



2014 Philanthropy Trends

Association of Fundraising Professionals
Oregon & SW Washington Chapter

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Dear Survey Respondent,

We're pleased to send you the full report of the fifth Philanthropy Trends Survey of our region as our thanks for participating in the survey.

Often we go about our work and feel like we're working in silos, not really aware of all that is happening in our sector in our community when it comes to fundraising and philanthropic activity. The intent of the survey report is to give you a picture of what has happened in 2013 and a look to what's in the works for 2014.

Armed with this knowledge, as a decision-maker, director of development, executive director, influencer, philanthropist, or board member, you can make smarter decisions when you have a better view of the landscape.

I also invite you to view a video recording of our AFP member meeting at which highlights of this report were presented and discussed. You may view the video here at this cut and paste link: <http://www.youtube.com/watch?v=vg8-LTxfSiU&feature=youtu.be>

Thank you so much for participating in this year's survey!

A handwritten signature in black ink, appearing to read 'Sam Vigil Jr.', written in a cursive style.

Sam Vigil Jr., President
AFP-Oregon & SW Washington

Highlights Summary

Fundraising results are UP.

MORE campaigns are in play and they add up to a very large number:

- Campaigns ending: \$1 billion
- Campaigns continuing or launching soon: \$1.5 billion
- OHSU campaign: \$1.2 billion
- Philanthropy survey reported campaigns: \$461 to \$819 million

Government budget cutbacks negatively affect all kinds of groups – not just the usual suspects.

The top reasons for increased results:

1. More individuals gave
2. More people gave major gifts
3. Major gifts were bigger

More staff and more money raised. “New staff” was a frequently cited reason for fundraising increases.

The number of \$1,000 gifts are an indicator of future success raising major gifts. Almost 60% of groups have fewer than 50 donors giving at this level. About a third (30%) have between 1,000 and 6,000 donors at this level.

Bequests make an important difference in the annual budgets of many groups. The #1 technique for top fundraisers is face-to-face meetings.

Board giving matters. It played a role in fundraising success for 89% of groups.

Mixed reviews for the effectiveness of corporate and business support.

Fundraising goals will be UP for 2014:

- increase greatly (25%+) = 16.4%
- increase (15-24%) = 22.2%
- increase modestly (5-14%) = 37.6%

Mixed results for social media but that might have to do with how nonprofits use (or don't use) it.

Bellwether Survey Highlights

More campaigns and bigger goals.

The big gifts are local.

Major giving is KING.

Bequests matter.

More staff and more money go together.

Annual fund participation may mean more than dollar totals when long-run fundraising objectives are considered.

Overall

Nonprofits are “all swimming in the same water,” but we make plans and think we play in our own silos.

Campaign goals continue to climb. Unless total philanthropy grows significantly, will many campaigns fall short – or will some campaigns shift money from other causes?

Is the nonprofit fundraising landscape is in the midst of a paradigm shift in regard to giving, size of gifts, and expectations of donors?



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About the Survey

This is the fifth survey of philanthropy in our region. Kevin Johnson of Retriever Development Counsel, LLC created it in 2009 for the purposes of giving professional and volunteer nonprofit leaders a snapshot of the regional fundraising landscape and to identify opportunities for fruitful discussion.

This most recent survey is sponsored by the Association of Fundraising Professionals, Oregon and SW Washington Chapter, with support from The Oregon Community Foundation, additional pro-bono assistance from Kevin Johnson of Retriever Development Counsel, LLC, and with in-kind support from the Nonprofit Association of Oregon (NAO).



Demographics and Background

The survey was conducted at the end of January 2014; more than 2,000 nonprofit groups in Oregon and SW Washington were invited to participate. The survey asked about calendar year 2013 fundraising experiences. In comparison to the total numbers of nonprofit groups in Oregon, survey responses represent a good sample. One hundred eighty (180) respondents from a wide range of group sizes and types completed the survey. These figures are comparable to those from the previous fundraising trends surveys.

A second survey was conducted that invited participation from the 25 groups that raised the largest individual amounts of philanthropic support in our region. This bellwether group case study is included as a companion to the larger, main survey. Unless noted otherwise, respondents to the main survey do not include those from this group invited to be part of the bellwether case study.

Respondents were primarily from Oregon (83%) and Washington (8%) and the majority represented independent organizations.^a Respondents were in positions of fundraising accountability.

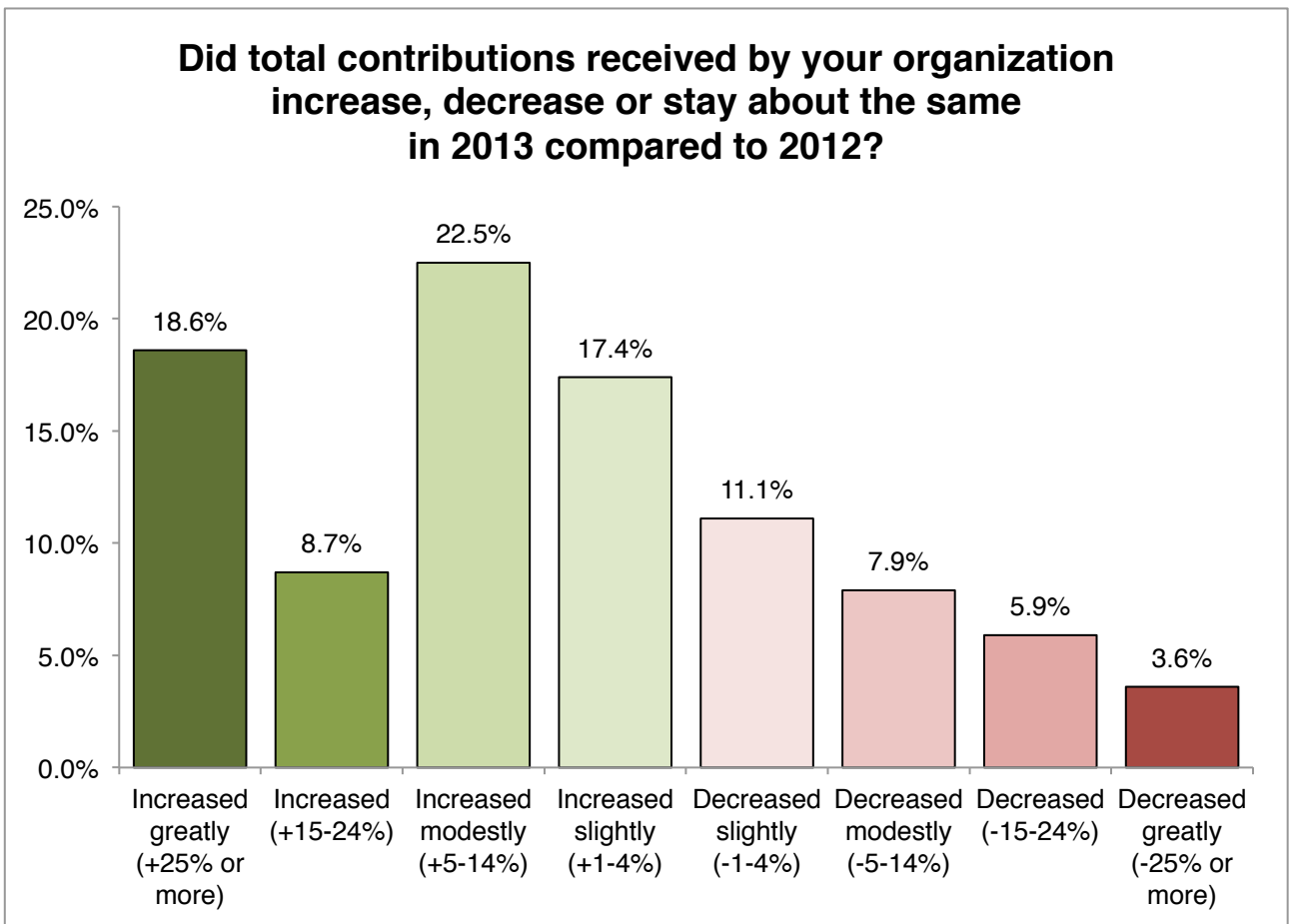
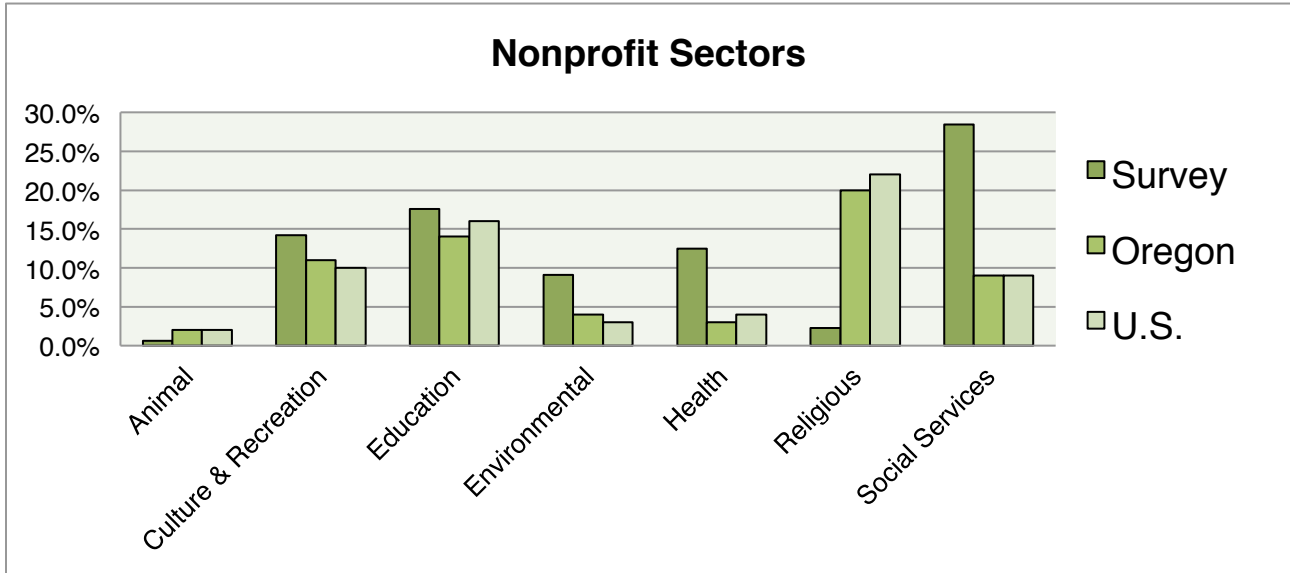
There was cross-sector participation, with the highest numbers in social services, education and research, and culture and recreation. These subsectors have consistently been the highest participants in this survey. When compared to national and state numbers for nonprofit sector types: organizations in education and culture and recreation (arts) were slightly overrepresented; environment, health, and social services were highly overrepresented; animal welfare organizations were underrepresented; and religious nonprofits were highly underrepresented. This subsector representation has been consistent over the years of the fundraising trends survey.^b

We compared the groups that responded to the most recent IRS 990 data using EIN numbers where matches were possible.

Collectively the total revenue of survey respondent groups is more than \$1,451,621,914. The total of contributions raised is more than \$476,439,494.

Subsector of Respondents	%
Social services	28.40%
Education and research	17.60%
Culture and recreation	14.20%
Health	12.50%
Environment	9.10%
Various	4.50%
Law, advocacy and politics	2.80%
Development and housing	2.80%
Business and professional associations, unions	1.70%
International	1.10%
Animal welfare	0.60%

Position of Respondent	%
Executive Director or CEO/President	42.60%
Development Director	27.30%
Other development staff	9.00%
Chief Development Officer	6.30%
Finance Director/CFO	2.30%
Board Chair	4.00%
Board Member	4.50%



Total contributions for the year

The percentage of respondents that reported increases of 25% and greater in their fundraising almost doubled, to 18.6%, compared with past surveys. In contrast, in the past three years of the fundraising trends survey, gains were reported more in the modest range (+5% to +24%), with only 9-11% reporting gains over 25%.

Over the five years of the fundraising trends survey, the percentage of groups reporting increased fundraising results has remained steady, increasing only slightly over that time period, from 45% to almost 50%.

What has increased is the percentage of groups reporting holding steady (reporting slight increases to slight decreases, +4% to -4%), with a concomitant drop in groups reporting decreases. Over the past three years, between 28% and 31% reported relatively flat results; the percentage reporting decreases changed from 25% in 2011 to 17.4% in 2013.

Overall, this trend could be a reflection of the slowly improving economy over the last five years. The higher “bump” in 2013 contributions is consistent with industry reporting that 2013 has been the best fundraising year since the beginning of the recession.

Results by subsector: There were not major differences among subsectors when it came to their fundraising results for the year, i.e., all subsectors represented had fundraising results across the spectrum, with the trend towards increased fundraising results. This is consistent with Blackbaud’s recent *Charitable Giving Report*, which reported that every nonprofit sector had year-over-year fundraising growth in 2013.¹

One standout for this year’s survey: of the organizations reporting that total contributions had increased greatly, health organizations were the most represented. These nonprofits comprised 12.5% of respondents, but represented 24% of groups that reported greatly increased total contributions. Other sectors trended as follows:

- Education and research: Modest increases
- Culture and recreation: Slight to modest increases
- Environment: Slight increases
- Social services: no clear trend

What made a difference in 2013?

Following the trend from last year’s fundraising survey, individual giving and major gifts played significant roles in both increased and decreased fundraising results, with foundation grants coming in third. Factors for increased fundraising results:

1. More individuals at all levels gave (61.5%)
2. More major gifts (61%)
3. Major gifts were bigger (56.5%)

¹ MacLaughlin, Steve. 2014. *Charitable Giving Report: How Nonprofit Fundraising Performed in 2013*. Blackbaud. <https://www.blackbaud.com/nonprofit-resources/charitablegiving#.UvpnGfZkIp8>

4. More members/more annual fund (47.8%)
5. Foundation grants were bigger (42.6%)

This ranking is based on groups that responded that the factor was most important or important in their results for the year. When we look just at the most important rankings, the list runs like this:

1. Major gifts were bigger (22.1%)
2. More major gifts (21.3%)
3. Foundation grants were bigger (18.4%)
4. More members/more annual fund (14.9%)
5. Foundations gave more grants / More individuals at all levels gave (tied, 14.8%)

In an open-ended follow-up question, the survey asked about the primary reason for the increase in contributions. The major trends in responses included:

- staff changes;
- the tactics employed, prominent among which were campaigns; and,
- the importance of major donors.

