



**Crain's/AFP New York
Metropolitan Nonprofit
Survey
Spring, 2014**

Crain's/AFP New York Metropolitan Nonprofit Survey

Introduction: Mark Hefter, AFP, New York City	3
Summary of Findings	4
Survey Detail	9

Introduction

Mark Hefter, President

Association of Fundraising Professionals – New York

The Association of Fundraising Professionals membership represents every type of nonprofit in the New York metropolitan region.

Here in New York, the Crain's/New York AFP-NY Survey has tapped these professionals to build a map of resource development trends supporting critical health, social service, education, cultural, environmental and advocacy activity that touches every citizen.

A pattern of growth in funds raised tracks increasingly positive regional economic trends.

At the same time, the Survey outlines challenges: the high percentage of staff turnover and changes in traditional funding patterns among government and private funders.

As a professional membership organization, our focus is on supporting the human resources whose success drives the fund raising capacity of our nonprofit sector. We welcome the opportunity to partner on the *Crain's*/New York-AFP Metropolitan Nonprofit Survey, and look forward to using its insights to inform programs and services in the year ahead. Senior Reporter, Theresa Agovino's, reporting in the June 16, 2014 edition of *Crain's New York Business* can be found in copies at Fund Raising Day in New York on June 27 and at:

<http://www.crainsnewyork.com/article/20140616/NONPROFITS/306159994/fundraising-gets-a-welcome-lift#>. The full report is on the AFP-NY website: www.nycafp.org/

Our thanks to all who took part in the Survey, and to *Crain's* and AFP-Board leadership who worked together to plan and produce this important project.



Mark Hefter
President
AFP, New York City Chapter

Summary of Findings

The Survey

In the spring of 2014, the Association of Fund Raising Professionals reached out to its members and their networks with the *Crain's*/AFP-New York Metropolitan Nonprofit Survey.

The 122 nonprofit professionals who responded represent a broad cross-section of nonprofit organizations. The greatest number of responses came from organizations based in the five boroughs of New York City, just as they represent the preponderance of nonprofits in the region. Nonprofits in the greater metropolitan area outside of New York City are also represented, bringing forward the experiences of these important service providers in the larger metropolitan region.

Grassroots organizations with budgets of less than \$1mm represented nearly 1 in 5 of respondents (18%). Nonprofits with budgets ranging from \$2mm - \$10mm represented 39% of respondents and organizations with budgets great than \$10mm represented 37% of respondents.

When respondents reported on their own work, their responses mirrored the proportion of nonprofits that engage in various fund raising efforts. Nearly 70% are involved in grants, the annual fund, major gifts and events. Smaller percentages work with social media and planned giving.

Trends in Fund Raising Overall:

Fund raising professionals responding to the survey are a scrappy lot. While only 44% saw the overall fund raising environment as better in 2014 than 2013, when asked about fund raising where they work, they presented more optimistic pictures. Better results are predicted by 57% while only 10% saw their fundraising trending down. When they did see lower fundraising results in 2014 as compared to 2013, the loss of grants and staff plus the negative impacts of mergers on donor loyalty and staff effectiveness were most commonly cited.

Another sign of optimism is that nearly half (42%) of respondents have capital campaigns underway or in planning.

Trends in Fund Raising by Source:

Survey respondents report *foundation* support increasing (31%) or maintaining (28%) as foundation endowments have been largely restored or have even increased since the losses of 2008. Only 2% reported decreases in foundation giving in 2013-14.

Likewise *corporate grants* and *contributions* are increasing (28%) or maintaining (27%). However, volatility in corporate giving programs and their priorities is evident AS 24% of respondents note decreases in corporate support. *Corporate in-kind* giving is not as volatile. Reflecting trends underway for a number of years, 26% report increases and only 5% report decreases.

Events often bring together both *business* and *individual* donors. Nearly 90% of respondents work with their volunteer leadership to produce fund raising events. Increases were noted by nearly half (48%) with decreases noted by less than 8%.

Individuals give in many ways. The mailed *annual fund* appeal remains one of the most cost-effective ways to reach individual donors. Here, the story is a glass half full or half empty. While 42% saw giving increasing, 45% saw giving at the same level or decreasing. Several notes indicated that the high cost of new donor acquisition had encouraged a change in priority, usually to more time spent cultivating major gifts.

In recent years, *social media* has gained the spotlight as a fund raising vehicle. Nearly half are watching colleagues in their field to see how *social media* fundraising goes, but only 36% are encouraged by the level of funds raised. More (57%) are encouraged by the brand raising they see. While 31% are not currently interested in the investments necessary to test fundraising via social media, 37% are initiating efforts beginning this year. Using *social media* for events is most common at 42% of users. Requests for general support via *social media* follow closely at 38%.

Half of respondents using social media noted using Facebook to raise funds, and 23% of them reported increases in giving. That said, comments suggest that the dollars are still a small part of overall fundraising.

About 40% of respondents using social media include twitter in their fundraising, but only 2% are currently seeing increases.

Nearly a third of respondents using social media include LinkedIn for fundraising and 15% are seeing increases.

Tumblr and YouTube were the most mentioned other social media platforms used to support fundraising.

Survey notes suggest that mobile fundraising using lists of followers developed by each nonprofit are yielding encouraging results.

Individual giving also comes via *major gifts*. Not all nonprofits have the capacity or access to cultivate *major gifts*. In this study, it appears that about 75% of respondents work in organizations that seek *major gifts*. Of those, nearly half (47%) of survey respondents reported increases and less than 10% reported decreases. That said, several survey notes suggest that nonprofits without robust numbers of major donors are vulnerable to sudden shifts in institutional stability if one or two major gifts are lost or significantly decreased.

Individuals also give via *planned gifts*. Although half of responding staff note that their organizations do seek *planned gifts*, of the other half who do, nearly one in five are seeing increases while 26% are maintaining their planned gift fundraising. Only 8% are seeing decreases.

In the United States, a great deal of service for the common good is performed by the nonprofit sector utilizing *government grants and contracts* enhanced by private philanthropy. Each side of this equation leverages the other, with *government funding* overall being the larger partner. In recent years, *government grants and contract funding* have been trending down. Survey respondents offer insights into the effect of this trend here in the New York Metropolitan area:

Federal grants and contracts: 8% increasing, 27% maintaining, 19% decreasing (54% report seeking)

State grants and contracts: 12% increasing, 37% maintaining, 11% decreasing (60% report seeking)

County/Borough grants and contracts: 5% increasing, 31% maintaining, 4% decreasing (40% report seeking)

City/town/village grants and contracts: 13% increasing, 22% maintaining, 14% decreasing (49% report seeking)

As government funding has maintained or trended lower, many nonprofits have taken a greater interest in *earned/fee income*. Who is the staff undertaking this new/increased priority? The Survey asked fund raisers. Higher priority around *earned income* was reported by 46% or respondents. But only 4% reported that development staff is involved. *Earned income* is not currently seen as an extension of fund raising by metropolitan region nonprofits.

Nonprofit Organization Trends:

In an environment where more than half (57%) of Survey respondents anticipate raising more funds in 2014 than 2013, and another third anticipate maintaining last year's levels, what is happening in our nonprofit organizations?

Nearly half (49%) report operating budgets increasing and only 5% reported operating budgets decreasing.

Service/program volume was reported to be increasing by 66% of respondents, and the variety of programs/services is also growing with 58% reporting increases.

At the same time only 29% reported development budgets and staff increasing.

Of those who provided detail, 56% were fundraising executives or staff.

However, not all of them have fund raising as the single focus of their position. While 92% of respondents worked full-time for their institutions, only 47% of respondents worked entirely in fundraising. Generally "marketing and communications" or "administration and management" were the other areas in which they worked. And about 1/3 reported staffing programs and services as well as fund raising.

Not surprisingly in an environment of growing budgets and program variety accompanied by growing fund raising goals...but not growing fundraising staff and development budgets...the sector is seeing high development staff turnover.

Nearly 60% of respondents have been in their positions for less than five years.

Only one in five (18%) have worked over 10 years with their current nonprofit. These staff represent the deepest relationships with funders and donors as well as the capacity to train new development professionals.

The good news is that new hires may have some training as they arrive since 82% come from other nonprofits or consulting to nonprofits.

A trend in increased time needed to win existing or new funds compounds the issues of limited development budgets.

52% of respondents reported more time needed to renew existing grants and contributions, while 40% reported about the same time needed.

74% of respondents reported more time needed to win new grants or contributions, while 20% reported about the same time needed.

Horsepower to move through a changing time

Every business model is marked by specialized activity that garners revenue. For nonprofits, this activity is undertaken by fundraising staff, C-Suite executive staff, and the Board of Trustees. How well is this train of activity working at a time of change in the mix and priorities of funders? Our Survey respondents tell us:

77% of respondents report that the C-Suite executive staff and development staff can work well together to maximize opportunity and meet challenges. That said, nearly a quarter (23%) are concerned that necessary synergy is not in place.

Survey respondents are less confident in the Board/Development staff capacity to maximize opportunity and meet challenges in the current, changing fund raising environment. Over half (58%) see good synergy. But over 40% do not.

Conclusion

The Crain's/AFP-New York Metropolitan Nonprofit Survey reveals nonprofit organizations and their fundraisers focused on growth in programs, services, and the needed funds to support them. The current economic environment gives them reason to believe success can be won.

But success is not won on wishes or even the setting of fundraising goals that simply reflect funds needed. Every dollar has its cost. Development staff and budgets are not growing in line with program and institutional expenses.

In the New York metropolitan area, our boards and staff have the capacity to apply business thinking to setting fundraising goals and the fundraising budgets based upon our current base of support and resources available to win new funders.

With greater understanding of our current fundraising model, we gain the capacity to right-size our fundraising goals with our fundraising budgets. The results are year-end fund raising success and reduction in fundraising staff turnover.

Many of *Crain's* readers are the Board members nonprofits count on to help with these analytics as well as open doors to support. And many Survey respondents follow their colleagues, leaders and donors through articles in *Crain's*. AFP-NY is committed to the networking and professional development training that strengthen the hands of fund raisers.

The *Crain's*/AFP-NY Metropolitan Nonprofit Survey was produced with help from many volunteers, including the Survey respondents.

Special thanks to:

Valerie Block, *Crain's New York Business*
Marilyn Hoyt and Gary Laermer, *AFP-NY*
Emily Brochstein, Kellen Company

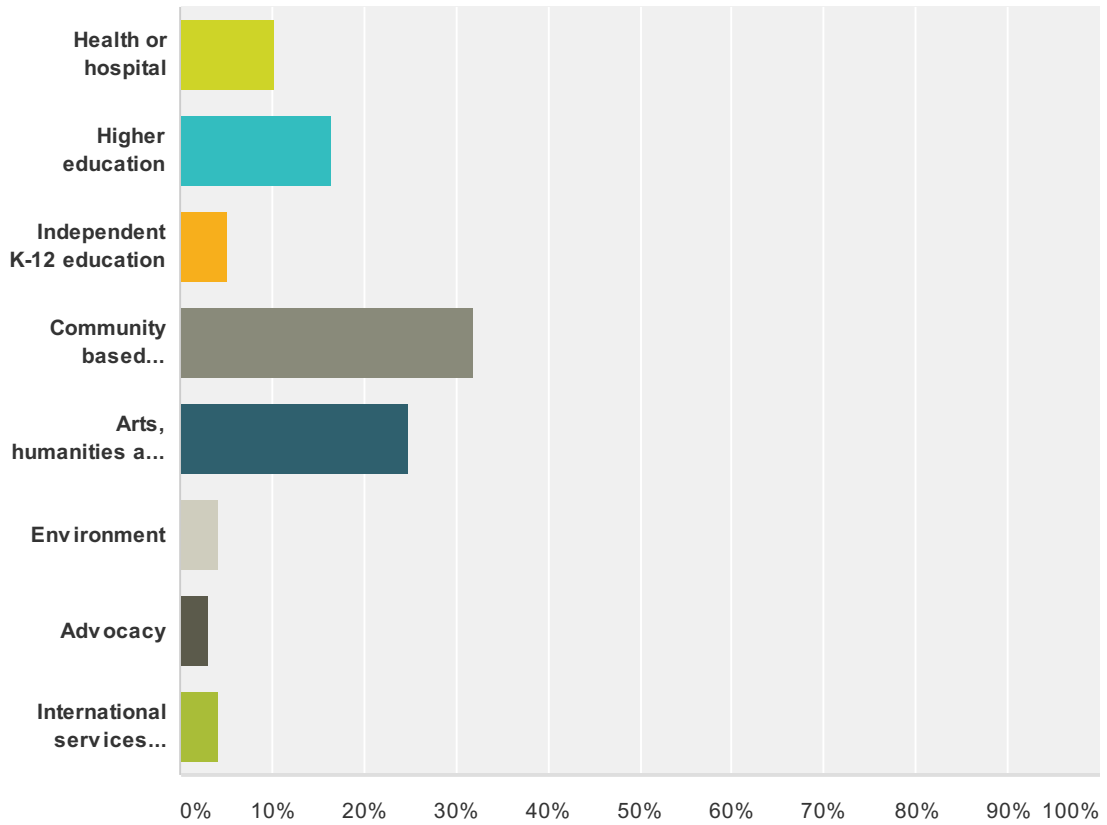


APPENDIX A

Survey Details

Q4 What type of nonprofit organization are you? (Please check one)

Answered: 97 Skipped: 25



Answer Choices	Responses
Health or hospital	10.31% 10
Higher education	16.49% 16
Independent K-12 education	5.15% 5
Community based organization (housing, youth, aging, social services etc.)	31.96% 31
Arts, humanities and culture	24.74% 24
Environment	4.12% 4
Advocacy	3.09% 3
International services including any or many above	4.12% 4
Total	97

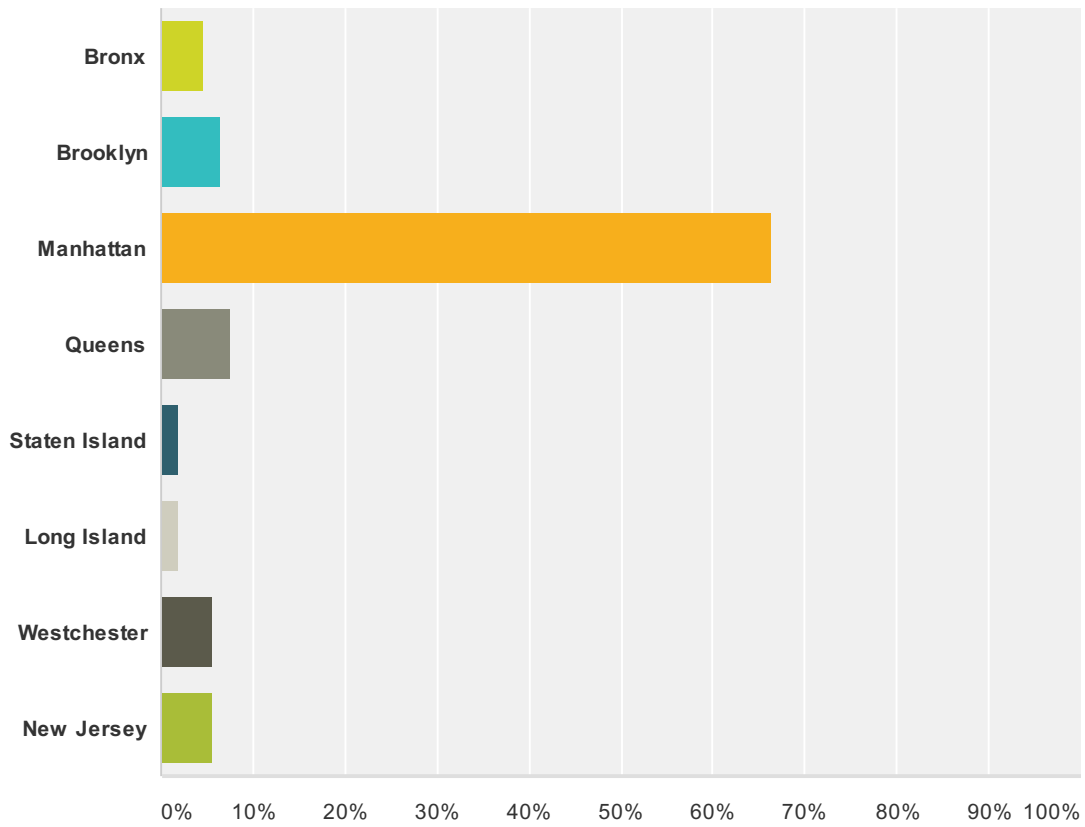
#	Other (please specify)	Date
1	Development consultant	5/6/2014 3:38 AM
2	Social science research in education, arts & culture, environmental ed, media, and health.	5/5/2014 10:57 AM
3	Economic Development	5/5/2014 10:35 AM
4	Economic development	5/5/2014 9:39 AM

Crain's / AFP New York City NonProfit Survey

5	Workforce development	5/2/2014 12:28 PM
6	Public media	4/29/2014 4:42 PM
7	medical education and research	4/29/2014 4:16 PM
8	Charter School	4/21/2014 10:12 AM
9	k-12 public charter school	4/19/2014 4:09 PM
10	mental health	4/18/2014 8:35 AM
11	Civil rights	4/17/2014 8:37 PM
12	Marketing Agency	4/17/2014 4:15 PM
13	Religious	4/17/2014 2:45 PM
14	bilateral U.S. to China policy organization	4/17/2014 1:17 PM
15	Education/Children with Disabilities	4/17/2014 1:15 PM
16	membership	4/17/2014 1:09 PM
17	Community Foundation	4/17/2014 1:06 PM
18	Professional Association	4/17/2014 12:53 PM
19	consultant	4/11/2014 9:53 AM
20	Retired	4/10/2014 10:20 AM
21	Social Services	4/8/2014 7:36 PM
22	Educational	4/8/2014 5:07 PM
23	Fundraising consultant	4/8/2014 2:59 PM
24	Mental Health, Education, Social Services, Youth Development	4/8/2014 1:17 PM
25	CONSULTANT	4/8/2014 12:44 PM

Q5 Where are you located?

