

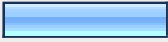
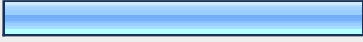
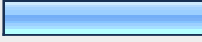
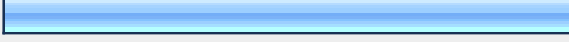
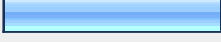


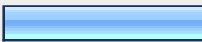
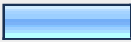

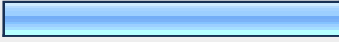
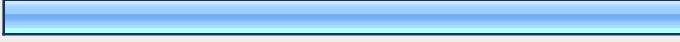
theromegroup

# PHILANTHROPIC LANDSCAPE 2008

*Survey of St. Louis Area Nonprofits*

# Local Trends in Philanthropy 2008



1. Which of the following categories describes your organization?			Response Percent	Response Count
Arts & Culture			10.7%	17
Education			23.9%	38
Health			13.2%	21
<b>Human Services</b>			<b>37.7%</b>	60
Other (please specify)			14.5%	23
			<i>answered question</i>	<b>159</b>
			<i>skipped question</i>	<b>0</b>

2. What is your organization's current annual operating budget?			Response Percent	Response Count
Under \$500,000			13.4%	21
\$501,000-\$750,000			8.3%	13
\$751,000-\$1,000,000			10.8%	17
\$1,001,000-\$3,000,000			22.3%	35
<b>Over \$3,000,000</b>			<b>45.2%</b>	71
			<i>answered question</i>	<b>157</b>
			<i>skipped question</i>	<b>2</b>

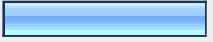
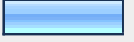
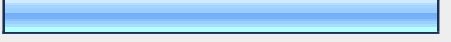
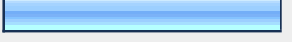
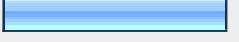
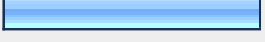
**3. Please indicate whether you agree or disagree with each of the following statements about your organization.**

	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Neither Agree/Disagree</b>	<b>Agree</b>	<b>Strongly Agree</b>	<b>Response Count</b>
My organization has an excellent reputation in the community.	0.6% (1)	1.9% (3)	10.1% (16)	43.0% (68)	<b>44.3% (70)</b>	158
The community understands what we do.	1.3% (2)	22.2% (35)	29.1% (46)	<b>37.3% (59)</b>	10.1% (16)	158
We have strong, long-term relationships with the majority of our donors.	0.0% (0)	18.4% (29)	21.5% (34)	<b>43.0% (68)</b>	17.1% (27)	158
Our staff has the experience and expertise we need to succeed.	0.6% (1)	6.3% (10)	9.4% (15)	<b>56.0% (89)</b>	27.7% (44)	159
Our board is actively involved in meeting all its roles and responsibilities.	2.5% (4)	22.3% (35)	26.1% (41)	<b>37.6% (59)</b>	11.5% (18)	157
We are limited by a lack of financial resources.	3.8% (6)	15.8% (25)	16.5% (26)	<b>37.3% (59)</b>	26.6% (42)	158
We cannot keep up with the demand for our programs/services given our current level of support.	1.9% (3)	24.8% (39)	21.7% (34)	<b>35.7% (56)</b>	15.9% (25)	157
	<b><i>answered question</i></b>					<b>159</b>
	<b><i>skipped question</i></b>					<b>0</b>



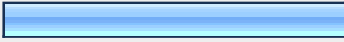
**4. Did your organization reach its fundraising goal in 2007?**

		Response Percent	Response Count
Yes		70.2%	99
No		29.8%	42
<i>answered question</i>			<b>141</b>
<i>skipped question</i>			<b>18</b>


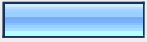
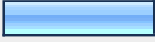

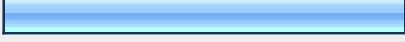
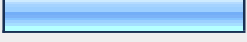
**5. How much did your organization receive in gifts and grants from individuals, corporations/businesses and foundations in 2007?**

		Response Percent	Response Count
Less than \$100,000		13.4%	19
\$101,000-\$200,000		7.7%	11
<b>\$201,000-\$500,000</b>		<b>28.9%</b>	41
\$501,000-\$1,000,000		18.3%	26
\$1,001,000- \$2,000,000		14.8%	21
More than \$2,000,000		16.9%	24
<i>answered question</i>			<b>142</b>
<i>skipped question</i>			<b>17</b>



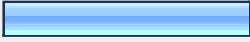
6. In 2007, did the amount of contributed income your agency receive...