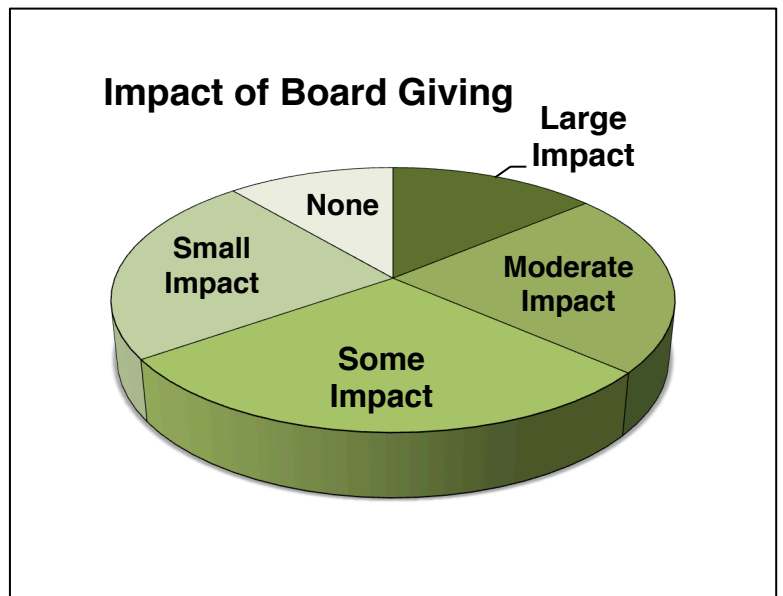
For staff changes, respondents most frequently mentioned new leadership, including new executive directors and board turnover; stronger board participation in fundraising was also mentioned. However, “new staff,” particularly in development, was also identified as a key contributor to fundraising increases. Other themes include a focus on creating or maintaining ongoing relationships, improving marketing/visibility, community (“we’re in this together”), creative ways to address challenges, flexibility, collaboration, and the pooling of resources.

Factors for decreased fundraising results

1. Gifts from individuals were smaller (60%)
2. Fewer individuals gave (56.3%)
3. Fewer major gifts (56%)
4. Major gifts were smaller/Foundation grants were smaller (tied, 48.9%)
5. Foundations gave fewer grants (46.8%)

Like above, this ranking is based on groups that responded that the factor was most important or important in their results for the year. When we look just at the most important rankings, the list runs like this:

1. Fewer major gifts (34%)
2. Major gifts were smaller (21.3%)
3. Fewer individuals gave (18.8%)
4. Foundations gave fewer grants (17.0%)
5. Gifts from individuals were smaller (16.7%)



As with increased contributions, the survey also asked about the primary reason for the decrease in contributions. The major trends in responses included:

- poor leadership/lack of staff/change in staff has a big impact;
- the lack of ongoing, sustained relationship with donors, or an ineffective relationship with the donor base hurts;
- major gifts – or the lack thereof – are a major deal, either due to less bequest income, smaller gifts from major donors, or major donors dying; and
- pessimism regarding the economy or the poor economy directly affecting the local area.

Both major gifts/donors and organization staff play a critical role in the year’s fundraising results, for good or for bad. Respondents with “up” fundraising years are much more likely to attribute their success to tactics – including donor stewardship and relationships -- than groups with “down” fundraising years. Though both groups with “up” and “down” years mentioned the economy, groups with “down” years are more likely to attribute poor results to the economy. This is a fundamental quirk of human nature: we tend to attribute successes to things that we did, while we tend to attribute things that are not as successful to forces outside of our control. This self-serving bias has been demonstrated in the responses to these attribution questions for the five years of the fundraising trends survey.

Techniques that contributed to 2013 fundraising results

Respondents ranked these techniques important to a large and moderate extent.

1. In person meetings: 58.3%
2. Large events: (51+ people): 56.7%²
3. Foundation grants: 53.7%
4. Sponsorships: 41%
5. Board giving: 36.4%

It may be interesting to note that board giving, sponsorships, and corporate support and grants were evenly divided across the importance spectrum. With the exception of in-person meetings, which played no role for just 8.6% of responding organizations, board giving was the next lowest figure, as only 11% of respondents said that it played no role in their fundraising results.

Changes for 2014

We asked respondents to rank factors that were important to 2013 success and changes planned in those factors for 2014.

1. Number of grant requests to foundations: 45.5%
2. Staffing related to development: 42.6%
3. Bigger grant requests to foundations: 40.2%
4. Bigger asks for major gifts: 36.5%
5. Number of proposals for major gifts: 35.1%

² However, 22.5% said this wasn’t important at all.

It is interesting that grant requests (both in number and size) are targeted here as factors in success, over factors related to major gifts, when major gifts have previously been identified as the more important factors in fundraising success. A potential link between these factors for success and the techniques that contributed to 2013 results is the mention of increased staffing related to development. Increased staffing could make both major gifts and foundation grants more achievable, as donor cultivation and stewardship and grant applications both take significant amounts of time.

The other stark fact to note is that foundation giving represents a much smaller proportion of total giving. Individuals historically give the largest percentage of total giving: \$251 billion compared with \$46 billion from foundations. At the same time over the last 40 years, giving by foundations has increased, from about 6-7% of the total between 1973 and 1992, to 14% of the total in the last five years (2008-2012). Giving USA believes the primary reason for the shift in giving by individuals to giving by foundations is the growth in giving by living individuals using family foundations as a giving tool.³

Recent studies from the Association for Healthcare Philanthropy demonstrate that “investing in fundraising staff generates the biggest return in donated dollars” and “more staff focused on major gifts ‘means that donor relationships are more genuinely cultivated and sustained;’ results improve when fundraising professionals have been on staff for five years or more.”⁴ These same studies found that groups that invested more in development staff and resources achieved a return on investment that averaged six times higher than that of groups that invested less.⁵

However, when we look at changes planned for 2014, those priorities flip again. Here are the top-ranked priorities by importance:

1. Number of proposals for major gifts: 65.5%
2. Number of grant requests to foundations: 62.5%
3. Bigger asks for major gifts: 61.4%
4. Bigger grant requests to foundations: 58.2%
5. Number of corporate requests: 56.8%

This flip-flop raises a number of questions. Is there a perception in organizations that foundation grants “count” more than donations from individuals? Are foundation grants more “visible” to the organization and supporters, conferring bragging rights that major and individual gifts do not confer? Are they perceived as having higher return on investment, or taking less time than donor cultivation? Are they easier for newer staff to focus on compared with building major donor relationships?

Over the past three years of this survey, fundraising success is consistently attributed to individual and major giving, and yet, in “plans for next year,” many respondents report that they want to increase their grant requests to foundations, both in number of requests and amounts solicited, as well as increase corporate requests.

³ Giving USA, 2013. <http://www.npengage.com/nonprofit-research/key-findings-from-giving-usa-2013-report/#sthash.uh9nPMos.dpuf>

⁴ Cohen, Todd. 2014. “Fundraising Success Tied to Staffing Capacity.” *Philanthropy North Carolina*. <http://philnc.org/2014/02/04/fundraising-success-tied-to-staffing-capacity/>

⁵ Hall, Holly. 2014. “Investing in Fundraisers Who Cultivate Big Donors Pays Off, Studies Find.” *The Chronicle of Philanthropy*, Feb. 5. <http://philanthropy.com/article/Investing-in-Fundraisers-Who/144319/>

What is meaningful corporate support?

When asked a separate question about meaningful corporate support in 2013, the top three kinds of corporate support that were most meaningful to respondents were event sponsorships, professional connections, and in-kind services/products.

In follow-up question about what could make corporate support more valuable/meaningful for organizations, respondents said that they wanted the following out of their corporate connections:

- mutually beneficial partnerships;
- substantive relationships, not superficial ones;
- ongoing support for the long-term, the equivalent of a “steady” boyfriend or girlfriend;
- genuine engagement and volunteerism from employees;
- corporations to “use their powers for good” by boosting group’s visibility, helping with fund-raising, using corporate connections to link to more donors and other CEOs;
- give more money with “less strings attached”

It is worthwhile to note that rural non-profits feel themselves to be at a disadvantage: they feel invisible to corporations. Some non-profits’ missions are more politically “charged” or controversial; these groups feel that this is a challenge to receive corporate support.

There were a number of comments that indicated a perception of disconnection between nonprofits and corporate support. For many groups, support of local businesses might read as more meaningful to them (and not register as corporate support), as they do not perceive themselves as having access to corporate support, because of their location, few corporations in Oregon, “everyone hits up the same corporations here,” etc.

Social media

There is a definite gap in perceived importance or expectations of social media and satisfaction in social media being able to deliver. Reasons for using social media ranked as most important include:⁶

1. Marketing and branding focus: 67.4%
2. Education: 61.2%
3. Engaging younger donors: 60.0%
4. Engaging existing donors: 59.5%
5. Connecting with new donors: 50.6%

These responses indicate a strong focus on tasks that social media is designed for, namely connection with others (here, donors) and communication (here, education and marketing).

Respondents were most satisfied⁷ with the return on investment (ROI) for:

1. Marketing and branding focus: 33.9%

⁶ Ranked 4 or 5 on a 5-point scale, with 1 = not important and 5 = very important

⁷ Ranked 4 or 5 on a 5-point scale, with 1 = not satisfied and 5 = very satisfied

2. Education: 31.1%
3. Advocacy or call to action: 24.1%
4. Engaging younger donors: 18.7%
5. Connecting with new donors: 16.8%

These responses indicate that groups are most satisfied (though minimally so) with the communications functions of social media, i.e. pushing information out. Again, it is clear that there is a significant gap between the importance of and satisfaction with social media to accomplish organizational goals. In a gap analysis, there was an average gap of 0.65 between the importance of an item and the satisfaction with the ROI for that item. Several items had a higher-than-average gap between importance and satisfaction: marketing and branding focus, engaging younger donors, and connecting with new donors.

Taken as a whole, the average rating on the importance of using social media for various purposes was 3.45 (on a 5-point scale). By comparison, the average rating for satisfaction on return on investment for social media was 2.80. Questions: Are groups using social media in a way that best utilizes what social media can do? Are the expectations for social media outsized?

Half of these groups cannot or do not track contributions in connection with social media. Of those that can or do, most report slight to modest increases in contributions through those channels. Due to the rising popularity and importance of online giving, as evidenced in the professional literature over the last two years, a future fundraising trends survey would do well to ask more specifically about online giving, as an entity that may be separate from giving via social media channels.

Donors matter

Respondents reported a range of donors giving annual gifts of \$1,000:

1. Fewer than 10 or zero: 26.9%
2. Between 11 and 50: 31.1%
3. 51-100: 15.5%
4. 101 and over: 25%

With almost 60% of groups having (only) up to 50 donors at the \$1,000 level, it is reasonable to assert that these donors have an important impact on these groups. These numbers compare with the total number of active donors: 48.2% of respondents have 1,000 active donors or fewer. Almost another third (30%) have between 1,000 and 5,999 donors. The data for the two donor questions is not much of a surprise, given the breakdown of size of groups in Oregon.

Group size (budget)	# Groups in Oregon
Less than \$500,000	10,761
\$500,001 - \$1 million	391
\$1,000,001 - \$3 million	464
\$3,000,001 - \$5 million	140
\$5,000,001 - \$10 million	120
More than \$10 million	156

Legacy/planned giving

About 34% of respondents reported that fewer than 10 people have indicated plans for a future bequest or deferred gift for their group, and 30.9% reported that no one has indicated these plans for their group. About a quarter (26.6%) report that between 11 and 100 people have declared this intention. A very small percentage of groups (4.8%) reported that more than 100 people have made this intention known.

For gifts received in 2013, notice of a future, intended bequest or estate gift was most common (51% of groups), followed by realized bequests (34.7% of respondents), and IRA rollover gifts (23.5%).⁸ Other gift types (CGA, CRT, CLT, PIF⁹) are much less common; if groups do get them, there are few of them.

Of realized legacy gifts, bequests and IRA rollovers had the most importance for 2013 budgets, compared with other gift vehicles. It is important to note that several groups that had increased contributions in 2013 specifically identified bequests as the primary reasons for their success. Likewise, several groups that reported decreased contributions for the year acknowledged that they had had significant bequest income in 2012 that was not repeated in 2013.

Budget impact	Bequests	IRA rollovers
<3% of budget	15.1%	12.6%
3-7% of budget	5.0%	1.71%
8-15% of budget	4.5%	1.71%
16-25% of budget	2.2%	
>25% of budget	0.6%	

Budget and service plans for 2014

Budget: For 36.7% of respondents, they project their budget to be about the same for 2014. Most of the rest (52%) are planning increases: 35.1% project modest ones (+5-14%), 9.6% project increases of +15-24%, and 7.5% project increases of over 25%. Very few groups are planning for decreased budgets.

Services: This aligns with projected increases in services (64.7% of respondents); however, this is not an unusual finding, as each year of this survey, groups have projected an increase in services, even in the worst years of the recession. For projected increases in services, 80% of respondents in education/research and 76.2% of respondents in social service organizations said they planned to increase services in 2014. Very few educational entities plan to decrease services, and no social service agencies planned decreases.

⁸ IRA Rollover: Legislation allowing individuals 70½ and older to rollover or donate money from their IRA account directly to a charity without having to treat the withdrawal as taxable income. Depending on how Congress acts this may or may not be a giving option for 2014 or beyond.

⁹ CGA (charitable gift annuity), CRT (charitable remainder trust and its variations), CLT (charitable lead trust), PIF (pooled income fund).

Neither of these subsector findings is particularly surprising. People have been flocking to education, either to retrain or as a way to avoid a stagnant job market that is rife with underemployment. As the economy has gradually improved, enrollments at many institutions have remained flat or decreased somewhat, but have not dramatically tapered off yet; some institutions are adding programs in response to emerging needs in the job market. For social service agencies, given the responses here, it seems that these agencies do not perceive that community need is tapering off.

Government cuts and impact on organizations

For the first time, this survey asked questions about the effect of known shifts in government on the community impact of nonprofit work.