Answered: 107 Skipped: 15



Answer Choices	Responses
Bronx	4.67% 5
Brooklyn	6.54% 7
Manhattan	66.36% 71
Queens	7.48% 8
Staten Island	1.87% 2
Long Island	1.87% 2
Westchester	5.61% 6
New Jersey	5.61% 6
Total	107

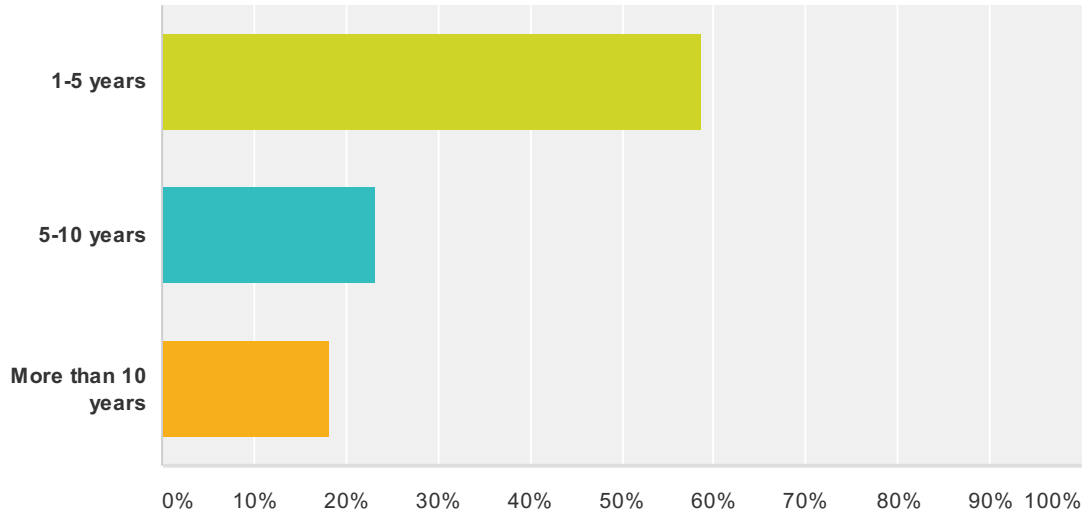
#	Other (please specify)	Date
1	Mid Hudson region	5/4/2014 7:46 AM
2	Bronx, Brooklyn, Manhattan, Queens, and Westchester	4/30/2014 11:50 AM
3	Cornwall on Hudson NY Orange co	4/30/2014 12:17 AM
4	anonymous	4/23/2014 3:55 PM
5	Bridgeport, CT	4/21/2014 10:12 AM

Crain's / AFP New York City NonProfit Survey

6	Bronx, Brooklyn, Manhattan	4/19/2014 4:09 PM
7	Virginia	4/17/2014 4:15 PM
8	we have services in all five boroughs	4/17/2014 1:33 PM
9	Michigan	4/17/2014 1:16 PM
10	Our Manhattan location is one of 7 on the East Coast	4/17/2014 1:15 PM
11	nat'l org with small office in LA, too	4/17/2014 1:12 PM
12	PA	4/17/2014 1:11 PM
13	Every borough but Mnahattan	4/17/2014 12:52 PM
14	Sault Ste Marie MICHIGAN	4/10/2014 10:20 AM
15	National, based in NYC	4/9/2014 6:57 PM
16	Dutchess County	4/8/2014 1:32 PM
17	5 Boroughs of New York	4/8/2014 12:52 PM
18	Headquartered in Westchester but with sites from Staten Island to Sullivan County	4/8/2014 12:45 PM
19	CT	4/8/2014 12:42 PM

Q6 How long have your worked for your current nonprofit?

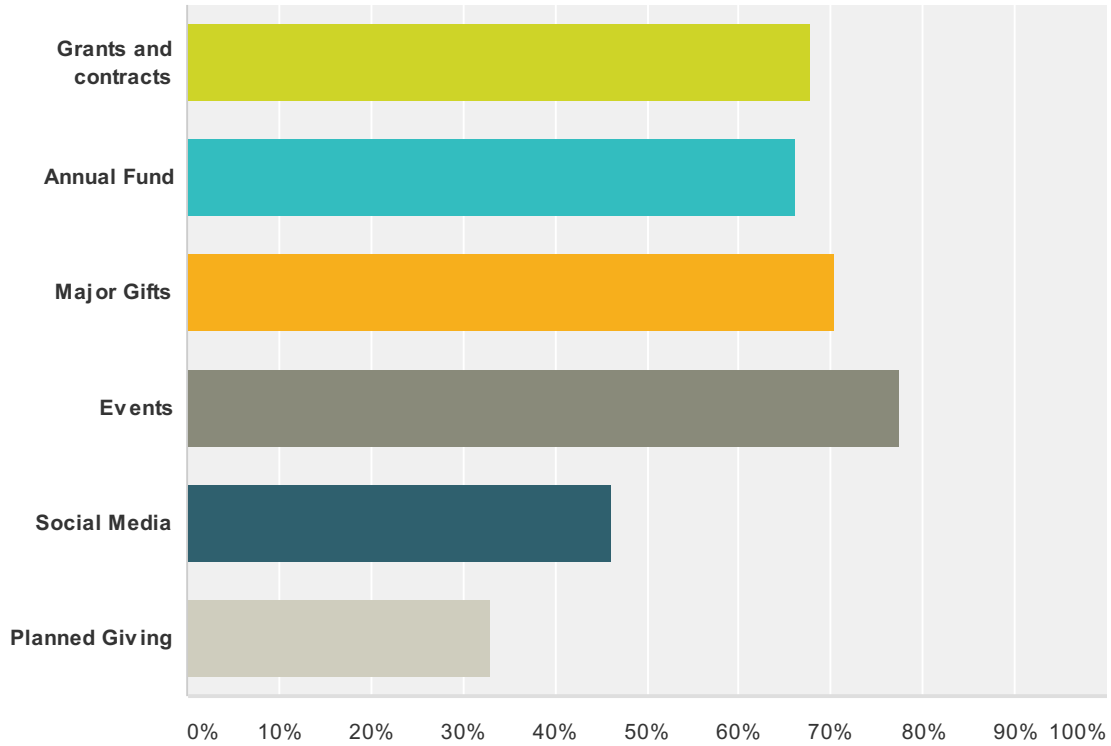
Answered: 121 Skipped: 1



Answer Choices	Responses
1-5 years	58.68% 71
5-10 years	23.14% 28
More than 10 years	18.18% 22
Total	121

Q7 What development activities do you undertake?

Answered: 115 Skipped: 7



Answer Choices	Responses
Grants and contracts	67.83% 78
Annual Fund	66.09% 76
Major Gifts	70.43% 81
Events	77.39% 89
Social Media	46.09% 53
Planned Giving	33.04% 38
Total Respondents: 115	

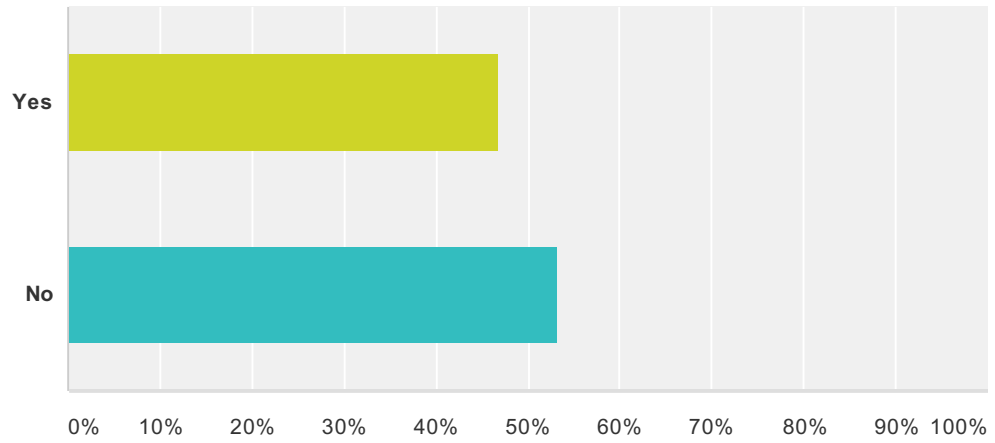
#	Other (please specify)	Date
1	Board Development, Communications/Marketing	4/30/2014 11:50 AM
2	just beginning need to hire someone to fund raise	4/30/2014 12:17 AM
3	Special Events	4/29/2014 9:52 PM
4	teaching all of the above	4/29/2014 8:02 PM
5	Communications & Governance Issues	4/29/2014 4:39 PM
6	prospect, financial and portfolio management	4/29/2014 4:16 PM
7	Stewardship, alumnae relations	4/21/2014 10:12 AM
8	Corporate	4/21/2014 9:38 AM

Crain's / AFP New York City NonProfit Survey

9	communications strategy, Kickstarter campaign, Public Relations	4/17/2014 3:06 PM
10	membership	4/17/2014 1:12 PM
11	Prospect Research	4/17/2014 1:11 PM
12	Corporate	4/17/2014 1:07 PM
13	Prospect Research	4/17/2014 1:05 PM
14	ED	4/17/2014 12:52 PM
15	Alumni outreach	4/17/2014 11:26 AM
16	Stewardship/Donor Relations	4/10/2014 1:19 PM
17	Interim Director of Development	4/8/2014 2:59 PM
18	Alumni Relations	4/8/2014 1:24 PM

Q8 Is your current position dedicated entirely to fundraising?

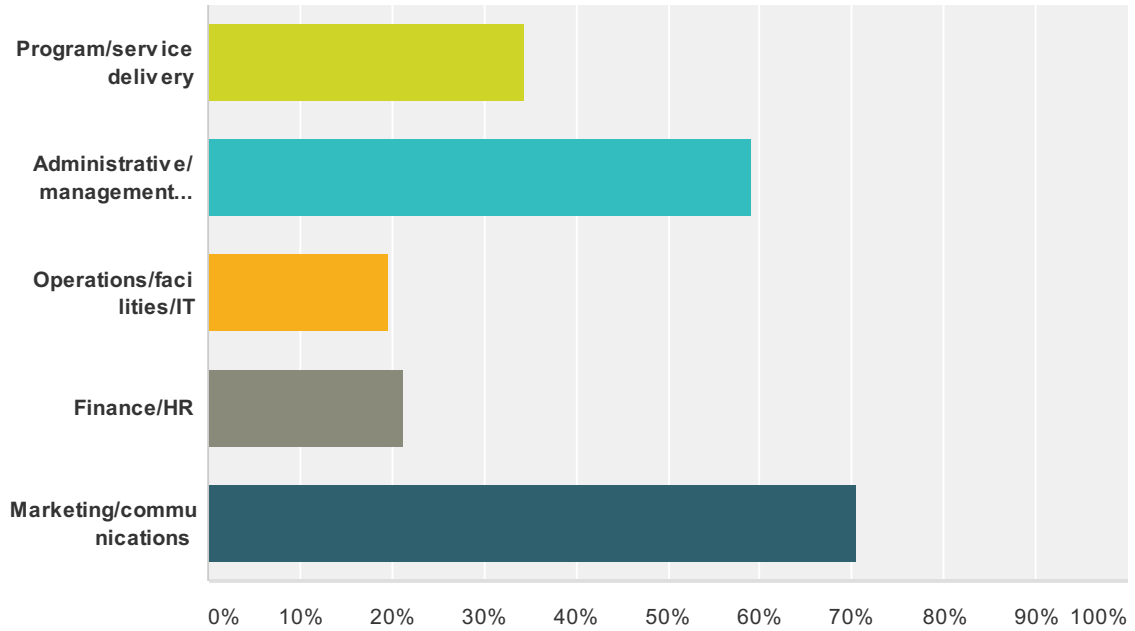
Answered: 120 Skipped: 2



Answer Choices	Responses
Yes	46.67% 56
No	53.33% 64
Total	120

Q9 If no, what other work is in your position:

Answered: 61 Skipped: 61

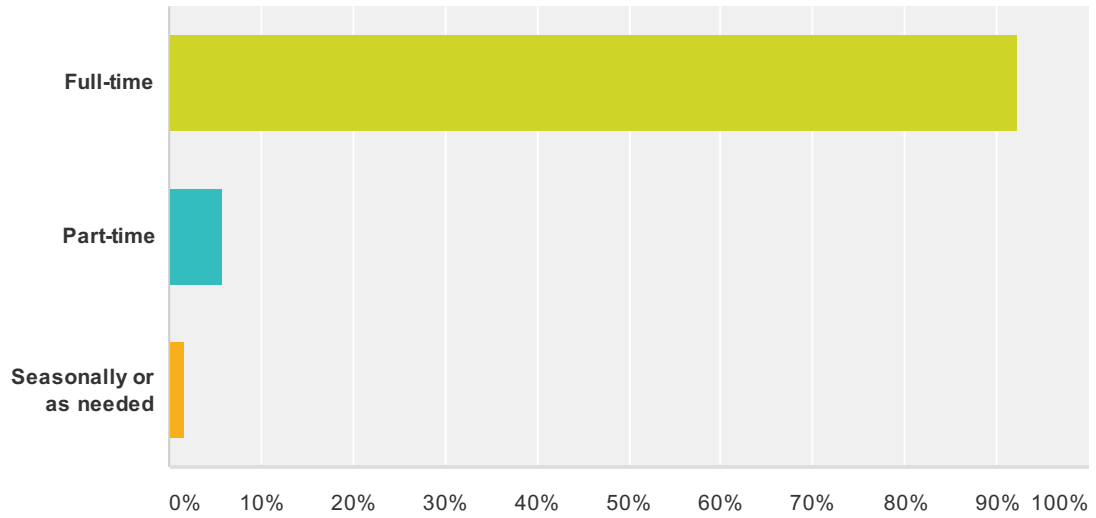


Answer Choices	Responses
Program/service delivery	34.43% 21
Administrative/management other than in development	59.02% 36
Operations/facilities/IT	19.67% 12
Finance/HR	21.31% 13
Marketing/communications	70.49% 43
Total Respondents: 61	

#	Other (please specify)	Date
1	teaching	4/29/2014 8:02 PM
2	External Affairs - Advocacy/Community Relations	4/19/2014 4:09 PM
3	I'm the ED	4/17/2014 6:00 PM
4	Prospect Research	4/17/2014 1:11 PM
5	social media, external relations	4/8/2014 7:36 PM
6	Public relations	4/8/2014 1:32 PM
7	Speaking; writing books	4/8/2014 12:44 PM

Q10 You are employed

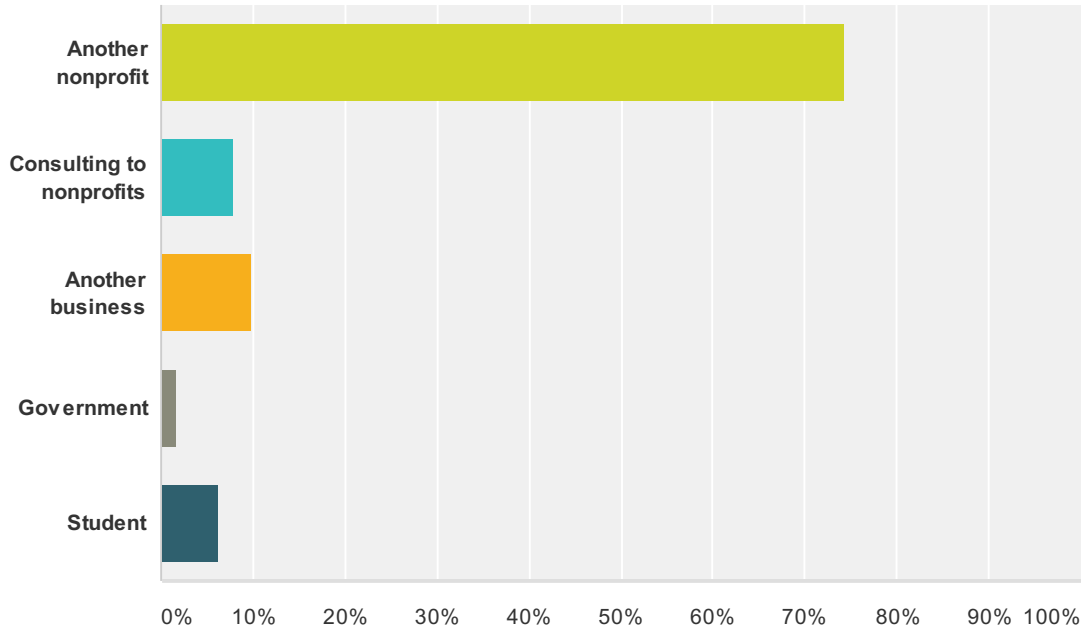
Answered: 118 Skipped: 4



Answer Choices	Responses	Count
Full-time	92.37%	109
Part-time	5.93%	7
Seasonally or as needed	1.69%	2
Total		118

Q11 Prior to working for your current nonprofit, where were you?

