



THE CENTER
FOR EFFECTIVE
PHILANTHROPY

Nonprofit Perspectives on Current Issues in Philanthropy

This survey should take approximately 15 minutes to complete.

Please complete this survey by **Thursday, November 21, 2019**.

Introduction

Thank you for your participation in this research study conducted by the Center for Effective Philanthropy. This survey examines current issues in philanthropy, and findings from this survey will allow foundations and individual donors to better understand these issues from the nonprofit perspective. Included in this survey are questions about:

- Your organization's funding sources
- Any anticipated changes to your organization's revenue
- Your organization's experiences receiving funding from donor-advised funds (DAFs)
- Whether your organization has a gift acceptance policy
- The potential consequences of a recession
- Your perspective on the role of philanthropy in a democratic society
- Whether your organization engages in efforts to influence public policy

If there is another staff member at your organization, such as a finance or development director, who you believe is better suited to comment on these topics, please feel free to ask them to complete the survey for your organization or to complete the survey in collaboration with them.

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.

SURVEY INSTRUMENT

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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.
- **Donor-advised fund**—a charitable giving vehicle used by individual donors and sponsored by national charities, community foundations, and single-issue charities, [as defined below by the National Philanthropic Trust](#):
 - **National charities**: *organizations that are independent or are commercially affiliated and national in reach; not focused on a particular region; do not have a specific religious and/or focus area. Examples include National Philanthropic Trust, Fidelity Charitable Gift Fund, and Renaissance Charitable Foundation. (National charities are often referred to as “national gift funds” or “charitable gift funds.”)*
 - **Community foundations**: *organizations that have a specific geographic or regional focus. Examples include Cleveland Foundation, Delaware Community Foundation, and Community Foundation of the Ozarks.*
 - **Single-issue charities**: *organizations that support a specific religious faith; focus on a particular issue area or cause; or fund a specific institution. Examples include Jewish Federation of Rhode Island and San Diego Human Dignity Foundation.*
- **Gift acceptance policy**—a set of guidelines for determining whether or not to accept funding from a particular source.
- **Efforts to influence public policy**—efforts to influence government priorities, laws, and regulations at the local, state, regional, and/or national levels, and across the legislative, judicial, and administrative branches of government.

SOURCES OF FUNDING

The following questions are about anticipated changes to your organization's overall revenue (i.e., both earned and contributed revenue) during your organization's current fiscal year, compared to your organization's last fiscal year.

1. During the past 3 years, did your organization receive any grants from staffed foundations?
 Yes
 No
 Not sure

2. During the past 3 years, did your organization receive any gifts from individual donors?

Please keep in mind the following definition:

Individual donors—individuals who give to your organization directly or give to your organization through donor-advised funds at community foundations/commercial financial institutions.

- Yes
 No
 Not sure

3. *(Display only if “yes” was selected in the previous question)* Did any of those individual donors give \$7,500 or more to your organization in a given year?
 Yes
 No
 Not sure

4. *(Display only if “no” was NOT selected in question 2)* Are you typically aware when individual donor gifts are coming through a donor-advised fund (DAF)?

Please keep in mind the following definition:

Donor-advised fund—a charitable giving vehicle used by individual donors and sponsored by national charities, community foundations, and single-issue charities, [as defined below by the National Philanthropic Trust:](#)

- **National charities:** *organizations that are independent or are commercially affiliated and national in reach; not focused on a particular region; do not have a specific religious and/or focus area. Examples include National Philanthropic Trust, Fidelity Charitable Gift Fund, and Renaissance Charitable Foundation. (National charities are often referred to as “national gift funds” or “charitable gift funds.”)*
- **Community foundations:** *organizations that have a specific geographic or regional focus. Examples include Cleveland Foundation, Delaware Community Foundation, and Community Foundation of the Ozarks.*

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- **Single-issue charities:** *organizations that support a specific religious faith; focus on a particular issue area or cause; or fund a specific institution. Examples include Jewish Federation of Rhode Island and San Diego Human Dignity Foundation.*

- Yes
 No
 It depends (*please explain:* _____)

5. (*Display only if “yes” or “it depends” was selected in the previous question*) During the past 3 years, did any of your organization’s individual donors give through DAFs?

- Yes
 No
 Not sure

6. (*Display only if “yes” was selected in the previous question*) When individual donors give to your organization through DAFs, are you typically aware of the type of organization (i.e., national charities, community foundations, and/or single-issue charities) that sponsors the DAFs?