Question: *For 2014 will known shifts in government support affect the community impact of your work?*

Respondents were asked to rank various related factors on a scale from 1 (little change) to 5 (big change). The average score for the items ranked for this question fell between 2.70 and 3.31, with the overall average at 3.06. It is worthwhile to note that the largest response on any of these items was “not applicable,” as many types of organizations do not rely on or obtain government funding, either through contracts or grants. Respondents expect to see a moderate to big change¹⁰ on their group’s impact in terms of:

Competition for funds	38.2%
Cumulative budget cuts since 2009	32.8%
Demand for more coordination/partners	30.3%
Belt tightening	29.2%
Government focus on “higher impact” programs	27.6%

Question: *What do these changes mean for the quality and volume of your group's services?*

Respondents were asked to rank various related factors on a scale from 1 (negative) to 5 (positive). Similar to the previous question, the average score for the items ranked here fell between 2.24 and 3.44, with the overall average at 2.76. Respondents said that these factors have an effect^c more towards the negative end of the scale:

Belt tightening	35.2%
Competition for funds	35.1%
Cumulative budget cuts since 2009	33.2%
Budget cuts mean more private fundraising to fill gaps	27.6%

While these numbers may seem small at first glance, **it is significant that government cuts will have a substantial effect on a quarter to a third of nonprofits.** We expected to see skewed results in this section, due to the high proportion of social service groups that responded to the survey. However, when we broke the data down by subsector, we found that the impact of governments cuts shows up across subsectors. These cuts may also have a ripple effect across the sector, as groups that have relied on government funding have to raise more from private sources, whether individuals

¹⁰ Definition: moderate to big change is the equivalent of a ranking of 4 or 5 on the 5-point scale.

or grantmakers, thereby competing with organizations for whom government funding has been less important.

Fundraising revenue goals

- Increase greatly (25%+): 16.4%
- Increase modestly (5-14%): 37.6%
- Increase (15-24%): 22.2%
- Stay the same (-4% to +4%): 18%

For last year’s survey, 81% of respondents projected increases to fundraising revenue goals, with most increases projected in the modest 6-10% range. Having over a third of respondents this year project fundraising revenue goals over 15% seems to be a positive harbinger of better times ahead, but one has to wonder if these projected goals are realistic and data-driven. With so many groups projecting increases, where exactly is all the money coming from?

Given that this survey is overrepresented in social service organizations, it is not surprising to see groups in that subsector show up prominently here. It might be useful to look at the proportion of organizations in each subsector proposing increases of over 15%:

- Education and research: 47%
- Social services: 43%
- Health: 38%
- Environment: 31%
- Culture and recreation: 30%

Revenue goals...	Top ranked	Second ranked	Third ranked
Increase greatly	Education & research (33.3%)	Social services (29.6%)	Health, Culture & recreation (tied, 11.1%)
Increase	Social services (23.8%)	Health, Education & research (tied, 11.9%)	Culture & recreation, Environment (tied, 9.5%)

In Blackbaud’s recent *Charitable Giving Report: How Nonprofit Fundraising Performed in 2013*, only the international affairs subsector posted double-digit growth (13.2%) over 2012; environment and animal welfare had 8.6% growth overall, education had 6.5% growth, and other subsectors had small, single-digit percentage increases. Even taking into account the survey’s overrepresentation in education and social services, both compared to the state and to the U.S., the numbers that we’re seeing for proposed increases seem overly optimistic compared to national norms and this raises several questions.

Are people in Oregon really that much more charitable than in other areas of the country? Residents of Utah with its high Mormon and religious base give the most, 10.6% of discretionary income but the percentage rapidly drops off. Many states are in the four percent range as is Oregon ranked 20th at

4.6%.¹¹ In that same study, the *Chronicle of Philanthropy* noted that people in red states “are more likely to give generously to charities than in blue states” such as Oregon.¹²

Or, do organizations that respond to this survey trend to self-selecting towards more successful or optimistic groups?

We also wondered if campaign status (see below) has something to do with the projected increases in fundraising revenue goals, but found this is not the case. For groups that project increases over 15%, there are approximately equal numbers currently in a campaign or with plans to launch this year as there are groups that have no campaign currently in play (in the planning stages, or not currently planned or ongoing). It should come as no surprise, however, that of those with a current or future campaign goal, having a campaign promotes an increased fundraising revenue goal, regardless of size of campaign goal.

The estimated size of current or future campaign is:	Number of reported campaigns by respondents	%	Low estimate of campaign size	Total dollar goal with low estimate of campaign size	Mid-point estimate of campaign size	Total dollar goal with mid-point estimate of campaign size
Less than \$1 million	33	36%	\$500,000	\$16,500,000	\$750,000	\$24,750,000
\$1 to \$2.9 million	21	23%	\$1,000,000	\$21,000,000	\$1,500,000	\$31,500,000
\$3 to \$7.9 million	19	21%	\$3,000,000	\$57,000,000	\$6,000,000	\$114,000,000
\$8 to \$14.9 million	9	10%	\$8,000,000	\$72,000,000	\$12,000,000	\$108,000,000
\$15 to \$29.9 million	3	3%	\$15,000,000	\$45,000,000	\$22,000,000	\$66,000,000
\$30 to \$99.9 million	5	5%	\$30,000,000	\$150,000,000	\$65,000,000	\$325,000,000
\$100 to \$199 million	1	1%	\$100,000,000	\$100,000,000	\$150,000,000	\$150,000,000
Total	91		Low estimate:	\$461,500,000	Mid-point estimate:	\$819,250,000

Even more campaigns

About 39% report launching or continuing a campaign in 2014, and an additional 13% will start or continue planning a campaign. In 2011, we noted an uptick in the number of planned or ongoing

¹¹ Gipple, Emily. 2012. “How The Chronicle Compiled Its Look at Giving Across America”, *The Chronicle of Philanthropy*, March 2, 2014. <https://philanthropy.com/article/How-The-Chronicle-Compiled-Its/133667/>

¹² Gose, Ben. 2012. “Wealthiest Don’t Rate High on Giving Measure”, *Chronicle of Philanthropy*, 8/19/2012. <https://philanthropy.com/article/America-s-Geographic-Giving/133591/>

campaigns; this seemed like a harbinger for the return of fundraising optimism. The best comparison here is between the 2009 survey report and this year, as there were about the same number of survey responses in both years.

In early 2009, 59% of those with a campaign said that it would be on schedule, and 38% said that the campaign would be postponed. For 2013, the survey asked if campaign goals were adjusted. For 66% of those with a campaign, they made no adjustment to campaign goals. Another 25% adjusted their goals up, leaving about 8% that adjusted their goals down. This seems to indicate that campaigns are either on track (no changes necessary) or going well, as goals are adjusted upwards. What is certain is that campaigns are going forward: the goals may be adjusted down, but campaigns are not being postponed or cancelled.

Comparing campaign goals to 2009, the goals for the 2013-14 campaigns reported by respondents are very similar: most are under \$10 million, with a few sizeable outliers.

Year	2009	2010	2011	2013	2014
%	19%	7.5%	21%	21%	39%

Looking at campaign size, and doing some quick math, this represents fundraising goals in the range of \$461 million to \$819 million – and this is not counting a number of the groups with the largest annual fundraising in the Bellwether Case Study, many of which also have current or planned campaigns, nor is it counting the \$1.2 billion OHSU campaign to meet Phil Knight’s challenge. Then, when you look at campaign timelines or expected duration of the campaign, one must wonder: Where is all this money going to come from in this amount of time?

The OHSU campaign to meet the Knight challenge

Participants were asked to reflect on the impact of the \$500 million challenge issued by Phil and Penny Knight to OHSU to match by raising a like amount by December 31, 2015 and to rate statements in regards to prospects for their 2014-15 fundraising.

Statement: *The Knight Challenge will be like a rising tide that lifts all boats.*

Answer: *47% said somewhat unlikely or very unlikely; 26.7% neutral (wait and see?)*

Fundraisers are in general an optimistic crowd. A response of this type suggests an overall pessimism that this challenge gift will increase philanthropy across the board.

By size: Groups that raised less than \$500,000 in 2013 were more likely than other groups to indicate that it was very unlikely or somewhat unlikely that this challenge will be a rising tide that lifts all boats. While groups that raised between \$1 and \$3 million trended negatively on this question, they also were more likely to have responses across the range, from very unlikely to somewhat likely. It is also worth noting that only groups that raised less than \$1 million said that this was not applicable.

By subsector: Groups in health and education had higher than average response rates for very unlikely or somewhat unlikely. However, respondents seemed more optimistic that the OHSU campaign to meet the Knight challenge will not affect their efforts.

Statement: *Our top 10 individual donors will maintain their current levels of support.*

Answer: 44.6% very likely; 32.6% somewhat likely

By size: In all fundraising brackets, the majority of responses were equally split between “somewhat likely” and “very likely.” One anomaly to this was that groups that raised between \$1 and \$3 million had almost twice as many “very likely” responses as “likely” responses. Another note: groups that raised under \$100,000 had the largest number of “neutral” and “not applicable” responses.

By subsector: Groups in education were both the most optimistic (higher than average response of “very likely”) and pessimistic (higher than average response of “very unlikely”). Environmental and animal welfare groups had above average responses of “very likely.”

Statement: *Our annual fund will meet or exceed annual goals.*

Answer: 23.3% very likely; 40.3% somewhat likely

By size: Groups that raised between \$1 and \$3 million were most likely to respond “very likely,” while groups that raised under \$100,000 were most likely to respond “somewhat likely.” The only groups that responded “not applicable” to this question were groups that raise less than \$1 million.

By subsector: Health and environmental groups had above average positive responses. Social services, education, and culture and recreation groups had responses all over the spectrum.

In contrast, groups with campaigns might be the most concerned about the OHSU campaign to meet the Knight challenge.

Statement: *Our campaign momentum will grow as fast as we originally projected.*

Answer: 12.4% very likely; 29.4% somewhat likely; 28.3% neutral (wait and see?); 22.6% not applicable

By size: Groups that raised between \$1 and \$3 million had the highest number of “very likely” and “somewhat likely” responses to this question.

Groups that raised over \$3 million were more likely to respond “somewhat likely” or “very likely.” Groups that raised less than \$100,000 had responses all along the spectrum, though they trended between “neutral” and “somewhat likely.” Responses of “not applicable” came primarily from groups that raised less than \$1 million, with a handful of groups in the \$1-3 million range.

In their own words:

“We are located in a rural area of Oregon and our services are location specific, so we don't expect to be in great competition related to the Knight challenge gift. That said, several of our major donors have been approached for support and expressed concern that their participation in the Knight project will mean fewer contributed dollars to local non-profits, especially for safety net services. You should know that many safety net providers in our region are on the precipice of financial failure and a loss of as little as \$50,000 is a budget disaster.”

“We've already experienced major donors who will not be contributing to our organization at all due to commitments to the (OHSU campaign for the) Knight challenge.”

“Nice to see them (OHSU) step forward but having to be creative to meet the match may be negative in many donors' minds.”

By subsector: Groups in education and health had above average positive responses here; however, these same subsector groups also responded across the spectrum, with below average responses of “neutral.” Groups in culture and recreation had above average responses of “somewhat likely.”

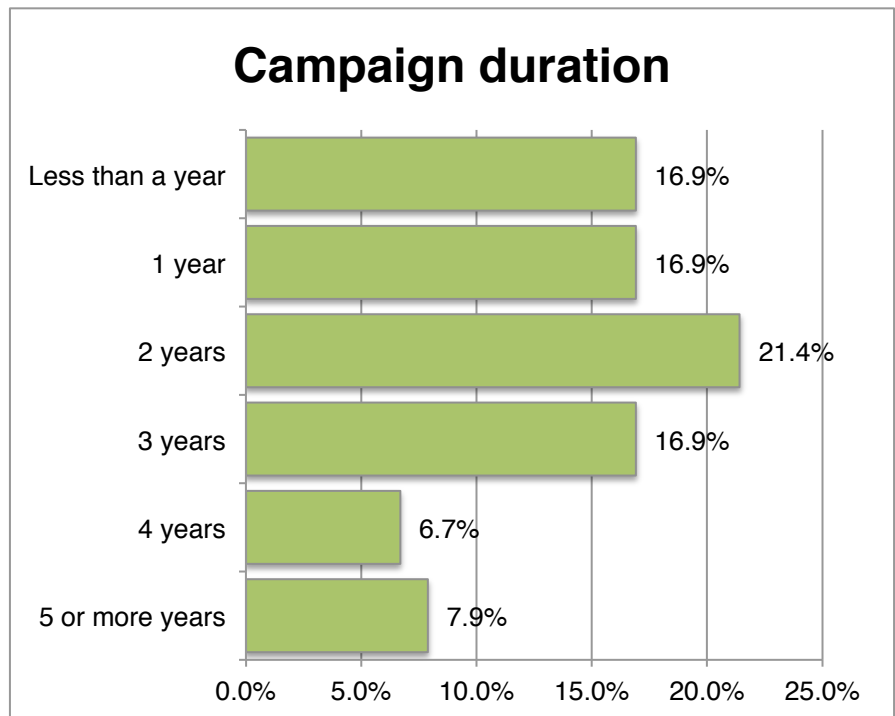
Looking at the responses from the top fundraising groups in a separate survey, they are slightly more optimistic than the larger survey respondents that the Knight Challenge will be like a rising tide that lifts all boats, and much more confident about their own fundraising prospects. This indicates that groups with substantial fundraising resources – staff, time, etc. – are in a much different place regarding this challenge than the majority of groups that serve as the “community glue” in Oregon.

In an open-ended follow-up question, there was a lot of ambivalence about the Knight challenge gift. It was surprising to see the number of respondents who said:

- “Knight challenge gift?”;
- it wouldn’t have any impact on the fundraising for their organization (because they’re a small or medium sized group, in a rural area, etc.);
- it would be more of a problem for organizations in Portland or I-5 corridor.

