonprofits were also noticeably less optimistic about the current giving climate (PSI of 49.0). The groups most optimistic about the current and future fundraising climate are fundraisers from religious and educational organizations.

Figure 2: Indexes by Subsector
Summer 2009

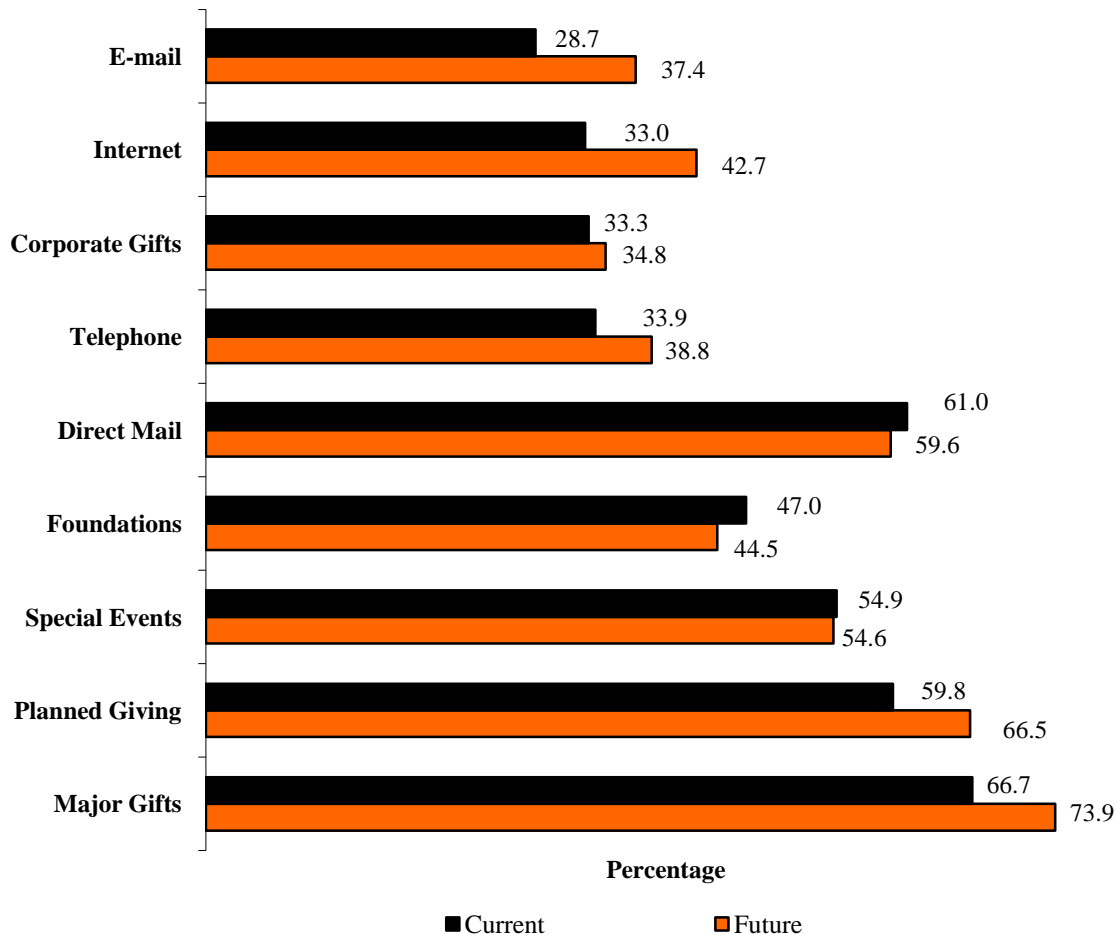


* PEA: Public Benefit, Environment/Animal and International nonprofits

Effectiveness of Solicitation Techniques

As shown in Figure 3, major gift fundraising through personal solicitation continues to be the most successful fundraising technique reported by professional fundraisers currently (66.7 percent) and six months from now (73.9 percent). Fundraisers also reported direct mail as a successful fundraising technique (61 percent). However, fundraisers believe that they will have less success with direct mail and foundation grants in the next six months (59.6 percent and 44.5 percent respectively). On the other hand, development officers believe they will have more success with planned giving in the next six months than currently reported (66.5 percent and 59.8 percent respectively). Few fundraisers report success with e-mail (28.7 percent), Internet (33.0 percent), or corporate giving (33.3 percent). However, fundraisers expect greater success with e-mail solicitations (37.4 percent) and Internet fundraising (42.7 percent) six months from now.

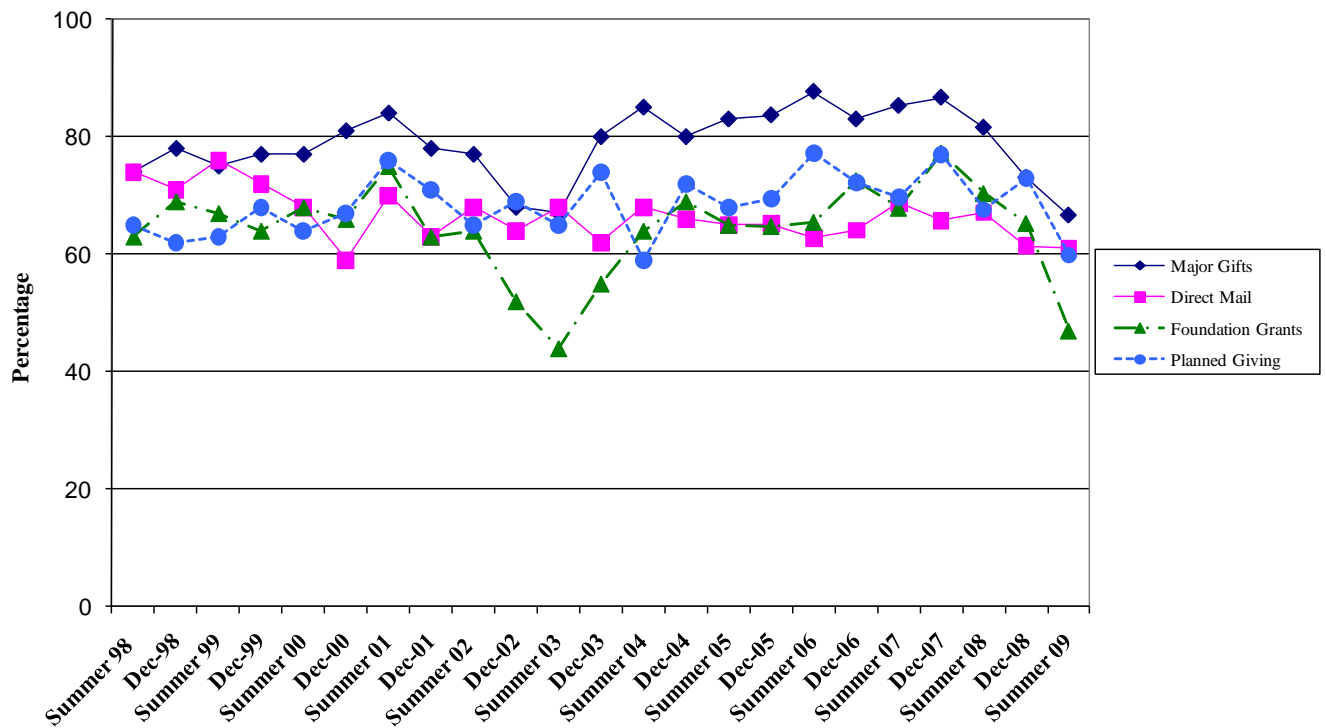
Figure 3: Percentage of Respondents Who Rated Fundraising Techniques as Successful or Somewhat Successful, Summer 2009



