

## Donor Confidence Report

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 October 2011 poll is 524. Details about the study methodology and audience are found on the final page of this report.

### Donor Confidence Inches Upward

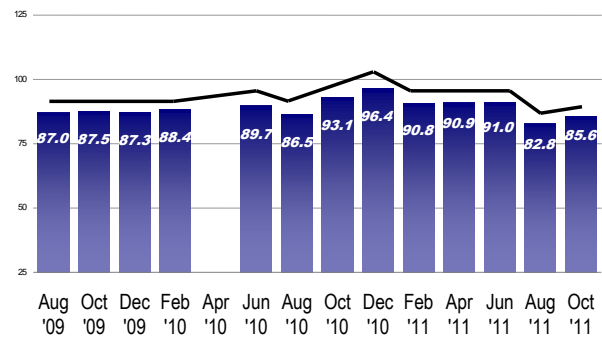
Though nowhere near a full recovery, the Donor Confidence Index (DCI) rose 2.8 points, to 85.6, in October 2011 from an all-time low in August.

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	Dec '10	Feb '11	Apr '11	June '11	Aug '11	Oct '11	2-Mo Chg
<b>Overall</b>	<b>96.4</b>	<b>90.8</b>	<b>90.9</b>	<b>91.0</b>	<b>82.8</b>	<b>85.6</b>	<b>▲ 2.8</b>
Political and Advocacy	98.7	91.3	85.5	100.1	84.3	91.3	▲ 7.0
Faith-based	97.3	92.8	91.8	93.7	84.6	90.1	▲ 5.5
Arts, Culture and Humanities	103.1	88.0	88.8	89.3	85.2	90.1	▲ 4.9
Hospitals & Hosp. Fnd.	94.4	92.6	91.0	90.2	81.5	85.9	▲ 4.4
Place of Worship	94.6	90.0	92.0	90.8	83.5	87.7	▲ 4.2
Int'l Relief and Development	102.1	95.7	92.2	92.8	90.2	94.2	▲ 4.0
Animal Rights	92.0	89.7	84.8	84.0	80.0	83.2	▲ 3.2
Environmental	92.9	90.8	93.5	87.2	85.1	88.2	▲ 3.1
Social Service	95.6	88.6	91.3	91.0	85.1	88.2	▲ 3.1
Education	97.7	93.8	93.8	90.5	84.6	87.4	▲ 2.8
Health and Medical	93.8	88.4	91.2	89.7	84.7	87.1	▲ 2.4

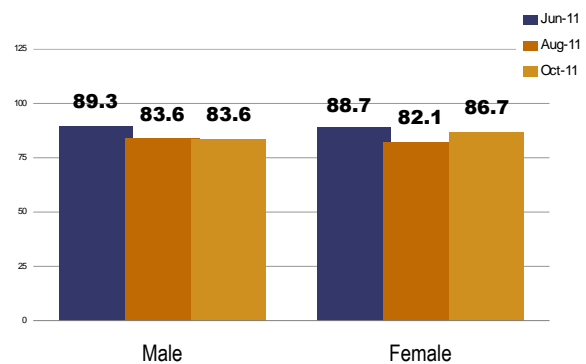
The performance of the Index within various sectors is shown in the table above, ranked by the change since August '11. Since last issue, the Index has risen in every category. Opinions from any single donor impact the Index for each sector they support.

Issue 19, October 2011

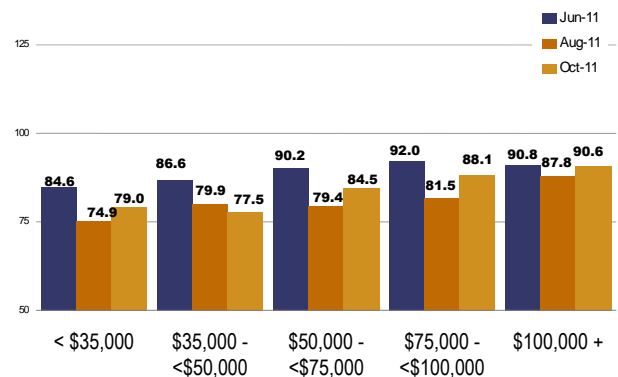


### Donor Confidence by Demographics

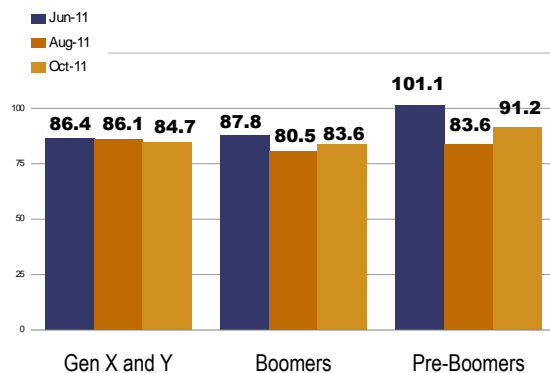
Confidence among men mirrors August results, while confidence among women has improved to 86.7.



October saw increases in every income category, with the exception of households earning \$35,000 to less than \$50,000. The Index score for these households is a low 77.5.



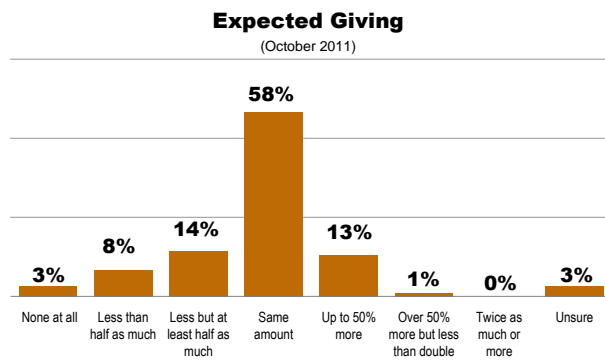
At 91.2, donor confidence is highest among Pre-Boomers. Boomers continue to post the lowest scores.