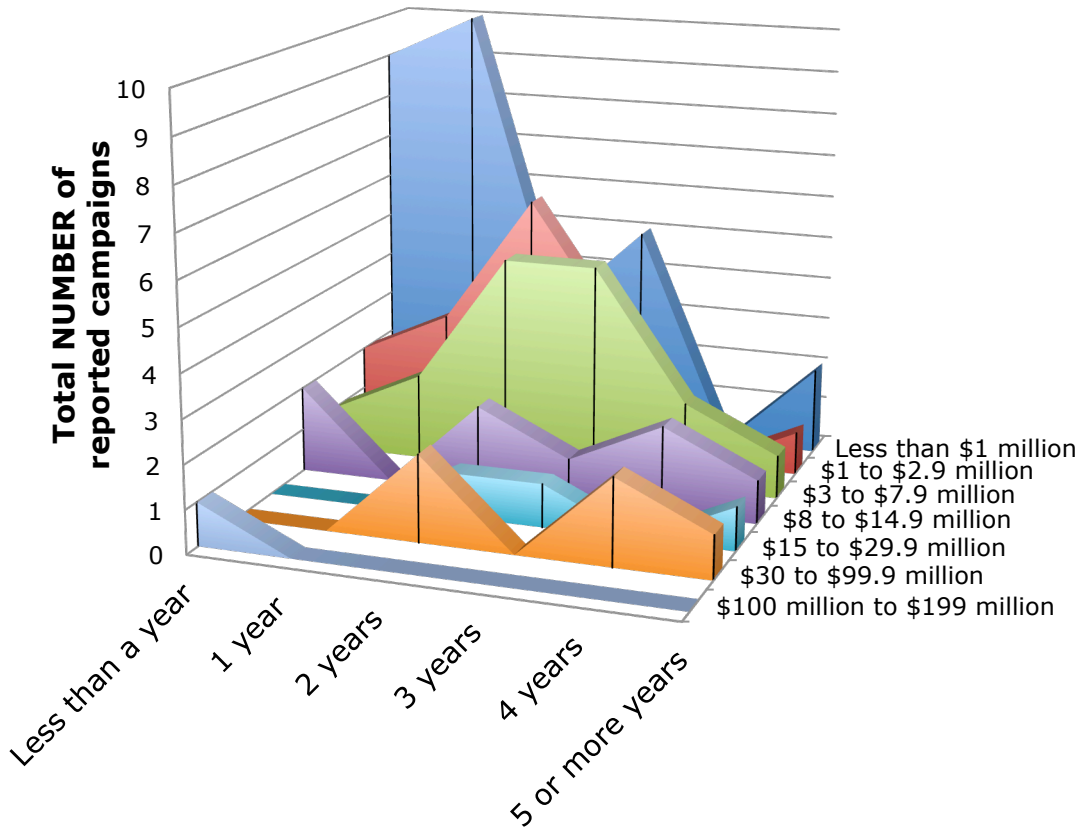
There is significant concern that funds will be diverted away from other causes, and some respondents stated that they are already seeing the effect of this challenge on their mid-level or major donors. Other expressed a frustration that all of this money/effort is being siphoned into one campaign, whereas mere fractions of the challenge amount could give their group a huge boost. Some respondents are keenly aware of the impact that this challenge brings to nonprofits.

There is definite concern that there will be a negative ripple effect for nonprofits in the state, though some expressed the hope that this challenge would bring more philanthropic attention (and dollars) into the state. Some respondents reported feeling inspired or motivated by this challenge, though more reported ambivalence in terms of being unconvinced that this challenge gift to OHSU would do much good for philanthropy in Oregon or unsure of how this would all play out.



Reported campaigns by size, number and expected campaign duration

(does not include largest campaigns of top 25 nonprofits or OHSU Knight challenge)



Job stability and satisfaction

When asked how long they had been in their current position, slightly more than a third (36%) of respondents had been in their position for less than two years, almost another third (30.3%) had been there between three and five years, and about another fifth (19.7%) had been in their position for six to ten years.

The majority of respondents (78%) said that they anticipated being in the same job position in 12 months; this is down from 84% of respondents from last year's survey. Small percentages reported that they did not foresee being in their job position in 12 months (10.7%) or they were unsure (11.3%).

There was also a question about job satisfaction, asking respondents to rate^d their satisfaction with various aspects of their job. Respondents are most satisfied^e with the following aspects:

Flexible working hours	77.7%
Good relationship with boss	71.7%
Flexible schedule that recognizes the variable needs of fundraising	68.1%
Reasonable workday length	53.9%
Health benefits	53.7%

We also asked respondents to rank the importance of those same aspects for **staying in their current job**. Respondents rated the following as the most important:^f

Good relationship with boss	89.9%
Flexible working hours	80.0%
Salary	70.2%
Flexible schedule that recognizes the variable needs of fundraising (this number was even higher among groups continuing or launching capital campaigns)	69.0%
Reasonable workday length	66.6%

The factors with the largest gaps between importance and satisfaction were, in declining order: **adequate support staffing**, salary, adequate budget, meaningful performance metrics, and retirement plan contributions.⁹ In other words, these are identified as areas for improvement for nonprofit organizations.

Fundraising Bellwether Case Study

The Association of Fundraising Professionals, Oregon and SW Washington Chapter, The Oregon Community Foundation, and Retriever Development Counsel, LLC sponsored this case study, which is a component of the fifth annual Philanthropy Trends Survey. It was conducted during January and February 2014.

The Fundraising Bellwether Case Study provides a philanthropic profile of ten of the most important fundraising organizations in Oregon and Southwest Washington and their 2013 fundraising experiences.

The Fundraising Bellwether Case Study invited responses from a representative group of 16 “top fundraisers”¹³ in Oregon and southwest Washington selected by a number of top fundraising professionals in the region as among the “most important in

Case Study Organizations

Lewis & Clark College
 The Nature Conservancy in Oregon
 Oregon Food Bank
 Oregon Humane Society
 Oregon State University
 Portland Art Museum
 Portland State University
 Reed College
 University of Oregon
 Anonymous

¹³ Organizations chosen for inclusion in this study were first screened based on total non-in-kind gift revenue and were among the top 25 fundraisers in the region.

the regional philanthropic landscape.” Ten organizations responded, a 63% response rate, providing an excellent case study on large fundraising organizations in our region.¹⁴

This sample represents a significant part of the total annual fundraising efforts in the region. Total giving in Oregon is estimated at \$1.7 billion.¹⁵ This group of respondents collectively raised more than \$322 million of that total according to the most recent 990 data available.¹⁶ By comparison, the top 25 groups raised a total of \$814 million (includes a one-time \$160 million bequest for restricted endowment – not current use - that was directed to The Oregon Community Foundation). The next 975 largest nonprofit fundraisers together collected \$838 million in that same period.

The survey asked a number of detailed questions, some of which required detailed data reporting. Our sincere thanks go to the many community-oriented, nonprofit leaders who invested time to respond to this survey. Their thoughtful responses will add to the ability of board members and nonprofit supporters of all dollar levels make better informed choices.

They Beat National Trends

Overall, this group was very successful in 2013 and outpaced national trends in regard to raising more philanthropic money. Four groups had a large increase of more than 25%, and another two had increases in the 15 to 24% range. A single respondent reported a modest decrease due to fewer large gifts to their endowment compared with the previous year.

Recent national research by Blackbaud reports a 2013 increase of 5.7% for large organizations (those raising more than \$10 million).¹⁷ True to national trends, the bellwether group fared better overall than the 180 small and medium size groups represented in the broader 2014 Philanthropy Trends Survey, the companion piece to this case study. This aligns with Blackbaud which reports larger increases for large organizations than experienced by small (3.6% increase) and medium (3.8% increase) sized organizations.¹⁸

Even within these “most important” organizations, there is quite a range, from the smallest dollars raised (\$5 million) to the largest dollars raised (\$102 million) within calendar year 2013. Because there is such a wide range of dollars raised within this group, the average is pulled upward by the “long tail”; hence median is a more useful measure.

¹⁴ Note that some instances not all organizations answered every single question, and percentages are calculated based on the number of respondents to individual questions.

¹⁵ *Giving in Oregon 2013*, The Oregon Community Foundation

¹⁶ The most recent IRS 990 reports available at this time in early 2014 are for the 2011 fiscal period. The 990 is the “tax return for nonprofits” and is a public document.

¹⁷ MacLaughlin, Steve. 2014. “Charitable Giving Report: How Nonprofit Fundraising Performed in 2013.” Blackbaud. <https://www.blackbaud.com/nonprofit-resources/charitablegiving#.UvpnGfZkIp8>

¹⁸ Blackbaud defines “small” as budgets of \$1 million or less and “medium” as groups with budgets of \$1 to \$10 million.

These organizations raised a median of \$12 million from a median of 16,000 donors. The median average gift for these organizations was \$1,500, with one-third of organizations reporting an average gift of \$500 or less, and almost half reporting an average gift of \$2,000 or more. Further analysis of average gift data largely reveals an inverse linear relationship between the number of donors and the size of average gift; that is, in our pool, organizations with more donors tended to have a lower average gift size. Within higher education, which composes half of our case study respondents, over the past decade, participation rates have been declining while total giving has increased.^{19,20} Half of our bellwether respondents appear to mirror this trend with a relatively high average gift and a smaller donor pool.

Reflections & Questions:

Looking at average gift size raises intriguing questions about the relationship between broad-based annual fund efforts and major giving:

- Are the organizations with smaller donor pools focusing sufficient energy on building tomorrow's major gift pipeline through annual giving efforts? Research by Lawrence Henze, a nationally recognized fundraising data expert, reveals that donors make gifts of \$1,000 or more after at least seven years of lower-level annual giving, and that those donors are 900% more likely to make a major gift than donors without this type of giving history.²¹
- Alternately, is there a new way forward for large institutions: cultivating deeper relationships with a smaller donor base? In this case, donor retention becomes more valuable, so investing in stewardship and annual giving efforts is crucial.
- One question for future survey exploration would be whether organizations of all sizes and sectors in our region are experiencing a decline in the number of donors with a concomitant rise in total revenue.

Comments on what worked in 2013

"Focus on developing and implementing good major gift solicitation strategies, time and content-effective cultivation and stewardship; and development of peer networks via board members to expand the major donor base and limited events aimed only at major donor prospects."

"Better trained major gift staff working with better developed pool of prospective donors who have recovered assets since 2008."

"Emphasis on principal gifts (\$5 million and up)"

"Stay focused, have fun, work together to vet strategies, work toward inspirational large asks that are tightly aligned with the long term mission and vision."

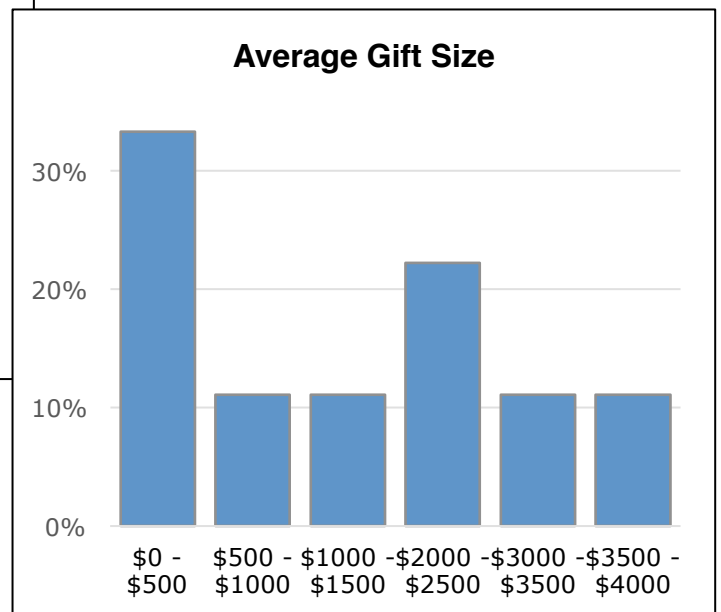
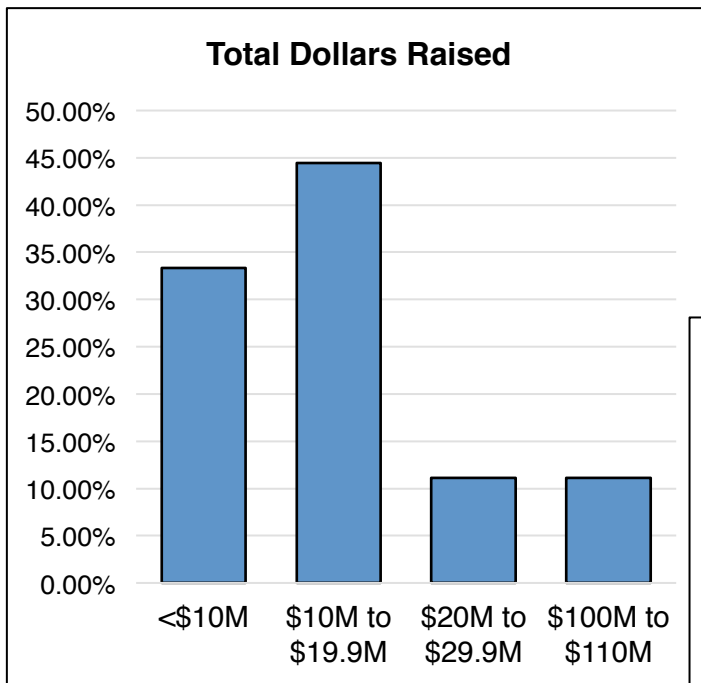
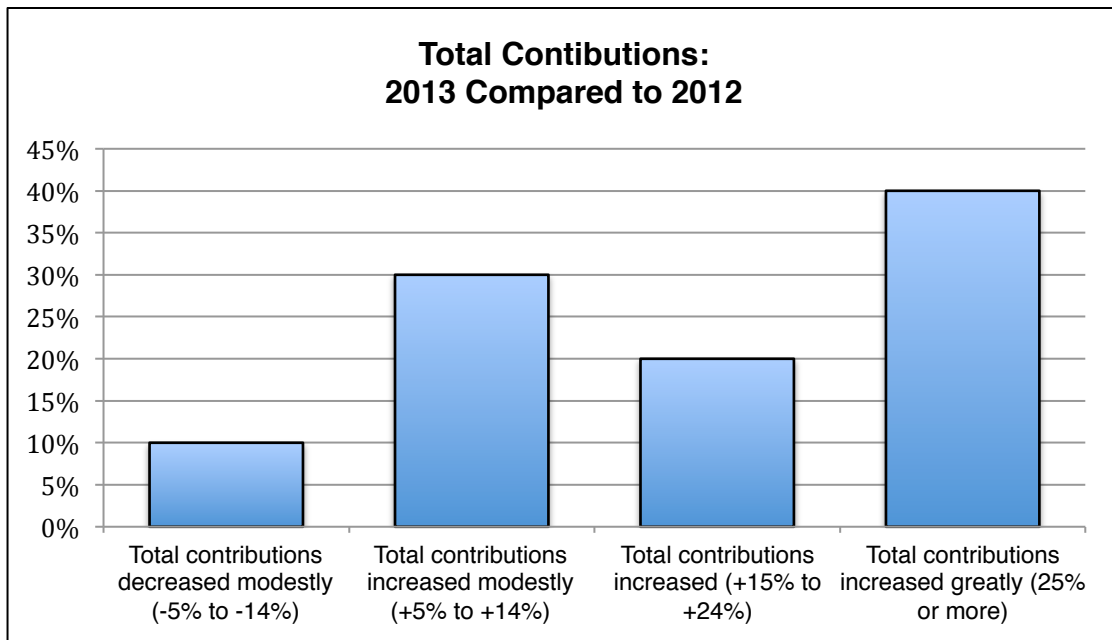
Success depends on major giving

It is clear that for this top group, major gifts are king. In a ranking of factors critical to 2013's fundraising results, every group chose the number and size of major gifts as important or very important to their success, dwarfing all other factors. Sixty-six percent of respondents planned to make more and larger major gift asks in 2014.^h

¹⁹ 2012. "Higher-ed fundraising up, donors down." *Philanthropy Journal*. <http://www.philanthropyjournal.org/news/top-stories/higher-ed-fundraising-donors-down>

²⁰ 2013. Index of Higher Education Fundraising Performance. Blackbaud. <https://www.blackbaud.com/files/resources/downloads/TA.HigherEducationFundraisingPerformanceIndex.pdf>

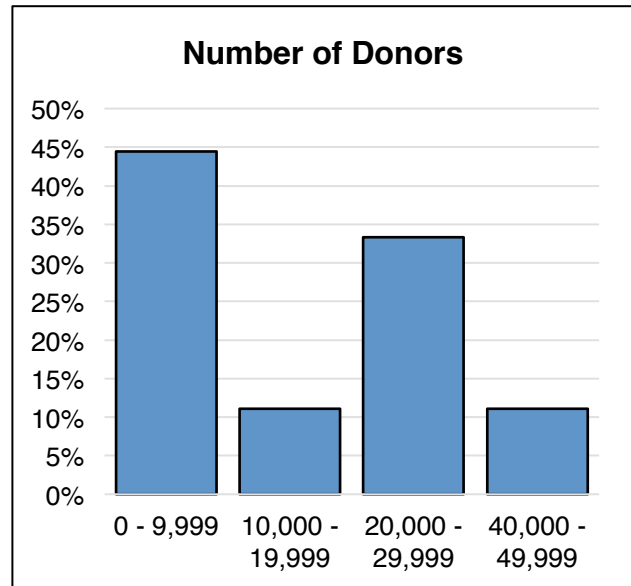
²¹ Henze, Lawrence. 2010. *Cultivating Lifelong Donors: Stewardship and the Fundraising Pyramid*. Blackbaud.



