A Fund-Raising Matters Survey
Outlook 2009: The Road Ahead

Survey Report & Findings

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presented by:

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A Fund-Raising Matters On-line Survey Report

OUTLOOK 2009: The Road Ahead

I. Introduction

This report is the third such on-line survey of the nonprofit marketplace that we as a firm have conducted. Our first two surveys were conducted in 2006 and 2007, prompted by high-profile national events, and a sense that there was a disconnect between media reports and what we, as fund-raisers were experiencing in the philanthropic marketplace.

Certainly 2009 has brought us another “event” that began with the financial market meltdown (as we’re calling it) and now the continuing economic recession.

We developed a short, simple questionnaire and administered the survey through the SurveyMonkey web service. (If you haven’t explored the ease of touching base and listening to your constituency through this affordable service, you should consider it.)

Over a period of about three weeks, we collected a total of 389 survey responses. As is the case in most endeavors of this kind, not everyone completed the survey, and not all participants responded to all possible questions. Three hundred eighty-four individuals completed a significant portion of the survey, which we feel is quite good and provides a critical mass for analysis.

We sent e-mail invitations to our contact database of nonprofit organizations, former clients, friends, and associates. After accounting for undeliverable and old e-mail accounts, the survey invitation was presented to more than 4,100 individuals. Thus, we received about a 10% response (9.466%), again a respectable return. *[I guess it shows that brand awareness is created by distributing 750,000 quarterly newsletters during the past 13 years, and more than 40,000 copies of our acclaimed Goettler Series.]*

We sent a total of three e-mail invitations, on May 18th, May 26th, and June 1st, and closed the survey on June 9th to begin our analysis. As in years past, there were four or five initial organizational survey questions that allowed us to sort the responses in many different ways to identify significant findings and conclusions. And again, as in years past, we were fascinated and sometimes surprised at what we found. At other times, we reasoned that the data pointed us to fund-raising facts that all development professionals should know, but too often must be reminded.

We at Goettler Associates want to thank all of our survey participants. We hope that this report helps to make you and your organization more successful.

John Goettler
President

David Goettler
Chief Executive Officer

II. Findings and Observations

Certainly the most profound change in survey results in 2009 from both the 2006 and 2007 results is the dramatic increase in the number of organizations that are now raising less. In fact, 45.6% of survey respondents reported raising less this year than the previous calendar or fiscal year.

Question: *Comparing fund-raising results in the current year (calendar or fiscal) with the last, did your organization raise more or less?*

Survey Year:	2009	2007	2006
A Lot More	4.2%	10.2%	8.9%
More	20.5%	47.5%	50.1%
subtotal more	*24.7%*	***57.7%***	*59%*
About the Same	29.7%	28.7%	26.4%
Less	38.2%	12.1%	11.7%
A Lot Less	7.4%	1.6%	2.9%
subtotal less	***45.6%***	*13.7%*	*14.6%*

The number of organizations that "raised less" increased from 13.7% in 2007 to 45.6% in 2009. Certainly unwelcome, but not surprising news. In previous years, one may have believed that more organizations were struggling, based on articles and reports in the media, than what our survey reported. This year, the survey results support what many of us are actually experiencing as well as reading in the daily news.

When viewing the responses to fund-raising results by type of organization, the Human or Social Service organizations appear to have faired better as a group than did other sub-sectors. Thirty-four percent of Human or Social Service organizations raised more, a much higher response than Education (25%); Health Care (21%); and All Others (19%). Consistently, Human or Social Service organizations were less likely to report having raised "less" or "a lot less."

Health Care organizations were mostly likely to have said that they "raised about the same," and Education and the All Other grouping of organizations were most likely to have indicated they "raised less."

These variations of fund-raising results by sub-sector of our industry were rather small, and the results by market segmentation remained close to the overall results:

- about 1/4 (24%) raised more,
- about 1/3 (29%) raised about the same, and
- nearly 1/2 (45%) raised less.

The size of the total operating budgets of organizations seemed to play a factor in overall fund-raising results. Survey respondents identified the total annual operating budgets of their organizations, and when this demographic is compared to fund-raising results, we see that "size does matter." When looking at the organizations that raised "a lot more," one-half also had operating budgets of $20 million or more. And, 33% of all organizations with budgets of $20 million or more reported raising more (a lot more or more) which is higher than the overall average. Organizations with the smallest budgets (those of $2.5 million or less, were more likely to report raising about the same.