Effectiveness of Solicitation Techniques across Time

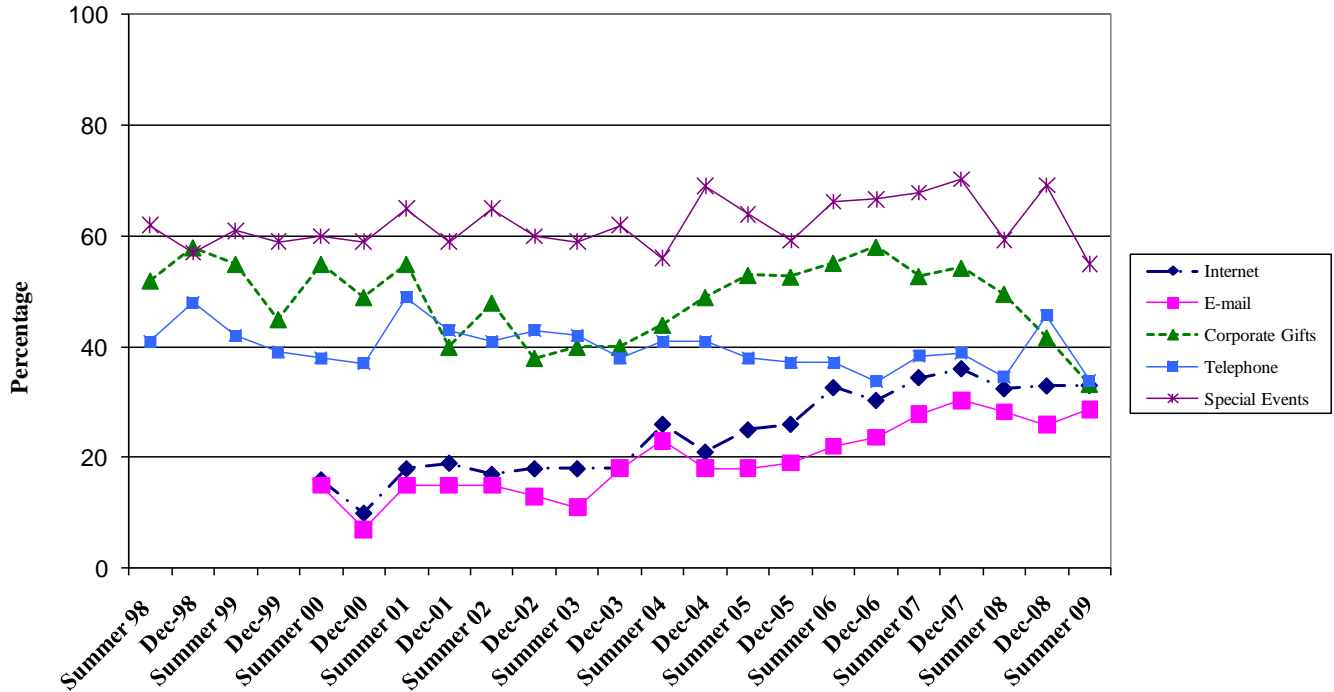
As Figure 4 shows, the economy is affecting the types of solicitation techniques differently. For three consecutive periods, fewer fundraisers are reporting success with major gifts and foundation grants – reaching all time lows. The reported success with major gifts and foundation grants has fallen since December 2007, a decrease of 23.1 percent and 39.2 percent, respectively. In addition, development officers are reporting less success with planned giving compared to six months ago (59.8 percent). The average reported success with direct mail since the study began in summer of 1998 is 66.5. For this wave of the PGI, the reported success with direct mail is 61.

Figure 4: Percentage Reporting Success Over Time With Major Gifts, Direct Mail, Foundation Grants, and Planned Giving



As illustrated in Figure 5, reported success with corporate gifts continued its downward trend which began in December 2007, falling 38.7 percent. Fundraisers reported success with special events fell from 69.2 percent in December 2008 to 54.9 percent in Summer 2009. The percentage of professional development officers reporting success using e-mail solicitations was slightly up, while success using the Internet remained fairly stable.

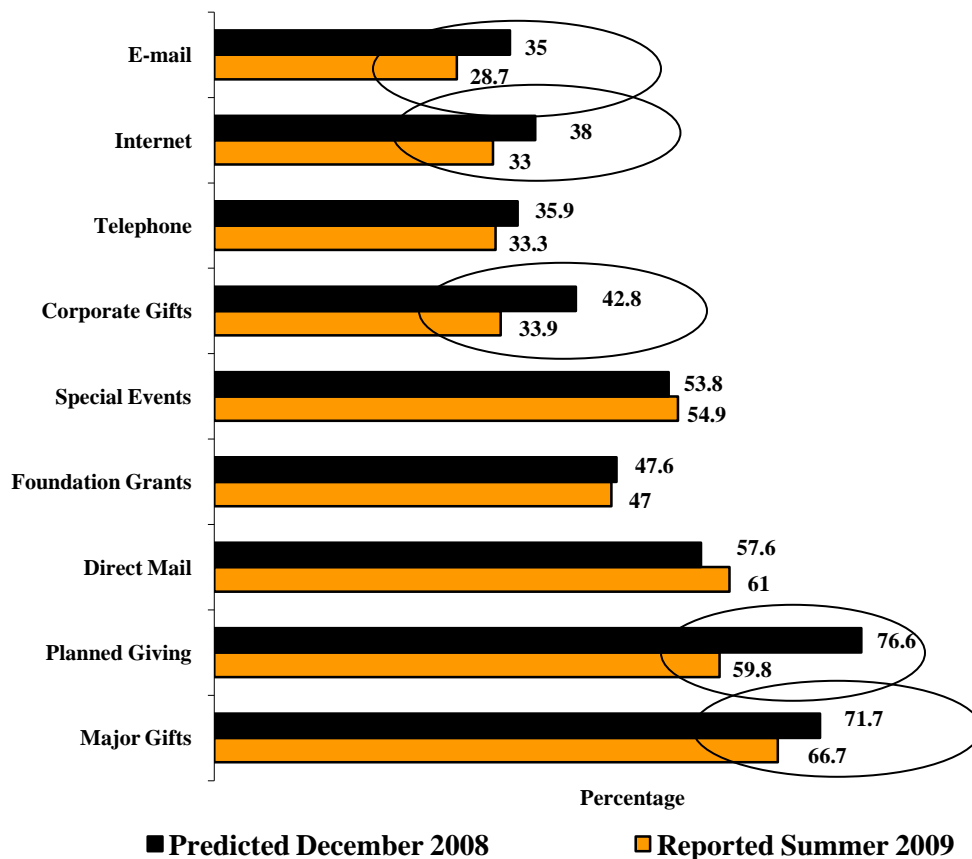
Figure 5: Percentage Reporting Success Over Time With Internet, E-Mail, Corporate Gifts, Telephone and Special Events



Predicted Versus Actual Levels of Success, by Fundraising Technique

The panel of professional fundraisers were asked six months ago to predict the level of success they would have with various fundraising techniques. Here we examine their predicted success with their current success as reported in Summer 2009 for those who responded to both surveys. For nearly every type of fundraising technique, development officers anticipated more success than they reported with the surprising exception of special events and direct mail. Six months ago, only 57.6 percent of fundraisers thought they would have success with direct mail in the coming months, but in Summer of 2009, 61 percent of these same fundraisers reported success. On the other hand, development officers anticipated much more success with major gift fundraising and planned giving than reported in Summer 2009. Fundraisers reported statistically significantly less success with major gifts, planned giving, corporate gifts, Internet, and e-mail solicitations than they predicted just six months ago.

Figure 6: Predicted (December 2008) Versus Reported (Summer 2009) Success of Fundraising Techniques (of those that responded to both surveys)



Note: Major gifts, planned giving, corporate gifts, Internet, and e-mail solicitations are statistically significantly less successful currently than predicted to be just six months ago.

