



# THE CENTER FOR EFFECTIVE PHILANTHROPY

## Nonprofits' Views of Major Individual Donors

The survey should take approximately 15 minutes to complete.

Please complete this survey by **Tuesday, November 20, 2018**.

### Introduction

Thank you for your participation in this research study conducted by the Center for Effective Philanthropy. The purpose of this survey is to understand what support nonprofits are receiving from individuals who donate major gifts, what these donors can do to support nonprofits better, and how nonprofits' relationships with these donors differ from their relationships with staffed foundations.

If there is another staff member at your organization, such as a development director, who you feel is better suited to respond about these topics, please feel free to ask them to complete the survey for your organization.

Your responses to this survey will be kept **completely confidential**. When results of this survey are shared:

- All numeric rating responses to this survey will be reported in aggregate.
- If we quote part of your response to an open-ended question, we will mask all identifying information in the quote to thoroughly protect your anonymity.

### Instructions

- **Please do not use the forward and back buttons on your browser's navigation bar** to move forward and back in the survey. Instead, use the directional buttons at the bottom of each screen.
- **To stop and continue the survey at a future time**, close your browser and use the survey link found in your email to resume the survey.

### Definitions

For the purposes of this survey, we use the following definitions:

- **Individual donors**—individuals who give to your organization directly or give to your organization through donor-advised funds at community foundations/commercial financial institutions
- **Major donors**—individual donors (as defined above) who give \$7,500 or more to your organization in a given year

#### SURVEY INSTRUMENT

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## YOUR ROLE

1. What is your current role at your organization?
  - CEO/Executive Director or equivalent
  - Development Director or equivalent
  - Other (*please specify:* \_\_\_\_\_)

## SUPPORT RECEIVED

2. During the most recent fiscal year, from approximately how many **individual donors** did your organization receive gifts?

Number of individual donors: \_\_\_\_\_

*(If "0" is entered, skip to Q36.)*

3. During the most recent fiscal year, did any of your organization's **individual donors** give \$7,500 or more to your organization? (*Force response.*)
  - Yes
  - No
  - Not sure

*(If "No" or "Not sure" is selected, skip to Q36.)*

4. During the most recent fiscal year, approximately how many of your organization's **individual donors** fell within the following giving ranges?

Less than \$7,500 \_\_\_\_\_  
\$7,500 to \$19,999 \_\_\_\_\_  
\$20,000 to \$49,999 \_\_\_\_\_  
\$50,000 to \$99,999 \_\_\_\_\_  
\$100,000 or more \_\_\_\_\_  
 Not sure

5. At what giving amount does your organization consider an **individual donor** to be a major donor?

Giving amount: \$ \_\_\_\_\_

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## EFFECTIVENESS OF MAJOR DONORS

In this survey, we define **major donors** as individual donors who give \$7,500 or more to your organization in a given year. For the remainder of the survey, please keep this definition in mind.

6. What is one thing **major donors** can start doing to help your organization do its best work?

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7. What is one thing **major donors** can stop doing to help your organization do its best work?

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8. In the next five years, what trends do you expect to see in how nonprofits work with **major donors**?

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9. In order for **major donors** to be most helpful to your organization, how important is it for them to...

	Not important 1	Slightly important 2	Moderately important 3	Very important 4	Extremely important 5
Understand your organization's goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand your organization's strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask about your organization's greatest needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the issue area(s) in which your organization works	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the social, cultural, or socioeconomic factors that affect your organization's work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand your organization's intended beneficiaries' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have giving priorities that reflect a deep understanding of your organization's intended beneficiaries' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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10. In order for **major donors** to be most helpful to your organization, how important is it for them to understand the local community in which your organization works?

Not important 1	Slightly important 2	Moderately important 3	Very important 4	Extremely important 5	N/A 77
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. In order for **major donors** to be most helpful to your organization, how important is it for them to provide your organization with...

	Not Important 1	Slightly important 2	Moderately important 3	Very important 4	Extremely important 5
Transparency about the likelihood of future funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unrestricted support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program-specific support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repeated support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. To what extent would you say that your organization's **major donors**...

	Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4	To a full extent 5
Understand your organization's goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand your organization's strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask about your organization's greatest needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the issue area(s) in which your organization works	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the social, cultural, or socioeconomic factors that affect your organization's work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand your organization's intended beneficiaries' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have giving priorities that reflect a deep understanding of your organization's intended beneficiaries' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**SURVEY INSTRUMENT**

13. To what extent would you say that your organization’s **major donors** understand the local community in which your organization works?

Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4	To a full extent 5	N/A 77
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. To what extent would you say that your organization’s **major donors** provide your organization with...

	Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4	To a full extent 5
Transparency about the likelihood of future funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unrestricted support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program-specific support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repeated support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Do your relationships with **major donors** change the larger the gifts become?

- Yes
- No

16. *(Display only if “Yes” was selected in Q15.)* Please describe how your relationships with **major donors** change the larger the gifts become.

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17. *(Display only if “Not at all” is selected in Q14 for “Support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.)”)* Would your organization want to start receiving support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.) from **major donors**?

- Yes
- No

18. *(Display only if an option other than “Not at all” is selected in Q14 for “Support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.)”)* Would your organization want to receive more support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.) from **major donors**?

- Yes
- No

**SURVEY INSTRUMENT**

19. *(Display only if "Yes" is selected in Q17 or Q18.)* What are 3 kinds of support beyond money that would be most helpful to receive from **major donors**?

- 1) \_\_\_\_\_
- 2) \_\_\_\_\_
- 3) \_\_\_\_\_

## COMPARISON TO STAFFED FOUNDATIONS

The purpose of this section is to compare your organization's relationships with **major donors** to your organization's relationships with **staffed foundations** that provide funding of similar amounts.