While the size of an organization's overall operating budget does not necessarily mean a larger development staff and/or ample resources are in place, we can demonstrate a clear correlation. Eighty-three percent of the organizations maintaining more than 10 development professionals have annual budgets of $10 million or more. And, 67% of the organizations with budgets of $20 million or more have three or more professional staff in development. The reverse is also true: 81% of organization with no development staff have annual budgets of $1.0 million or less. Only one (3%) of the organizations with more than a $20 million annual budget had no development staff.

Overall, 3/5 of all respondents had between one and five development professionals. Organizations with one professional were most likely (43%) to have said they raised the same as last year, along with those who had no staff (47%). Of all the organizations that reported raising the same as last year, 1/3 (32%) had a staff of one.

Organizations with a staff of three to five were least likely to have said they raised “about the same.” Strangely, organizations with three to five staff were both more likely to have reported raising more and more likely to have reported raising less than other staff sizes for all other organizations. Thirty-eight percent of those that raised “more” or “a lot more” had a staff size of three to five, and 55% of all organizations that reported raising less had a staff size of three to five.

The size of an organization’s staff also has some trends by market or sub-sector as well. Seventy-two percent of Health Care organizations had between one and five professional staff members; 63% of Education had three or more; 65% of Social or Human service organizations had between one and five; and the All Others group had the smallest staff size of one or less.

The survey respondents have also given us some insight on factors that contributed to their fund-raising results.

The organizations that raised less were more likely to indicate that individual donors and the size of individual gifts were deciding factors. Health Care organizations were most likely to have indicated that both the quantity and size of individual gifts led to their decline. Human or Social Service organizations and the All Others group reported fewer corporate gifts than the other sub-sectors, and the Social Service organizations were also more likely to say their corporate gifts were smaller.

These past experiences are also reported by survey participants as trends they are experiencing this year: overall donors are giving less. Health Care and Social Service organizations were more likely to report a decrease in the support of events, and a decrease in direct mail.

Organizations that successfully raised more **also** cite individuals as the deciding factor. More individual gifts, and larger gifts from individuals, were reported by organizations three times more often than other gift income sources.

These findings are logical based on our knowledge that individuals make up the largest donor constituency year-in and year-out. However, we are continually frustrated to observe organizations faced with a decrease in budgeted revenue that place their efforts solely in grant writing or working to improve their special events and corporate sponsorships. If you want to raise more, the survey results again point to focusing efforts and strategies on increasing **individual** major gifts.

Expectations for The Road Ahead

Those who raised less were most likely to believe that this is a trend that will continue, while those who raised more were less likely to believe their upward trend will continue. When comparing this response to previous years, our survey respondents clearly have a more pessimistic view of the future than in previous years. In 2007, only 16% of organizations that raised less thought the negative trend would continue, while in 2009 40% believe this. There was a similar response for those who raised more. In 2007, 44% of those that raised more thought the trend would continue upward, while in 2009 only 12% shared the same outlook.

This rather dramatic change in results clearly reflects the uncertainty that exists in the marketplace today.

A question was also presented to survey participants to indicate their expectations for five revenue sources in the year ahead. The highest percentage response indicated anticipated decreases for corporate funding (44%); foundation funding (34%); and earned revenue (31%). The respondents were uncertain and their response inconclusive regarding government funding. Only “gifts from individuals” was selected by 35% of respondents that this revenue source may increase in the year ahead.

We also asked about anticipated response to appeal methods in the year ahead. The most conclusive response is that organizations believe the dollar amount of gift transactions will decrease in the year ahead.

Taking the collective opinions of our survey respondents, a reasonable nonprofit executive would be focusing their efforts on the identification, cultivation, solicitation, and stewardship of individual donors. And, these efforts should anticipate that the organization will be challenged to successfully engage a larger number of individual donors than in any previous years.

Already it appears that many organizations are working toward revising strategies. Survey participants conclusively responded that a majority have begun to reshape their overall strategies and methods, as well as to increase efforts with the annual/recurring gifts campaign, and to increase efforts with a major gifts program.

While between 10% and 15% of survey participants anticipate launching new programs—with the highest percentage looking at online donations—most organizations will increase their efforts with existing: 1) major gifts, 2) annual gifts campaign, and 3) planned and deferred gifts.