The Economy

Several indicators influence the fundraising climate for the U.S. During the first quarter of 2009, economic output contracted at an annual rate of 5.5 percent (Bureau of Economic Analysis, 2009). At the close of June 2009, the Standard & Poor's 500 Index decreased only 12 points since January of 2009. However, the civilian unemployment rate was 9.5 percent in June 2009. Job losses were widespread across the major industry sectors, with large declines in manufacturing, professional and business services, and construction. Since the start of the recession in December 2007, the unemployment rate has risen by 4.6 percentage points. The Consumer Confidence Index (CCI), which is reported monthly by The Conference Board, increased from 37.7 in January of 2009 to 49.3 in June indicating consumers are slightly more confident.

Given the economic news and indicators it is not surprising that the vast majority of the panel believes that the economy is having a negative impact on fundraising, and expects a less negative impact six months from now (71.7 percent currently and 55.9 percent six months from now), as shown in Figure 7. Fundraisers, however, have more negative views about the current impact than they do about the near future. Just under 15 percent (14.4 percent) believe the economy is currently having a very negative impact on fundraising while only 3.8 percent believe the economy will have a very negative impact six months from now. In fact, about one-fifth (22.6 percent) of fundraisers believe the economy will have a positive impact six months from now on fundraising in organizations like theirs.

Figure 7: Impact of Economy on Fundraising

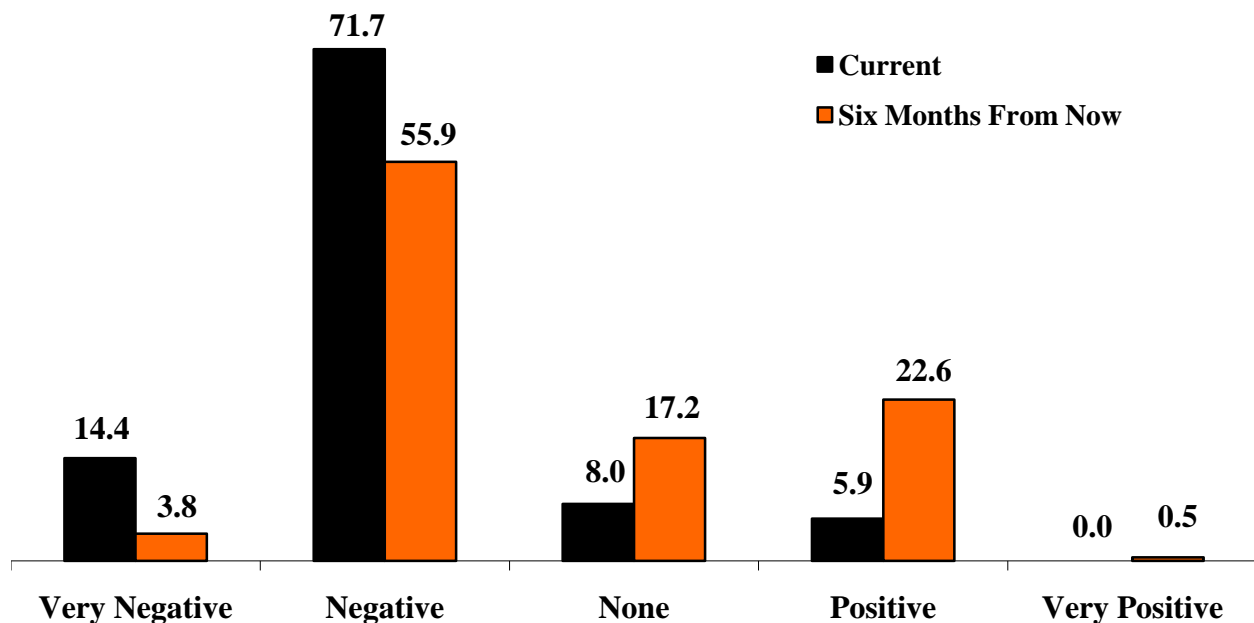
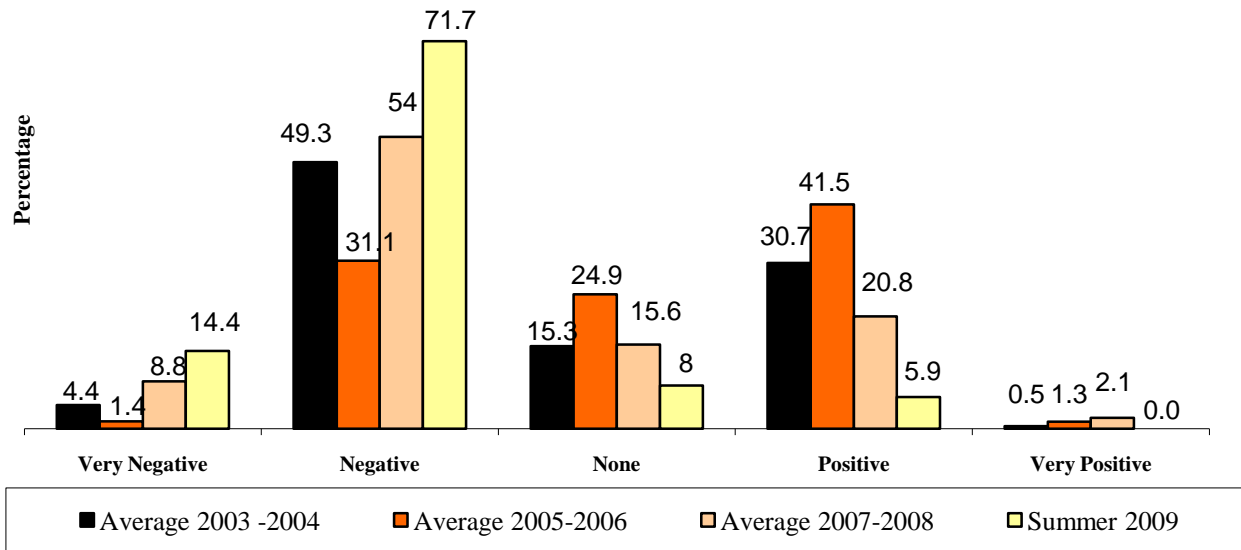


Figure 8 tracks the impact of the U.S. economy on fundraising since 2003, the first year the question was asked. More fundraisers are reporting that the economy is having a negative or very negative impact on fundraising in Summer 2009 than at any other time since the question began. Over 86 percent believe the economy had a negative or very negative impact on fundraising in the first half of 2009. This compares to only 6 percent of fundraisers that reported that the economy is having a positive impact on fundraising.

Figure 8: Current Impact of the U.S. Economy on Fundraising



Economy Questions

In the Summer 2009 edition of the Philanthropic Giving Index, we asked a series of questions that are related to charitable giving and the economy. Among them, we asked our panel of fundraisers about the changes in the total dollars raised when comparing fundraising totals in 2008 to those in 2007.

As shown in Figure 9, more fundraisers (39.2 percent) reported that they raised fewer dollars in 2008 than in 2007. In comparison, approximately 57 percent of fundraisers raised about the same amount or more dollars in 2008 than 2007.