In this survey, we define **major donors** as individual donors who give \$7,500 or more to your organization in a given year.

20. On average, how much time does your organization spend identifying **major donor** prospects, compared to the time you spend identifying **staffed foundation** prospects for funding of similar amounts?

- Much more time identifying major donor prospects
- Somewhat more time identifying major donor prospects
- Equal amounts of time identifying major donor and staffed foundation prospects
- Somewhat more time identifying staffed foundation prospects
- Much more time identifying staffed foundation prospects

21. *(Display only if 1, 2, 4, or 5 was selected in Q20.)* What activities contribute to this time difference?

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22. On average, how much time does your organization spend securing funding from new **major donors**, compared to the time you spend securing funding of similar amounts from new **staffed foundations**? Please consider time starting from when the prospective donor/staffed foundation is identified to the point of receiving the gift/grant.

- Much more time securing funding from new major donors
- Somewhat more time securing funding from new major donors
- Equal amounts of time securing funding from new major donors and new staffed foundations
- Somewhat more time securing funding from new staffed foundations
- Much more time securing funding from new staffed foundations

23. *(Display only if 1, 2, 4, or 5 was selected in Q22.)* What activities contribute to this time difference?

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24. On average, how much time does your organization spend maintaining relationships with **major donors**, compared to the time you spend maintaining relationships with **staffed foundations** that provide funding of similar amounts?

- Much more time maintaining relationships with major donors
- Somewhat more time maintaining relationships with major donors
- Equal amounts of time maintaining relationships with major donors and staffed foundations
- Somewhat more time maintaining relationships with staffed foundations
- Much more time maintaining relationships with staffed foundations

25. *(Display only if 1, 2, 4, or 5 was selected in Q24.)* What activities contribute to this time difference?

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26. On average, how much time does your organization spend increasing the giving levels of **major donors**, compared to the time you spend increasing the giving levels of **staffed foundations** that provide funding of similar amounts?

- Much more time increasing the giving levels of major donors
- Somewhat more time increasing the giving levels of major donors
- Equal amounts of time increasing the giving levels of major donors and staffed foundations
- Somewhat more time increasing the giving levels of staffed foundations
- Much more time increasing the giving levels of staffed foundations

27. *(Display only if 1, 2, 4, or 5 was selected in Q26.)* What activities contribute to this time difference?

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28. To what extent would you say that your organization's **staffed foundation funders**...

	Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4	To a full extent 5
Understand your organization's goals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand your organization's strategies	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ask about your organization's greatest needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the issue area(s) in which your organization works	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand the social, cultural, or socioeconomic factors that affect your organization's work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understand your organization's intended beneficiaries' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Have giving priorities that reflect a deep understanding of your organization's intended beneficiaries' needs	<input type="checkbox"/>				
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29. To what extent would you say that your organization's **staffed foundation funders** understand the local community in which your organization works?

Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4	To a full extent 5	N/A 77
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

30. To what extent would you say that your organization's **staffed foundation funders** provide your organization with...

	Not at all 1	To a small extent 2	To a moderate extent 3	To a large extent 4	To a full extent 5
Transparency about the likelihood of future funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unrestricted support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Program-specific support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Repeated support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Support beyond money (e.g., volunteer time, legal/accounting advice, fundraising help, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

31. What, if anything, could your organization's **staffed foundation funders** do to help you fundraise from **major donors**?

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32. What is the biggest advantage of receiving funding from **major donors**, compared to receiving funding of similar amounts from **staffed foundations**?

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33. What is the biggest disadvantage of receiving funding from **major donors**, compared to receiving funding of similar amounts from **staffed foundations**?

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**SURVEY INSTRUMENT**

34. Based on your experiences with **major donors** and **staffed foundations**, what would be your ideal mix of **major donor** and **staffed foundation** funding?

- Receiving much more funding from major donors than staffed foundations
- Receiving somewhat more funding from major donors than staffed foundations
- Receiving equal amounts of funding from major donors and staffed foundations
- Receiving somewhat more funding from staffed foundations than major donors
- Receiving much more funding from staffed foundations than major donors

35. *(Display only if Q34 is not blank.)* Why would you prefer this mix?

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## ABOUT YOU AND YOUR ORGANIZATION

36. How would you describe the geographical scope(s) of your organization? *(Select all that apply.)*

- Local
- State
- Regional
- National
- Global

37. In what program area(s) does your organization work? *(Select all that apply.)*

- Agriculture, fishing, and forestry
- Animals
- Arts and culture
- Community and economic development
- Education
- Environment
- Health
- Human rights
- Human services
- Information and communications
- International relations
- Philanthropy
- Public affairs
- Public safety
- Religion
- Science
- Social justice
- Social sciences

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- Sports and recreation
- Other (*please specify:* \_\_\_\_\_)

38. How many foundations currently give grants to help fund your organization?

\_\_\_\_\_

39. In the most recent fiscal year, what percentage of your organization's budget was funded by foundations?

\_\_\_\_\_

40. Please select the option that represents how you describe yourself:

- Female
- Male
- Prefer to self-identify (*optional, please describe:* \_\_\_\_\_)
- Prefer not to say

41. What is your race/ethnicity? (*Select all that apply.*)

- African-American/Black
- American Indian or Alaska Native
- Asian (including the Indian subcontinent)
- Caucasian/White
- Hispanic/Latinx
- Pacific Islander
- Race/ethnicity not included above
- Prefer not to say

42. How many years have you been in your current role at your organization?

- Less than 1 year
- At least 1 year but fewer than 3 years
- At least 3 years but fewer than 6 years
- At least 6 years but fewer than 10 years
- 10 years or longer