There was also a majority of response about what specific initiatives organizations are planning and hoping to do in the coming year, as well as what they are ***not*** planning.

In 2009, a majority of organizations are planning **to do** the following:

- reviewing and revamping development strategies (66%)
- developing new marketing and communications (60%)
- new or redesigned web sites (59%)
- strategic planning (58%)

In 2009, a majority of organizations are planning **NOT to do**:

- Capital Campaign Planning (or feasibility) study (54%)

In one sense, these results appear logical and appropriate for the times. The surprising finding is that nearly the exact percentage of responses received in 2009 mirrored those received in 2006 and 2007 . . . the more things change, the more they stay the same.

III. Conclusion

Fund-raising and development is facing a time of challenges and contraction. Confidence about the future prospect of attaining higher goals is weak. Yet, in the face of this uncertainty, the path forward appears clear. The organizations that are succeeding today—and the ones that will succeed tomorrow—will do so **through greater involvement, engagement, and retention of individual donors.**

Despite a historical tendency for development officers to focus on short-cuts and "silver bullets" from corporations and foundations (and now even possibly government stimulus money), the nonprofit organizations that will change and improve our communities will do so through the lasting support of individuals.

For the past 44 years, Goettler Associates has demonstrated success in conceiving, planning, and winning campaigns. We have recently introduced new services designed specifically for the annual and recurring gifts campaigns, and continue to succeed in directing and advising our clients' special gift campaigns.

We hope the results of this study will serve your organization well, and encourage you to call a Goettler consultant to discuss your plans and challenges.

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Basic Organizational Information:		
What is the focus of your organization's mission?		
Answer Options	**Response Percent**	**Response Count**
Health Care	28.6%	110
Education	33.1%	127
Human or Social Services	14.6%	56
Arts/Culture	8.3%	32
Recreation	2.1%	8
Fund-Raising (e.g., community foundation, United Way, etc.)	6.5%	25
Other	6.8%	26
	answered question	**384**
	skipped question	**5**

Basic Organizational Information:		
What is your organization's total annual operating budget?		
Answer Options	**Response Percent**	**Response Count**
less than $500,000	15.4%	58
between $500,000 and $1.0 million	10.9%	41
$1.1 million - $2.5 million	15.7%	59
$2.6 million - $5.0 million	8.5%	32
$5.1 million - $7.5 million	6.6%	25
$7.6 million - $10 million	3.7%	14
$10 million - $20 million	10.1%	38
More than $20 million	29.0%	109
	answered question	**376**
	skipped question	**13**

Basic Organizational Information:		
How many full-time professional development (fund-raising) personnel are employed by your organization?		
Answer Options	**Response Percent**	**Response Count**
none	8.4%	32
part-time (less than one)	9.2%	35
one	22.4%	85
2	16.4%	62
3 - 5	24.0%	91
6 - 10	10.3%	39
more than 10	9.2%	35
	answered question	**379**
	skipped question	**10**

Basic Organizational Information:		
What portion of your organization's total operating budget is derived from voluntary contributions?		
Answer Options	**Response Percent**	**Response Count**
less than 10%	49.5%	186
between 10% and 25%	19.9%	75
between 26% and 50%	9.8%	37
between 51% and 75%	8.2%	31
more than 75%	12.5%	47
	answered question	**376**
	skipped question	**13**

Operating and Financial Results:		
Comparing fund-raising results in the current year (calendar or fiscal) with the last, did your organization raise more money or less money?		
Answer Options	**Response Percent**	**Response Count**
We raised a lot more this year	4.2%	16
We raised more	20.5%	78
Our results were about the same as last year	29.7%	113
We raised less this year	38.2%	145
We raised significantly less this year	7.4%	28
	answered question	**380**
	skipped question	**9**

Factors Affecting the Decline in Financial Results:		
What factors caused total contributions to decrease? (select all that apply)		
Answer Options	**Response Percent**	**Response Count**
Fewer Individuals gave (decrease in number of donors)	59.9%	100
Individual donors made smaller gifts	70.7%	118
Fewer Corporations gave (decrease in number of donors)	50.9%	85
Corporate donors made smaller gifts	37.1%	62
Fewer Foundations gave (decrease in number of donors)	31.7%	53
Foundation donors made smaller grants	26.3%	44
	answered question	**167**
	skipped question	**222**