- Yes
 No
 It depends (*please explain:* _____)

7. (*Display only if “yes” or “it depends” was selected in the previous question*) During the past 3 years, through which of the following type(s) of charitable sponsors has your organization received funding from DAFs? (*Select all that apply.*)

- National charities
 Community foundations
 Single-issue charities
 Not sure (*mutually exclusive*)

8. (*Display only if “no” was NOT selected in question 2*) The Tax Cuts and Jobs Act went into effect on January 1, 2018. Since then, do you believe that these changes in the tax code have impacted **individual giving** to your organization?

- Yes, I believe these tax code changes have **increased** individual giving to my organization.
 Yes, I believe these tax code changes have **decreased** individual giving to my organization.
 No, I believe these tax code changes have had **no impact** on individual giving to my organization.
 I’m not sure whether these tax code changes have impacted individual giving to my organization.

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CHANGES IN FUNDING – CURRENT FISCAL YEAR

The following questions are about anticipated changes to your organization's overall revenue (i.e., both earned and contributed revenue) during your organization's current fiscal year, compared to your organization's last fiscal year.

9. In what month does your organization’s fiscal year end? *(Dropdown menu.)*

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

10. Compared to the last fiscal year, do you anticipate that your organization’s **overall revenue** will be higher, the same, or lower during the current fiscal year?

- My organization’s overall revenue **will be lower** during the current fiscal year.
- My organization’s overall revenue **will remain the same** during the current fiscal year.
- My organization’s overall revenue **will be higher** during the current fiscal year.
- I’m not sure** how my organization’s overall revenue during the current fiscal year will compare to the last fiscal year.

11. *(Display only if either “lower” or “higher” was selected in the previous question)* What do you believe is contributing to the change in your organization’s **overall revenue**?

12. *(Asked only of respondents whose organizations have individual donors above the \$7,500 per year giving level – Display only if “yes” was selected in question 3)* Compared to the last fiscal year, do you anticipate that the **percentage of your organization’s budget** funded by individual donors *below the \$7,500 per year giving level* will be higher, the same, or lower during the current fiscal year?

- The percentage of my organization’s budget funded by individual donors below the \$7,500 per year giving level **will be lower** during the current fiscal year.
- The percentage of my organization’s budget funded by individual donors below the \$7,500 per year giving level **will remain the same** during the current fiscal year.
- The percentage of my organization’s budget funded by individual donors below the \$7,500 per year giving level **will be higher** during the current fiscal year.
- I’m not sure** how the percentage of my organization’s budget funded by individual donors below the \$7,500 per year giving level during the current fiscal year will compare to the last fiscal year.

13. *(Asked only of respondents whose organizations have individual donors above the \$7,500 per year giving level – Display only if “yes” was selected in question 3)* Compared to the last fiscal year, do you anticipate that the **percentage of your organization’s budget** funded by individual donors *at or above the \$7,500 per year giving level* will be higher, the same, or lower during the current fiscal year?

- The percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level **will be lower** during the current fiscal year.
- The percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level **will remain the same** during the current fiscal year.
- The percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level **will be higher** during the current fiscal year.
- I’m not sure** how the percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level during the current fiscal year will compare to the last fiscal year.

14. *(Display only if either “lower” or “higher” was selected in at least 1 of the previous 2 questions)* What do you believe is contributing to the change(s) in the **percentage of your organization’s budget** funded by these sources?

CHANGES IN FUNDING – NEXT FISCAL YEAR

The following questions are about anticipated changes to your organization's overall revenue (i.e., both earned and contributed revenue) during your organization's next fiscal year.

15. Do you anticipate that your organization's **overall revenue** will be higher, the same, or lower in the next fiscal year?

- My organization's overall revenue **will be lower** during the next fiscal year.
- My organization's overall revenue **will remain the same** during the next fiscal year.
- My organization's overall revenue **will be higher** during the next fiscal year.
- I'm not sure** how my organization's overall revenue during the next fiscal year will compare to the current fiscal year.

16. *(Display only if either "lower" or "higher" was selected in the previous question)* What do you believe will be contributing to the change in your organization's **overall revenue**?

17. *(Asked only of respondents whose organizations have individual donors above the \$7,500 per year giving level – Display only if "yes" was selected in question 3)* Do you anticipate that the **percentage of your organization's budget** funded by individual donors *below the \$7,500 per year giving level* will be higher, the same, or lower during the next fiscal year?