Is the role of annual giving evolving and changing?

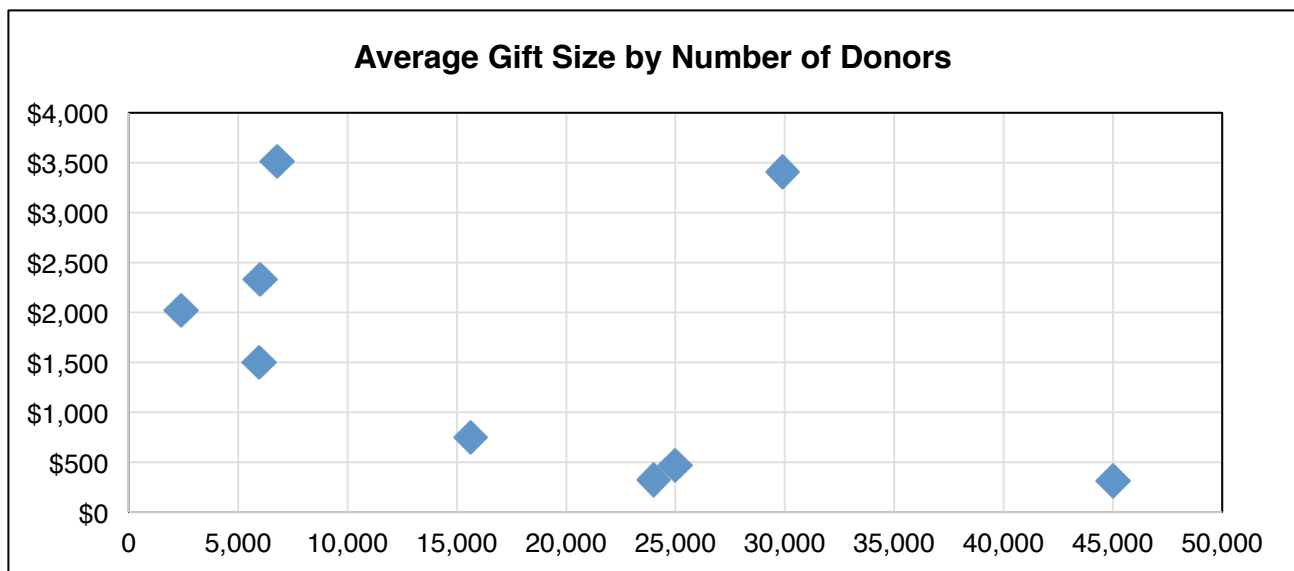
Interestingly, 90% of these organizations also said that the number of individuals giving at all levels was important or very important. However, the size of individual giving at all levels was considered less important, with only 50% of groups ranking it as important or very important. Similarly, membership/annual giving was ranked as important/very important by 50% of groups.

Fifty percent of the bellwether organizations plan to increase their emphasis on annual fundraising in 2014, but only one-third planned to increase broad-based solicitation methods such as direct mail, phone and e-appeals, which may point to an interest in growing large annual gifts through personal solicitations.



Reflections & Questions:

- Speculating on the importance to most of our respondents of giving at all levels of the giving pyramid, with less emphasis on the size of gifts, it seems likely that top fundraising organizations see annual giving as a means of pipeline-building for major giving. This emphasizes a value on participation but not necessarily on total annual fund dollars. For these large shops, number of donors may be the most important and relevant annual fund metric, rather than total dollar amount of gifts.
- Emphasizing face-to-face time with annual fund donors also points to a focus on relationship-building, initiating or strengthening relationships that can blossom into current major gifts and planned gifts later.



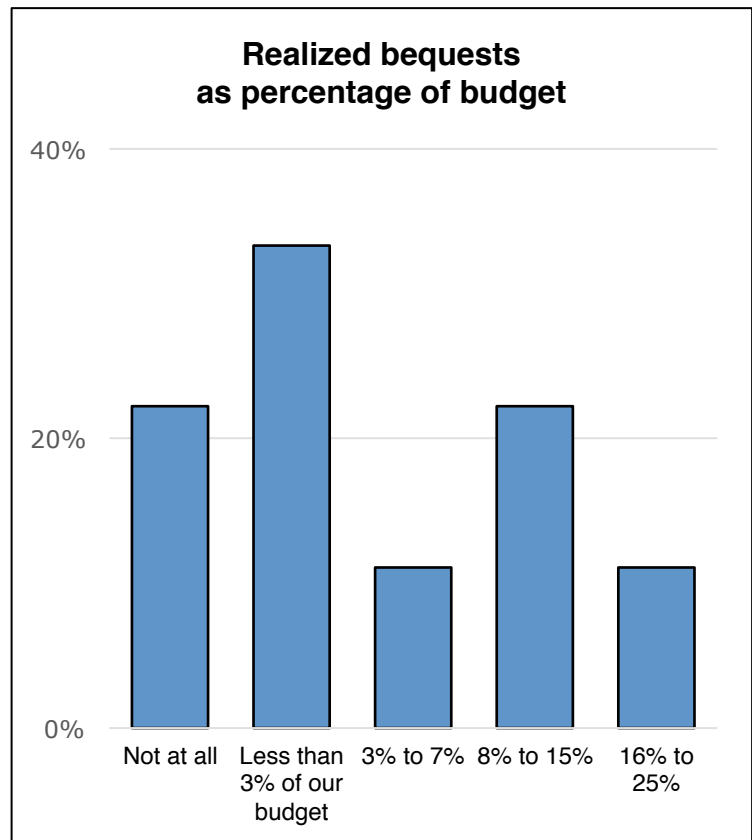
Big foundation gifts matter, but corporate support less important

After major giving, large foundation gifts also matter to this top fundraising group, with 60% of respondents ranking the size of foundation grants as very important or important, and 50% ranking the number of foundation grants as very important/important in fundraising success. Fifty-five percent of respondents planned to submit both more and larger grant requests to foundations in 2014.

Corporate giving was less important to this group, with only 30% ranking the size of corporate gifts as important, and 40% ranking the number of corporate gifts as important. Only 38% of respondents planned more corporate requests in 2014.

When asked what kinds of corporate support were meaningful, few respondents claimed that various types of corporate support were either moderately or very meaningful: in-kind products (30%), employee matching gifts (30%), professional connections (30%), event sponsorships (20%), in-kind services (20%), corporate grants (10%), corporate staff as volunteers (10%), and loaned staff (10%).

Nationally, corporate giving totals only 6% of total giving, so these findings are in line with national trends.²² However, according to Giving USA, corporate giving did increase by 12.2% in 2012.²³



Reflections & Questions:

- Considering the small, yet growing, amount of dollars given by corporations, does it make sense to focus on securing corporate gifts?
- Are there partnership opportunities available that would allow large nonprofits to tap into more meaningful corporate support?
- Conversely, is there an opportunity to be experimental in this category: if corporate gifts are not largely meaningful, can nonprofits experiment with “raising prices” for sponsorship to see what the corporate market will bear?

²² Giving USA Foundation. 2013. Giving USA, <http://www.philanthropy.iupui.edu/news/article/giving-usa-2013>

²³ Giving USA 2013, Giving USA Foundation

Planned giving: The simple bequest rules

Planned giving (generally, gifts received from a donor’s estate) matters to top fundraisers, but clearly plays second fiddle to current major giving. When asked what percentage of their total number of gifts for the year were planned gifts, three-quarters of respondents indicated that it was one percent or less. One outlier reported that 15% of gifts were planned gifts.

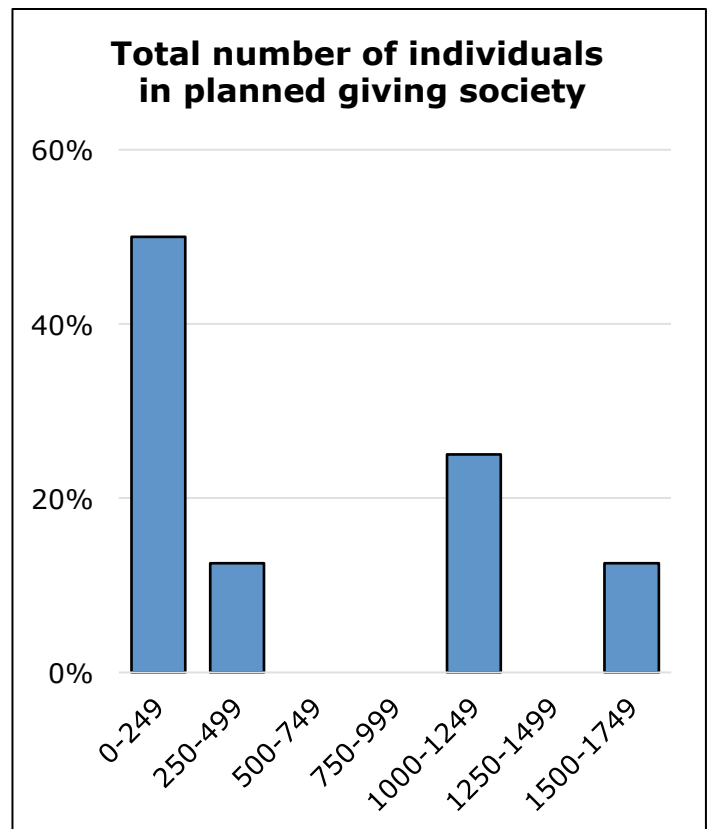
Of the planned gifts that these bellwether groups did receive, the majority were bequests (provisions in donors’ wills), and relatively few came from more exotic vehicles. This is in keeping with national statistics, with an estimated 90% to 95% of planned gifts overall being bequests.²⁴

Though bequests made up a small number of gifts received, some organizations did realize significant budget impacts from bequests, with nearly half of respondents reporting an impact of greater than 3%. A few organizations reported a significant budget impact from other vehicles, but most organizations did not see budget impacts of greater than 3% for non-bequest planned gifts.

All respondents received proceeds from at least one bequest in 2013, though 63% received less than ten bequests. One-quarter of respondents received quite a few bequests, between 50 and 99. IRA rollover gifts were the next most popular vehicle, with 72% of respondents reporting that they had received between one and nine. One organization reported receiving more than 100 IRA rollover gifts. CGAs and CRTs were both fairly popular, with 50% receiving between one and nine. Only one organization benefited from Pooled Income Funds (PIF), and none of our respondents reported receiving gifts from a Charitable Lead Trust.

All of our respondents received notice of future intended bequests, with two organizations reporting that they had received notice from more than 50 individuals. One common way for large nonprofits to track the number of expected planned gifts is to automatically include those who have informed the group of a planned gift or bequest plan in a giving or legacy society. There was great variation in the number of donors these organizations counted in their legacy societies, with three organizations reporting greater than 1,000 donors in their legacy societies. The median number of legacy society donors was 264.

When asked about the importance of bequests to fundraising success, 50% of the bellwether organizations ranked the overall **amount of bequest income** as an important or very important factor in success. In regard to the **number of bequests**, only 20% ranked the number as very important or important, and 40%



²⁴ Swank, Katherine. 2008. *Are You Ready to Start a Planned Gift Program?*. Blackbaud.

ranked the **size of bequest** amounts as very important or important. Fifty-five percent (55%) of respondents planned to increase their emphasis on bequest gifts in 2014. Only one-third planned to focus on forms of charitable remainder trusts (CRTs) and charitable gift annuities (CGAs).