Answered: 113 Skipped: 9

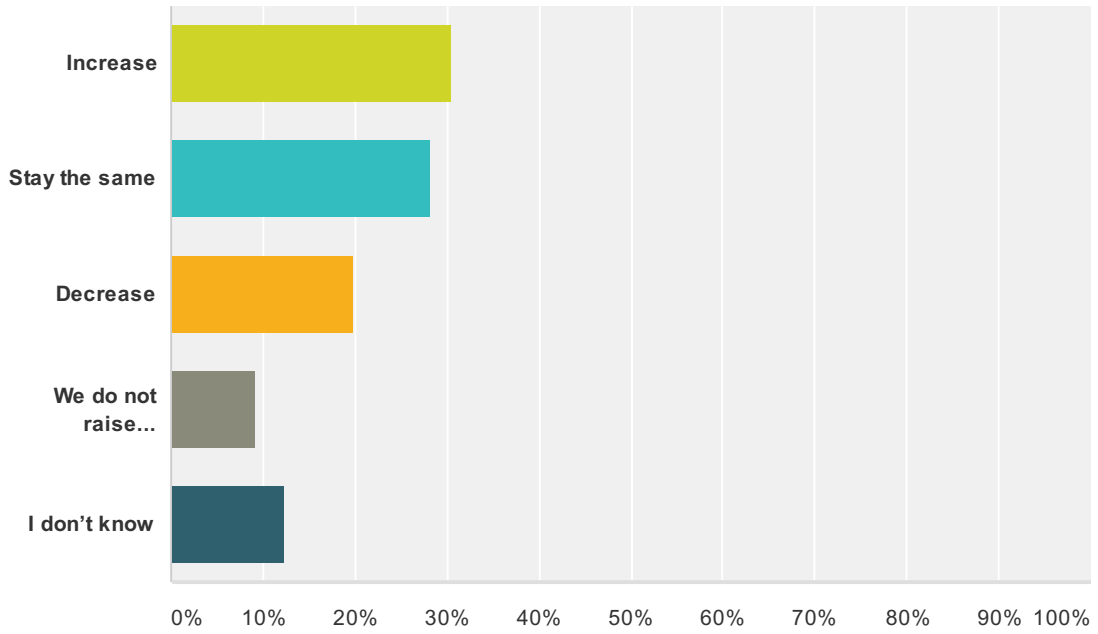


Answer Choices	Responses	
Another nonprofit	74.34%	84
Consulting to nonprofits	7.96%	9
Another business	9.73%	11
Government	1.77%	2
Student	6.19%	7
Total		113

#	Other (please specify)	Date
1	Freelance writer	5/5/2014 9:39 AM
2	Private foundation	5/4/2014 7:46 AM
3	I have another career as psychoanalyst	4/30/2014 12:17 AM
4	homemaker	4/24/2014 4:41 PM
5	I work for the Housing Partnership 2 days a week and at a faith based direct social services agency on Long Island the other three days	4/14/2014 10:59 AM
6	The Associated Press	4/10/2014 11:20 AM
7	Indiana University	4/10/2014 10:20 AM
8	law firm	4/10/2014 8:40 AM
9	journalism	4/8/2014 3:08 PM
10	Worked at Pace University as VP then 2008 started consulting	4/8/2014 12:44 PM

Q12 Foundation

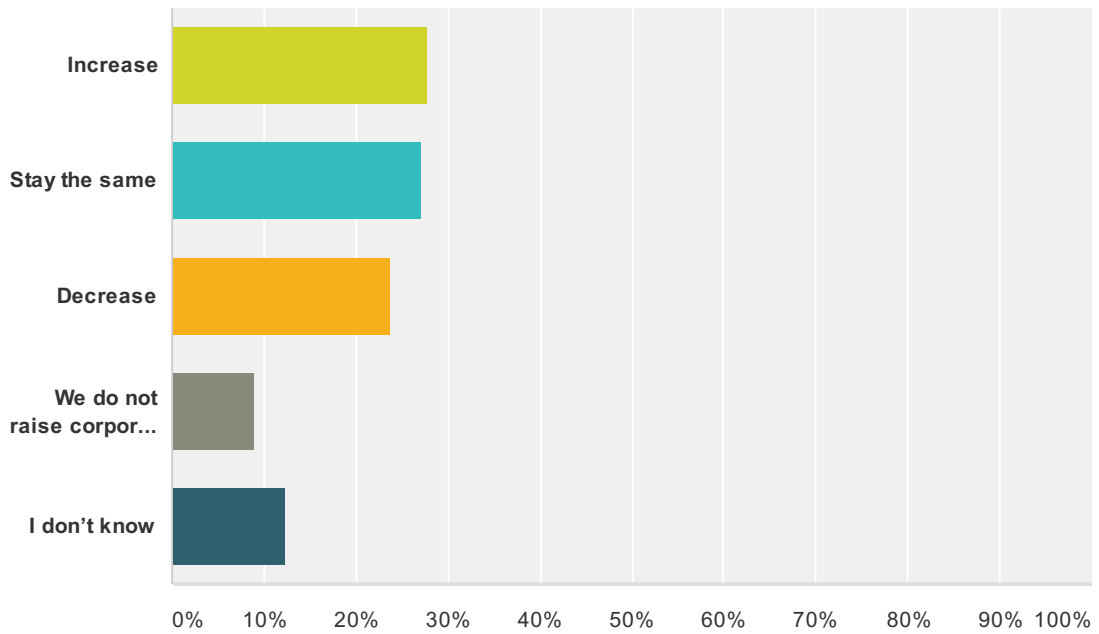
Answered: 121 Skipped: 1



Answer Choices	Responses
Increase	30.58% 37
Stay the same	28.10% 34
Decrease	19.83% 24
We do not raise foundation funding	9.09% 11
I don't know	12.40% 15
Total	121

Q13 Corporate grants and contributions

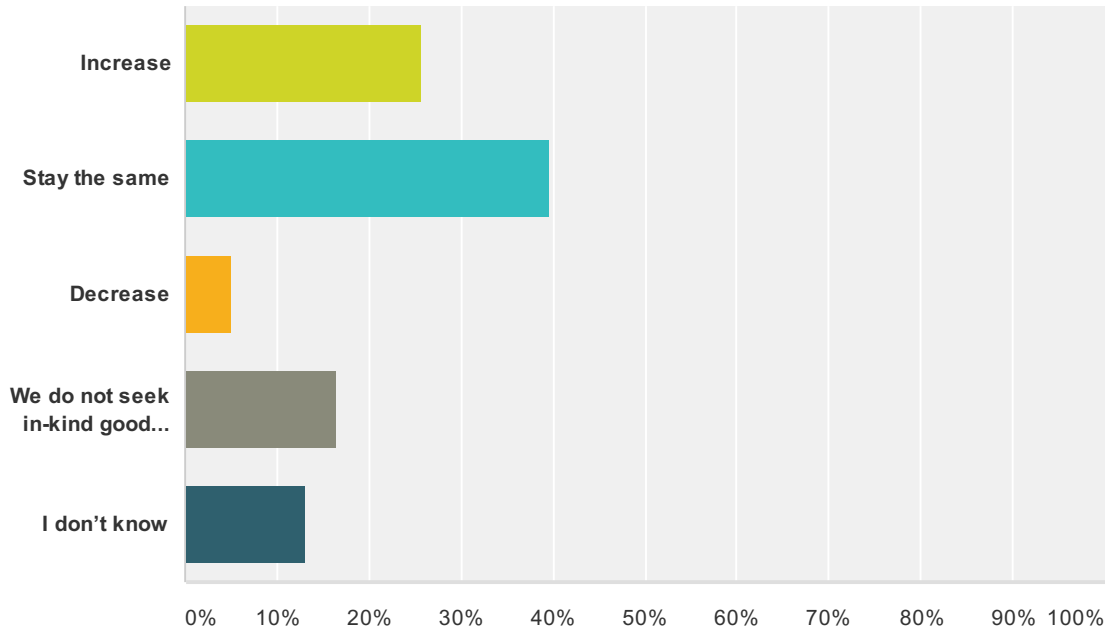
Answered: 122 Skipped: 0



Answer Choices	Responses	
Increase	27.87%	34
Stay the same	27.05%	33
Decrease	23.77%	29
We do not raise corporate grants or contributions	9.02%	11
I don't know	12.30%	15
Total		122

Q14 In-kind goods and services

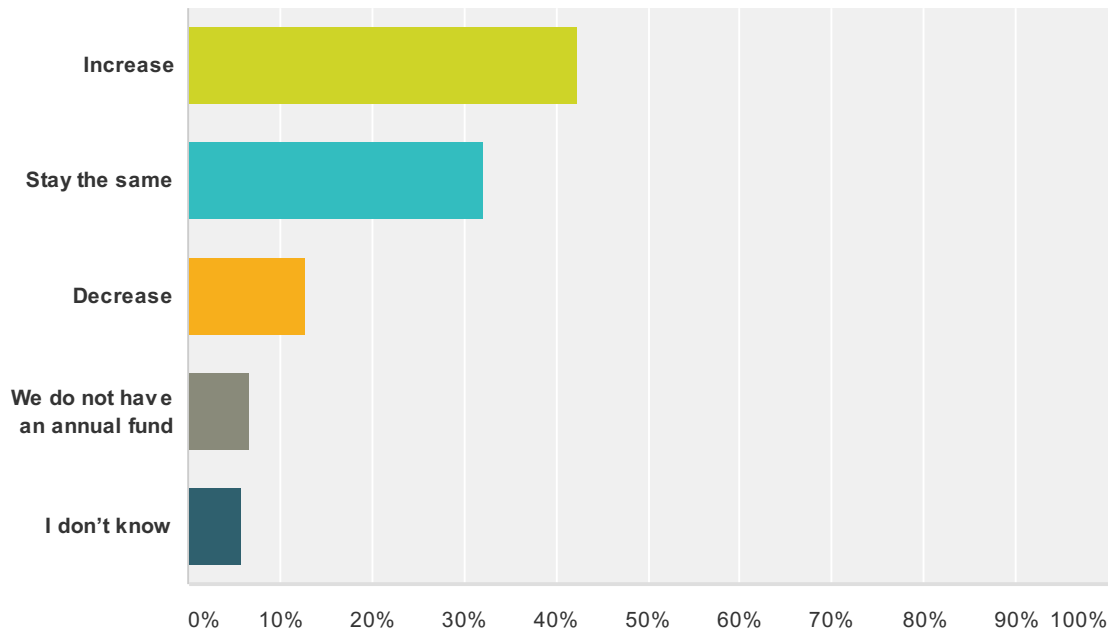
Answered: 121 Skipped: 1



Answer Choices	Responses
Increase	25.62% 31
Stay the same	39.67% 48
Decrease	4.96% 6
We do not seek in-kind goods and services	16.53% 20
I don't know	13.22% 16
Total	121

Q15 Annual Fund/individual giving

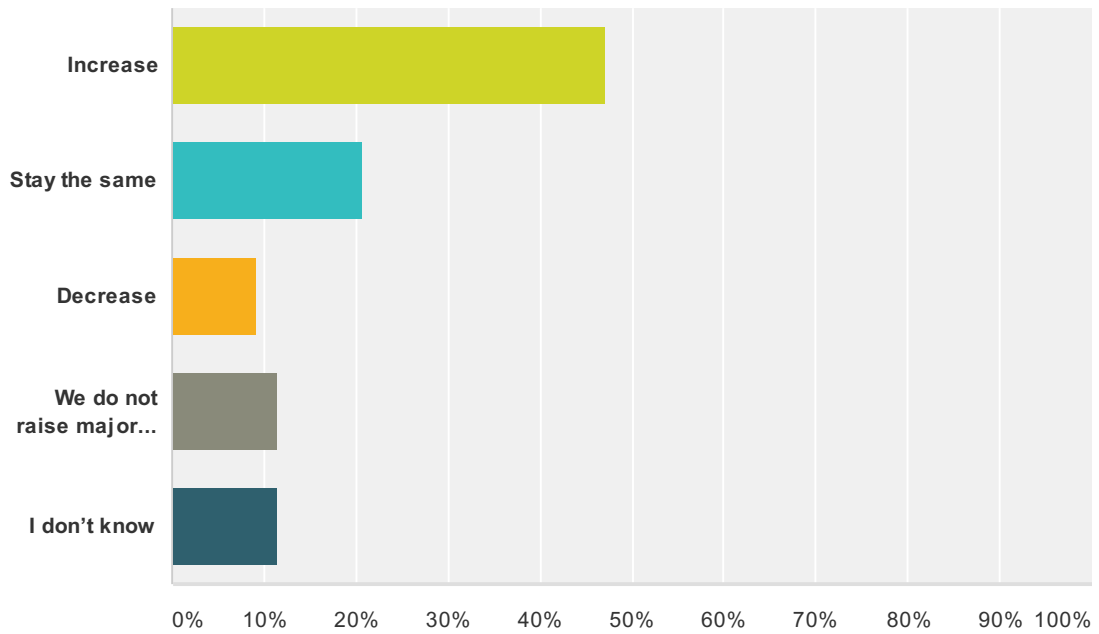
Answered: 118 Skipped: 4



Answer Choices	Responses
Increase	42.37% 50
Stay the same	32.20% 38
Decrease	12.71% 15
We do not have an annual fund	6.78% 8
I don't know	5.93% 7
Total	118

Q16 Major Gifts

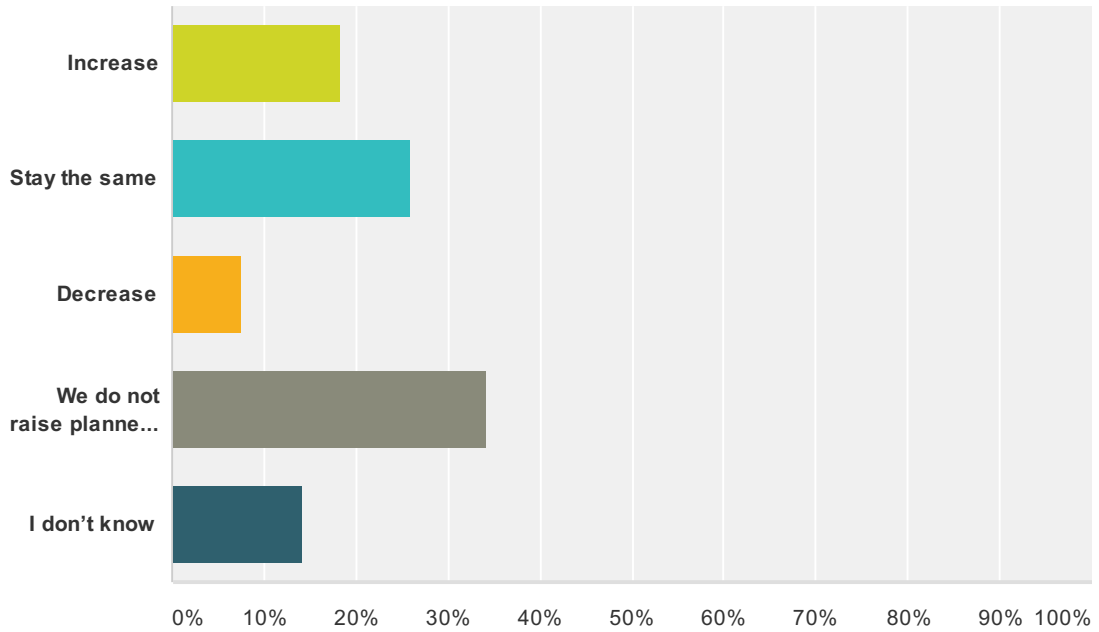
Answered: 121 Skipped: 1



Answer Choices	Responses
Increase	47.11% 57
Stay the same	20.66% 25
Decrease	9.09% 11
We do not raise major gifts	11.57% 14
I don't know	11.57% 14
Total	121

