

Donor Confidence Report

Issue 17, June 2011

The results in this Donor Confidence Report are drawn from an ongoing Campbell Rinker survey of donor attitudes on giving. The sample size for the June 2011 poll is 294. Details about the study methodology and audience are found on the final page of this report.

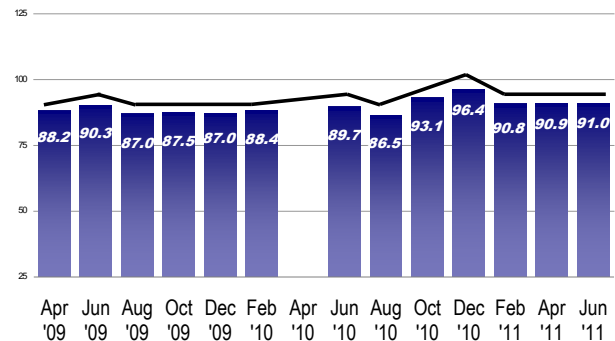
Donor Confidence Steady in 2011

The overall Donor Confidence Index (DCI) has experienced a marginal increase, rising 0.2 points, from 90.9 to 91.0 since last issue.

The Index takes into account donors' self-reported expectations about their giving, their view of the nonprofit sector, the nation's economic health, and several other factors.

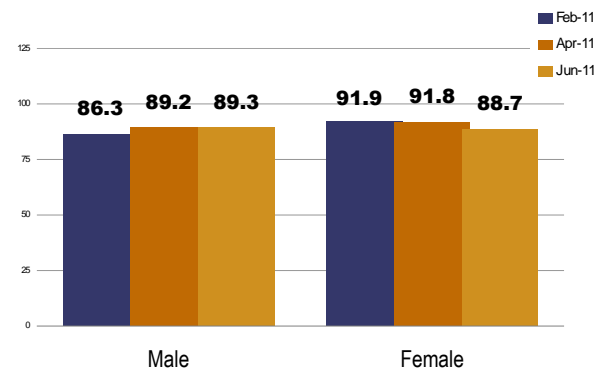
Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	June '11	2-Mo Chg
Overall	86.5	93.1	96.4	90.8	90.9	91.0	▲ 0.2
Political and Advocacy	82.5	92.7	98.7	91.3	85.5	100.1	▲ 14.6
Faith-based	88.9	91.2	97.3	92.8	91.8	93.7	▲ 1.9
Int'l Relief and Development	88.9	95.7	102.1	95.7	92.2	92.8	▲ 0.6
Arts, Culture and Humanities	82.9	95.6	103.1	88.0	88.8	89.3	▲ 0.5
Social Service	84.6	90.0	95.6	88.6	91.3	91.0	▼ -0.3
Hospitals & Hosp. Fnd.	87.2	94.3	94.4	92.6	91.0	90.2	▼ -0.8
Animal Rights	85.3	93.0	92.0	89.7	84.8	84.0	▼ -0.8
Place of Worship	87.6	93.0	94.6	90.0	92.0	90.8	▼ -1.2
Health and Medical	85.5	93.1	93.8	88.4	91.2	89.7	▼ -1.5
Education	87.0	93.4	97.7	93.8	93.8	90.5	▼ -3.3
Environmental	87.3	92.4	92.9	90.8	93.5	87.2	▼ -6.3

The performance of the Index within various sectors is shown in the table above, ranked by the change since April '11. Since last issue, the Index has risen in four categories and fallen in seven categories. Opinions from any single donor impact the Index for each sector they support.