Numbers of Gifts Received by percentage of Bellwether Groups

Number of Gifts	Charitable Gift Annuities (CGA)	Charitable Remainder Trusts (CRT)	Charitable Lead Trusts (CLT)	Pooled Income Fund (PIF)	IRA rollover gifts	Realized bequests received	Notice of intended, future bequest or estate gift
None	38%	38%	100%	86%	14%		
1 - 9	50%	50%			71%	63%	29%
11 - 24	13%	13%		14%		13%	14%
25 - 49							29%
50 - 74						13%	14%
75 - 99						13%	14%
100 or more					14%		

Reflections & Questions:

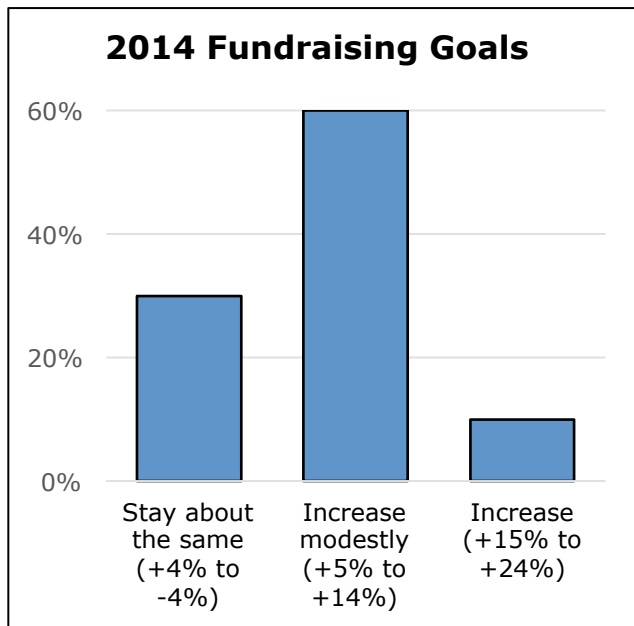
- Considering that the majority of planned gifts received by large organizations are simple bequests, what are the implications for marketing planned gifts? Does it make sense to continue to focus on more complicated vehicles like CRTs and CGAs, both in terms of staff time and marketing messaging?
- It is not uncommon for large organizations hiring planned giving staff to focus on hiring someone with extensive legal knowledge. Given the relative rarity of exotic bequest gifts, does it make more sense to de-emphasize legal knowledge, or even to integrate planned giving into major gift officer duties while retaining legal counsel to handle more complex gifts?
- Is the era of specialized planned giving officer coming to an end as legal and financial professionals increasingly claim this territory?

Plans to raise more in 2014

In 2014, most respondents (70%) will see an increase in their fundraising goal, and 30% will see their goal stay about the same. Most of those increasing their goal will see a modest increase between 5% and 14%. Nobody is decreasing their goal for 2014.

How will these organizations accomplish their planned increase in major gift and foundation grant activity? Forty-four percent said that they would increase development staffing in 2014, and 55% thought that leadership changes would play an important role in 2014's success.

Recent studies by the Association for Healthcare Philanthropy found that hospitals and medical centers that invested in major gift officers and support staff for major giving efforts had the best success in raising major gifts. Reducing fundraiser turnover was also key to their success.



When asked which tactics bellwether groups would emphasize in 2014, requests to corporations and travel budgets were the only categories with an overall ranking indicating a decrease in activity, and even this decrease was slight (3.3 out of 5, with 5 being “much less”).

Though organizations plan to grow fundraising, increase staffing and make more asks, it appears most organizations will be asked to “do more with the same”. Only 22% plan to increase their fundraising budget in 2014, and one organization will be decreasing its budget for development.

Overall, budgets for large organizations are not increasing either. Sixty percent of respondents report that their organization’s budget will remain about the same for 2014 and 40% report a modest increase between 5%-14%.

Reflections & Questions:

- More organizations have indicated a plan to increase staffing than have indicated a plan to increase budgets. Is this due to unfilled positions? Or did they already staff up in 2013 as many did?
- With fundraising goals continuing to increase, but fundraising budgets staying about the same, how will organizations meet this challenge?
- Is there a danger that organizations will concentrate staffing and budget resources on the donors who can yield the largest gifts today, without adequately building the pipeline for coming years?
- In light of the questions raised above by declining numbers of donors, how can staffing strategies meet both short-term and long-term organizational needs without sacrificing either? How can organizations become more efficient in their work so that they can raise more money without increasing budget or staffing? It seems likely that technology (including data mining and process automation) will play a role. Administrative staffing could also play a crucial role here, by focusing relatively high-cost major gift officers on donor contact while reserving other activities (record-keeping, appointment-setting, stewardship activities) for lower-cost administrative staff.
- Given the gifts from out of area, they better increase travel!

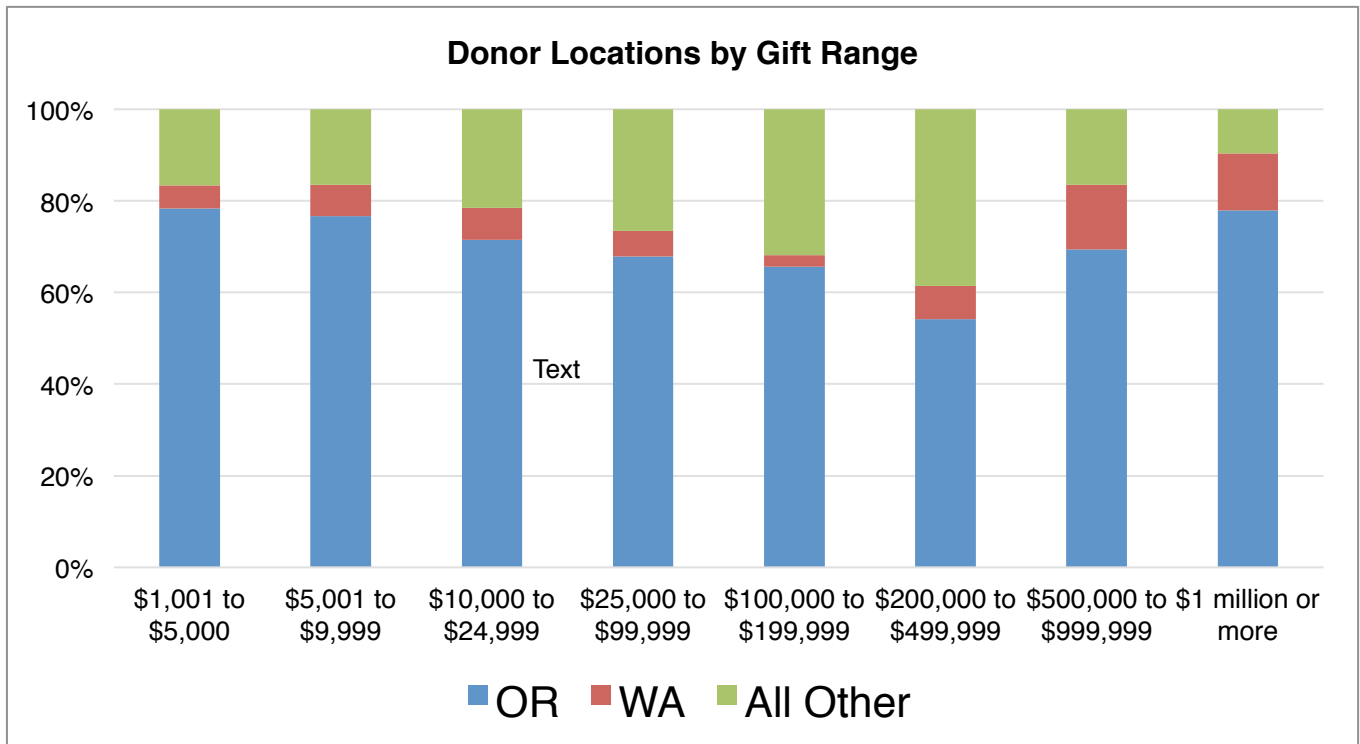
What worked in 2013?

“Hire the right people and give them the tools to be successful.”

“Invest in fundraising staff and infrastructure. Do what works for your organization.”

WHERE is the money coming from? Locally or out-of-state?

On average, one-quarter of donors of greater than \$1K to higher education institutions are from outside of Oregon and Washington. Bellwether organizations do garner large donations from outside of Oregon and Washington, though seven-figure gifts are still largely homegrown. There is also a



clear distinction between higher education institutions and the other respondents in the bellwether group.

On average, respondents report that 83% of their donors of more than \$1,000 are from Oregon (78%) and Washington (5%).²⁵ It is interesting to note that large organizations tend to have the most success with out of state donors at the mid-range major gift section of the pyramid (\$25K to \$499K). However, when one looks closely at the data, it is clear that the predominance of higher education institutions in this data set skew these numbers. Within our small data set, on average, higher education institutions raise about 27% of their funds outside Oregon (66%) and Washington (8%). Other organizations represented in our sample raised an average of 96% of their funds from Oregon (91%) and Washington (5%).

It is interesting to note that for bellwether fundraising groups, an average 90% of donors in the \$1 million and above bucket come from Oregon (78%) and Washington (12%), potentially creating a great deal of competition for Oregon donors at the seven-figure level. It’s also worthwhile to note that Washington donors are proportionally greater in the upper ranges of giving.

Reflections & Questions:

- Questions for further research might include how frequency of travel impacts out-of-state giving, e.g. do donors outside of Oregon and Washington give fewer principal gifts because they are not cultivated as intensively as nearby donors?

²⁵ This data is tabulated based on a subset of six respondents. One additional respondent reported raising only 1% of its total from Oregon and Southwest Washington. This result was excluded from analysis, as it appeared to be a data entry error. Likewise, data for gifts of \$1,000 or less was inconsistent and was not included.

- Are donors less likely to give principal gifts outside their home location? It is interesting to note in this context that only one bellwether organization planned to increase its travel budget in 2014.

Campaigns are pervasive: \$1.5 billion more + OHSU

Eighty percent of our respondents are either in a campaign, or planning for a campaign.

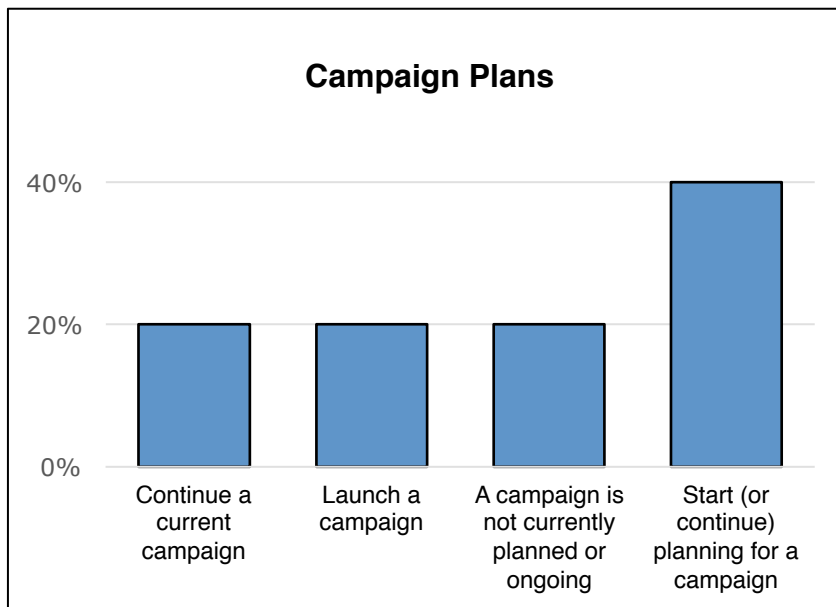
All of these campaigns, save one, are “comprehensive” campaigns. One organization is in a capital campaign.

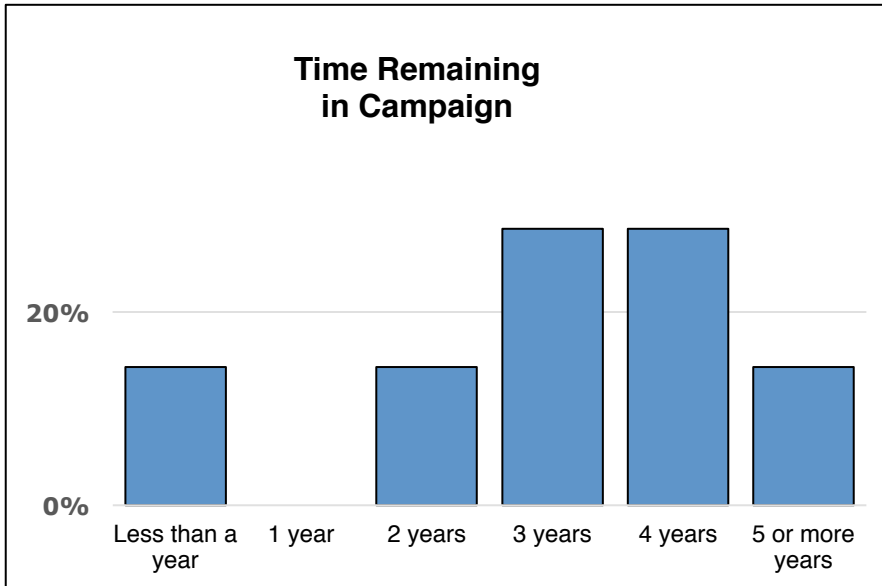
The campaigns vary in size, but five organizations plan to raise more than \$100 million, with two organizations focused on billion-dollar campaigns. One organization declined to share its goal. One organization reported being in the final year of a billion dollar campaign, another was in the midst of one of similar magnitude. Excluding the campaign soon to conclude, a minimum of amount of campaign goals over the next two to five years exceeds \$1,545,000,000.

Campaign concluding:	\$1 billion
Campaigns continuing, launching or starting soon:	\$1.5 billion
OHSU campaign:	\$1.2 billion
Philanthropy survey <u>reported</u> campaigns:	Low: \$461 million
	High: \$819 million
Totals:	\$2.96 billion to \$4.5 billion

OHSU’s \$500 million campaign (not including an additional \$200 million in state bonds being sought by OHSU) to meet its challenge from Phil and Penny Knight is **in addition** to this total. Plus, the 2014 Philanthropy Trends Survey, a companion to this case study, identified a minimum of \$461 to \$819 million in current and future campaigns. All told, this adds up to fundraising efforts hoping to obtain more than \$3 billion in support spread over the next few years in Oregon. **Note these numbers are only campaigns from those groups responding to the surveys.**

Most campaigns have several years remaining, with five respondents reporting greater than three years remaining in their campaign period.