Q17 Planned Gifts/individual giving

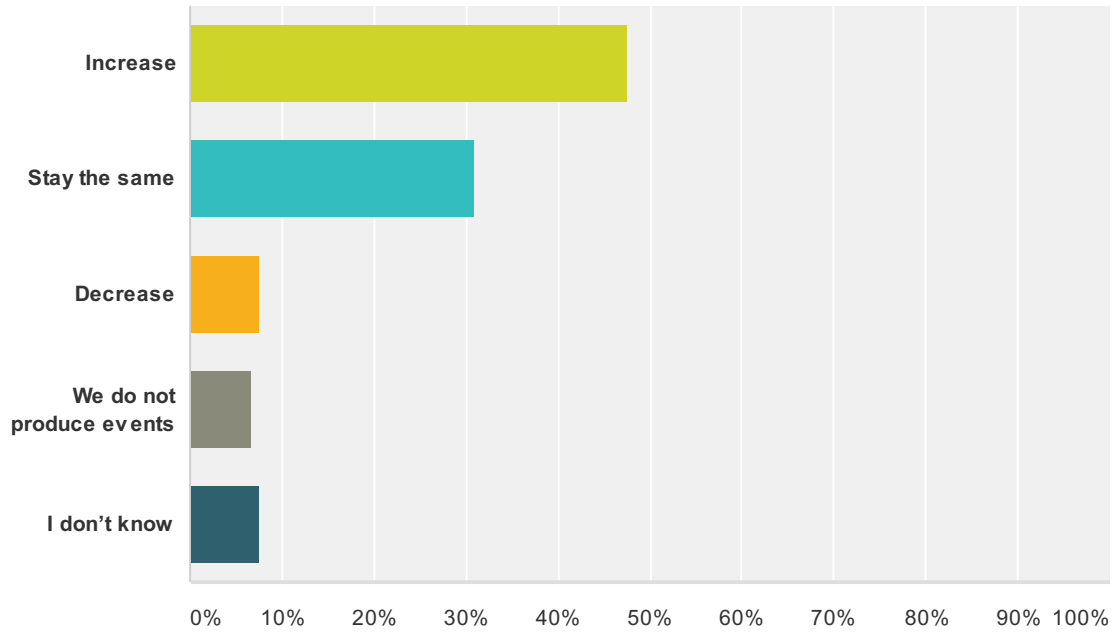
Answered: 120 Skipped: 2



Answer Choices	Responses
Increase	18.33% 22
Stay the same	25.83% 31
Decrease	7.50% 9
We do not raise planned gifts	34.17% 41
I don't know	14.17% 17
Total	120

Q18 Events

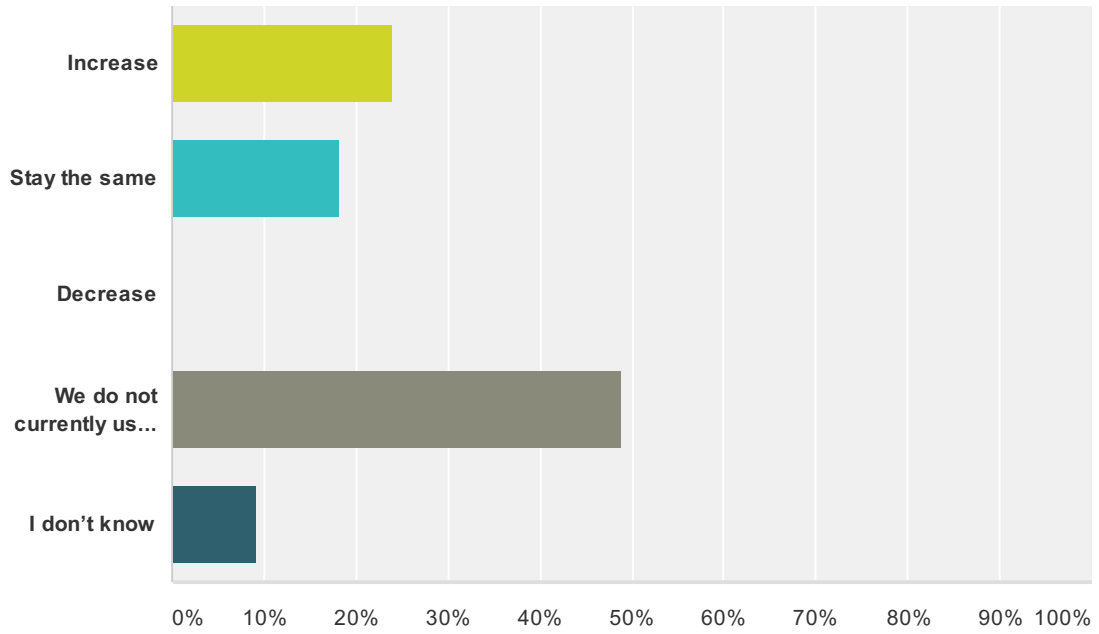
Answered: 120 Skipped: 2



Answer Choices	Responses
Increase	47.50% 57
Stay the same	30.83% 37
Decrease	7.50% 9
We do not produce events	6.67% 8
I don't know	7.50% 9
Total	120

Q19 Facebook

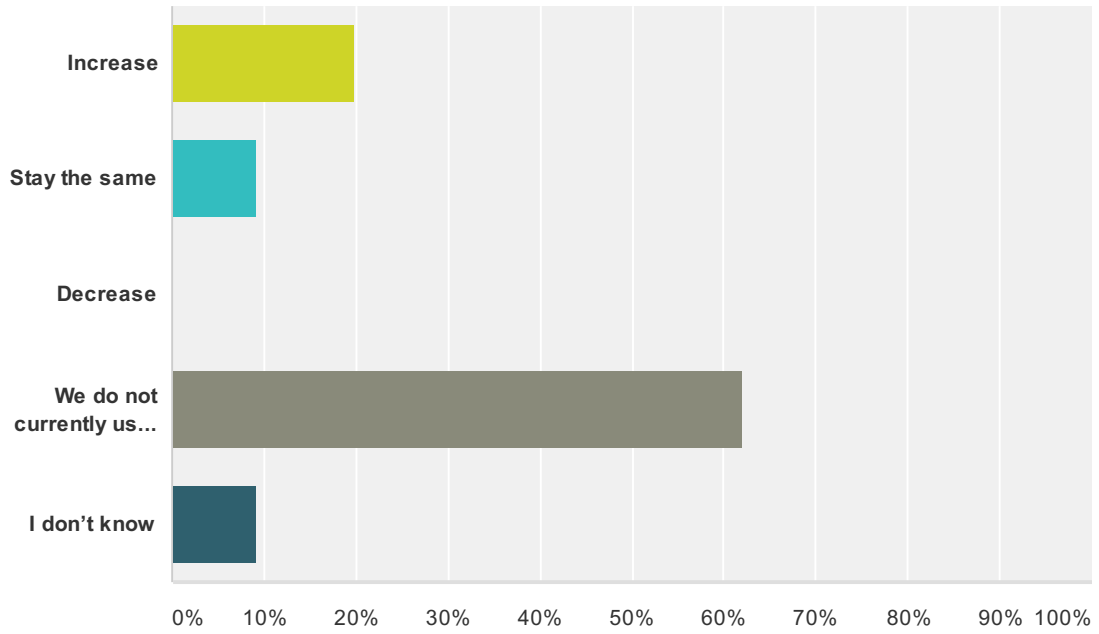
Answered: 121 Skipped: 1



Answer Choices	Responses
Increase	23.97% 29
Stay the same	18.18% 22
Decrease	0.00% 0
We do not currently use Facebook for fundraising	48.76% 59
I don't know	9.09% 11
Total	121

Q20 Twitter

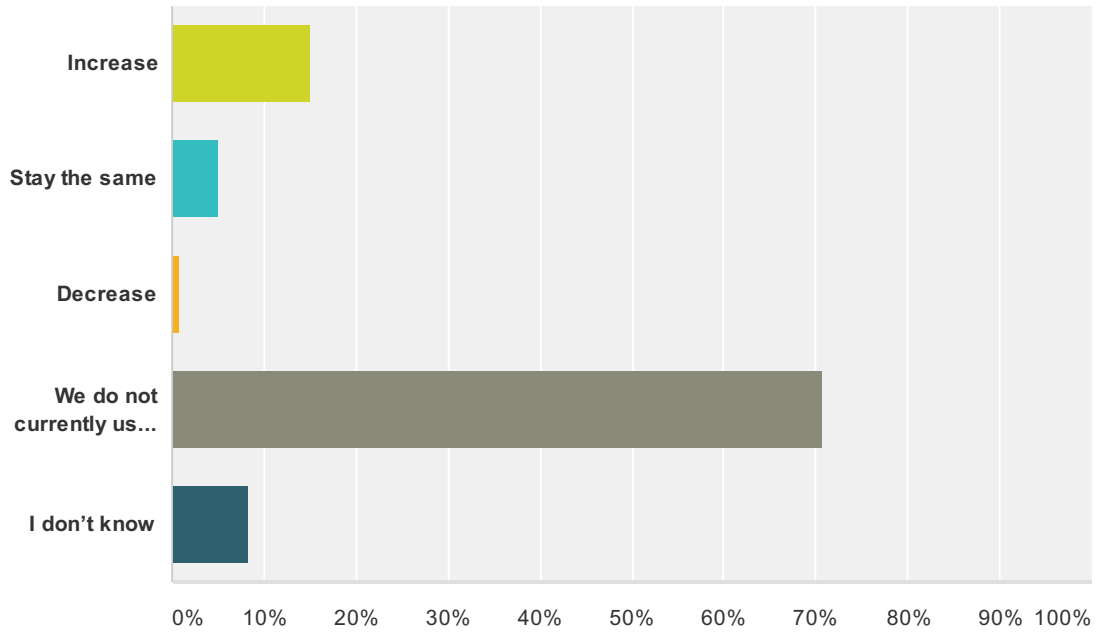
Answered: 121 Skipped: 1



Answer Choices	Responses	
Increase	19.83%	24
Stay the same	9.09%	11
Decrease	0.00%	0
We do not currently use Twitter for fundraising	61.98%	75
I don't know	9.09%	11
Total		121

Q21 Linked In

Answered: 120 Skipped: 2



Answer Choices	Responses
Increase	15.00% 18
Stay the same	5.00% 6
Decrease	0.83% 1
We do not currently use Linked In for fundraising	70.83% 85
I don't know	8.33% 10
Total	120

Q22 Does your organization use any other types of social media? If so, please list below:

Answered: 37 Skipped: 85

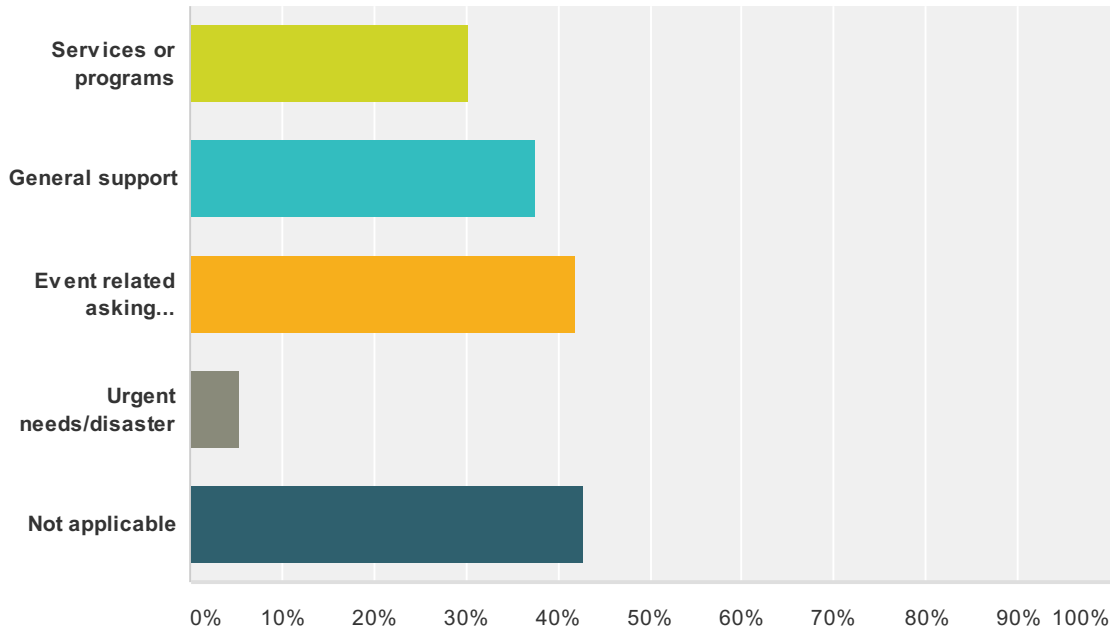
#	Responses	Date
1	Instagram	5/5/2014 9:39 AM
2	Tumblr, pinterest	5/4/2014 7:46 AM
3	YouTube	5/2/2014 12:28 PM
4	Pinterest Instagram	5/1/2014 1:04 PM
5	Instagram Flickr YouTube Pinterest	5/1/2014 8:41 AM
6	I don't know.	4/29/2014 8:02 PM
7	Tumblr and Instagram	4/29/2014 5:57 PM
8	Pinterest, tumblr, instagram	4/29/2014 4:42 PM
9	We use Facebook, Twitter and LinkedIn for communications and donor/supporter relations, but do not make direct fundraising asks through these methods.	4/29/2014 4:39 PM
10	limited social media knowledge - primarily handled by our alumni and young leadership arms	4/29/2014 4:16 PM
11	you tube	4/29/2014 4:12 PM
12	Twitter Facebook youtube	4/29/2014 4:01 PM
13	pinterest and instagram	4/24/2014 4:41 PM
14	Instagram	4/17/2014 7:14 PM
15	Instagram, Constant Contact	4/17/2014 6:00 PM
16	Blogs	4/17/2014 4:15 PM
17	Instagram	4/17/2014 3:06 PM
18	Google +, youtube	4/17/2014 1:40 PM
19	Weibo, Wechat, and Youku. (all Chinese)	4/17/2014 1:17 PM
20	E-mail and web-based appeals.	4/17/2014 1:12 PM
21	tumblr blog	4/17/2014 1:09 PM
22	We do emails and action alerts for fundraising.	4/17/2014 1:07 PM
23	Yes but not for fundraising.	4/17/2014 1:07 PM
24	Facebook	4/17/2014 1:05 PM
25	pinterest	4/15/2014 11:16 AM
26	N/A	4/14/2014 10:59 AM
27	YouTube, Instagram, Livestream, but none are used for fundraising	4/10/2014 9:31 AM
28	Pinterest	4/9/2014 6:57 PM
29	facebook, instagram, twitter	4/9/2014 2:00 PM
30	Instagram	4/8/2014 11:25 PM
31	E-newsletters	4/8/2014 7:36 PM
32	eblasts, banners	4/8/2014 4:46 PM

Crain's / AFP New York City NonProfit Survey

33	Flickr, Pinterest	4/8/2014 2:33 PM
34	We have only had a high school for 14 years, and have graduated 10 classes. Alumni are very young, and we are just beginning to connect them and provide activities. We primarily use social media to connect with them. Fundraising right now is primarily through events.	4/8/2014 1:24 PM
35	N/A	4/8/2014 1:06 PM
36	YouTube, Tumblr, Google+	4/8/2014 12:50 PM
37	Tumblr and Pinterest	4/8/2014 12:39 PM