		Response Percent	Response Count
Increase		66.7%	94
Decrease		10.6%	15
Stay about the same as in 2006		22.7%	32
<i>answered question</i>			<b>141</b>
<i>skipped question</i>			<b>18</b>

7. How much did your contributed income increase or decrease in 2007, compared to 2006?

		Response Percent	Response Count
50% or more		6.1%	8
30-49%		9.2%	12
20-29%		9.9%	13
<b>10-19%</b>		<b>32.1%</b>	42
5-9%		26.7%	35
Less than 5%		16.0%	21
<i>answered question</i>			<b>131</b>
<i>skipped question</i>			<b>28</b>

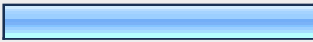

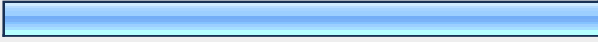


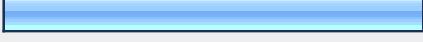
**8. Over the past five years, has the amount of contributed income your agency receives...**

		Response Percent	Response Count
Increased		75.2%	106
Decreased		8.5%	12
Stayed about the same		16.3%	23
<i>answered question</i>			<b>141</b>
<i>skipped question</i>			<b>18</b>

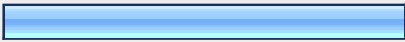


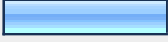
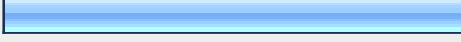
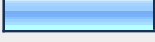
**9. Did the following sources of support increase or decrease for your organization in 2007 as compared to 2006?**

	Increased	Decreased	No Change	Response Count
Individuals	<b>74.3% (101)</b>	10.3% (14)	15.4% (21)	136
Corporations/businesses	<b>48.6% (67)</b>	21.0% (29)	30.4% (42)	138
Private foundations	<b>46.0% (63)</b>	21.2% (29)	32.8% (45)	137
Government	35.0% (41)	19.7% (23)	<b>45.3% (53)</b>	117
United Way	23.4% (22)	8.5% (8)	<b>68.1% (64)</b>	94
			Other (please specify)	10
<i>answered question</i>				<b>139</b>
<i>skipped question</i>				<b>20</b>

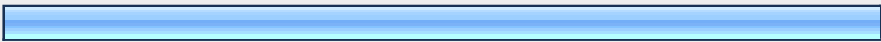

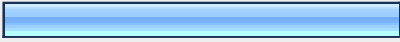
10. Which strategy is the most effective in your fundraising efforts?

		Response Percent	Response Count
Direct mail		20.6%	28
Telephone appeals		6.6%	9
<b>Major gifts</b>		<b>39.7%</b>	54
Planned gifts		3.7%	5
Online appeals		1.5%	2
Special events		27.9%	38
		<b><i>answered question</i></b>	<b>136</b>
		<b><i>skipped question</i></b>	<b>23</b>

**11. Which strategy is the least effective in your fundraising efforts?**


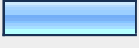
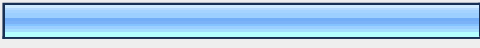
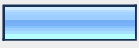

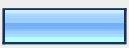
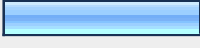
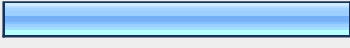

		Response Percent	Response Count
Direct mail		26.7%	35
Telephone appeals		18.3%	24
Major gifts		3.8%	5
Planned gifts		10.7%	14
<b>Online appeals</b>		<b>30.5%</b>	40
Special events		9.9%	13
		<i>answered question</i>	<b>131</b>
		<i>skipped question</i>	<b>28</b>

**12. How do you predict your fundraising results in 2008 will compare with 2007?**





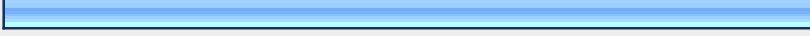

		Response Percent	Response Count
<b>Increase</b>		<b>58.6%</b>	82
Decrease		15.0%	21
Remain the same		26.4%	37
		<i>answered question</i>	<b>140</b>
		<i>skipped question</i>	<b>19</b>