Factors Affecting the Decline in Financial Results:		
Do you believe this year's fund-raising results are part of a discernable trend?		
Answer Options	**Response Percent**	**Response Count**
Yes	40.2%	68
Maybe	30.8%	52
No	16.6%	28
I don't know	12.4%	21
	answered question	**169**
	skipped question	**220**

Factors Affecting the Decline in Financial Results:		
In your experience, which trends are you CURRENTLY experiencing? (please select all that apply)		
Answer Options	**Response Percent**	**Response Count**
Fewer donors (decrease in actual gift received)	53.0%	88
Donors are still giving, but they are giving less	77.1%	128
Decrease in support of Events	48.8%	81
Less support of Direct Mail Appeals	28.3%	47
More restrictions and conditions on giving	20.5%	34
	answered question	**166**
	skipped question	**223**

Factors Affecting the Decline in Financial Results:		
In your opinion, which of these factors contributed most to the organization's decrease in fund-raising?		
Answer Options	**Response Percent**	**Response Count**
The current economic recession!	82.0%	137
A specific organizational issue (planning, resources, personnel, strategy)	10.2%	17
Specific industry-related or regional market	7.8%	13
	answered question	**167**
	skipped question	**222**

Factors Affecting the INCREASE in Financial Results:		
What factors caused total contributions to increase (select all that apply)		
Answer Options	**Response Percent**	**Response Count**
More Individuals gave (increase in number of donors)	61.8%	55
Individual donors made larger gifts	58.4%	52
More Corporations gave (increase in number of donors)	21.3%	19
Corporate donors made larger gifts	18.0%	16
More Foundation gave (increase in number of donors)	14.6%	13
Foundation donors made larger grants	19.1%	17
	answered question	**89**
	skipped question	**300**

Factors Affecting the INCREASE in Financial Results:		
Do you believe this year's fund-raising results are part of a discernable upward trend?		
Answer Options	**Response Percent**	**Response Count**
Yes	12.1%	11
Maybe	40.7%	37
No	29.7%	27
I don't know	17.6%	16
	answered question	**91**
	skipped question	**298**

Factors Affecting the INCREASE in Financial Results:		
In your opinion, which of these factors contributed most to the organization's increase in fund-raising?		
Answer Options	**Response Percent**	**Response Count**
A specific organizational issue/condition (planning, resources, personnel, strategy)	84.9%	73
Specific industry related or regional market	3.5%	3
The current economic recession	11.6%	10
	answered question	**86**
	skipped question	**303**

Operating Conditions in the Year Ahead:		
Comparing operating conditions in the current year (calendar or fiscal) with the last, how has the demand for your organization's programs and services changed?		
Answer Options	**Response Percent**	**Response Count**
Increased	52.3%	185
About the Same	39.0%	138
Decreased	6.8%	24
I don't know	2.0%	7
	answered question	**354**
	skipped question	**35**

Operating Conditions in the Year Ahead:

What are your organization's expectations for revenue in the year ahead? (please indicate opinion for each revenue type below)

Answer Options	Increase	No change	Decrease	I don't know	Not Applicable	Response Count
Corporate funding (gifts/sponsorships/etc.)	66	88	155	28	18	355
Foundation funding	65	112	120	38	18	353
Gifts from individuals	125	99	107	19	4	354
Government grants and program funding	76	85	82	41	66	350
Earned revenue	72	103	109	34	32	350
					answered question	356
					skipped question	33

Operating Conditions in the Year Ahead:

Based on the current market conditions and your recent fund-raising response, what results do you anticipate for the current year?

Answer Options	Will Increase	Will NOT change	Will Decrease	I wish I knew	Not Applicable	Response Count
The total number of donors	121	103	101	23	6	354
The dollar amount of gift transactions	61	82	171	34	6	354
Attendance at Special Events	65	127	97	30	34	353
Response to direct mail	60	101	113	40	37	351
Response to telemarketing	24	47	40	12	224	347
Response to online giving	96	83	21	50	99	349
					answered question	355
					skipped question	34

Operating Conditions in the Year Ahead:

Please indicate which of the following actions your organization is taking to weather the current economic recession.