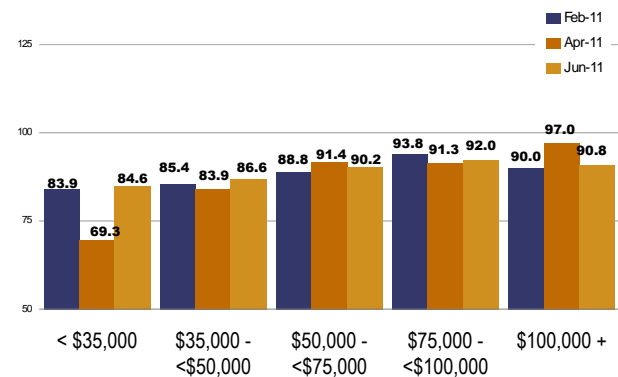


Donor Confidence by Demographics

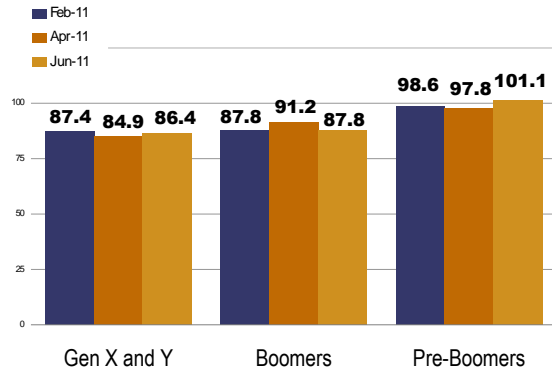
Confidence among men is mostly unchanged, while confidence among women has fallen 3.1 points since April.



Households earning less than \$50,000 remain least optimistic, posting scores in the mid-80s. Those with income of \$75,000+ currently post scores in the low 90s.



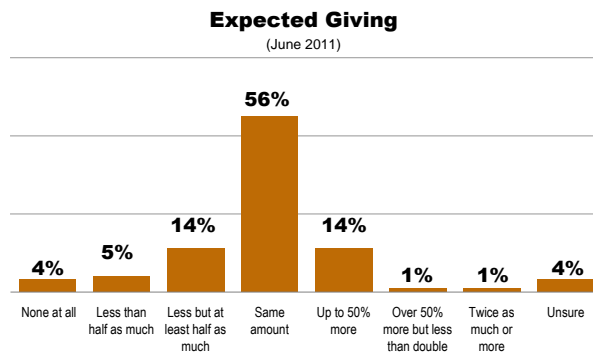
Pre-Boomers continue to exhibit higher confidence levels than all other generations; this issue, the Index for this segment exceeds 100.



Expectations for Giving in 2011

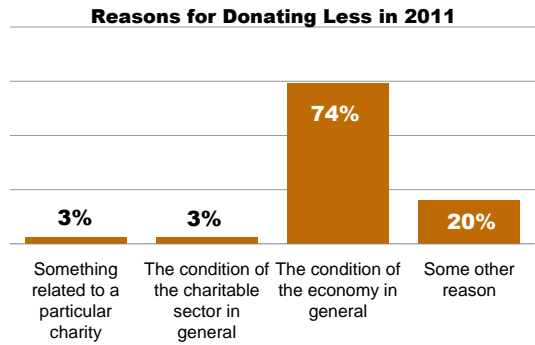
In each poll, Campbell Rinker asks U.S. donors whether they expect to give the same, more, or less in the present year compared with the last year.

In June, 56% of donors reported planning to donate the same amount this year as in 2010. Down 4% from two months ago, 16% currently plan to give more.



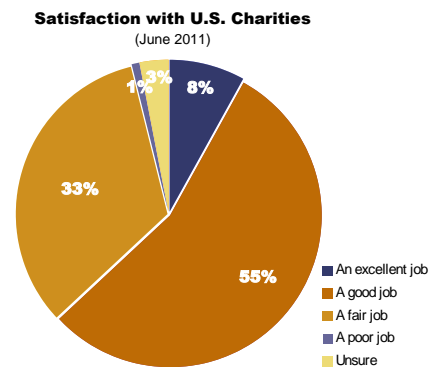
Economy Continues to Affect Giving

Of the one in five of donors who plan to give less this year, 74% cite the condition of the economy as their reason for doing so.