- The percentage of my organization's budget funded by individual donors below the \$7,500 per year giving level **will be lower** during the next fiscal year.
- The percentage of my organization's budget funded by individual donors below the \$7,500 per year giving level **will remain the same** during the next fiscal year.
- The percentage of my organization's budget funded by individual donors below the \$7,500 per year giving level **will be higher** during the next fiscal year.
- I'm not sure** how the percentage of my organization's budget funded by individual donors below the \$7,500 per year giving level during the next fiscal year will compare to the current fiscal year.

18. *(Asked only of respondents whose organizations have individual donors above the \$7,500 per year giving level – Display only if “yes” was selected in question 3)* Do you anticipate that the **percentage of your organization’s budget** funded by individual donors *at or above the \$7,500 per year giving level* will be higher, the same, or lower during the next fiscal year?
- The percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level **will be lower** during the next fiscal year.
 - The percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level **will remain the same** during the next fiscal year.
 - The percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level **will be higher** during the next fiscal year.
 - I’m not sure** how the percentage of my organization’s budget funded by individual donors at or above the \$7,500 per year giving level during the next fiscal year will compare to the current fiscal year.

19. *(Display only if either “lower” or “higher” was selected in at least 1 of the previous 2 questions)* What do you believe will be contributing to the change(s) in the **percentage of your organization’s budget** funded by these sources?

20. *(Display only if “lower” was selected in question 15)* During the next fiscal year, what effect do you believe a decline in **overall revenue** would have on your organization’s staffing and operations? *(Select all that apply.)*

- My organization would have to **freeze hiring**.
- My organization would have to **lay off employees**.
- My organization would have to **freeze wages**.
- My organization would have to **reduce wages**.
- My organization would have to **freeze employee benefits**.
- My organization would have to **reduce employee benefits**.
- My organization would have to **reduce programs or services**.
- My organization would **not have to make significant changes**. *(mutually exclusive)*
- I’m not sure** what effect a decline in revenue would have on my organization’s staffing and operations. *(mutually exclusive)*
- Other** *(please specify: _____)*

21. *(Display only if “lower” was selected in question 15)* How is your organization preparing for a decline in overall revenue in the next fiscal year?

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DONOR-ADVISED FUNDS *(If the respondent's organization does not receive funding from DAFs, skip this section.)*

The following questions are about your organization's experiences receiving funding from DAFs.

Please keep in mind the following definition:

Donor-advised fund—a charitable giving vehicle used by individual donors and sponsored by national charities, community foundations, and single-issue charities, [as defined below by the National Philanthropic Trust:](#)

- **National charities:** *organizations that are independent or are commercially affiliated and national in reach; not focused on a particular region; do not have a specific religious and/or focus area. Examples include National Philanthropic Trust, Fidelity Charitable Gift Fund, and Renaissance Charitable Foundation. (National charities are often referred to as “national gift funds” or “charitable gift funds.”)*
- **Community foundations:** *organizations that have a specific geographic or regional focus. Examples include Cleveland Foundation, Delaware Community Foundation, and Community Foundation of the Ozarks.*
- **Single-issue charities:** *organizations that support a specific religious faith; focus on a particular issue area or cause; or fund a specific institution. Examples include Jewish Federation of Rhode Island and San Diego Human Dignity Foundation.*

22. *(Display only if at least 2 responses other than “not sure” were selected in question 7)* In general, through which type of charitable sponsor does your organization prefer to receive DAF funding?

- My organization prefers to receive DAF funding through **national charities**.
- My organization prefers to receive DAF funding through **community foundations**.
- My organization prefers to receive DAF funding through **single-issue charities**.
- My organization **does not have a preference**.

23. *(Display only if a preference was indicated in the previous question)* Please explain why your organization prefers to receive DAF funding through this type of charitable sponsor.

24. What are the biggest advantages of receiving funding through DAFs?

25. What are the biggest disadvantages of receiving funding through DAFs?

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As DAFs have grown, there have been debates about whether DAFs have made philanthropy more accessible with low barriers to entry, whether there is enough transparency surrounding the use of DAFs, and whether DAFs delay nonprofits from getting donations.

26. What are your thoughts on these issues related to DAFs?

GIFT ACCEPTANCE

The following questions are about whether your organization has a gift acceptance policy and whether your organization has ever – or would ever – decline(d) a gift.