13. What do you see as the primary challenge you face in the year ahead? (choose only one)

		Response Percent	Response Count
Attracting, retaining and training qualified staff		4.3%	6
Organizational leadership (board and staff)		8.6%	12
<b>The economy</b>		<b>31.7%</b>	<b>44</b>
Reductions in major sources of funding		8.6%	12
Increased competition for funding from national and state political campaigns		0.7%	1
Ability to keep up with the growing demand for our services		7.9%	11
Competition for charitable dollars		12.9%	18
Finding new ways to communicate effectively and help the public understand who we are and what we do		23.0%	32
Aging of current donor base		2.2%	3
		Other (please specify)	3
		<b>answered question</b>	<b>139</b>
		<b>skipped question</b>	<b>20</b>

14. What do you consider to be your organization's fundraising strengths? (Check all that apply)

		Response Percent	Response Count
Public awareness of our organization		16.5%	23
<b>Our organization's image and reputation</b>		67.6%	94
Community understanding of the organization's need		10.8%	15
Relationships with donors		66.2%	92
Staff		54.0%	75
Volunteer leadership		32.4%	45
		Other (please specify)	3
		<b>answered question</b>	<b>139</b>
		<b>skipped question</b>	<b>20</b>

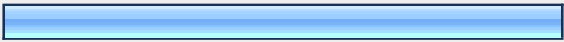

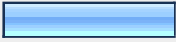



15. What do you consider to be your organization's fundraising challenges? (Check all that apply)

		Response Percent	Response Count
Lack of awareness of the organization		54.1%	72
The organization's image and reputation		6.8%	9
<b>Community understanding of the organization's need</b>		<b>69.2%</b>	92
Relationships with donors		21.1%	28
Staff		9.8%	13
Volunteer leadership		27.8%	37
Other (please specify)			6
		<b>answered question</b>	<b>133</b>
		<b>skipped question</b>	<b>26</b>



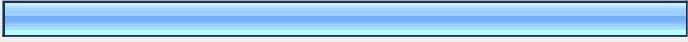
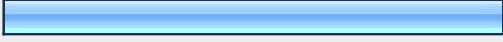

16. Please rate your organization's current capacity in each of the following areas:

	Inadequate				Maintaining					Excellent	Rating Average	Response Count
Strategic planning	5.0% (7)	1.4% (2)	3.6% (5)	8.6% (12)	<b>20.9% (29)</b>	12.9% (18)	10.1% (14)	20.1% (28)	8.6% (12)	8.6% (12)	6.31	139
Staff resources	6.6% (9)	2.9% (4)	3.6% (5)	8.0% (11)	16.1% (22)	10.9% (15)	<b>17.5% (24)</b>	16.1% (22)	10.2% (14)	8.0% (11)	6.25	137
Technology	5.8% (8)	3.6% (5)	9.4% (13)	6.5% (9)	<b>21.0% (29)</b>	9.4% (13)	10.9% (15)	20.3% (28)	7.2% (10)	5.8% (8)	5.91	138
Programs/services	0.0% (0)	0.0% (0)	0.7% (1)	1.5% (2)	9.5% (13)	9.5% (13)	6.6% (9)	<b>27.0% (37)</b>	24.1% (33)	21.2% (29)	8.03	137
Training for staff	1.5% (2)	1.5% (2)	6.6% (9)	4.4% (6)	<b>19.7% (27)</b>	13.1% (18)	15.3% (21)	<b>19.7% (27)</b>	13.1% (18)	5.1% (7)	6.53	137
Board/Leadership	3.6% (5)	5.8% (8)	8.7% (12)	4.3% (6)	15.2% (21)	10.1% (14)	15.2% (21)	<b>19.6% (27)</b>	6.5% (9)	10.9% (15)	6.26	138
Facilities	1.5% (2)	4.4% (6)	6.6% (9)	5.8% (8)	18.2% (25)	7.3% (10)	9.5% (13)	16.8% (23)	10.9% (15)	<b>19.0% (26)</b>	6.77	137
Marketing	5.1% (7)	6.5% (9)	9.4% (13)	9.4% (13)	13.0% (18)	<b>19.6% (27)</b>	14.5% (20)	14.5% (20)	5.1% (7)	2.9% (4)	5.59	138
Public Relations	2.9% (4)	4.4% (6)	10.2% (14)	9.5% (13)	16.8% (23)	<b>19.0% (26)</b>	13.1% (18)	13.9% (19)	6.6% (9)	3.6% (5)	5.77	137
Resources to try new things	11.1% (15)	9.6% (13)	14.8% (20)	7.4% (10)	<b>17.0% (23)</b>	8.1% (11)	14.8% (20)	8.9% (12)	6.7% (9)	1.5% (2)	4.88	135
	<b>answered question</b>											<b>139</b>
	<b>skipped question</b>											<b>20</b>