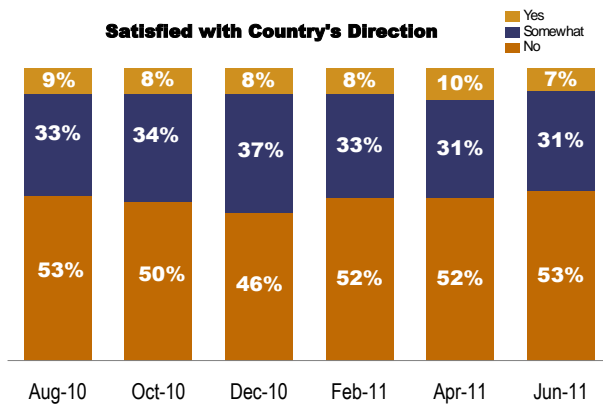
Charity Approval Ratings Rise

An increase of 11% in two months, 63% of donors believe U.S. nonprofits to be doing “good” or “excellent” work. Another one in three say charities are doing a “fair” job.

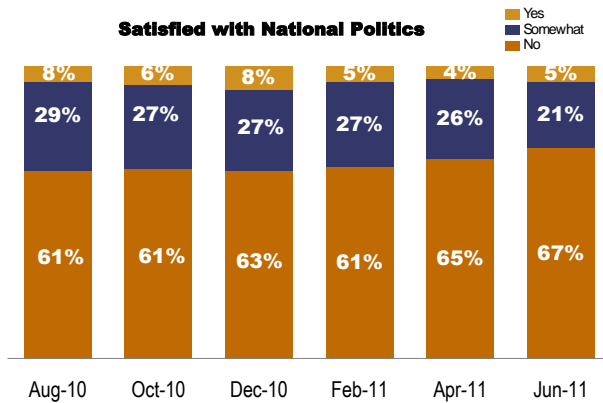


Dissatisfaction with Government at Highest Level to Date

The proportion of donors dissatisfied with the country’s direction is mostly stable at 53%.

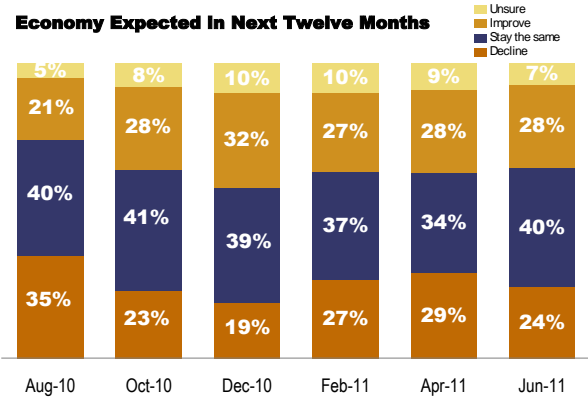


Dissatisfaction with politics at the federal level, however, continues to rise. With two in three donors (67%) expressing complete dissatisfaction, this figure is the highest ever recorded in Donor Confidence history.

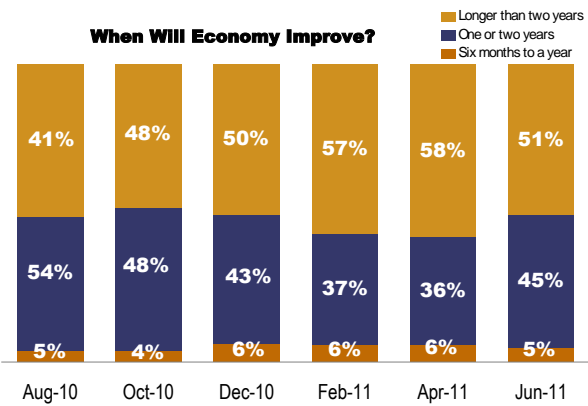


Expectations for the State of the Economy

Donors' expectations for the economy are slightly more optimistic now than they were earlier this year. Today, 24% expect the economy to decline further, while 40% expect stability and 28% expect improvement.

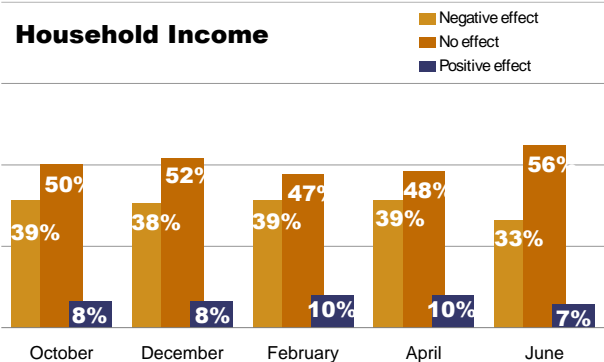


About half of all donors (51%) anticipate recovery in over two years; the other 50% expect a relatively speedier recovery.