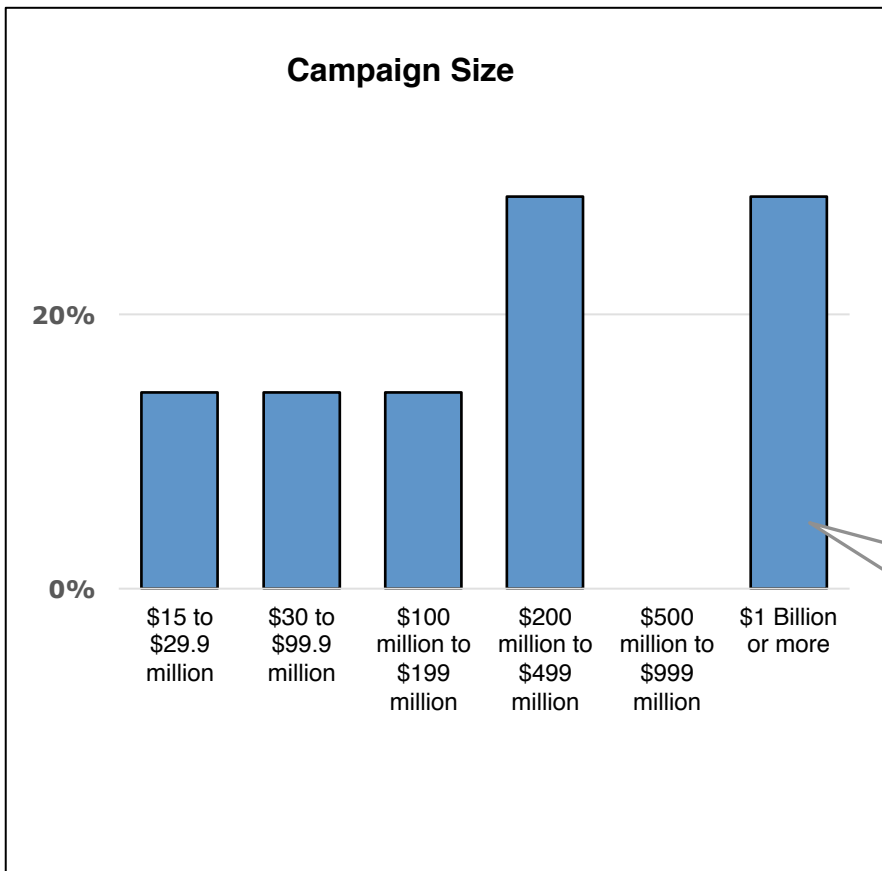
In their own words:

“Those institutions that can only raise money in this area struggle to meet their fundraising goals.”

“The rapid growth of donor advised funds, including the Oregon Community Foundation, competes for the most important resource funding charities in this area: gifts from individuals.”

“Phil and Penny Knight’s gift to OHSU is a wonderful thing and will have a positive impact on philanthropy in the area.”

“Fundraising success for more sophisticated organizations will come [from] both local and out of state donors.”

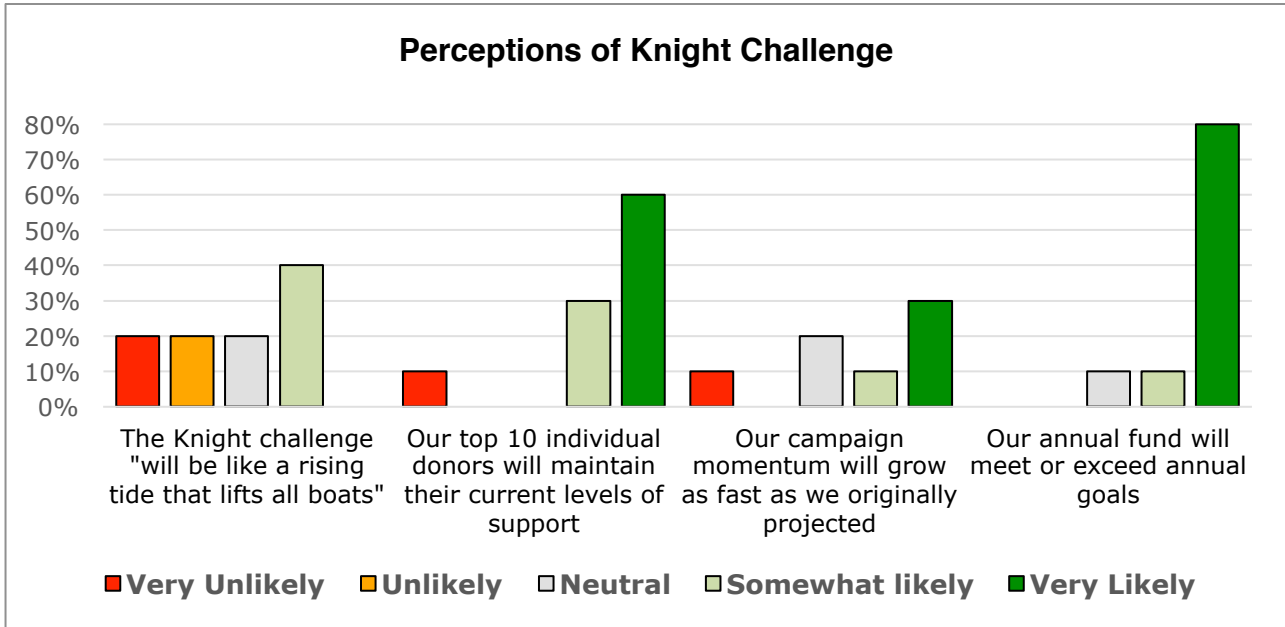


Does NOT include OHSU campaign to meet Knight challenge

Bellwether groups optimistic

When asked about the fundraising landscape, including OHSU’s \$1 billion campaign spurred by a challenge gift from Phil and Penny Knight, bellwether groups were largely optimistic that their fundraising plans would not be impacted by the challenge.

Though confident in their own success, the bellwether groups displayed less confidence that the



challenge would have widespread positive consequences. Forty percent believed that the challenge would be “a rising tide that lifts all boats”, with the remainder feeling neutral or finding this to be an unlikely proposition.

Reflections & Questions:

- With campaigns becoming truly pervasive, will donors become fatigued? If campaigns are no longer “special” but instead are the norm, does the sense of urgency and shared purpose become diminished?
- With so many campaigns occurring simultaneously, and the vast majority of seven-figure donors coming from Oregon, will all organizations that attempt a campaign be able to find success? Or will there be clear “winners” and “losers”?
- Are there opportunities for collaboration in promoting philanthropy, a la the Philanthropy Roundtable’s “3 percent solution,” an effort to increase charitable giving as a percentage of gross domestic product from 2 percent (where it’s been stuck for decades) to 3 percent?²⁶

²⁶ Perry, Suzanne. 2013. The Stubborn 2% Giving Rate. *Chronicle of Philanthropy*. <https://philanthropy.com/article/The-Stubborn-2-Giving-Rate/139811/>

Bellwether Case Study Reflections

It's clear that for this bellwether group, major giving is crucial to meeting increased fundraising goals, yet this group also looks to giving at all levels of the pyramid as a key factor for success.

While goals are increasing without a corresponding increase in fundraising budgets, it will be important for this group to achieve a sustainable strategy that focuses attention on donors at the top of the giving pyramid, without neglecting to build a pipeline to ensure future major donors.

Staffing will certainly be a part of this puzzle as bellwether organizations seek to recruit and retain major gifts staff, while ensuring that annual giving, stewardship and technology staffing and systems are sufficient to retain and upgrade tomorrow's major gift donors.

Overall, this is a group that is optimistic for the future and their own individual campaign successes, in a regional landscape with billions of campaign dollars to be raised, in which most seven-figure gifts will come from within Oregon and Washington.

It will be interesting to follow campaign success over the next several years to find out if the "rising tide" of many campaigns of all sizes of organizations has "lifted all boats", or increased the divide in fundraising success between small and large organizations.

List of Participating Organizations

Note: Of the organizations that participated in the survey, the following gave permission to list their names in the survey report.

"I Have a Dream" Oregon
211info
ACCESS
Adventist Health/Tillamook Regional Medical Center
All God's Children International
Architecture Foundation of Oregon
ARCS Foundation (Achievement Rewards for College Scientists)
Arts Council of Pendleton (2)
Ashland Supportive Housing and Community Outreach
Autism Empowerment
Battle Ground Health Care
Boy Scouts of America, Cascade Pacific Council
Caldera
Camp and Retreat Ministries – Oregon-Idaho
United Methodist Church
Carpe Mundi
Cascade AIDS Project
Catlin Gabel School
Children's Center
Children's Institute
Children's Trust Fund of Oregon

Case Study Organizations

Lewis & Clark College
The Nature Conservancy in Oregon
Oregon Food Bank
Oregon Humane Society
Oregon State University
Portland Art Museum
Portland State University
Reed College
University of Oregon
Anonymous

City Club of Portland
Clackamas Community College Foundation

Clatsop Community Action
College Housing Northwest
Columbia Slough Watershed Council
Community Warehouse
Coos Art Museum
Cottage Theatre
Crooked River Watershed Council
De Paul Treatment Centers
Deschutes Children's Foundation
Deschutes Land Trust
Deschutes River Conservancy
Dress for Success Oregon
Eastern Lewis County Hospital Foundation
Environmental Education Association of Oregon
Equity Foundation
Farmers Ending Hunger
Free Geek
Furry Friends Therapy Dogs, Inc.
George Fox University
Girl Scouts of Oregon and Southwest Washington
Gladstone Public Library Foundation
Grande Ronde Hospital Foundation
Greenbelt Land Trust
Hacienda CDC
Halton Foundation
Hells Canyon Preservation Council
Henderson House
High Desert Museum
Hillsboro Schools Foundation
Home Builders Foundation
Ka'ana 'Ike A Ka 'Ohana Foundation
Kairos Northwest
Kids on the Block After-School Enrichment
Klamath-Siskiyou Wildlands Center
La Clinica
Lake Oswego Schools Foundation
Lan Su Chinese Garden
Lift Urban Portland
Lotus Rising Project
Macdonald Center
Mainstream Housing
Marion-Polk Food Share
Maryhill Museum of Art
McKenzie River Trust
Meals on Wheels People
Metropolitan Family Service
Metropolitan Performing Arts Academy



Mid-Valley Literacy Center
Morrison Child and Family Services
My Father's House, A Community Shelter
National Women's Coalition Against Violence & Exploitation (NWCAGE)
NeighborImpact
New Avenues for Youth
Nonprofit Association of Oregon
Nonprofit Network Southwest Washington
OHSU Foundation
Old Mill Center for Children and Families
ONABEN-A Native American Business Network
OPAL Community Land Trust
Open Meadow
Oregon Affiliate of the American College of Nurse-Midwives
Oregon Ballet Theatre
Oregon Children's Theatre
Oregon Coast Aquarium
Oregon College of Oriental Medicine
Oregon Episcopal School
Oregon Historical Society (2)
Oregon Museum of Science and Industry
Oregon Natural Desert Association
OSPIRG Foundation
Outside In
Parks Foundation of Clark County
Partners in Careers
Pastoral Counseling Center
PeaceHealth Southwest Medical Center Foundation
Planned Parenthood Columbia Willamette
Planned Parenthood of Southwestern Oregon (2)
Portland Center Stage
Portland Homeless Family Solutions
Portland Japanese Garden
Portland Opera
Portland Playhouse
Power Productions Events & Auctions
Providence Portland Medical Foundation
Pudding River Watershed Council
REACH CDC
Recovering New Life
ReFIT, Remodeling for Independence Together
Ride Connection
Rogue Valley Council, St. Vincent de Paul

Rogue Valley Family YMCA
ROSE Community Development
Rural Development Initiatives, Inc.
ScienceWorks Hands-on Museum
Self Enhancement, Inc.
Serendipity Players
Share
ShelterCare
Siskiyou Field Institute
Southern Oregon Land Conservancy
St. Mary's Academy
St. Charles Foundation
St. John the Baptist Catholic Church & School
Support for Early Learning & Families
The Dougy Center for Grieving Children & Families
The Geos Institute
The Kids Cooking Corner
The Nature of Words
The Northwest Catholic Counseling Center
The Shadow Project
Tower Theatre Foundation
Trout Unlimited
Tucker-Maxon School
Umatilla-Morrow Head Start, Inc.
United Way of Deschutes County
United Way of Jackson County
University of Portland
Vernonia Hands-on Art Center
Virginia Garcia Memorial Foundation
Volunteer Connect
Wallowa Land Trust
Western States Center
Willamette Humane Society
William Temple House
World Forestry Center
Write Around Portland
YMCA of Columbia-Willamette
YMCA of Douglas County
Youth, Rights & Justice

Respondent comments

These quotations are a selection of survey respondents' comments and are intended for illustration only. They illustrate a spectrum of comments and do not proportionately represent the comments made for any question.

Increase in Contributions Comments

Question: What do you attribute as the primary reason for the increase in contributions?

Staff and Level of Support

1. Bringing on board additional development staff
2. Entire staff turnover, changes to the organization that got positive response from donors and community.
3. Better staffing plan, new executive director with fundraising skills, better grant strategy (largest increase was in grant income)
4. A new director of development took over
5. More effort spent in securing contributions, especially by the board.
6. Change in leadership, hired consultants to help us change communication and solicitation methods
7. Our Board has had some major transitions and as a result, well over half are new. The new folks have brought on new contacts and new relationships, which has been tremendously helpful at increasing new donor giving.
8. New Executive Director who initiated a Community Support Campaign that had never been undertaken by the Board.
9. We experienced a change in leadership, in which led the organization to apply for funds not gone after in previous years. And, due to the change in leadership our funders responded positively and gave more dollars.

10. In 2013, we had a complete staff change and it has helped bring new life to our organization.
11. New leadership and staff, new strategic plan and stronger Board.
12. Increased advancement staff, aggressive fundraising goals, total support from board members of fundraising goals
13. More fundraising staff who've had time to build relationships with major donors as well as amazing work being done in our organization.

Tactics

14. Asking for more from all sources.
15. We launched an individual donor campaign.
16. We are just beginning to focus on seeking contributions (because we've always operated on our Earned Income) and the first steps were in negotiating and securing discounts on services and in-kind donations. Also, our Earned Income increased.
17. We are in the midst of a capital campaign.
18. Greater emphasis on monthly giving (immediate increases), as well as a new focus on bequests, and the effect that has had on perception of need for a perpetual, well-funded organization.
19. Paying attention to existing donors, thanking them, letting them know the impact of their giving and how grateful we are for their support, and retaining and upgrading those donors.
20. We worked hard on procuring more major gifts from individuals and corporations. Still building our base at the same time as healthcare reforms are changing the funding landscape for our sector.

Major and "big" gifts

21. More effort spent in securing contributions, especially by the board.
22. A few major gifts were bigger
23. More major gifts

24. Major Gifts were larger
25. It was a small increase, largely caused by the generosity of a single donor.
26. Large bequest.
27. Unexpected major gift - bequest.
28. A large bequest.
29. The primary increase was the result of an exceptionally large bequest.
30. Increase in grants awarded to the organization.
31. We had a couple of big grants; we received a bequest for the first time.

Event or Linked to a Mark in Time

32. We lost 80% of our government funding and the community responded very generously to keep us afloat until funding was restored. Pretty amazing in such an impoverished area.
33. We had a big Anniversary year, planned far ahead and in greater detail and sought larger sponsors and grants than ever before in orgs history.

Decrease in Contributions Comments

Question: What do you attribute as the primary challenge or reason affecting the decline in contributions?