17. Who is primarily responsible for crafting the various messages you use with donors and prospects?

		Response Percent	Response Count
Executive Director		37.3%	50
<b>Development Director</b>		<b>41.8%</b>	56
Development Staff		11.2%	15
Other Agency Staff		3.7%	5
Outside consultant(s)		1.5%	2
Board members		4.5%	6
		Other (please specify)	10
		<b><i>answered question</i></b>	<b>134</b>
		<b><i>skipped question</i></b>	<b>25</b>

18. Overall, how effective do you think your marketing & communications are? (scale is 1-5, with 1 = not very effective and 5 = extremely effective)

		Response Percent	Response Count
1		3.6%	5
2		15.2%	21
3		45.7%	63
4		33.3%	46
5		2.2%	3
<b>answered question</b>			<b>138</b>
<b>skipped question</b>			<b>21</b>

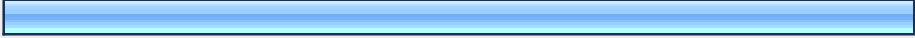
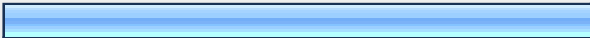
19. How effective are each of the following marketing strategies/tools for your organization?

	Not Effective				Very Effective	Not Applicable	Rating Average	Response Count
Public relations/media relations	2.2% (3)	14.1% (19)	<b>34.1% (46)</b>	32.6% (44)	14.8% (20)	2.2% (3)	3.50	135
Printed newsletters	2.2% (3)	6.7% (9)	16.3% (22)	<b>39.3% (53)</b>	20.7% (28)	14.8% (20)	4.14	135
E-newsletters	5.3% (7)	11.4% (15)	13.6% (18)	22.7% (30)	6.8% (9)	<b>40.2% (53)</b>	4.35	132
Web site	6.0% (8)	14.3% (19)	25.6% (34)	<b>27.1% (36)</b>	25.6% (34)	1.5% (2)	3.56	133
Distributing marketing materials	2.2% (3)	21.5% (29)	<b>34.1% (46)</b>	28.1% (38)	8.9% (12)	5.2% (7)	3.36	135
Speakers Bureau	10.5% (14)	12.0% (16)	14.3% (19)	13.5% (18)	7.5% (10)	<b>42.1% (56)</b>	4.22	133
Direct mail	2.3% (3)	15.8% (21)	21.1% (28)	<b>31.6% (42)</b>	16.5% (22)	12.8% (17)	3.83	133
Advertising	5.3% (7)	19.5% (26)	<b>27.8% (37)</b>	15.8% (21)	4.5% (6)	27.1% (36)	3.76	133

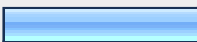
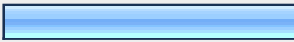

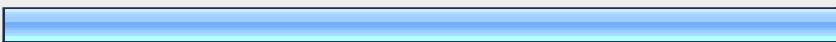

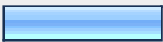
Public service announcements	10.5% (14)	17.3% (23)	19.5% (26)	13.5% (18)	6.8% (9)	<b>32.3% (43)</b>	3.86	133
Cause related marketing sponsorships	10.1% (13)	9.3% (12)	14.0% (18)	16.3% (21)	6.2% (8)	<b>44.2% (57)</b>	4.32	129
Other (please specify)								2
							<b>answered question</b>	<b>136</b>
							<b>skipped question</b>	<b>23</b>