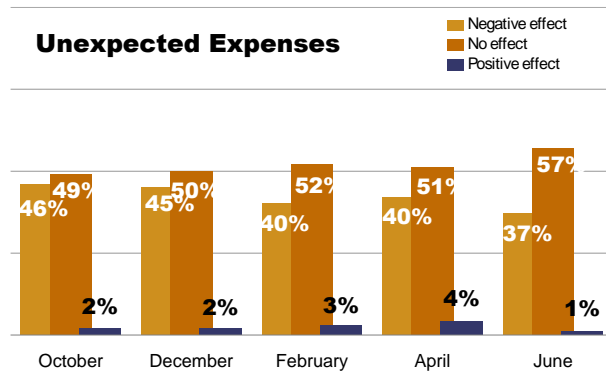


Expenses Greatest Barrier to Giving

The negative impact from changes in household income has decreased six percent since last issue to 33%.



The impact of unexpected expenses has dropped by a lesser margin (three percent) to 37%.



Sector Spotlights

Campbell Rinker asked donors to indicate which of 11 nonprofit sectors they had supported in the last year. Within these results, ratings from one donor may contribute to the DCI in more than one nonprofit sector.

The sections below highlight the stated plans donors have for giving to each of the following nonprofit categories:

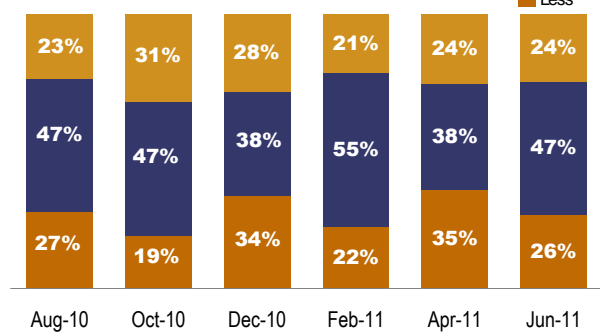
- Animal rights, protection, and training
- Arts, culture, and humanities
- Educational institutions and programs
- Environmental protection and preservation
- Faith-based charities, excluding places of worship
- Health and medical charities
- International relief, education, and sponsorship
- Not-for-profit hospitals and hospital foundations
- Places of worship
- Political organizations
- Social service organizations

Animal Rights & Protection

The DCI for Animal Rights organizations has declined further to 84 points, its lowest score in the past year.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Animal Rights	85.3	93.0	92.0	89.7	84.8	84.0
6-mo Avg.	87.0	89.1	90.1	91.6	88.8	86.2

Expected Giving to Animal Rights
(Excludes "Unsure" responses)



The proportion of donors planning to give less or the same to this sector continues to shift. Today, 26% plan to give less and 47% plan to give the same dollar amount.

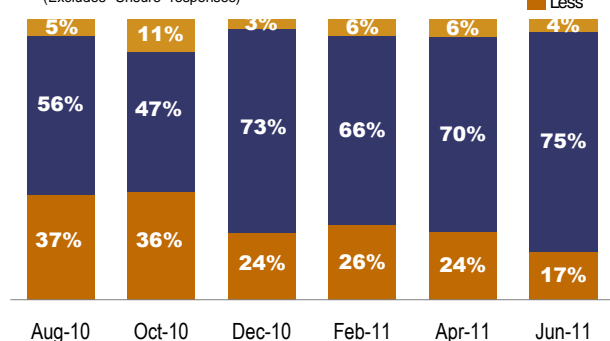
Arts, Culture, and Humanities

Recovering from its steep drop in February, the DCI for Arts organizations has risen 0.5 points since April, and currently stands at 89.3.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Arts & Culture	82.9	95.6	103.1	88.0	88.8	89.3
6-mo Avg.	87.4	88.7	93.9	95.6	93.3	88.7

Three in four donors (75%) presently expect to give the same amount to this sector this year.