Answer Options	Response Percent	Response Count
Reduce or eliminate programs and services	30.7%	109
Reduce staff / staff benefits	39.7%	141
Freeze staff and salary	47.6%	169
Engage the board	58.3%	207
Use reserve funds	28.2%	100
None of these changes are planned for this year	14.4%	51
	answered question	355
	skipped question	34

Fund-Raising Programs and Appeals:

As a result of the current economy, please indicate changes that you HAVE ALREADY made to your current fund-raising efforts:

Answer Options	Increased Efforts	Decreased Efforts	Began New Program	Eliminated Program	Made No Changes	Response Count
Major Gift Program	168	10	24	1	126	329
Direct Mail Program	116	24	20	4	166	330
Special Events	112	32	18	11	149	322
Annual/Recurring Gifts Campaign	195	3	25	1	100	324
Planned & Deferred Gifts Program	137	9	24	1	152	323
Online Giving	119	3	24	1	173	320
Telemarketing	32	3	12	9	247	303
Overall strategy and methods	246	3	17	0	61	327
					answered question	340
					skipped question	49

Fund-Raising Programs and Appeals:

Please indicate ANTICIPATED or PLANNED changes to your future fund-raising efforts:						
Answer Options	**Will Increase Efforts**	**Will Decrease Efforts**	**Will Launch New Program**	**Will Eliminate Program**	**No Changes Anticipated**	**Response Count**
Major Gift Program	233	0	28	1	63	325
Direct Mail Program	135	18	26	5	141	325
Special Events	133	29	30	3	127	322
Annual / Recurring Gifts Campaign	221	1	26	0	78	326
Planned & Deferred Gifts Program	202	1	39	0	86	328
Online Donations	179	2	47	1	96	325
Telemarketing	41	4	14	6	242	307
					answered question	**334**
					skipped question	**55**

Fund-Raising Programs and Appeals: Given the current economic recession, has your organization stopped, delayed or scaled back any projects that were planned or in progress?		
Answer Options	**Response Percent**	**Response Count**
Yes, stopped projects that were in process	5.3%	18
Yes, decided not to move forward with planned projects	15.3%	52
Scaled back projects that were planned or in process	27.1%	92
No, we haven't changed any project plans	48.2%	164
I don't know	4.1%	14
	answered question	**340**
	skipped question	**49**

Fund-Raising Programs and Appeals: What specific initiatives are you planning or considering for this coming year?					
Answer Options	**Yes**	**Maybe**	**No**	**I don't know**	**Response Count**
Strategic Planning Process	191	45	84	10	330
Branding/positioning campaign	150	57	110	13	330
Development of new marketing and communications	198	67	47	18	330
New or redesigned web site	197	55	69	14	335
Updating or expanding Information Technology	162	62	77	27	328
Campaign Planning (or Feasibility) Study	69	55	176	25	325
Capital (major gifts) Fund-raising Campaign	133	58	114	18	323
Reviewing & Revamping Development Strategies	218	65	32	14	329
				answered question	**341**
				skipped question	**48**

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analysis: did the type of organization affect the reported fund-raising resutls?

	a lot more	%	more	%	about the same	%	less	%	a lot less	%	DNA / blank	Total Org Type (Q.1)	
1 HealthCare	6	38%	18	23%	36	32%	38	26%	9	32%	3	110	28%
	5%		16%		33%		35%		8%		3%	100%	
2 Education	7	44%	25	32%	34	31%	49	34%	11	39%	2	128	33%
	5%		20%		27%		38%		9%		2%	100%	
3 Human or Social Service		0%	19	25%	15	14%	21	15%	1	4%	0	56	15%
	0%		34%		27%		38%		2%		0%	100%	
All Others	3	19%	15	19%	26	23%	36	25%	7	25%	4	91	24%
	3%		16%		29%		40%		8%		4%	100%	
blank	0	0%		0%		0%		0%		0%	1	1	
TOTAL by results	16	100%	77	100%	111	100%	144	100%	28	100%	10	386	
	4%		20%		29%		37%		7%		3%	100%	

analysis: did total annual operating budget affect the organization's fund-raising results?