Figure 9: Percentage of Fundraisers Reporting Changes in Fundraising Totals (Fiscal or Calendar Year)

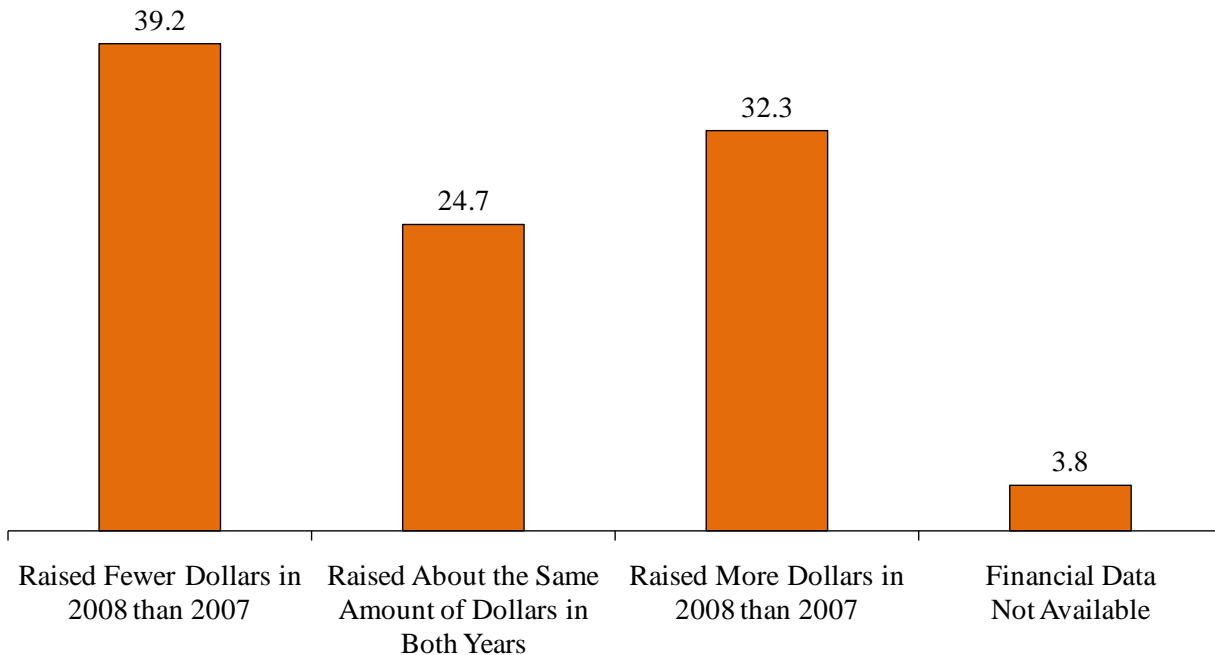


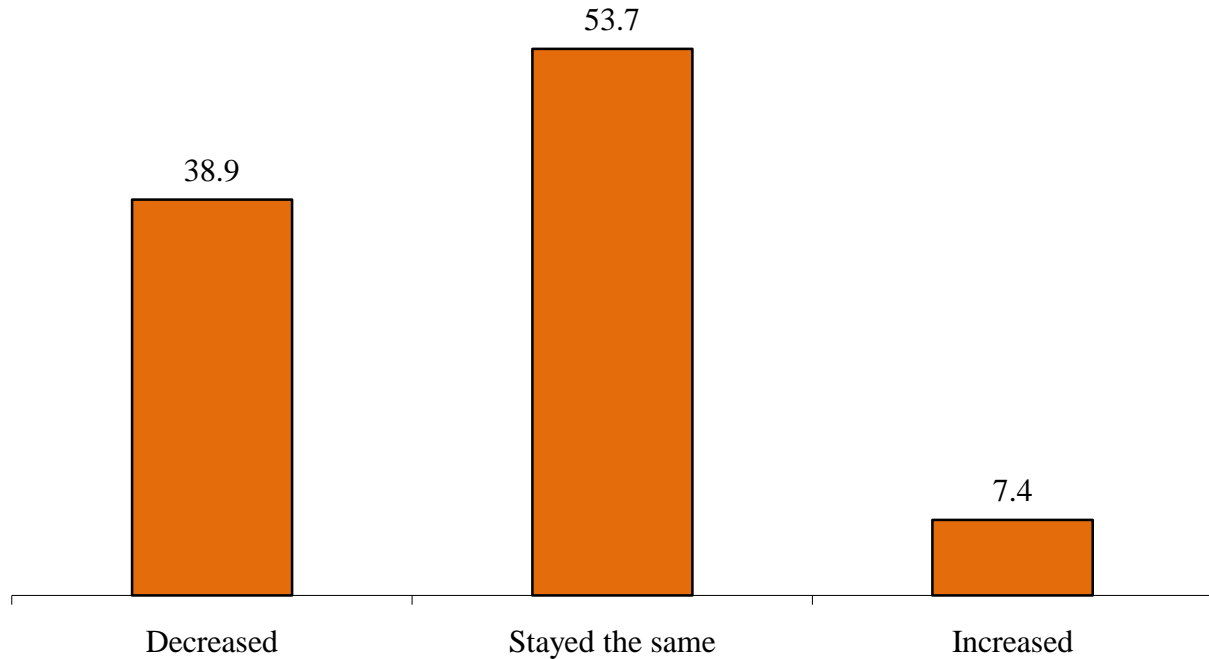
Table 3 shows the percent change in dollars raised when comparing 2008 fundraising totals to those in 2007. Approximately 16 percent of fundraisers reported that they raised between 1 and 5 percent less in 2008 than 2007 and 34 percent reported a decrease of between 6 and 15 percent in dollars raised. At least 33 percent of fundraisers reported that they raised between 1 and 5 percent more dollars in 2008 than 2007 and 29.3 percent reported an increase of between 6 and 15 percent in dollars raised.

Table 3: Percent Change in Dollars Raised in 2008 than 2007

	Decrease of:	Increase of:
1 to 5 percent	16.4	32.8
6 to 15 percent	34.2	29.3
16 to 25 percent	20.5	20.7
26 percent or more	28.8	17.2

Figure 10 shows the changes in the past six months with expenses entailed within the fundraising budget. Approximately 39 percent of fundraisers reported a decrease in expenses and nearly 54 percent reported that expenses stayed the same. Only 7.4 percent of fundraisers reported that expenses entailed with the fundraising budget increased.

Figure 10: Percentage of Fundraisers Reporting the Change in Expenses Entailed Within the Fundraising Budget



Of the fundraisers that reported a decrease in expenses, approximately 47.1 percent reported a 1 to 5 percent decrease in expenses and 33.8 percent of fundraisers reported a 6 to 15 percent decrease in the expenses entailed within the fundraising budget (see Table 4). An additional 19 percent of fundraisers reported more than 16 percent decrease in expenses.

Table 4: Percent Decrease in Expenses Entailed within Fundraising Budget*

	Decrease of:
1 to 5 percent	47.1
6 to 15 percent	33.8
16 to 25 percent	10.3
26 percent or more	8.8

*Only 7.4 percent of fundraisers reported an increase in expenses.

Figure 11 shows the change, if any, that fundraisers are projecting in revenue generated from fundraising when preparing the budget for the next fiscal or calendar year. Approximately 37 percent of fundraisers are projecting a decrease in revenue generated from fundraising when preparing their budgets. In comparison, more than 62 percent of fundraisers are projecting no changes at all or an increase in revenue when preparing their budgets.