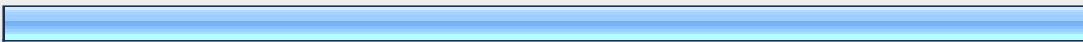
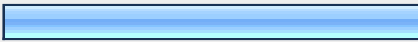
20. Please indicate whether you agree or disagree with each of the following statements.						
	Strongly disagree	Disagree	Neither Agree/Disagree	Agree	Strongly Agree	Response Count
Our organization lends itself to great stories that inspire our donors.	0.7% (1)	3.6% (5)	12.3% (17)	<b>42.8% (59)</b>	40.6% (56)	138
Our programs/services are extremely complex and difficult for outsiders to understand.	14.6% (20)	<b>43.8% (60)</b>	17.5% (24)	21.2% (29)	2.9% (4)	137
People understand what we do the first time they hear/read about us.	3.6% (5)	21.9% (30)	24.8% (34)	<b>40.9% (56)</b>	8.8% (12)	137
We do not have the resources to tell our story the way we would like to.	2.2% (3)	27.5% (38)	19.6% (27)	<b>34.8% (48)</b>	15.9% (22)	138
We are constantly looking for new ways to communicate more effectively.	0.0% (0)	0.7% (1)	3.6% (5)	<b>57.7% (79)</b>	38.0% (52)	137
We review and update our primary agency marketing materials at least annually.	8.1% (11)	18.5% (25)	16.3% (22)	<b>39.3% (53)</b>	17.8% (24)	135
We evaluate the effectiveness of each communication (newsletter, email blast, annual report, etc.) that	10.3% (14)	23.5% (32)	23.5% (32)	<b>34.6% (47)</b>	8.1% (11)	136

we send out and use that knowledge to improve our next communication.						
We tailor what we say and how we say it to match the communication vehicle used (print, Web, verbal presentation, etc.).	3.6% (5)	10.9% (15)	18.2% (25)	<b>59.1% (81)</b>	8.0% (11)	137
We target different communication pieces to different audiences and tailor what we say to match those audiences.	5.1% (7)	12.5% (17)	14.7% (20)	<b>55.1% (75)</b>	12.5% (17)	136
<i>answered question</i>						<b>138</b>
<i>skipped question</i>						<b>21</b>


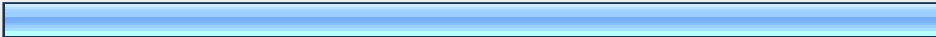
21. Do you conduct an evaluation of every program/service you provide?			Response Percent	Response Count
Yes			60.9%	84
No			39.1%	54
<i>answered question</i>				<b>138</b>
<i>skipped question</i>				<b>21</b>



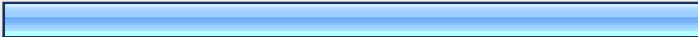
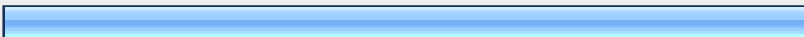
22. What is the primary reason you do program evaluations?			Response Percent	Response Count
Provides data for marketing and fundraising efforts			12.9%	16
Funders require it in reports			19.4%	24
Board requires it			0.8%	1
<b>Provides data on which to base regular program/process improvement decisions</b>			<b>55.6%</b>	<b>69</b>
Useful for staff performance evaluations			0.8%	1
Gives guidance to strategic planning			10.5%	13
		Other (please specify)		6
		<b>answered question</b>		<b>124</b>
		<b>skipped question</b>		<b>35</b>

23. Do you accept online donations through your web site?			Response Percent	Response Count
Yes			72.3%	99
No			27.7%	38
		<b>answered question</b>		<b>137</b>
		<b>skipped question</b>		<b>22</b>

**24. Do you make online (outgoing) fundraising solicitations?**

		Response Percent	Response Count
Yes		37.7%	52
No		62.3%	86
<i>answered question</i>			<b>138</b>
<i>skipped question</i>			<b>21</b>

**25. Do you have the ability to accept event registrations and payments online?**

		Response Percent	Response Count
Yes		46.4%	64
No		53.6%	74
<i>answered question</i>			<b>138</b>
<i>skipped question</i>			<b>21</b>

26. Do you use online/email communications with your board, donors, staff and others?			
	Yes	No	Response Count
Board	97.8% (135)	2.2% (3)	138
Donors	61.2% (82)	38.8% (52)	134
Staff	95.6% (129)	4.4% (6)	135
Others	87.1% (101)	12.9% (15)	116
	<i>answered question</i>		<b>138</b>
	<i>skipped question</i>		<b>21</b>

27. Are there any other comments you would like to share regarding local trends in philanthropy?		Response Count
		31
	<i>answered question</i>	<b>31</b>
	<i>skipped question</i>	<b>128</b>

28. If you do not receive The Rome Group's e-newsletter and would like to be added to our mailing list, please provide your email address below.		Response Count
		20
	<i>answered question</i>	<b>20</b>
	<i>skipped question</i>	<b>139</b>