	a lot more	%	more	%	about the same	%	less	%	a lot less	%	DNA / blank	Total by Budget (Q.2)	
1 < $500K	1	6%	8	10%	26	23%	16	11%	7	25%		58	15%
	2%		14%		45%		28%		12%			100%	
2 $500K to $1.0 Mil	2	13%	8	10%	11	10%	15	10%	3	11%		39	10%
	5%		21%		28%		38%		8%			100%	
3 $1.1 to $2.5	3	19%	10	13%	14	12%	29	20%	2	7%		58	15%
	5%		17%		24%		50%		3%			100%	
4 $2.6 to $5.0			7	9%	7	6%	14	10%	3	11%		31	8%
			23%		23%		45%		10%			100%	
5 $5.1 to $7.5	1	6%	4	5%	4	4%	11	8%	5	18%		25	7%
	4%		16%		16%		44%		20%			100%	
6 $7.6 to $10			2	3%	5	4%	6	4%	1	4%		14	4%
			14%		36%		43%		7%			100%	
7 $10 to $20	1	6%	9	12%	10	9%	17	12%	1	4%		38	10%
	3%		24%		26%		45%		3%			100%	
8 more than $20	8	50%	28	36%	32	28%	35	24%	6	21%		109	29%
	7%		26%		29%		32%		6%			100%	
blank	0		2		4		2		0		5	8	2%
Total by results (Q.5)	16	100%	76	97%	109	96%	143	99%	28	100%	0	380	380
	4%		21%		30%		38%		7%				

analysis: what is the correlation of annual operating budget to number of development professionals?

Count of FTE development annual budget	FTE development None	Part-Time %	One %	Two %	3 - 5 %	6 - 10 %	> than 10 %	Grand Tota %
1 < $500K	18 56%	11 33%	17 20%	7 11%	4 4%			57 15%
	32%	19%	30%	12%	7%			100%
2 $500K to $1.0 Mil	8 25%	4 12%	9 11%	10 16%	7 8%	3 8%		41 11%
	20%	10%	22%	24%	17%	7%		100%
3 $1.1 to $2.5	4 13%	4 12%	22 27%	7 11%	12 13%	7 18%	3 9%	59 16%
	7%	7%	37%	12%	20%	12%	5%	100%
4 $2.6 to $5.0		7 21%	3 4%	3 5%	11 12%	5 13%	3 9%	32 9%
		22%	9%	9%	34%	16%	9%	100%
5 $5.1 to $7.5		1 3%	6 7%	7 11%	10 11%			24 6%
		4%	25%	29%	42%			100%
6 $7.6 to $10	1 3%	0%	3 4%	3 5%	7 8%			14 4%
	7%	0%	21%	21%	50%			100%
7 $10 to $20		1 3%	7 8%	12 19%	9 10%	4 11%	4 12%	37 10%
		3%	19%	32%	24%	11%	11%	100%
8 more than $20	1 3%	5 15%	16 19%	13 21%	31 34%	19 50%	24 71%	109 29%
	1%	5%	15%	12%	28%	17%	22%	100%
Grand Total	32 100%	33 100%	83 100%	62 100%	91 100%	38 100%	34 100%	373

analysis: what is the typical staff size for each organization type?

	Health Care	%	Education		Social Service		All Others		DNA / blan	Q. #3
none	5	5%	9	7%	5	9%	13	14%	0	32
%	16%		28%		16%		41%			100%
part time	10	9%	8	6%	5	9%	12	13%		35
	29%		23%		14%		34%		0%	100%
one	31	28%	12	9%	16	29%	26	29%		85
	36%		14%		19%		31%		0%	100%
two	24	22%	17	13%	10	18%	11	12%		62
	39%		27%		16%		18%		0%	100%
three to five	24	22%	42	33%	10	18%	15	16%	0	91
	26%		46%		11%		16%		0%	100%
six to ten	9	8%	21	17%	2	4%	7	8%		39
	23%		54%		5%		18%		0%	100%
more than 10	7	6%	16	13%	8	14%	4	4%	0	35
	20%		46%		23%		11%		0%	100%
DNA / blank			2	2%		0%	3	3%		10
Q.#1	110	100%	127	98%	56	100%	91	97%	5	
								385	390	

analysis: what factors caused total contributions to decrease? (selected all that apply)

	Education		HealthCare		Social Service		All Others		Total		Respondents	
Fewer Indv Donors	24	40%	38	81%	14	64%	24	56%	100	58%	167	60%
Smaller Indv Gifts	40	67%	41	87%	12	55%	25	58%	118	69%	167	71%
Fewer Corp Donors	24	40%	22	47%	13	59%	26	60%	85	49%	167	51%
Smaller Corp Gifts	15	25%	15	32%	15		17	40%	62	36%	167	37%
Fewer Fndn Donors	13	22%	16	34%	13	59%	11	26%	53	31%	167	32%
Smaller Fndn Gifts	15	25%	8	17%	10	45%	11	26%	44	26%	167	26%
# Raised Less	49		38		21		36		144			
# Raise A lot Less	11		9		1		7		28		173 raised less	
Total # of Orgs	60		47		22		43		172			

analysis: for organizations that raised less - what results do you anticipate for the current year?