Figure 11: Percent of Fundraisers Reporting the Projected Change in Revenue Generated from Fundraising when Preparing the Budget for the Next Fiscal or Calendar Year

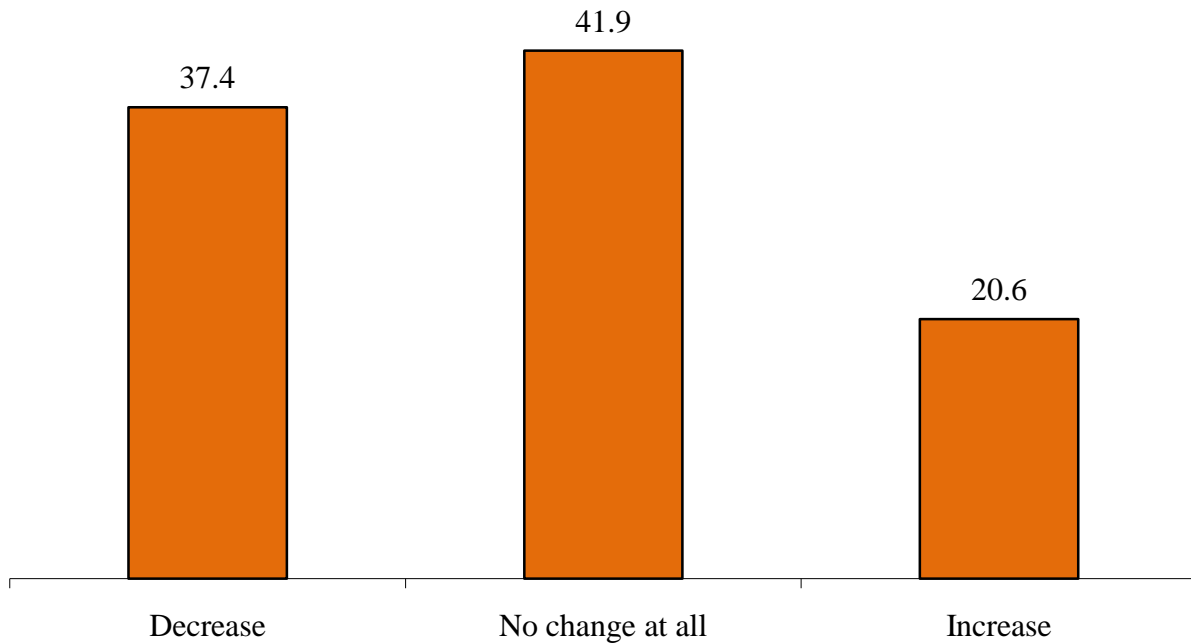


Table 5 shows that the majority of fundraisers (70.1 percent) are projecting a decrease in revenue of between 1 and 15 percent. Of the 20.6 percent of fundraisers that are projecting an increase in revenue, 54.8 percent are projecting an increase of between 1 and 5 percent.

Table 5: Reported Change in Projected Revenue for Next Fiscal or Calendar Year

	Decrease of:	Increase of:
1 to 5 percent	33.3	54.8
6 to 15 percent	36.8	22.6
16 to 25 percent	21.1	6.5
26 percent or more	8.8	16.1

The panel of fundraisers was also asked about changes in the number of paid, full-time equivalent fundraising staff that are employed by their organization or organizations that they consult with in the past six months (see Figure 12). Most respondents, 56.4 percent, said the number of fundraising staff stayed the same the past six months. However, nearly 38 percent reported a decrease in the number of employed fundraising staff in the past six months.

Figure 12: Percentage of Fundraisers Reporting the Change in Paid, Full-Time Equivalent Fundraising Staff Employed in Last Six Months

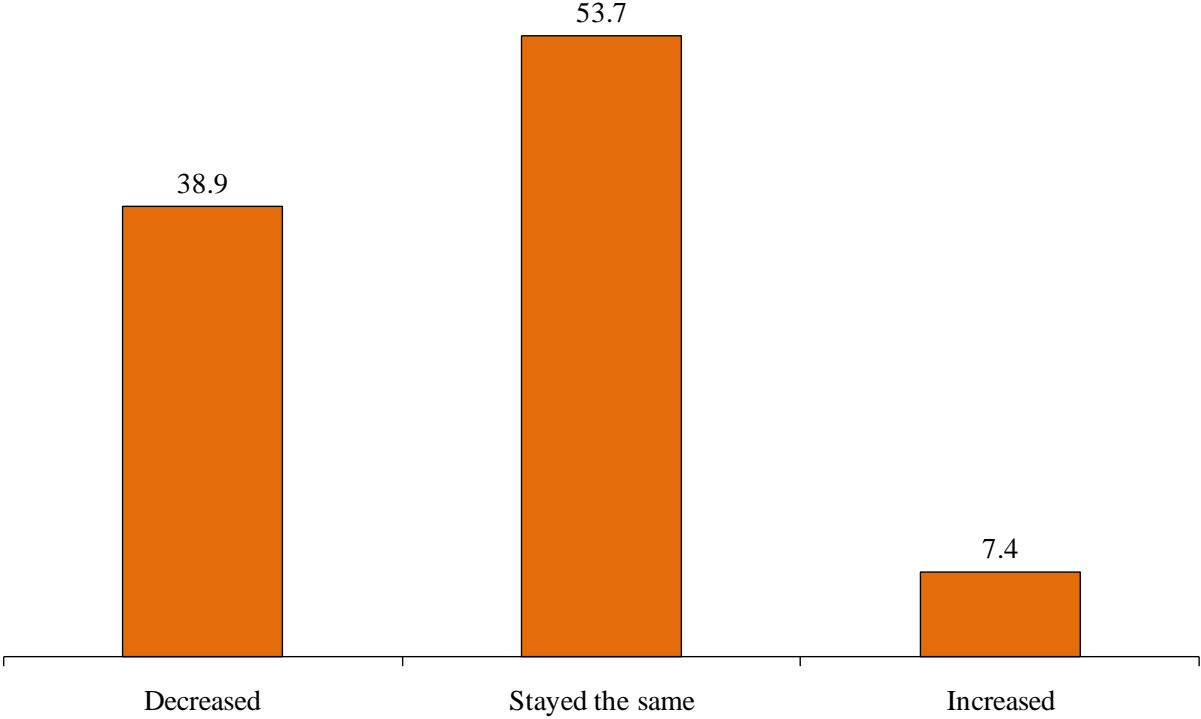
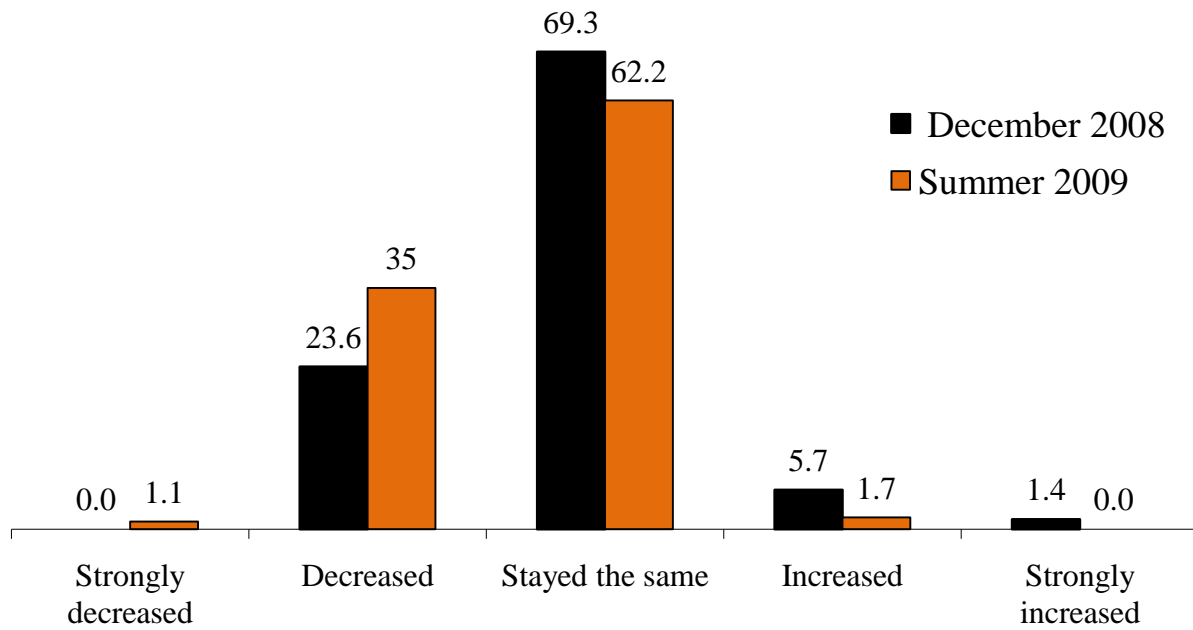