Expected Giving to Arts & Culture
(Excludes "Unsure" responses)

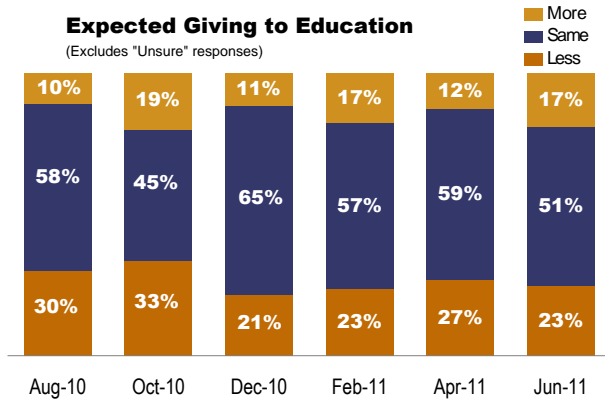


Educational Institutions & Programs

The Confidence Index for Educational Institutions has fallen 3.3 points since April to 90.5.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Education	87.0	93.4	97.7	93.8	93.8	90.5
6-mo Avg.	88.0	89.6	92.7	95.0	95.1	92.7

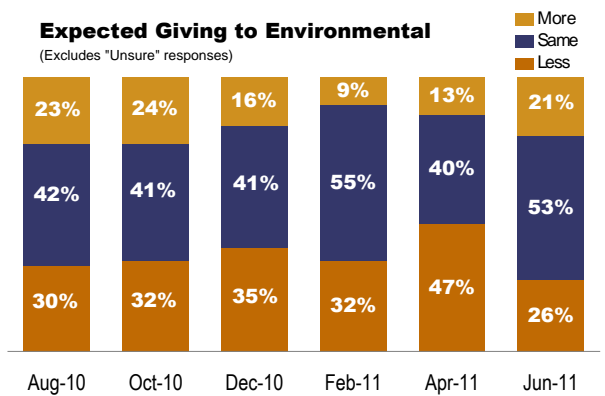
Approximately half the donors to Education (51%) plan to donate the same amount to this sector throughout 2011 as they did in 2010. Fewer than one in four (23%) plan to give less.



Environmental Protection

The Index for Environmental donors has decreased by 6.3 points, the largest drop this issue.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Environmental	87.3	92.4	92.9	90.8	93.5	87.2
6-mo Avg.	88.7	89.8	90.9	92.0	92.4	90.5



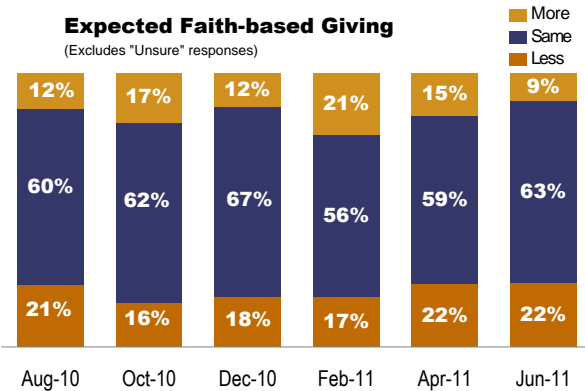
While confidence among Environmental donors has declined significantly, expected giving to this sector shows positive changes. Up eight percent from April, 21% now plan to donate more throughout the year. The percentage planning to give less has fallen considerably from 47% to 26%.

Faith-based Charities

The DCI for donors to Faith-based charities increased by nearly two points in June, from 91.8 to 93.7.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Faith-based	88.9	91.2	97.3	92.8	91.8	93.7
6-mo. Avg.	92.6	91.4	92.5	93.8	94.0	92.8

A majority of donors to Faith-based organizations continue to plan to give the same amount this year as last year. One in ten plan to give more.