	Education		HealthCare		Social Service		All Others		Total		Responder	% of all respondin
Current Trends:												
Fewer Donors	22	37%	35	74%	8	36%	23	53%	88	51%	166	53%
Donors are Giving Less	39	65%	42	89%	16	73%	31	72%	128	74%	166	77%
Decrease in Support of Eve	25	42%	27	57%	13	59%	16	37%	81	47%	166	49%
Less from Direct Mail	14	23%	19	40%	9	41%	5	12%	47	27%	166	28%
More restricted Gifts	8	13%	14	30%	7	32%	5	12%	34	20%	166	20%
# Raised Less	49		38		21		36		144			
# Raise A lot Less	11		9		1		7		28		173 raised less	
Total # of Orgs	60		47		22		43		172			

analysis: what factors caused total contributions to increase (selected all that apply)?

	Education (2)		HealthCare (1)		Social Service (3)		All Others (4-7)		Total		Respondents	
More Indv Donors	14	44%	19	79%	14	74%	8	44%	55	59%	89	62%
Larger Indv Gifts	18	56%	20	83%	7	37%	7	39%	52	56%	89	58%
More Corp Donors	4	13%	7	29%	3	16%	5	28%	19	20%	89	21%
Larger Corp Gifts	2	6%	7	29%	2	11%	5	28%	16	17%	89	18%
More Fndn Donors	4	13%	3	13%	4	21%	2	11%	13	14%	89	15%
Larger Fndn Gifts	5	16%	5	21%	4	21%	3	17%	17	18%	89	19%
# Raised More	25		18		19		15					
# Raise A lot More	7		6		0		3				94 raised more	
Total # of Orgs	32		24		19		18		93			

analysis: do you believe this year's fund-raising results are part of a discernable upward (or downward) trend?

	OUTLOOK 2009				OUTLOOK 2007				OUTLOOK 2006			
Answer Option	Raised More		Raised Less		Raised More		Raised Less		Raised More		Raised Less	
Yes	11	12%	68	40%	78	44%	7	16%	92	34%	16	31%
Maybe	37	41%	52	31%								
No	27	30%	28	17%	50	28%	25	57%	91	34%	22	42%
I don't know	16	18%	21	12%	51	28%	12	27%	86	32%	14	27%
Total Response	91	100%	169	100%	179	100%	44	100%	269	100%	52	100%
# Raising More/Less	94		173									

Operating Conditions in the Year Ahead:
analysis: what are your organization's expectations for revenue in the year ahead? (indicated opinion for each revenue type listed

answer options	Increase		No change		Decrease		I don't know		NA		Response Count	
Corporate funding	66	19%	88	25%	155	44%	28	8%	18	5%	355	100%
Foundation funding	65	18%	112	32%	120	34%	38	11%	18	5%	353	100%
Gifts from individuals	125	35%	99	28%	107	30%	19	5%	4	1%	354	100%
Government grants and program funding	76	22%	85	24%	82	23%	41	12%	66	19%	350	100%
Earned revenue	72	21%	103	29%	109	31%	34	10%	32	9%	350	100%

analysis: what specific initiatives are organizations planning or considering for this coming year?

	Strategic Planning Process	Branding/ positioning campaign	Development of new marketing and communications	New or redesigned web site	Updating or expanding Information Technology Capabilities	Campaign Planning (or Feasibility) Study	Capital (major gifts) Fund-raising Campaign	Reviewing & Revamping Development Strategies
1 Yes	191	150	198	197	162	69	133	218
	58%	45%	60%	59%	49%	21%	39%	66%
2 Maybe	45	57	67	55	62	55	58	65
	14%	17%	20%	16%	19%	17%	17%	20%
3 No	84	110	47	69	77	176	114	32
	25%	33%	14%	21%	23%	54%	34%	10%
4 I don't kow	10	13	18	14	27	25	32	14
	3%	4%	5%	4%	8%	8%	9%	4%
Response coun	330	330	330	335	328	325	337	329

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