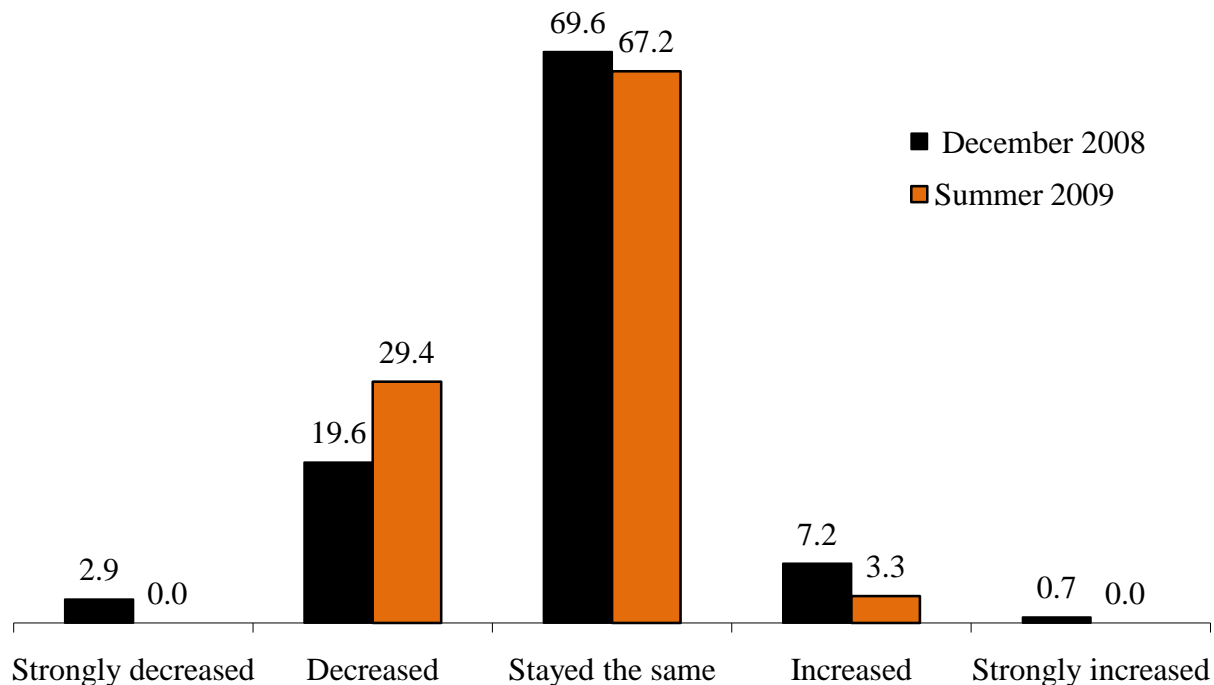
Figure 13 shows the percentage of fundraisers reporting the change in payment of pledges on their scheduled date during the past six months. For the Summer 2009 PGI, just under 63 percent of fundraisers reported no change in the timing of pledge payments, a decrease of 7 percentage points from what was previously reported in the December 2008 PGI. About 35 percent, however, did report what amounts to a slowdown in pledge payments compared to 23.6 percent six months ago.

Figure 13: Percentage of Fundraisers Reporting the Change in Payment of Pledges on Scheduled Date in the Past Six Months



The panel of fundraisers was also asked about changes in the past six months in the full payment of pledged amounts to organizations like theirs (see Figure 14). Similar to the previous question about the timing of pledges, most respondents, 67.2 percent, said the full payment of pledges stayed the same compared to 69.6 percent six months ago. However, nearly 30 percent reported a decrease in the full payment of pledges compared to 19.6 percent six months ago.

Figure 14: Percentage of Fundraisers Reporting the Change in Payment of Full Pledged Amounts in the Past Six Months



Most of the professional fundraisers reported giving to their organization was down and that they were experiencing uncertainty about the fundraising climate, delaying some fundraising, and not asking others to give at this time. However, a fair amount reported the economy was having a mixed effect on fundraising of their organization. Fundraisers on our panel said:

“Although we experienced a sharp decline in the overall amount of funds raised, we discovered that the number of donors increased. It is our goal to cultivate the new donor base to increase their giving.”

“Our regular donors have shown remarkable "staying power." However, average gift amounts have decreased from most donors.”

“Planned giving continues to remain relatively strong in today's market with constituents choosing to participate more in charitable giving vehicles that give them the ability to change their beneficial interests, e.g. wills, retirement plans, life insurance, etc. Charitable gift annuities continue to remain strong.”

“People are very cautious and waiting for economy to "turn." Emotions have stabilized, but optimism has not returned. Those organizations which are executing and planning are performing above average now and will do so later also.”

“The ask cycle is becoming longer. People living off portfolios are apt to give less. Also, people seem to be a bit less willing to make longer term pledge commitments.”

“Less sense of confidence among volunteers (especially board members) to provide stewardship visitation to solicit.”

“Actual fundraising results are still okay for most organizations, but fear about asking and hearing no is a continuing issue that must be addressed at every meeting. Some people are extending pledge periods and delaying decisions, but careful cultivation of prospective donors, sensitivity to their circumstances, and flexibility in helping them structure a gift are continuing to produce positive results in the large majority of cases.”

The Impact of the Economy by Subsector, Revenue, and Location of Donor Support

Overall, there were few differences in how the economy impacted fundraising among the various types of nonprofits. Below we discuss those few differences.

Subsector

- Fundraisers from arts, culture, and humanities organizations were the most likely (55 percent) to report raising fewer dollars in 2008 than 2007 and to have seen a decrease in expenses entailed with the fundraising budget in the past six months (75 percent).
- Over 43 percent of development officers working in PEAH organizations and 40 percent in human service organizations are projecting a decrease in revenue when preparing their budgets for next fiscal or calendar year.
- While 42.9 percent of arts, cultural, and humanities organizations reported that the number of full-time fundraising staff stayed the same in the past six months, they were statistically significantly more likely to report a decrease (57.1 percent) than other types of organizations.
- More than 51 percent of consultants and 38 percent of education fundraisers have seen a decrease in the number of paid, full-time fundraising staff in organizations like theirs in the past six months.
- Nearly 43 percent of education fundraisers and 52.4 percent of arts, culture, and humanities fundraisers reported a decrease in the timing in the full payment of pledge amounts, the highest of any type of organization.
- Human services fundraisers were more likely to report a decrease in the amount of pledge payments, than any other type of organization (40 percent).

Revenue

- Nearly 54 percent of small profits reported a decrease in the number of dollars raised when comparing 2008 to 2007 and 73 percent reported no change in the number of paid, full-time fundraising staff employed in the last six months.

- At least 45 percent of organizations with a revenue size between \$5 and \$10 million were more likely to project a decrease in revenue when preparing their budgets for next fiscal or calendar year.

Location of Donor Support

- Fundraisers from organizations with a national donor base were more likely (53.8 percent) to report raising fewer dollars in 2008 than 2007.
- Fundraisers from local organizations were more likely to project a decrease in revenue when preparing their budgets for next fiscal or calendar year (40.4 percent).
- Organizations with a national donor base were more likely to report a decrease in the number of paid, full-time fundraising staff (45 percent).

Capital Campaign

Just one-third of nonprofits are currently involved in a capital campaign, a slight increase from the previous wave of the PGI, where just 27 percent reported their organization was currently conducting a capital campaign. Health organizations were the most likely to be involved in a capital campaign (46.7 percent). In a change from the previous waves of the PGI, religious organizations (88 percent), human services organizations (77.8 percent) followed by arts and cultural organizations (76.2 percent) were the least likely to be in a capital campaign. National organizations (41.5 percent) and organizations with more than \$50 million in revenue were also more likely to be involved in a capital campaign (51.9 percent).