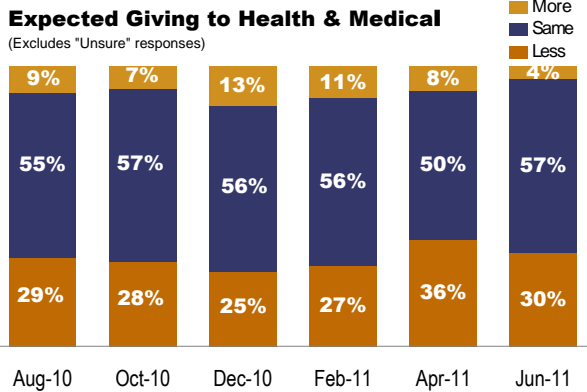


Health and Medical Charities

The DCI for Health and Medical charities is currently 89.7, representing a drop of 1.5 points in two months.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Health and Medical	85.5	93.1	93.8	88.4	91.2	89.7
6-mo. Avg.	87.4	89.2	90.8	91.8	91.1	89.8

Three in ten donors now plan to give less to this sector in 2011, while 57% plan to give the same.

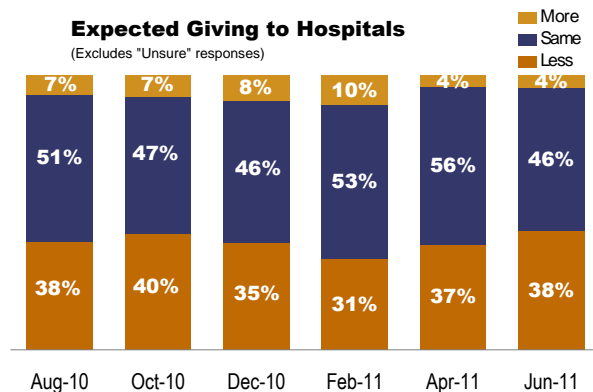


Hospitals & Hospital Foundations

Confidence among donors to Hospitals and their Foundations has decreased 0.8 points to 90.2 in June.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Hospitals	87.2	94.3	94.4	92.6	91.0	90.2
6-mo. Avg.	88.3	90.0	92.0	93.8	92.7	91.3

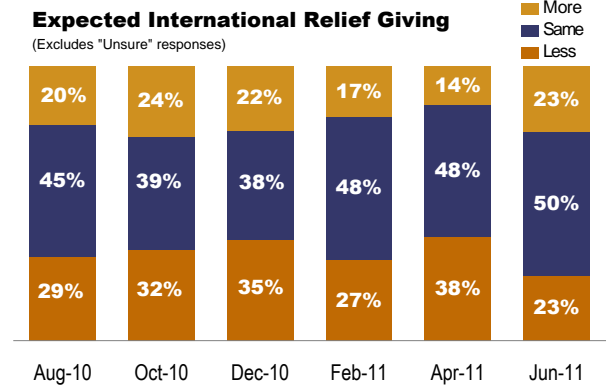
Today, 46% expect to give the same amount to Hospital Foundations, while 38% expect to give less.



Int'l Relief & Sponsorship

In June, the DCI for International Relief and Sponsorship charities is 92.8, an increase of 0.6 points over April.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Int'l Relief and Development	88.9	95.7	102.1	95.7	92.2	92.8
6-mo. Avg.	92.5	93.2	95.6	97.8	96.7	93.6



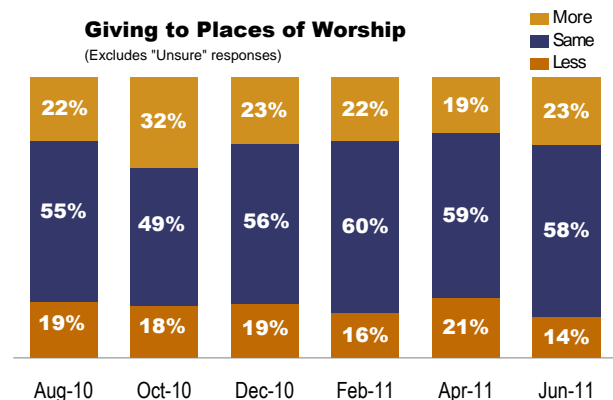
Half of all donors to sector plan to donate the same amount in 2011 as in 2010. Equal proportions plan to give either more or less (23%)

Places of Worship

This issue, the Index for Places of Worship is 90.8, a 1.2 point decrease from April.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Places of Worship	87.6	93.0	94.6	90.0	92.0	90.8
6-mo. Avg.	89.2	89.8	91.7	92.5	92.2	90.9

At present, nearly one in four (23%) plan to give more to Places of Worship in 2011, while just 14% plan to give less.