Q23 Our social media asking includes

Answered: 112 Skipped: 10

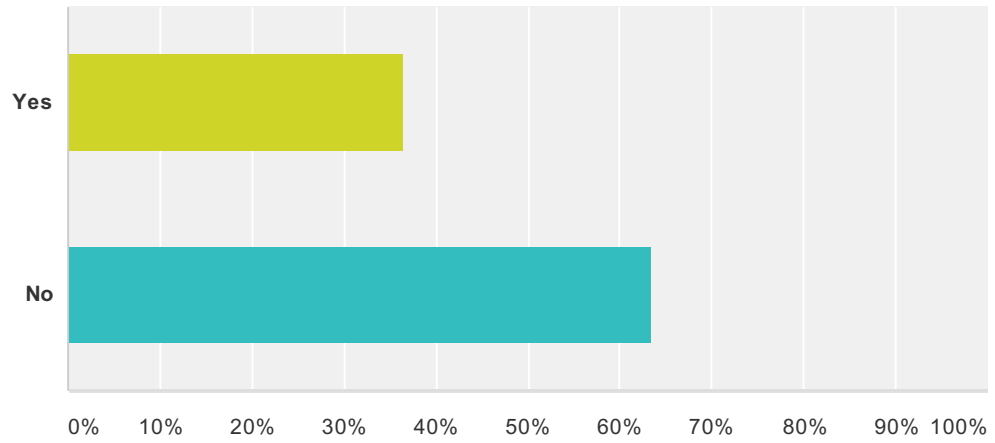


Answer Choices	Responses
Services or programs	30.36% 34
General support	37.50% 42
Event related asking (sponsorship, e-journals, auctions)	41.96% 47
Urgent needs/disaster	5.36% 6
Not applicable	42.86% 48
Total Respondents: 112	

#	Other (please specify)	Date
1	In-kind items	4/30/2014 11:50 AM
2	News and updates	4/17/2014 8:37 PM
3	Classes	4/17/2014 6:00 PM
4	Also part of creative project of nonprofit music reporting	4/17/2014 3:06 PM
5	Membership	4/17/2014 1:12 PM
6	Use primarily with Alumni - information, networking	4/8/2014 1:24 PM

Q24 We are initiating use of social media for fundraising in 2014

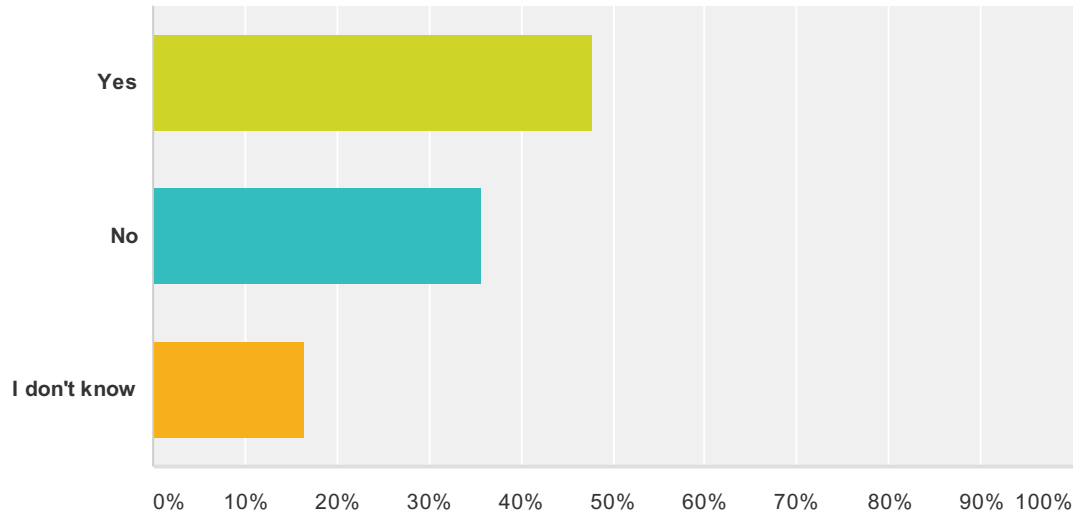
Answered: 115 Skipped: 7



Answer Choices	Responses	
Yes	36.52%	42
No	63.48%	73
Total		115

Q25 We are watching colleagues in our field to determine whether social media should be a priority for our fundraising

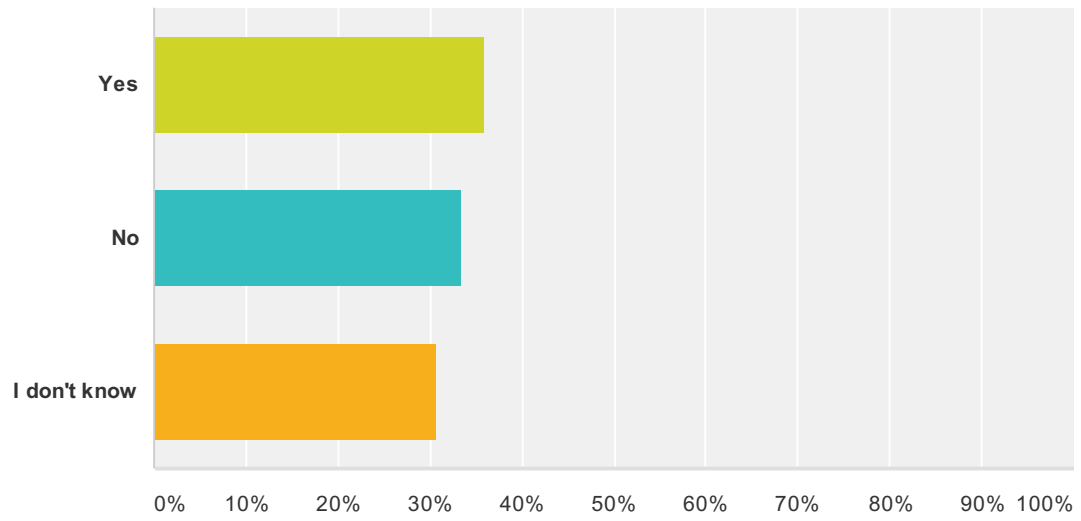
Answered: 115 Skipped: 7



Answer Choices	Responses
Yes	47.83% 55
No	35.65% 41
I don't know	16.52% 19
Total	115

Q26 We are encouraged by social media fundraising trends we are seeing in our field

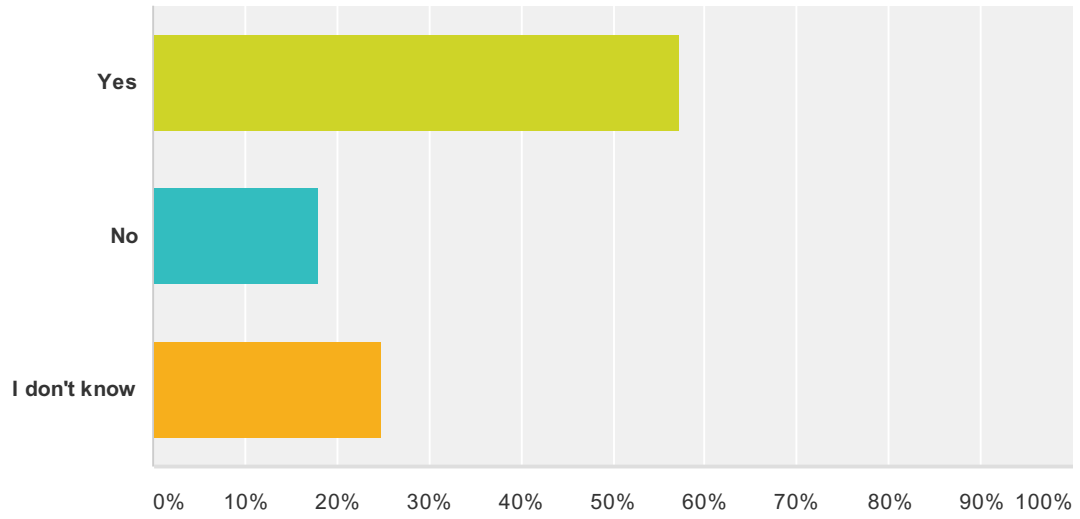
Answered: 117 Skipped: 5



Answer Choices	Responses	
Yes	35.90%	42
No	33.33%	39
I don't know	30.77%	36
Total		117

Q27 We are seeing brand-raising success, but actual fundraising does not yet appear encouraging

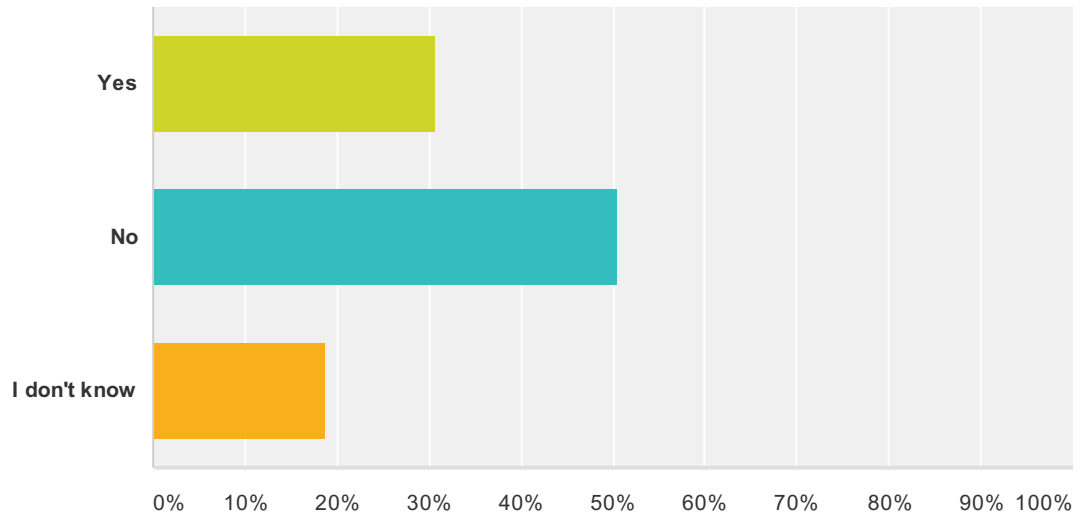
Answered: 117 Skipped: 5



Answer Choices	Responses	Count
Yes	57.26%	67
No	17.95%	21
I don't know	24.79%	29
Total		117

Q28 We are not currently interested in social media as a platform for fundraising

Answered: 117 Skipped: 5



Answer Choices	Responses
Yes	30.77% 36
No	50.43% 59
I don't know	18.80% 22
Total	117

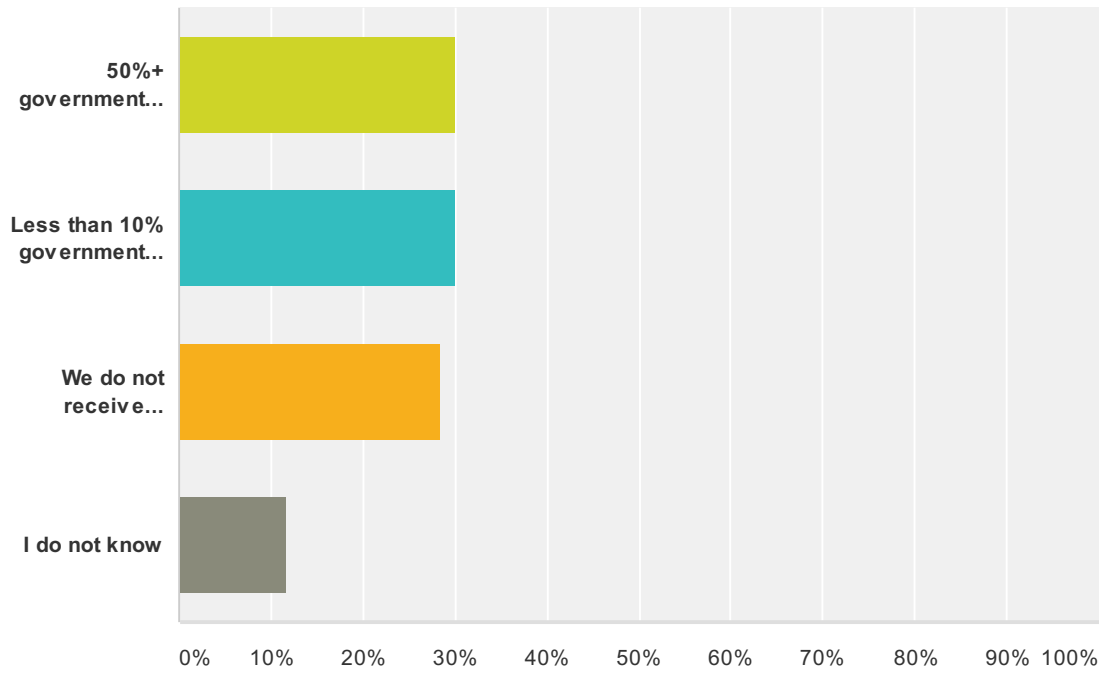
Q29 Comments

Answered: 17 Skipped: 105

#	Responses	Date
1	We use social media to spread the word about our programs and to promote activities in Queens.	5/5/2014 9:39 AM
2	We see small results from social media fundraising, which we are just beginning, but have faith that it will build over time.	5/1/2014 8:41 AM
3	I need to find someone to do fund raising, write grants and so publicity please send any ones my way http://www.riverbankhistorichousemuseum.org	4/30/2014 12:17 AM
4	We're interested in social media as an engagement tool	4/29/2014 4:42 PM
5	Social media SHOULD be social and media; best use is NOT as fundraising tool where you are seeking to build close and long-term donor relationships.	4/29/2014 4:39 PM
6	we are still exploring our options and determining what makes the most sense in terms of social media	4/24/2014 4:41 PM
7	We do very little fundraising on social media but are interested in seeing how it grows and develops.	4/19/2014 4:09 PM
8	We are currently using SM for fundraising with some success. I would really like to more systematically use it as a platform to engage our audiences in preparation for regular fundraising	4/17/2014 3:06 PM
9	We are interested but want to be sure that when we launch such an initiative we are going about it the right way.	4/17/2014 1:15 PM
10	We do post information about our fundraising events on Social media but we don't see any results. We do use social media to inform people about what we and our partners are doing.	4/17/2014 1:14 PM
11	Including appeals sent to our e-mail list and via our website (which may or may not be considered social media) -- we've seen big growth over the last few years, holding steady so far this year.	4/17/2014 1:12 PM
12	We use social media to update our supporters and keep donors engaged, but do not make direct asks.	4/14/2014 9:52 AM
13	Social media as a fundraising tool is not something we have considered (although we are aware of its potential use); our social media efforts are largely focused on audience development.	4/10/2014 9:31 AM
14	Social media is here to stay and we are using it fully.	4/8/2014 7:36 PM
15	Not sure if we have the capacity staff-wise to use social media for fundraising at this time.	4/8/2014 1:42 PM
16	Still in connecting mode. Perhaps in a year or two.	4/8/2014 1:24 PM
17	Organization doesn't have strong use of social media. Social media is not an institutional priority right now.	4/8/2014 1:00 PM

Q30 What is the mix of government and non-government sources supporting your organization?