Results of Fundraising Techniques by Subsector

Success with various fundraising methods differs widely by the type of organization. Table 6 shows the percentage of fundraisers that reported current success with various fundraising techniques and Table 7 presents the predicted success rates six months from now. ‘*’ Denotes whether or not there were statistical differences within each column as well as the level of significance.

Table 6: The Percentage of Respondents Reporting Success with Fundraising Techniques by Subsector (%)

	Direct Mail	Telephone	Special Events	Planned Giving	Major Gifts	Corporate	Foundation	Email	Internet
ACH	52.4	38.9	57.1	57.1	85.7	33.3	47.6	36.8	25.0
PEAI	63.6	9.1	81.8**	57.1	61.9	50.0	50.0	33.3	42.9
ED	68.6	62.9***	32.4	65.7	71.4	45.7	45.7	25.7	31.4
HE	56.7	23.1	75.9*	69.0	50.0*	37.9	44.4	7.7	26.7
HS	83.3*	22.2	52.9	41.2	61.1	33.3	66.7	16.7	22.2
RE	64.0	28.0	52.0	64.0	72.0	12.0	36.0	37.5	41.7
CS	43.8*	34.4	46.9	53.1	65.6	21.9*	41.9	38.7	36.7
Total	60.7	33.5	55.6	59.4	66.5	33.5	46.4	28.2	32.6

Note: ACH = Arts, Culture, and Humanities; PEAI = Public Benefit, Environment, Animal, and International;

ED = Education; HE= Health; HS = Human Services; RE = Religion; CS = Consultants

Note: Statistical significance tests determined by the means; *p<.05, **p<.01, ***p<.001

Table 7: The Percentage of Respondents Predicting Success with Fundraising Techniques Six Months from Now by Subsector (%)

	Direct Mail	Telephone	Special Events	Planned Giving	Major Gifts	Corporate	Foundation	Email	Internet
ACH	44.4	50.0	66.7	66.7	66.7	28.6	28.6	26.3	21.1
PEAI	63.2	23.8	66.7	65.0	76.2	42.9	52.4	47.6	47.6
ED	63.3	57.1**	48.5	62.9	82.9	44.1	48.6	45.7	54.3
HE	60.9	31.0	62.1	73.3	63.3	37.9	37.0	7.4***	25.9*
HS	81.2	22.2	50.0	44.4*	64.7	38.9	55.6	44.4	55.6
RE	78.9	41.7	44.0	80.0	68.0	20.0	40.0	37.5	37.5
CS	40.6**	34.4	53.1	62.5	83.9	28.1	46.9	48.4	50.0
Total	59.9	38.5	55.3	65.7	73.3	34.4	44.1	37.1	42.5

Note: ACH = Arts, Culture, and Humanities; PEAI = Public Benefit, Environment, Animal, and International; ED = Education;

HE= Health; HS = Human Services; RE = Religion; CS = Consultants

Note: Statistical significance tests determined by the means; *p<.05, **p<.01, ***p<.001

Arts, Culture, and Humanities

More development professionals from arts, culture, and humanities organizations reported success with raising funds through major gifts (85.7 percent) than any other fundraising technique or any other type of organization. Success with this fundraising technique is expected to decrease six months from now (66.7 percent). Fundraisers from the arts, culture, and humanities also have success with planned giving and special events and this is expected to continue six months from now. The least successful fundraising techniques reported by these organizations continue to be the Internet with only 25.0 percent reporting success. In addition, fewer of these fundraisers anticipate success in the next six months with direct mail (52.4 percent

to 44.4 percent), foundation giving (47.6 percent to 28.6 percent), and corporate gifts (33.3 percent to 28.6 percent). In fact fundraisers from arts, cultural, and humanities organizations were less optimistic about their success with foundation grants six months from now than their peers working in other types of organizations.

Public-Benefit, Environment/Animal, and International (PEAI)

Fundraisers from public-benefit, environment/animal, and international (PEAI) nonprofits were statistically significantly more successful with special events than their peers working in other types of nonprofits (81.8 percent). Fundraisers predict success with special events to fall six months from now to 66.7 percent. Most development officers from PEA I organizations have less success with telephone solicitation than their peers working in other types of organizations (9.1 percent). More development professionals working in PEA I organizations believe they will have success with planned giving and major gifts in the next six months than currently reported. Fundraisers reported foundation grants as a successful fundraising tool both currently and six months from now (50.0 percent and 52.4 percent).

Education

More development professionals from education organizations reported success with raising funds through major gifts (71.4 percent) and direct mail (68.6 percent). Most development officers from educational organizations report having less success with special events than their peers working in other types of organizations (32.4 percent). Surprisingly, statistically significantly more educational fundraisers report success with telephone fundraising (62.9 percent) than their peers. In addition, more education development officers were having success with telephone solicitation than reported success with corporate gifts, foundation grants, or special events. Statistically significantly more fundraisers anticipate success using the telephone for solicitations six months from now than their peers.

Health

Most fundraising professionals working in health organizations reported statistically significantly more success with special events (75.9 percent). However, these fundraisers reported statistically significantly less success with major gifts than other types of organizations. In addition, more fundraisers in health reported success with planned giving than their peers in other organizations (69 percent). Fewer of these fundraisers anticipate success in the next six months with special events (75.9 percent to 62.1 percent), and foundation giving (44.4 percent to 37.0 percent). However, statistically significantly fewer development officers in health anticipate success with e-mail solicitations and Internet solicitations six months from now.

Human Services

Many fundraisers from human service organizations reported statistically significantly more success with direct mail than their peers working in other types of organizations (83.3 percent). Fewer development professionals from human services organizations are reporting success with many types of fundraising techniques than their peers working in other types of organizations. For example, few human service fundraisers reported success with telephone solicitations, planned giving, email, and internet. Further, statistically significantly fewer fundraisers from human service groups anticipate success with planned giving (44.4 percent) than their peers six months from now. More human service fundraisers are having success with foundation grants

than their peers in other organizations (66.7 percent) and while fewer predict success with special events six months from now (55.6 percent), it still is reported by more human service fundraisers as potential success than any other type of solicitation technique.

Religion

Many fundraisers from religious organizations are finding success with major gifts (72 percent), planned giving (64 percent), and direct mail (64 percent). With the exception of major gifts, religious fundraisers are anticipating more success with planned giving (80 percent) and direct mail (78.9 percent) six months from now. Religious fundraisers anticipate less success with corporate gifts, e-mail solicitations, and Internet fundraising in the next six months. In fact, religious fundraisers are having less success with corporate gifts than their peers working in other types of organizations.

Consultants

Consultants in our panel work for all types of organizations. Statistically significantly less consultants report success with direct mail both currently and six months from now than fundraisers working in nonprofits (43.8 percent and 40.6 percent, respectively). In our panel statistically significantly less consultants also reported success with corporate giving (21.9 percent) than development professionals working directly in nonprofit organizations, with the exception of religious organizations. More consultants anticipate success with major gifts six months from now than their peers working in other organizations. Fewer consultants have success with planned giving (53.1 percent).

Results of Fundraising Techniques by Revenue

Success with various fundraising techniques also differs by the revenue size of the organization. Table 8 shows the percentage of fundraisers that reported current success with various techniques by revenue size. Table 9 details the predicted success of various techniques six months from now. ‘*’ Denotes whether or not there were statistical differences within each column as well as the level of significance.