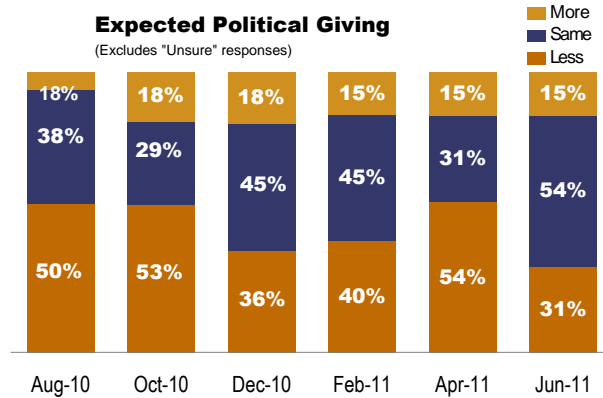


Political & Advocacy

The DCI for Political and Advocacy organizations now stands at 100.1. Given the instability of this sector's scores, its current 14.6 point increase can be viewed as abnormally high but not uncharacteristic.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Political and Advocacy	82.5	92.7	98.7	91.3	85.5	100.1
6-mo. Avg.	87.2	88.0	91.3	94.2	91.8	92.3

In a reversal from last issue, 54% now plan to give the same to this sector and 31% plan to give less.



Social Service

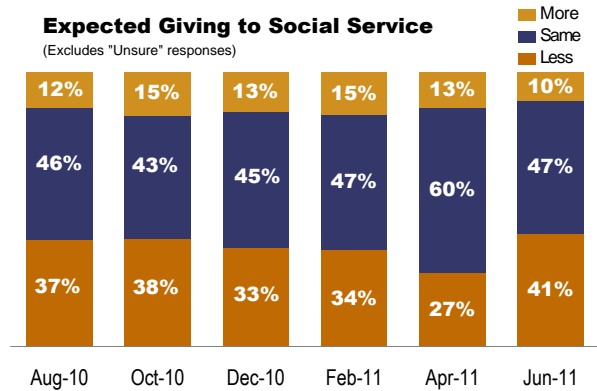
The Index for Social Service organizations decreased 0.3 points between April and June to 91.0.

Sector	Aug '10	Oct '10	Dec '10	Feb '11	Apr '11	Jun '11
Social Svcs	84.6	90.0	95.6	88.6	91.3	91.0
6-mo. Avg.	87.4	87.7	90.1	91.4	91.8	90.3

Rising 14% from last issue, 41% plan to donate less to Social Services this year. Just under half (47%) plan to donate the same dollar amount.

Expected Giving to Social Service

(Excludes "Unsure" responses)



Methodology

This Donor Confidence Report poll was conducted June 30 through July 2, 2011 among 294 Internet respondents who either responded to our original February 2008 study or who have demonstrated similar habits and behaviors since then.

The Benchmark study that forms the basis for the Donor Confidence report was conducted as part of Campbell Rinker's ongoing DonorPulse survey in February 2008. This hybrid study of 3,312 US donors included 29% of respondent households from random telephone calling and the balance from an Internet panel reflecting national demographics.

To qualify to take the survey, responding households must have made a charitable contribution in the previous year and be at least 18 years old. Of the 3,312 responding donors, 726 self-identified themselves as Christian and 85 self-identified as adherents to non-Christian faiths.

The Donor Confidence Index is computed at the respondent level using an algorithm developed by Campbell Rinker that takes into account a donor's propensity to give again, their opinions and attitudes about the condition of the country, the nonprofit sector, their economic outlook, and their ongoing engagement in giving. The scores presented in this report represent a true longitudinal view of donors in June 2011 compared to the same pool of donors in previous reports.

Fewer respondents answered some questions. The following table summarizes the estimate of error at the 95% confidence level at various sample sizes.

Sample Size	Estimate of Error
100	±9.8%
200	±6.9%
300	±5.7%
400	±4.9%
500	±4.4%

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