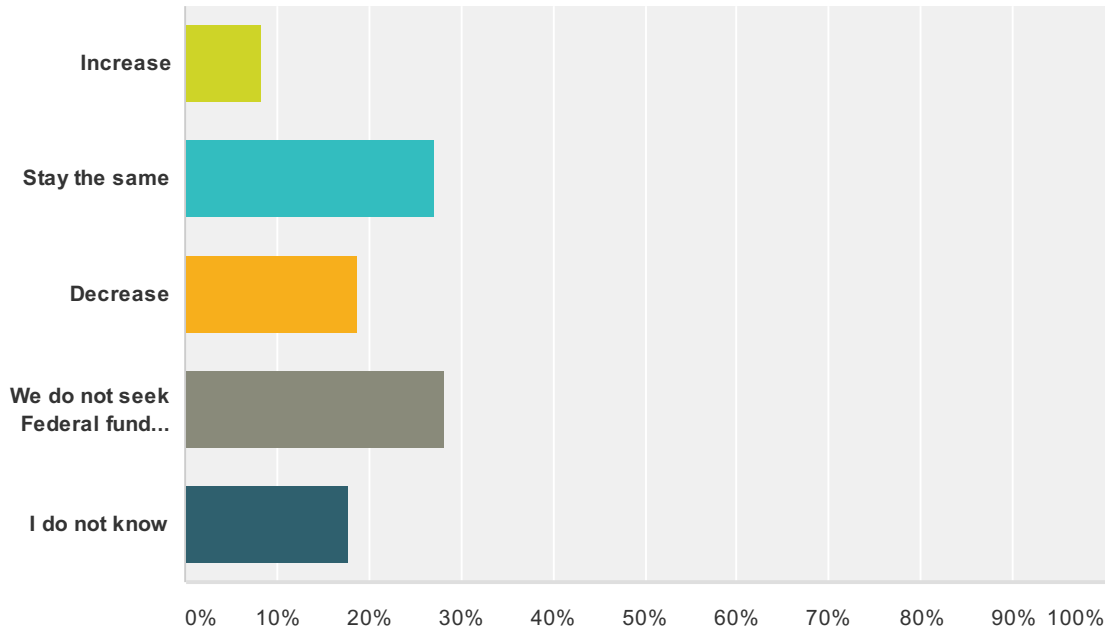
Answered: 120 Skipped: 2



Answer Choices	Responses	
50%+ government funding as compared to earnings, grants and contributions	30.00%	36
Less than 10% government funding as compared to earnings, grants and contributions	30.00%	36
We do not receive government funding (Skip to Section V)	28.33%	34
I do not know	11.67%	14
Total		120

Q31 Federal

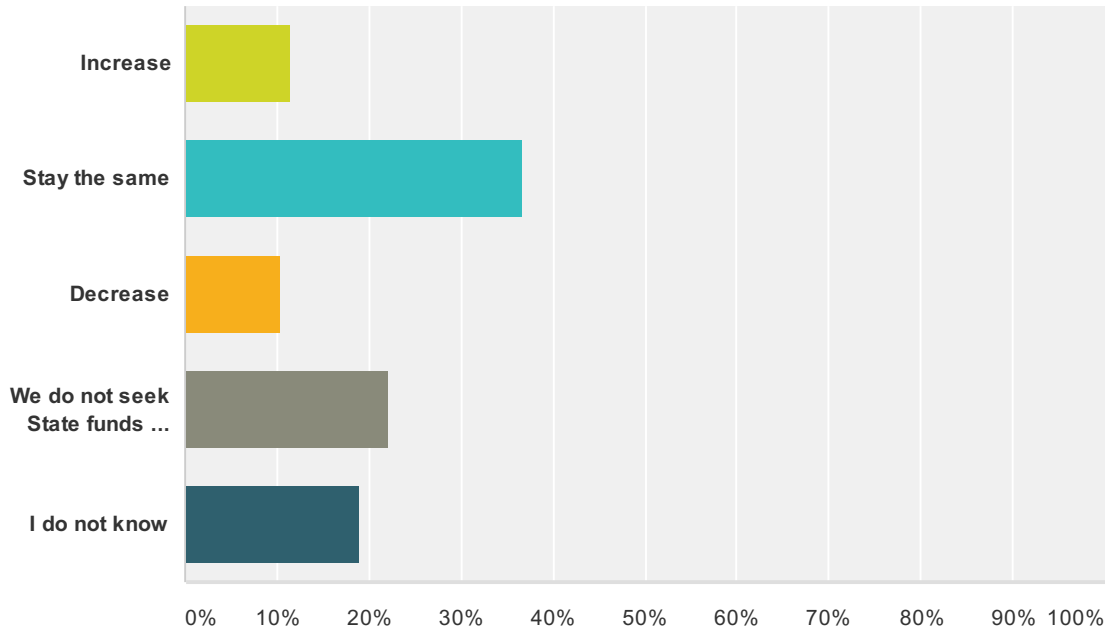
Answered: 96 Skipped: 26



Answer Choices	Responses
Increase	8.33% 8
Stay the same	27.08% 26
Decrease	18.75% 18
We do not seek Federal funds or contracts	28.13% 27
I do not know	17.71% 17
Total	96

Q32 State

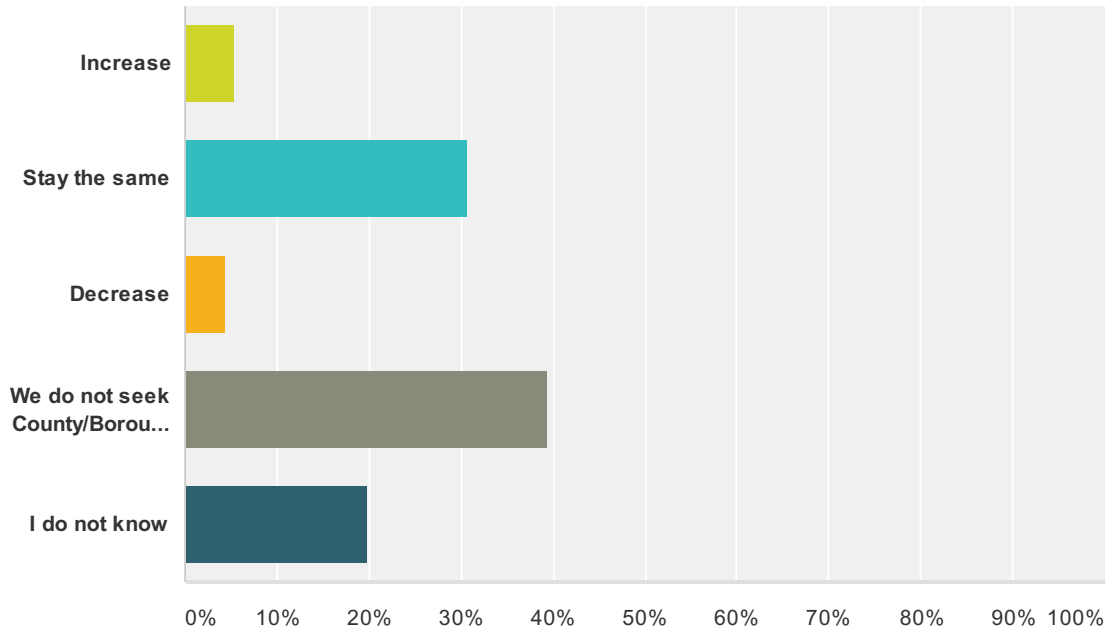
Answered: 95 Skipped: 27



Answer Choices	Responses
Increase	11.58% 11
Stay the same	36.84% 35
Decrease	10.53% 10
We do not seek State funds or contracts	22.11% 21
I do not know	18.95% 18
Total	95

Q33 County/Borough

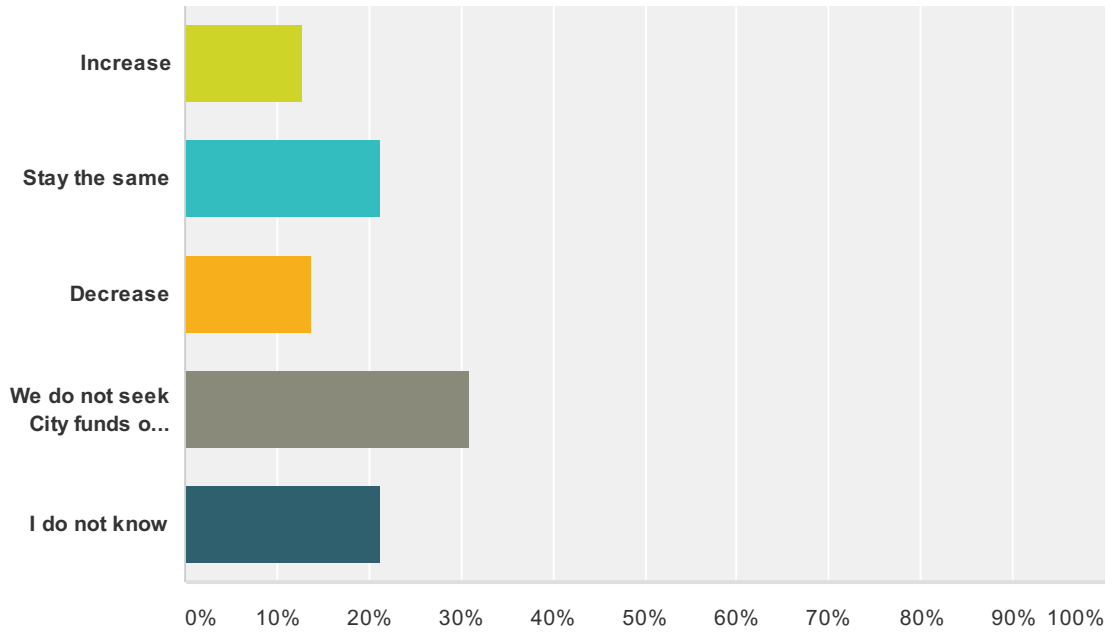
Answered: 91 Skipped: 31



Answer Choices	Responses	
Increase	5.49%	5
Stay the same	30.77%	28
Decrease	4.40%	4
We do not seek County/Borough funds or contracts	39.56%	36
I do not know	19.78%	18
Total		91

Q34 City

Answered: 94 Skipped: 28



Answer Choices	Responses	
Increase	12.77%	12
Stay the same	21.28%	20
Decrease	13.83%	13
We do not seek City funds or contracts	30.85%	29
I do not know	21.28%	20
Total		94

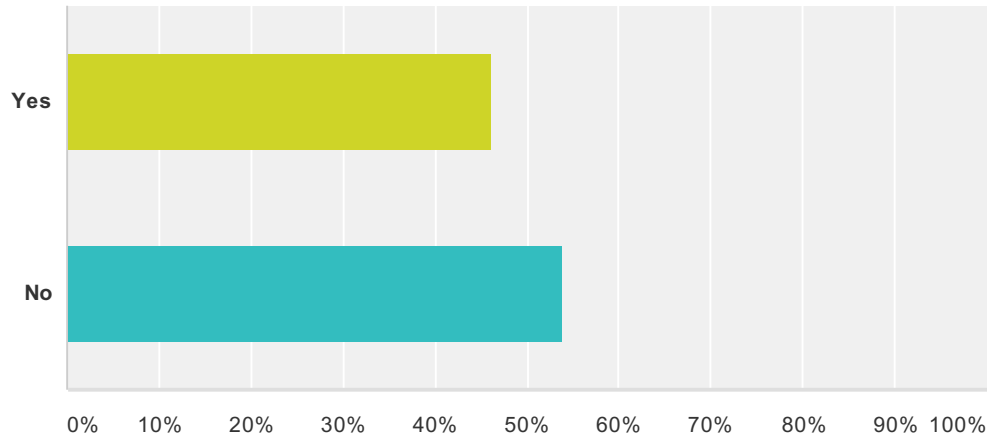
Q35 Comments

Answered: 13 Skipped: 109

#	Responses	Date
1	This year we received one large state contract in response to an RFP focused on Hurricane Sandy relief efforts.	5/6/2014 9:54 AM
2	City budget will not be determined until end of June - unsure how the new administration will handle this.	5/5/2014 10:35 AM
3	We would like more city funding. In fact, we hope to get more city funding this year. We'll see what happens.	5/5/2014 9:39 AM
4	I am not sure of city funding as this is the first year with a new mayor.	4/29/2014 5:57 PM
5	A very small percentage of our support. Nice to have, but not necessary. But keeps us as voice at the table in re: policy, etc.	4/29/2014 4:39 PM
6	govt funding is not tracked by our department	4/29/2014 4:16 PM
7	Need an option between "less than 10%" and "50%+" for question 30	4/18/2014 8:53 AM
8	Not enough development staff/capacity to go after city, state/foundation funds.	4/17/2014 3:06 PM
9	I'm not certain how we are fairing overall as an organization. For the NY location, I would say that funds remain unchanged in 2014.	4/17/2014 1:15 PM
10	Not sure about City Funding because of the new administration in New York.	4/17/2014 1:07 PM
11	I work for a number of organizations so hard to comment because each has its own funding mix.	4/11/2014 9:53 AM
12	I believe we have seen a steady decrease in government funding on all levels since 2008.	4/8/2014 1:42 PM
13	We have received government funding from the National Endowment for the Arts in the past. However, the time involved in securing the funds and reporting was disproportionate to the amount of funding received, so we chose not to apply in subsequent seasons.	4/8/2014 1:04 PM

Q36 Do you see an increased focus on initiating/increasing earned income at your nonprofit organization?

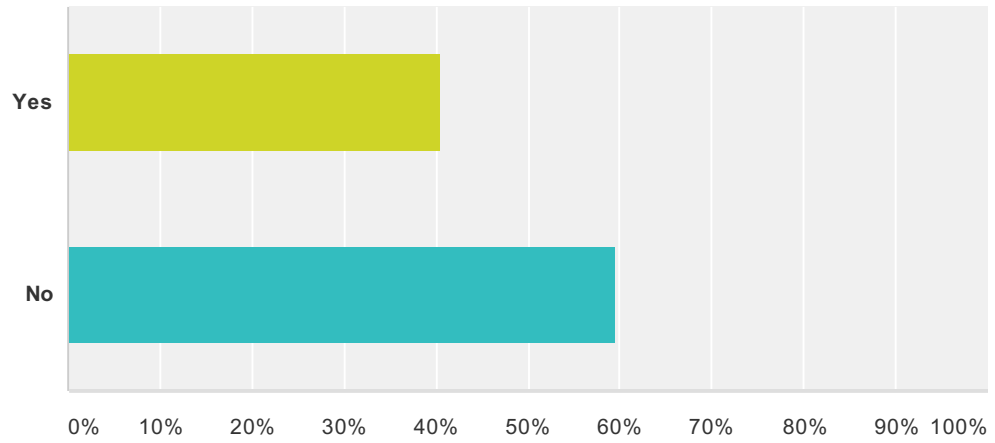
Answered: 119 Skipped: 3



Answer Choices	Responses
Yes	46.22% 55
No	53.78% 64
Total	119

Q37 If yes are you involved in increasing earned income?

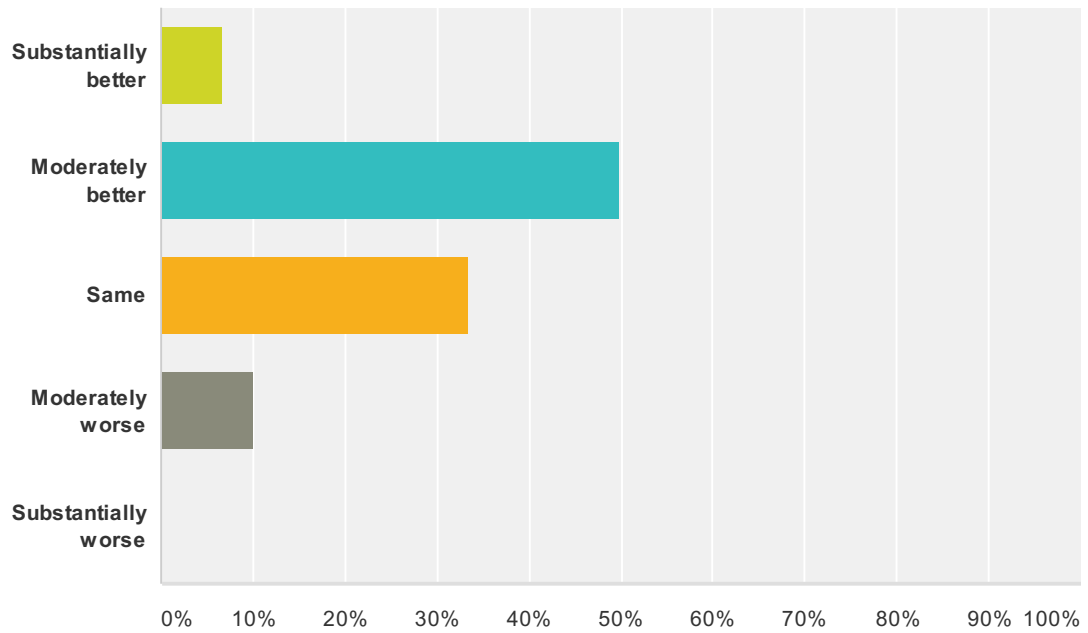
Answered: 94 Skipped: 28



Answer Choices	Responses	
Yes	40.43%	38
No	59.57%	56
Total		94

Q38 How would you describe the fundraising environment for your organization in 2014 compared to 2013?