Staff and Level of Support

1. We had two maternity leaves in our development department. A lack of sufficient staffing is also a factor.
2. Fewer volunteers involved in fundraising.
3. The large nonprofits are getting the bulk of the funding. A small organization doing great work lacks the resources to go after funding, thus they get squeezed out.
4. New development team coming on in February -- no director since previous October.
5. We lost our development director.

Tactics

6. We spent 6 months working on an event rather than doing major gifts fundraising.

Major and "big" gifts

7. We had a major donor contribute \$300K less this year than last year.
8. One bequest last year made the difference (\$60,000 difference) between 2013 and 2012. But, in general, there were more gifts in smaller amounts in individual and major giving, and fewer and smaller grants received.
9. We are losing some of our best donors to death.

Lessons Learned Comments

Question: Reflecting on your experience of fundraising in 2013, what is the most important lesson learned you would apply to your 2014 fundraising work?

Lessons Learned: Relationships

1. Our organization can really stand out by doing an outstanding job at donor stewardship. We will continue and increase our efforts in this regard as best we can.
2. Relationships matter more than ever
3. More face-to-face meeting. More events.
4. Since this was my first complete year here, I learned quite a bit, but I'd have to say the most important is I learned the rhythm of our donors and next year's solicitation schedule is formulated more strategically.
5. Personal contact is very important in understanding where donor passions lie and in communicating the accomplishments that affect lives of our students/parishioners (donor needs/passions)

6. Fundraising is most successful when it's personal. Bring in prospective donors. Meet them face-to-face.
7. Dismissed the idea of there being BIG donors with deep pockets just waiting to give money to us, if only we could find them!! Recognition that our 4,000 members are our donors. With increased focus and attention on how we talk with and interact with our members, we can grow their passion for our mission and thus grow donations.
8. Relationship building (and tracking through our database) is the best investment we can make in our future fundraising.
9. To do more face to face visits.
10. Keep in better contact with donors and volunteers.
11. We must have a compelling case, tailored to the donor's specific dreams/needs and convey that through one-on-one meetings with donors. (donor needs/passions)
12. Importance of investing time in donor relationships/stewardship. Increase marketing of planned gifts/bequests.
13. We need to work toward long term giving in order to maintain income stability.

Lessons Learned: Staff/Volunteer/Board Bandwidth

14. Schedule more time and resources dedicated specifically to fundraising.
15. Recruit volunteers sooner.
16. It is part of the board's job to ask. We are lacking in individual donors. The competition for dollars is stiff in Oregon. (importance of effective board)
17. How time intensive this is and how challenging it is for a small organization. We need funding for a development position.
18. 2013 was a building year, we added .75 FTE's in annual giving and .5 FTE's grantsmanship. We look for 2014 to begin reaping the rewards of this building process, although we are looking through a

19. window of three years to determine return on investment.
19. We need to add one staff person to focus on fundraising & development, with continued efforts by current staff & board members.
20. Executive transitions are inevitable and deeply affect fundraising; everyone should plan for the inevitable.
21. Increased investment in development staff and systems is required to increase and sustain fundraising efforts.
22. Our ability to raise money is directly correlated with staff. We have received every level of efficiency in our office and now are held back because we simply don't have the staff to cultivate new opportunities.
23. Make sure that internal operations are set up to handle data collection, tracking, and managing donor development even with a small staff; assign duties to existing staff instead of waiting to hire new staff. Hire the right development manager.
24. Cultivate an environment of development throughout the organization, not just with development staff and CEO.
25. Hire good people
26. Adequate staff resources matter more than can be counted on a budget spreadsheet.
27. Newly re-focused full time on fundraising from half time, I look forward to seeing what can happen when I have the time and energy allowed to actually raise funds.
28. Fundraising and community relations needs focus and dedicated staff.
29. It is important to have many people involved so the work is spread out and produces more results and more donors are engaged.

Lessons Learned: Tactics and Focus

30. Successful programming that demonstrates leveraging of resources.
31. Need broader fund development base. Rely too much on government funding and foundations.

32. I'm new to Development, so this may seem basic. Grants: keep a consistent calendar of several grants a month grouped into various programs for funding (spread them out throughout the year and apply for many). Donor Acknowledgements: donors respond positively to personal calls. Social Media: don't count on Facebook/Twitter to get the word out. Emails, personal calls, newspaper/magazine articles, and mailed letters are the best way to get a response (for our organization). Events: procuring sponsorships and getting the "right" people to the event is more important (especially early on) than any other event detail (location, theme, food, etc.) General: peer-to-peer fundraising is crucial.
33. Getting the board excited and confident about fundraising resulted in their spending more time and effort, which resulted in more donations.
34. We have a separate foundation that works toward a long-term endowment. The agency and foundation need to work together (combine) more. Donors are confused as to who they are giving to.
35. A key part of significantly growing fundraising success is to be able to have the entire organization aware of its need to be involved in fundraising. Hence, fundraising depends on a team of advocates, not just one office or person.
36. Keep the bequest pipeline full!
37. We are just beginning, so my learnings were simple: be confident in strong, sustainable operations, build a better and better brand/community presence, reach out and make connections with a powerful and engaging story, and build a community of well-connected, primary supporters and advocates. Oh, and take this survey to have 27 "ah-ha!" moments about future ideas and strategies.
38. We learned we have to be more active around planned giving and more deliberate when asking for corporate sponsorships.
39. More aggressively tie the nonprofit mission message with our program marketing message(s)
40. Emphasis on planned giving
41. Be open to new partnerships and don't be afraid to try new avenues for fund raising.
42. I think that the lesson learned was that your work needs to be integrated and not siloed in your organization. I also learned that like grant-makers, donors do compare notes about they are approached by various organizations.
43. We do not have a Planned Giving Program. It may be time to implement this type of program into our fundraising work.
44. Be more bold!!
45. We do not ask often enough or with enough attention paid to providing donors with an outcome.
46. Though many individuals wait until December to give, we'd really like to do a better job of trying to get those donations in earlier in the year.
47. Our supporters are truly our best fundraisers! Whether being asked to bring guests to an event, send an email asking a friend to meet with us, or engage a company that their company works with, they can get responses that we would not be able to get.
48. Greater response on social media than direct mail for first time.

Lessons learned: Major Gifts

49. Focus on major gifts and planned giving.
50. Remaining laser focused on major gift work.
51. Our organization will continue to increase our focus on major gifts.
52. Major Donor Cultivation is the most important thing that we do.
53. Increased focus on working with board of directors to cultivate and secure major gifts from individual donors.
54. There are two: One is that we need to plan and present our programs in a way that more compellingly makes the case for

major and multi-year gifts, and secondly, we need an individual giving program.

55. We have a very small donor base. Most of the revenue we earn is earned revenue, and it's very difficult to break into fundraising. That being said, we do have about 500-600 donors which has been growing over the past few years, and they're loyal to our work. We need to focus on creating a major donor program, and a planned giving program. In terms of lessons learned, that's where we should focus our energy.

Lessons Learned: Marketing

56. Advertising will have to take on a larger role. Social media must be tapped into
57. Advertise.

Knight Challenge and OHSU Campaign Open Ended Comments

Resource challenge or drain for other nonprofits

1. I hope it doesn't divert funds from social service agencies.
2. This is so out of the realm of our major donors, that it really has little impact in terms of incenting bigger gifts. It does have an impact in terms of siphoning off some funding that might otherwise flow to smaller non-profits, like ours.
3. The Knight Cancer Center is not the only organization doing cancer research in this area.
4. I think cancer research is great. I certainly understand why people want to invest in that. I wish that big donors like that were more accessible to the smaller nonprofits and there was a interest in learning more about the innovative and critical work we are doing. We could do so much with just a fraction of what they are donating.

5. Will OHSU share resources or collaborate?
6. Again, the big dogs get the funding - little agencies die out - even when they are loved by their community.
7. I think that it is going to drain resources from other social service sectors.
8. Its doesn't seem fair that control of resources could be limited to such a small number of hands. By proposing the challenge, Phil Knight is deciding that OHSU and cancer research are the priority for our region.
9. There is only so much private funding to go around. Diverting attention from smaller organizations for large philanthropy activities does have an impact on other causes.
10. Used to be that major donors gave money without a whole lot of fanfare and publicity. Now, unless your agency serves a population that can be marketed and flashed before the public with the sponsor's name affixed, it is harder to gain support for the agency. For example, how many millions did MODA pay to change the name of the sports arena? How many hours of community mental health for low-income people and other "under the radar" services would that have provided? Grrrrrrr!
11. We are located in a rural area of Oregon and our services are location specific, so we don't expect to be in great competition related to the Knight challenge gift. That said, several of our major donors have been approached for support and expressed concern that their participation in the Knight project will mean fewer contributed dollars to local non-profits, especially for safety net services. You should know that many safety net providers in our region are on the precipice of financial failure and a loss of as little as \$50,000 is a budget disaster.
12. We've already experienced major donors who will not be contributing to our organization at all due to commitments to the Knight challenge.

13. I think the Knight gift will pull from other organizations and plans in the single focus effort of meeting the challenge.

Inspired or Motivated

14. We live in a generous community.
15. I really appreciate their tremendous philanthropy through Oregon and the US. Such a large challenge might work in the Portland area. It wouldn't work anywhere else in the state. Challenge gifts have not been very productive for us--they just add more pressure and confuse the messaging.
16. God bless the Knight family for making such a wonderful gift. :-) We look forward to building relationships in our community to find our own "Knight" in shining armor to help fund our organization.
17. I hope lots of donors from outside Oregon participate.
18. We think it will raise, on a national level, Oregon as a philanthropic priority.
19. The Knight Challenge is like a challenge to be even more effective to those who may fear its impact on their efforts.
20. This is an amazing gift. However, the timeline is short and I feel OHSU may have had to completely turn the ship in the water around meaning any strategic plan they were working to fulfill went to a grinding stop, and a new strategic plan had to be developed to meet this match in 2 years and time is of the essence.
21. It's attracting the best and brightest fundraisers, that's a plus It's bringing notice to the area, that's a plus It's for a wonderful cause that touches most people during their lifetimes; compelling I worry about it stretching our mid-level donors
22. I don't like the fact that we are seeking government money to match it. Wish it were all private.
23. Nice to see them step forward but having to be creative to meet the match may be negative in many donors' minds.

Unconvinced or unsure about impact.

24. Intentional philanthropy has a long way to go in our state with donors truly doing their due diligence in knowing and understanding the organizations they are giving to and how their money is being spent.
25. The idea of "giving less so I can give to more organizations" needs to shift and donors need to step up, do their due diligence, and become change agents by making intentional major gifts.
26. I suspect the success of the Knight challenge will depend significantly on dollars pledged from outside of Oregon, and most likely, from outside of the US.
27. I am not convinced that the Knight challenge will change philanthropy in our state. I believe that many Oregonians do not believe or understand what true philanthropy is and many do not see themselves as philanthropists.
28. Public funding is not an appropriate match for a private challenge gift.
29. I will be interested to see how far the impact of this gift will reach into rural, somewhat insulated/isolated areas outside of the I-5 corridor. My guess is will not be very visible.
30. We are fairly new to fundraising and have no built-in donor constituency. Our base is not big enough to protect us from the impacts of the Knight challenge.
31. If the measurement is of giving "received" by Oregon Charities - does it take into account gifts received from out of state? If the top 4 fundraising orgs in Oregon are 3 universities (including OHSU) and the Food Bank, it would be reasonable to assume those U's get a fair proportion from alumni outside of Oregon? I want to remain hopeful that it will not have a significant impact on a local/regional charity like ours.
32. The impact on the small non-profit is huge.
33. The Knight gift is completely off of our radar screen down in Southern Oregon.

34. I doubt it will have any impact on our modest capital campaign.
35. Everyone's watching the Knight challenge.

Additional Comments

1. Thank you!
2. Congratulations on assembling a comprehensive survey that touches on important components of our collective work!
3. Thank you.
4. Thank you for doing this. I think it is very important as we all strive to be more strategic with our resources and in our work.
5. This survey could not have been more perfectly timed! This is a good omen for me. Thanks! P.S. Thank goodness for the extension!
6. Thanks for taking the time to create this survey. The act of taking it prodded me to think about what we are doing and not doing in our own fundraising efforts -- and that was helpful.
7. Thank you for compiling this survey. It's important to better understand philanthropy at a regional level in our state.
8. Thank you. Looking forward to the report.

General Observations:

9. Foundations continue to want to support collaborative efforts/requests from non-profits. During this incredibly tumultuous time for health care non-profits, we are focused on keeping our organizations in the black and don't have the staff resources/bandwidth/time to put together meaningful collaborations. I believe that foundations could move the needle on this wish of theirs if only they would pay for the staff time it takes to collaborate, not just fund the collaborative project.
10. In organizations like ours, general operating support is more important than

- any directed funding of programming that we must invent to meet the terms of giving.
11. Fundraising is a bugger! Not sure that some of our most fabulous cultural, educational and scientific treasures should be funded this way :-)
12. We have crawled out a very challenging financial state. Currently, we are in the best financial condition in last 25 years. We have barely scratched the surface of possibility
13. I just wish foundations would say publicly that they are only going to support large charities. That way the little ones can stop spending hundreds of hours on grant writing for no outcome.
14. So much good happening, so many generous people, and yet so much more to do - always!
15. Philanthropy in a community like ours depends on collaboration between like-minded organizations that can offer their shared donors opportunities for transformative gifts that would not otherwise be possible.

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Endnotes

^a For the main survey, the majority of respondents (90%) were not responding as a member of a college or department of a larger university, a state chapter of a larger organization, or a division of a national nonprofit. For those who were responding as part of a larger organization, about half were affiliated with educational institutions and about another quarter were part of a local or state chapter of a regional or national group.

^b The one change is that animal welfare organizations are underrepresented, compared to past surveys where their representation was proportionate.

^c Definition: ranked 1 or 2 on the 5-point scale.

^d On a five-point rating scale, with 1 as not satisfied and 5 as very satisfied, respondents ranked an overall average satisfaction score of 3.38, with a range of 2.75 to 4.22 across 16 different aspects.

^e Definition: Most satisfied equals a rating of 4 or 5 on the five-point scale.

^f Definition: Most important equals a rating of 4 or 5 on the five-point scale.

^g In a gap analysis of the difference between importance of these factors and satisfaction with the factors, the average gap was -0.13. This is a negative number because satisfaction was ranked before importance on the matrix.

^h Respondents were asked to rank the changes they planned for 2014 on a five-point scale from "much less" to "much more". The two points at the "much more" end are considered a planned increase.