Please keep in mind the following definition:

Gift acceptance policy—a set of guidelines for determining whether or not to accept funding from a particular source.

27. Does your organization have a gift acceptance policy?

- Yes
- No
- Not sure

28. *(Display only if “yes” was selected in the previous question)* Is your organization’s gift acceptance policy documented?

- Yes
- No
- Not sure

29. Has your organization’s staff discussed criteria under which the organization would decline a gift?

- Yes
- No
- Not sure

30. Has your organization’s board discussed criteria under which the organization would decline a gift?

- Yes
- No
- Not sure

31. *(Display only if “yes” was selected in any of the previous 4 questions)* Under what circumstances would your organization decline a gift, and why?

32. To the best of your knowledge, has your organization ever declined a gift?

- Yes
- No
- Not sure

33. *(Display only if “yes” was selected in the previous question)* From which of the following funding sources has your organization ever declined a gift? *(Select all that apply.)*

- Individual donors
- Foundations
- Government
- Corporations
- Other *(please specify: _____)*

34. *(Display only if “yes” was selected in question 32)* Why did your organization decline the gift(s)?

RECESSION

In a 2019 National Association for Business Economics [survey](#) of 226 economists, 72% of economists predicted that the U.S. economy will enter the next recession in 2020 or 2021. The following questions are about the conversations your organization may be having regarding the potential consequences of a recession.

35. Are you concerned about the impact that a recession would have on your organization?

- Yes
- No
- Not sure

36. Would a recession increase the need/demand for your organization’s programs or services?

- Yes
- No
- Not sure

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37. Does your organization have a plan for how it would handle a recession?

- Yes
- No
- Not sure

38. *(Display only if “yes” was selected in the previous question)* How would your organization handle a recession?

39. *(Display only if “no” was NOT selected in question 1)* Have any of your organization’s staffed foundation funders talked with you about how a recession would change the way they support you?

- Yes
- No
- Not sure

40. *(Display only if “yes” was selected in the previous question)* How have your organization’s staffed foundation funders said a recession would change the way they support you?

41. *(Display only if “no” was selected in question 39)* Would you like your organization’s staffed foundation funders to talk with you about how a recession would change the way they support you?

- Yes
- No
- Not sure

THE ROLE OF PHILANTHROPY

Recently, some critics have argued that philanthropy can be undemocratic and a misuse of tax-privileged dollars. These critiques have sparked debates about the role of philanthropy in a democratic society. The following questions are about your perspective on these debates.

42. Are you following these debates?

- Yes
- No

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43. *(Display only if “yes” was selected in the previous question)* What are your thoughts on these debates?

EFFORTS TO INFLUENCE PUBLIC POLICY

The following questions are about whether your organization engages in efforts to influence public policy.

Please keep in mind the following definition:

Efforts to influence public policy—efforts to influence government priorities, laws, and regulations at the local, state, regional, and/or national levels, and across the legislative, judicial, and administrative branches of government.

44. Does your organization seek to influence public policy?

- Yes
- No
- Not sure

45. *(Display only if “yes” was selected in the previous question and “no” was NOT selected in question 1)* To what extent are your organization’s staffed foundation funders supportive of your organization’s efforts to influence public policy?

Not supportive	Somewhat supportive	Completely supportive
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

46. *(Display only if the previous question was not left blank)* What, if anything, could your organization’s staffed foundation funders do to better support your organization’s efforts to influence public policy?

ABOUT YOU AND YOUR ORGANIZATION

The following questions are about you and your organization.

47. What are the current roles of the people who contributed responses to this survey? (*Select all that apply.*)
- CEO/Executive Director or equivalent
 - Finance Director or Equivalent
 - Development Director or equivalent
 - Other (*please specify:* _____)
48. Does the CEO/Executive Director of your organization identify as a person of color?
- Yes
 - No
 - Not sure
 - Prefer not to say
49. Please select the option that represents how the CEO/Executive Director of your organization describes themselves:
- Female
 - Male
 - Prefer to self-identify (*optional, please describe:* _____)
 - Prefer not to say
50. How would you describe the geographical scope(s) of your organization? (*Select all that apply.*)
- Local
 - State
 - Regional
 - National
 - Global
51. 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

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- Information and communications
- International relations
- Philanthropy
- Public affairs
- Public safety
- Religion
- Science
- Social justice
- Social sciences
- Sports and recreation
- Other (*please specify:* _____)