Answered: 120 Skipped: 2



Answer Choices	Responses
Substantially better	6.67% 8
Moderately better	50.00% 60
Same	33.33% 40
Moderately worse	10.00% 12
Substantially worse	0.00% 0
Total	120

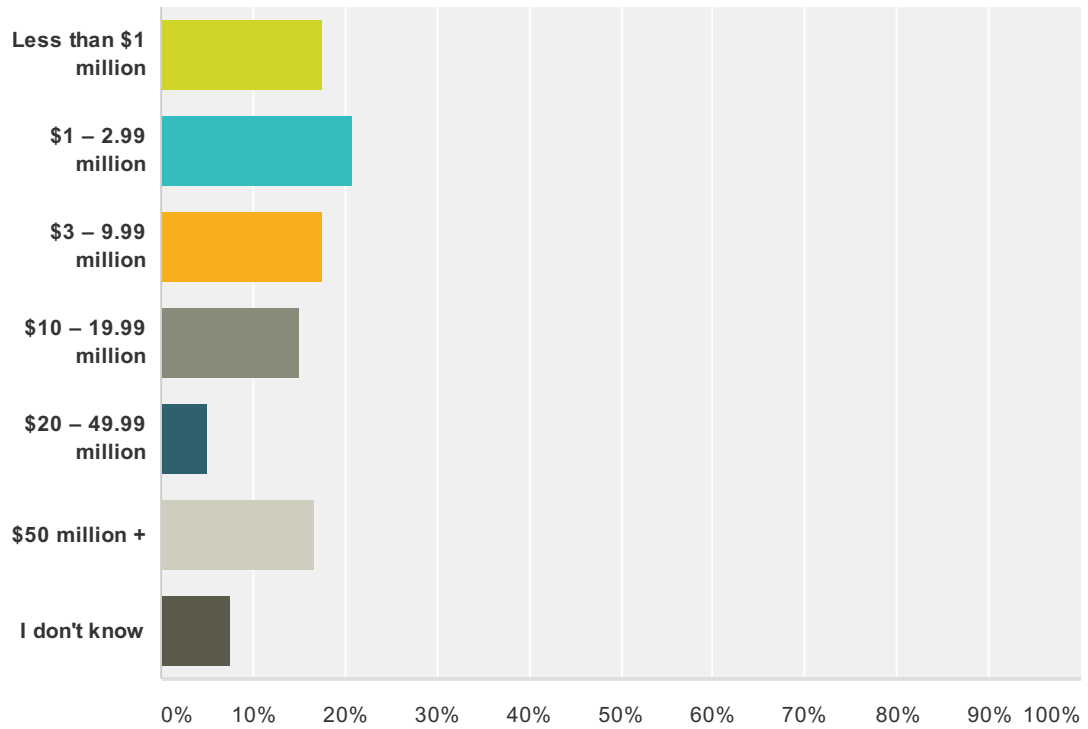
Q39 Comments

Answered: 13 Skipped: 109

#	Responses	Date
1	We saw increases in our special event revenue and major gifts. However, we were surprised to lost some large grants, including a \$100,000 general operating support grant which was significant for our organization.	5/6/2014 9:54 AM
2	We are asked to be sustainable by funders but also asked to not charge fees - sometimes a difficult task	5/5/2014 10:35 AM
3	We just had a change in Executive Director leadership, which is re-igniting our staff around fund raising.	4/30/2014 2:29 PM
4	It is a poor environment due to a merger.	4/29/2014 11:10 PM
5	Left dysfunctional national parent org. We are much more productive as a stand-alone.	4/29/2014 4:39 PM
6	we are substantially broadening our efforts and exposures to get us in front of both individual donors and major grantors	4/24/2014 4:41 PM
7	Not enough in budgt to really increase fundraising capacity. Right now concentrating on individuals and major gifts but cannot hire fundraising professional.	4/17/2014 3:06 PM
8	Loss of foundation funding has a profound effect. We are making up the difference with individual giving (membership, board, major gifts) and special events (most corporate contributions) – but it requires a lot more to raise \$50,000 in \$50 increments than to win a multi-year grant that can be relied upon. A continual struggle.	4/17/2014 1:12 PM
9	need more funds this year with the same # or fewer prospects	4/17/2014 1:09 PM
10	We had a lot of turnover in 2013, so 2014 will be more stable.	4/17/2014 11:26 AM
11	We've had a substantial decrease in foundation giving, which is about 1/3 of our funding.	4/14/2014 9:52 AM
12	We have undergone some staffing transitions and structural changes, as well as heavy reliance on a few high-level donors, and are beginning to notice the consequences.	4/10/2014 9:31 AM
13	Fundraising is moderately better, but the government grants are all going down.	4/8/2014 7:36 PM

Q40 What were your operating expenses in your last fiscal year?

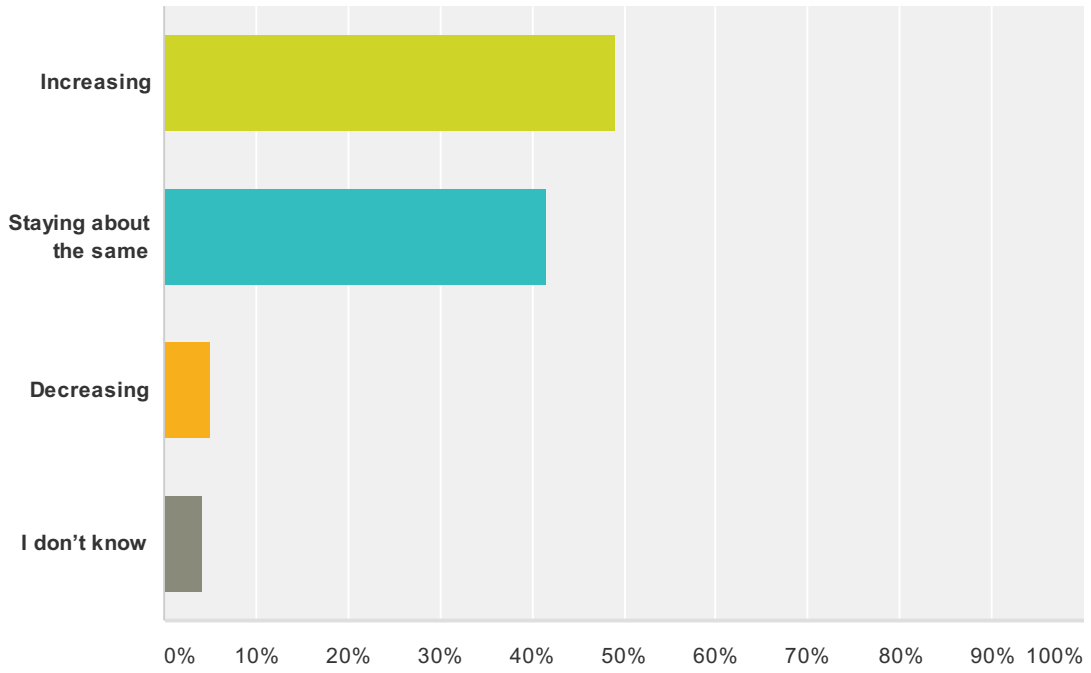
Answered: 120 Skipped: 2



Answer Choices	Responses	Count
Less than \$1 million	17.50%	21
\$1 - 2.99 million	20.83%	25
\$3 - 9.99 million	17.50%	21
\$10 - 19.99 million	15.00%	18
\$20 - 49.99 million	5.00%	6
\$50 million +	16.67%	20
I don't know	7.50%	9
Total		120

Q41 Our annual operating budget is:

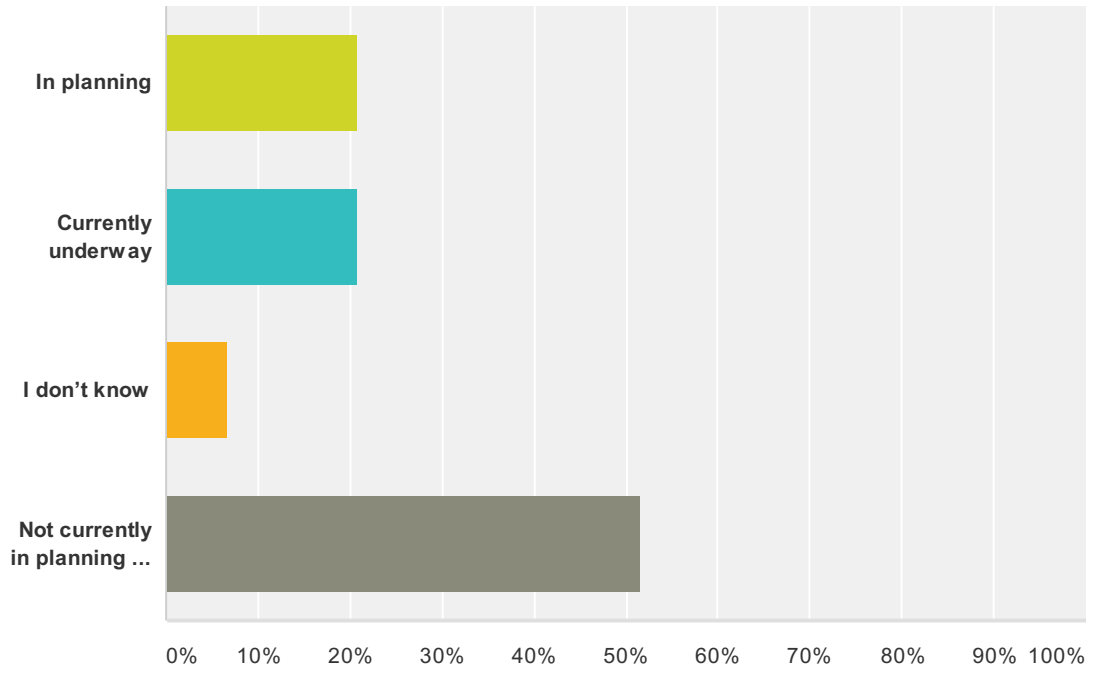
Answered: 118 Skipped: 4



Answer Choices	Responses	
Increasing	49.15%	58
Staying about the same	41.53%	49
Decreasing	5.08%	6
I don't know	4.24%	5
Total		118

Q42 A capital campaign is:

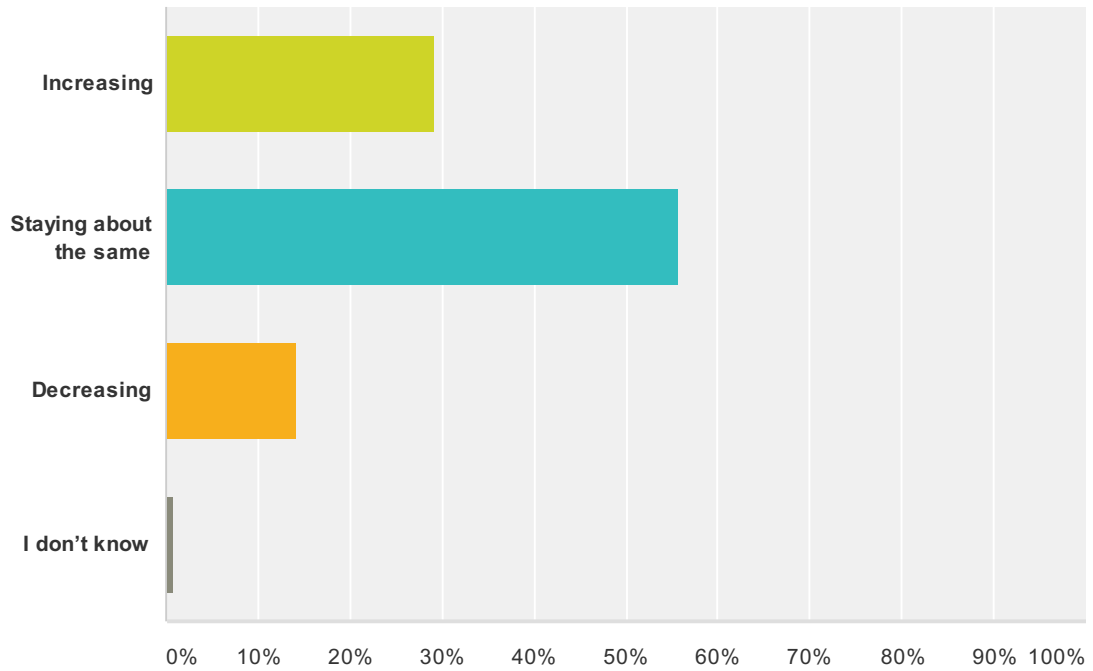
Answered: 120 Skipped: 2



Answer Choices	Responses
In planning	20.83% 25
Currently underway	20.83% 25
I don't know	6.67% 8
Not currently in planning or underway	51.67% 62
Total	120

Q43 Compared to recent years, Development's budget and/or staffing is:

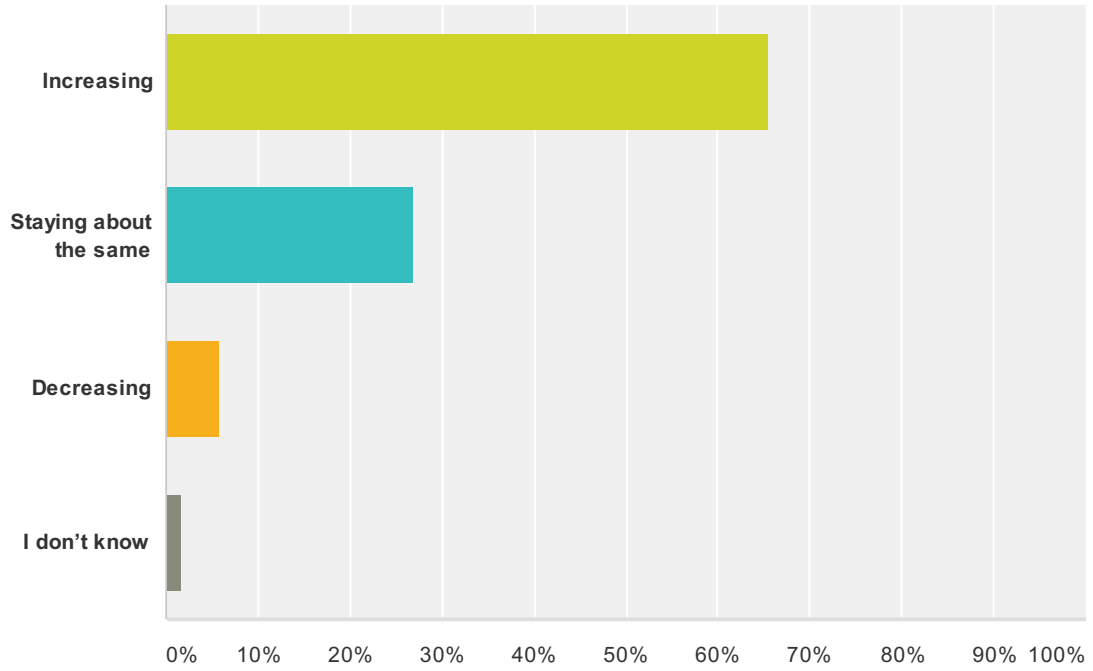
Answered: 120 Skipped: 2



Answer Choices	Responses
Increasing	29.17% 35
Staying about the same	55.83% 67
Decreasing	14.17% 17
I don't know	0.83% 1
Total	120

Q44 Compared to recent years, the volume of our services/programs is:

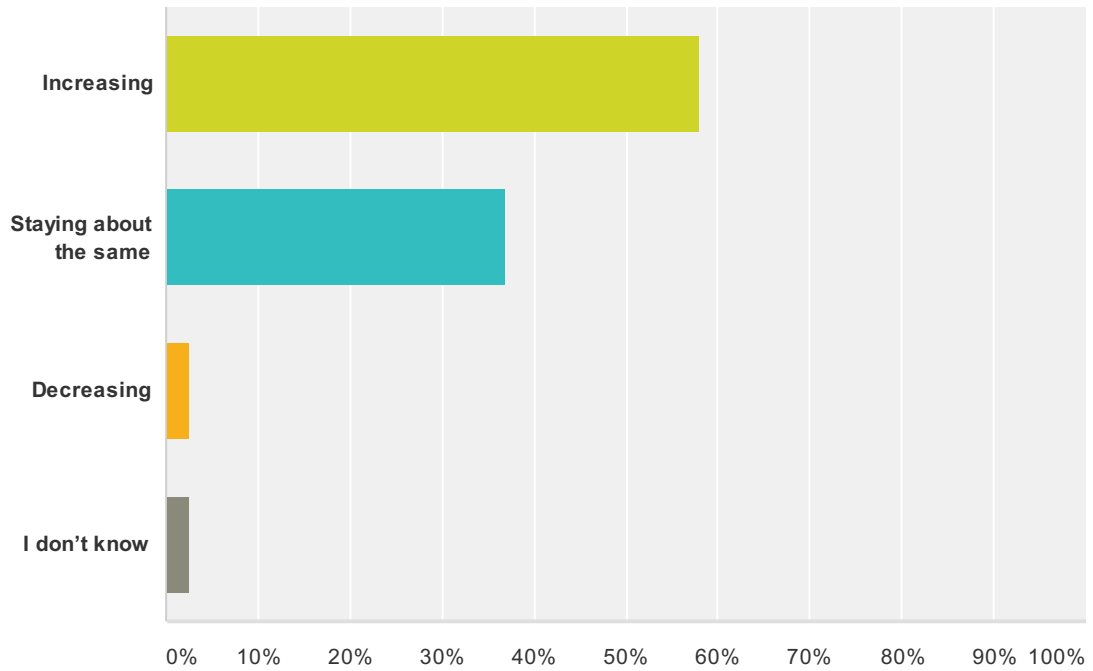
Answered: 119 Skipped: 3



Answer Choices	Responses
Increasing	65.55% 78
Staying about the same	26.89% 32
Decreasing	5.88% 7
I don't know	1.68% 2
Total	119

Q45 Compared to recent years, the variety of our services/programs is:

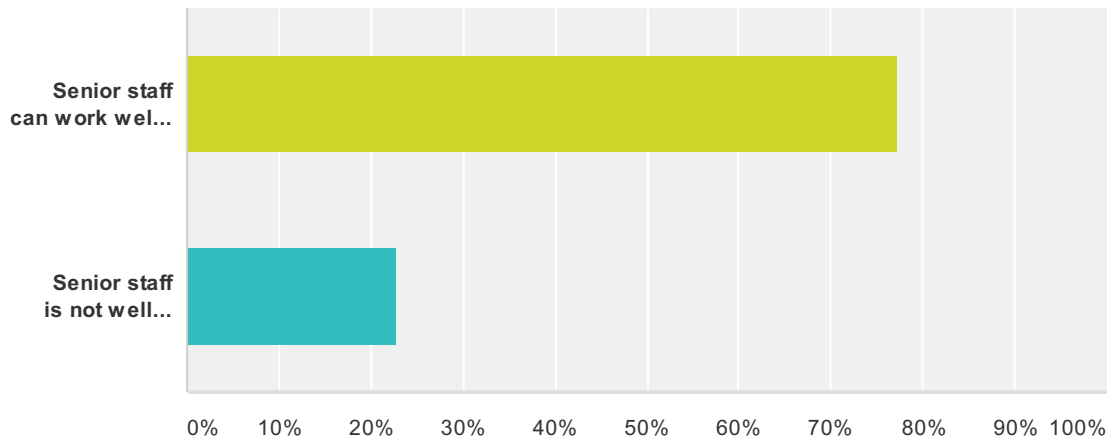
Answered: 119 Skipped: 3



Answer Choices	Responses
Increasing	57.98% 69
Staying about the same	36.97% 44
Decreasing	2.52% 3
I don't know	2.52% 3
Total	119

Q46 It is my perception/experience that:

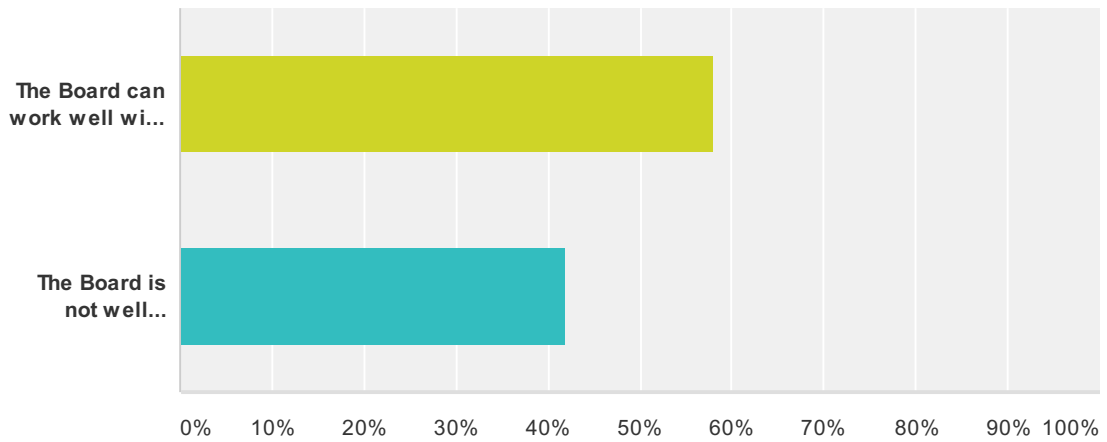
Answered: 119 Skipped: 3



Answer Choices	Responses
Senior staff can work well with Development as funding conditions change	77.31% 92
Senior staff is not well positioned to work effectively with Development as funding conditions change	22.69% 27
Total	119

Q47 It is my perception/experience that:

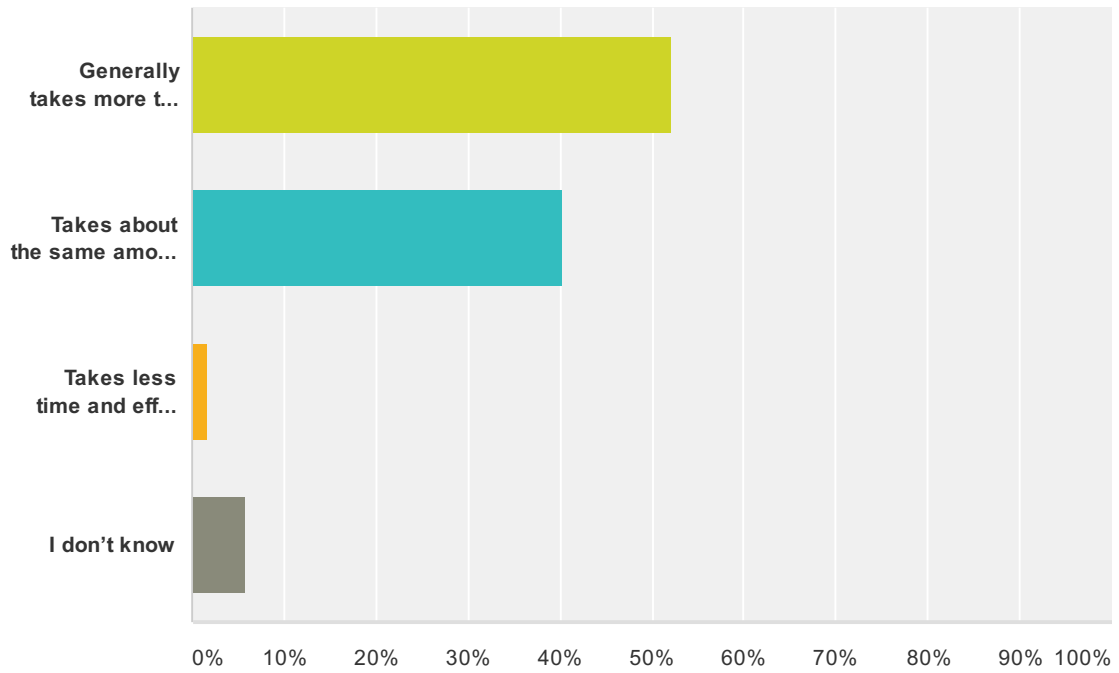
Answered: 119 Skipped: 3



Answer Choices	Responses
The Board can work well with Development as funding conditions change	57.98% 69
The Board is not well positioned to work effectively with Development as funding conditions change	42.02% 50
Total	119

Q48 It is my perception/experience that retaining current grants and contributions and running ongoing events:

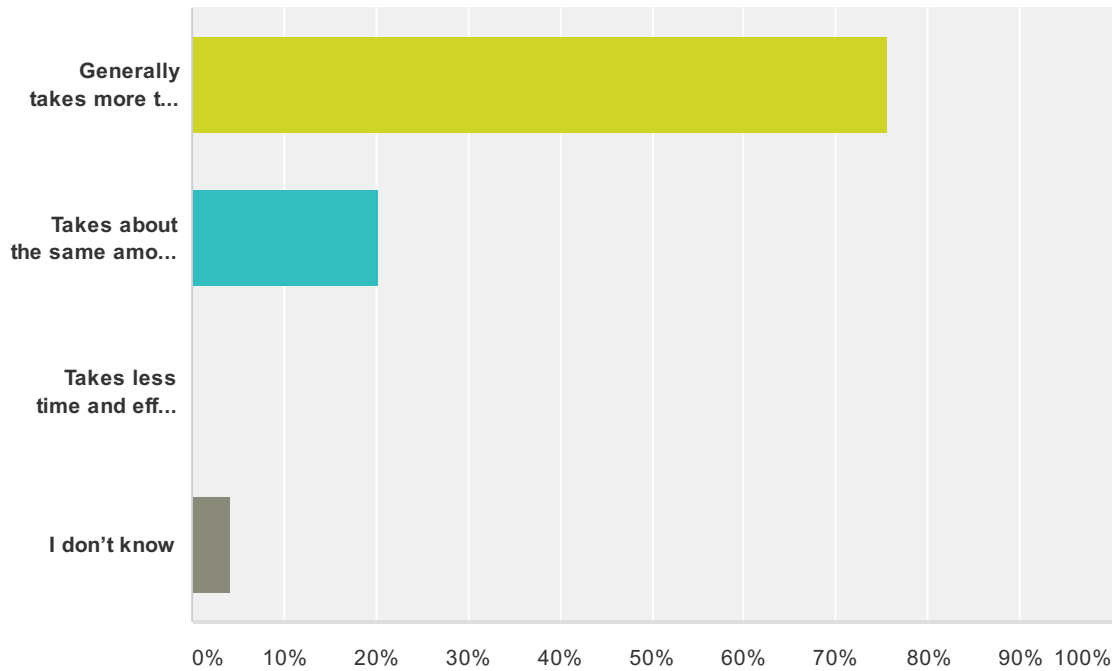
Answered: 119 Skipped: 3



Answer Choices	Responses	
Generally takes more time and effort than it did in the past	52.10%	62
Takes about the same amount of time and effort as it did in the past	40.34%	48
Takes less time and effort than it did in the past	1.68%	2
I don't know	5.88%	7
Total		119

Q49 It is my perception/experience that winning new grants and contributions and initiating new events:

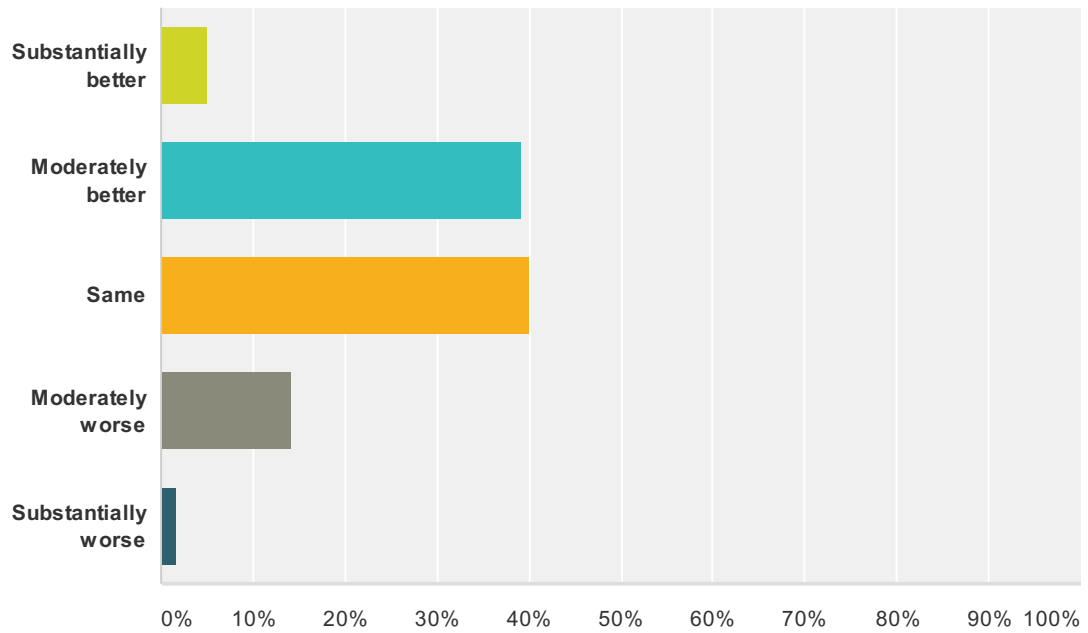
Answered: 119 Skipped: 3



Answer Choices	Responses	
Generally takes more time and effort than it did in the past	75.63%	90
Takes about the same amount of time and effort as it did in the past	20.17%	24
Takes less time and effort than it did in the past	0.00%	0
I don't know	4.20%	5
Total		119

Q50 How would you describe the fundraising environment for the nonprofit sector overall in 2014 compared to 2013?

Answered: 120 Skipped: 2



Answer Choices	Responses
Substantially better	5.00% 6
Moderately better	39.17% 47
Same	40.00% 48
Moderately worse	14.17% 17
Substantially worse	1.67% 2
Total	120

Q51 If you had asked, I would have told you about other trends I'm seeing:

Answered: 25 Skipped: 97

#	Responses	Date
1	Rise of corporate volunteerism and the amount of time that takes from Development staff to execute well.	5/2/2014 12:28 PM
2	More inter-organizational collaboration and partnership Higher rates of volunteerism, especially from corporate community Greater involvement in fundraising from past clients served by our organization	5/1/2014 1:04 PM
3	crowdfunding; emphasis on "peer-to-peer" fundraising; use of video/multimedia	4/30/2014 11:50 AM
4	folks are less and less interested in visiting and or supporting historical sites	4/30/2014 12:17 AM
5	A decrease in individual giving.	4/29/2014 11:10 PM
6	people to people fundraising; crowd fundraising; mobile giving	4/29/2014 9:52 PM
7	Small organizations are being burdened with excess reporting on city, state and federal level. Things like CDP, and the NYS Grants Gateway have a lot of redundancies and should be streamlined.	4/29/2014 5:57 PM
8	Fewer events, but the ones that remain are more thoughtfully designed! Less focus on direct mail and new donor acquisition, but more focus on current donor relations, with more high-quality interactions with donors individually or in small groups with program experts/faculty. Many people not being very thoughtful about how to use social media -- with too many vendors trying to sell people dumb social media 'tools' and 'strategies.' Ugh.	4/29/2014 4:39 PM
9	looking ahead to FY15, we anticipate greater fundraising demands with fewer staff.	4/29/2014 4:16 PM
10	More interest in volunteering before giving.	4/21/2014 10:12 AM
11	Eviscerating experienced development staff in favor of development underlings tasked with work they are not experienced, nor mentored, to handle.	4/17/2014 8:37 PM
12	NYC's small and medium sized organizations rely heavily on special events and grants for support, whereas national trends and cutting edge research in the field stress major gifts and individual giving in non-special event heavy environment. For small and medium sized organizations, throwing a special event is one of the most expensive, resource- draining and lowest return on investment ways to raise money. Other environments (Chicago, San Francisco, mid-west, etc) use nonprofit marketing and relationship fundraising (Indiana School of Philanthropy) to raise money from individuals. This technique relies not on superstar development directors with a pocket full of big donors, but works on principals of psychology of giving, psychology of altruism, nonprofit marketing and database management to facilitate person to person (board and high level volunteers) fundraising to raise money from individuals. This non-blowout, non-major special event heavy type of fundraising is very much misunderstood in the NYC area and difficult to practice, but much better for the small and medium sized nonprofits. Small to medium sized nonprofits far outnumber the larger nonprofits in this market. It would be great if Crains did a story on the other side of nonprofit fundraising. This is a little understood in the overall NYC nonprofit environment but needs to be spoken about from a nonprofit business perspective. Please write about this part of nonprofit business management.	4/17/2014 3:06 PM
13	Mobile fundraising	4/17/2014 2:39 PM
14	Getting people under 40 to make a gift is not getting easier and that using social media to involve them is a burden on our staff time and isn't converting them to donors.	4/17/2014 1:14 PM
15	Challenge identifying new board members who are younger (under age 60), diverse, dedicated to our mission, have capacity to give, are willing to actively solicit others.	4/17/2014 1:12 PM
16	It is very difficult to get new Foundations to give support.	4/17/2014 1:07 PM

Crain's / AFP New York City NonProfit Survey

17	We are expected to do more with less - raise significantly more money without increasing fundraising capacity in anyway (not hiring additional staff or a consultant, not paying for the full version of a program but making do with the less effective free version). Also, raising the same amount of money takes much more time and effort due to social media and the Internet. You can't just send out a direct mail appeal; you must send direct mail, have an up-to-date website to accept online contributions, and an e-mail campaign to reach donors, just to raise as much in your annual campaign as you did in the past. But the more platforms you use, the more time you must spend.	4/14/2014 9:52 AM
18	Lots of turnover is low/mid-level staff due to poor training, bad leadership, and lower-than-average pay.	4/10/2014 1:19 PM
19	Public support for the arts may be negatively affected in the new administration--de Blasio clearly does not have the interest in that area that Bloomberg did.	4/10/2014 9:31 AM
20	I am seeing exhausted fundraisers with not enough staff to to increased fundraising. There is a lot of pressure on fundraisers to help offset government funding decreases. I hear a lot of people talking about leaving the field. All fundraisers I know are being asked to do more and more with less resources, which is burning people out.	4/8/2014 7:36 PM
21	Baby boomers are aging and next generations not as committed to fund-raising..	4/8/2014 4:46 PM
22	Increasing funder interest in early childhood programs	4/8/2014 3:08 PM
23	Workloads and expectations on the job continue to increase, but nonprofit staff salaries do not rise enough to keep up with inflation/the cost of living within the 5 boroughs.	4/8/2014 1:42 PM
24	We are a small organization with many grassroots supporters. We are seeing an increase in the number of people who contribute, but a decrease in the amount that the average donor is able to give.	4/8/2014 1:04 PM
25	Collective on line fundraising (kick starter etc) and more donor advised funds	4/8/2014 12:42 PM