Table 8: Percentage of Respondents Reporting Success with Fundraising Techniques by Revenue Size (%)

	Direct Mail	Telephone	Special Events	Planned Giving	Major Gifts	Corporate	Foundation	Email	Internet
<\$1 mil	76.9	28.0	60.0	68.0	65.4	23.1	52.0	16.7	28.0
\$1-5 mil	64.9*	20.0	59.5	54.3	63.9	43.2	45.9	20.6	27.0
\$5-10 mil	52.4	25.0	71.4	52.4	66.7	38.1	47.6	25.0	28.6
\$10-50 mil	60.9	38.1	45.5	65.2	69.6	36.4	52.4	50.0	54.5
> \$50 mil	59.3	51.9	53.8	77.8*	74.1	48.1	51.9	14.8	14.8
Total	63.4	32.0	58.0	63.4	67.7	38.3	49.6	24.4	29.5

Note: Statistical significance tests determined by the means

Note: * indicates statistical significance *p<.05, **p<.01, ***p<.001

Table 9: The Percentage of Respondents Predicting Success with Fundraising Techniques Six Months From Now by Revenue Size (%)

	Direct Mail	Telephone	Special Events	Planned Giving	Major Gifts	Corporate	Foundation	Email	Internet
<\$1 mil	76.2	40.0	61.5	73.1	76.9	30.8	54.2	25.0	33.3
\$1-5 mil	55.2	29.7	58.3	52.8***	62.2*	32.4	37.8	25.0	40.0
\$5-10 mil	50.0	33.3	47.6	52.4	71.4	19*	19**	25.0	30*
\$10-50 mil	62.5	45.5	40.9	73.9	73.9	40.9	47.6	54.4	52.2
> \$50 mil	66.7	46.2	64.0	84.6	84.6	57.7	61.5	30.8	34.6
Total	61.8	38.2	55.4	66.7	72.9	36.4	44.2	31.2	38.3

Note: Statistical significance tests determined by the means

Note: * indicates statistical significance *p<.05, **p<.01, ***p<.001

\$1 million

Most fundraisers from the *smallest nonprofits, those with annual revenues of less than \$1 million*, report success with direct mail (76.9 percent) and planned giving (68 percent), while fewer fundraisers from these organizations report success with e-mail solicitations, corporate gifts, telephone, and the Internet. Most fundraisers from these smallest nonprofits anticipate more success with major gifts (76.9 percent) and planned giving (73.1 percent) six months from now. In addition, fundraisers from these small nonprofits anticipate less success with e-mail solicitations (25 percent) and Internet (33.3 percent) in the next six months.

\$1 million to \$5 million

Statistically significantly more fundraisers from *medium-sized organizations, those with revenues in the \$1 million to \$5 million range*, report success with direct mail (64.9 percent), though fundraisers are anticipating less success six months from now with this fundraising technique (55.2 percent). While statistically significantly less fundraisers believe planned giving and major gifts will be successful in the next six months (52.8 percent and 62.2 percent,

respectively). Fewer development personnel from medium-sized organizations (29.7 percent) report success with telephone solicitations than their peers working in organizations smaller or larger than theirs. However, more do anticipate success with telephone solicitations in the next six months (29.7 percent).

\$5 million to \$10 million

More development personnel from *organizations with annual revenues between \$5 million and \$10 million* report success with special events (71.4 percent) than any other type of fundraising technique and their peers working in organizations smaller or larger than theirs. However, less fundraisers believe special events will be successful in the next six months (47.6 percent). Statistically significantly fewer fundraisers anticipate success with corporate gifts and foundation grants in the next six months (both at 19 percent).

\$10 million to \$50 million

Most fundraisers from *organizations with revenues between \$10 million and \$50 million* report success with major gifts (69.6 percent) and planned giving (65.2 percent). More fundraisers anticipate success with major gifts and planned giving in the next six months (both at 73.9 percent). Fewer fundraisers working in organizations with revenues between \$10 million and \$50 million report success with special events (45.5 percent respectively) than fundraisers working in smaller and larger organizations. In fact, less fundraisers believe special events (40.9 percent) and foundation grants (47.6 percent) will be successful in the next six months.

More than \$50 million

Not surprisingly, statistically significantly more development officers from *large nonprofit organizations with revenues between \$50 million and \$100 million* report success with planned giving (77.8 percent) than fundraisers from smaller organizations. In addition, more development officers (84.6 percent) predict success with planned giving in the next six months. Nearly 52 percent reported success with telephone solicitations and fewer predict success with telephone solicitations in the next six months (46.2 percent). Only 14.8 percent report success with the e-mail solicitations and Internet.

Results of Fundraising Techniques by Donor Base

Success rates with fundraising techniques also vary by the location of the organization's donor base. Table 10 outlines the percentage of fundraisers reporting success with various fundraising techniques by where their donor base is located. Table 11 presents predicted success rates six months from now. '*' Denotes whether or not there were statistical differences within each column as well as the level of significance.

Table 10: The Percentage of Respondents Reporting Success with Fundraising Techniques by Location of Donor Base (%)

	Direct Mail	Telephone	Special Events	Planned Giving	Major Gifts	Corporate	Foundation	Email	Internet
Local	57.4	23.7*	68.9**	46.7	61.7	39.3	50.0	22.4	25.4
Regional	64.6	34.9	60.9	65.2	68.8	38.3	50.0	20.9	27.7
National	75.6*	48.8*	32.5*	73.2	70.7	24.4	41.5	36.6	41.5
Total	64.7	34.3	56.5	59.9	66.4	34.9	47.6	26.1	30.6

Note: Statistical significance tests determined by the means

Note: * indicates statistical significance *p<.05, **p<.01, ***p<.001

Table 11: The Percentage of Respondents Predicting Success with Fundraising Techniques Six Months from Now by Location of Donor Base (%)

	Direct Mail	Telephone	Special Events	Planned Giving	Major Gifts	Corporate	Foundation	Email	Internet
Local	60.0	26.7*	61.7	55*	70.0	32.8	43.3	27.1*	30.5*
Regional	57.9	43.5	71.7	75.0	66.7	40.4	41.3	22.7	40.9
National	77.8*	56.1**	29.3**	78.0	82.9	37.5	47.5	61***	58.5
Total	64.5	40.1	55.8	67.8	72.5	36.5	43.8	35.4	41.7

Note: Statistical significance tests determined by the means

Note: * indicates statistical significance *p<.05, **p<.01, ***p<.001

Local Donor Base

Statistically significantly more fundraisers from organizations with a local donor base report success with special events than fundraisers working for other types of nonprofits. Statistically significantly more fundraisers from local organizations report success with telephone solicitations both currently and six months from now. More fundraisers from local organizations anticipate success with major gifts six months from now. On the other hand, statistically significantly more fundraisers anticipate success with planned giving, e-mail, and the Internet in the next six months.

Regional Donor Base

More development officers from organizations with a regional donor base report success with major gifts (68.8 percent) and planned giving (65.2 percent). While less anticipate success with major gifts in the next six months (66.7 percent), more anticipate success with planned giving (75 percent). Email and Internet continue to be reported as success by few fundraisers from organizations with a regional donor pool (22.7 percent and 40.9 percent respectively).

National Donor Base

Statistically significantly more development personnel from organizations with a national donor base reported success with direct mail (75.6 percent) and telephone solicitations (48.8 percent) than development officers working in other types of organizations. On the other hand statistically significantly fewer development personnel reported success with special events (32.5 percent) than development personnel working in other organizations. Finally fundraisers from organizations with a national donor base were statistically significantly more likely to predict success with direct mail, telephone, and e-mail fundraising in the next six months.

For further information please contact:

Reema T. Bhakta

The Center on Philanthropy at Indiana University

550 West North Street, Suite 301

Indianapolis, IN 46202-3272

(317) 278-8996

rtbhakta@iupui.edu

<http://www.philanthropy.iupui.edu>

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