**Expectations for Giving in 2011**

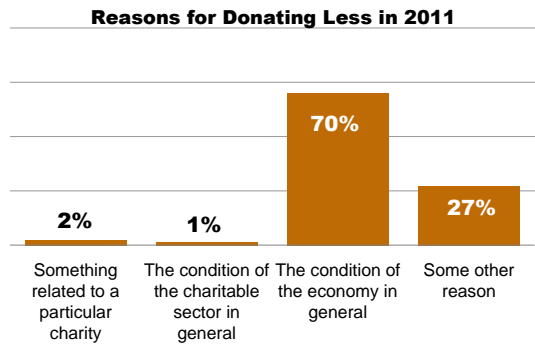
In each poll, Campbell Rinker asks U.S. donors whether they expect to give the same, more, or less in the present year compared with the last year.

Expected giving for 2011 is mostly unchanged. Nearly three in five (58%) still plan to donate the same amount this year as last. One in four plan to donate less and 14% plan to donate more.



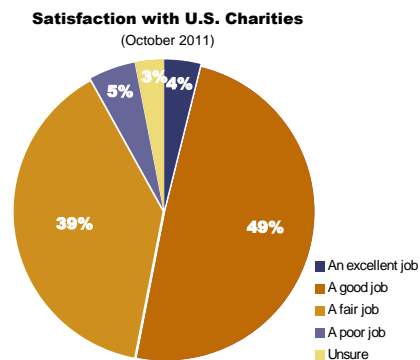
**Economic Impact on Giving**

Seven in ten donors who plan to give less this year cite the condition of the economy as their reason for giving less.



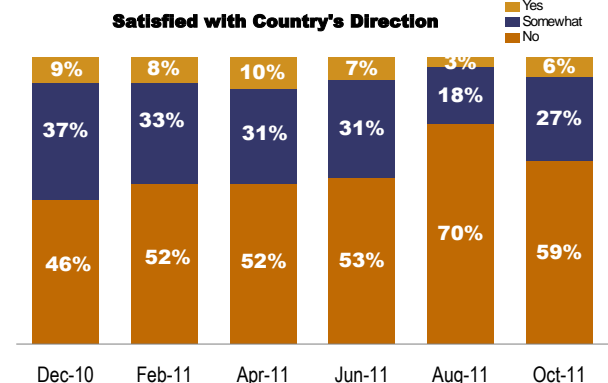
**U.S. Nonprofit Approval Ratings**

Approximately half of all U.S. donors find charities to be doing “a good job.” Just four percent responded “excellent” and 39% responded “fair.”

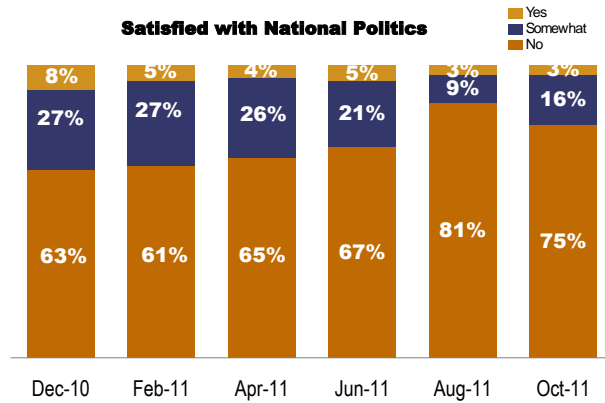


**Donors Unhappy with Government**

Approximately three in five donors (59%) express complete dissatisfaction with the country’s direction. Another 27% are somewhat dissatisfied.

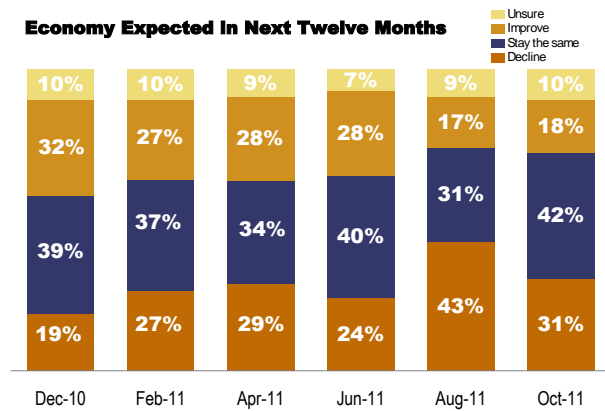


Three in five (75%) are entirely dissatisfied with the political system at the federal level.

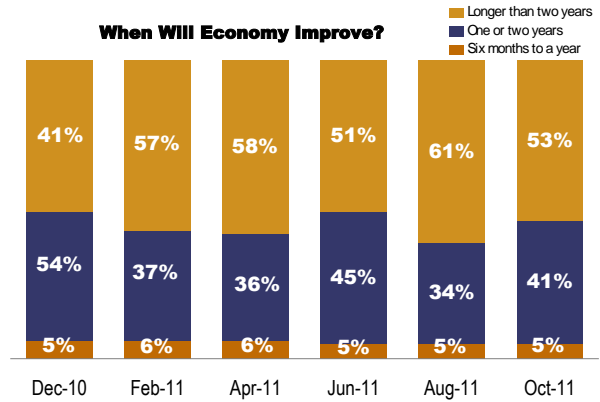


### Dismal Expectations for Economy

More than two in five donors (42%) expect the economic climate to remain the same over the next year, while 31% expect the economy to decline further. Fewer than one in five (18%) anticipate improvement.

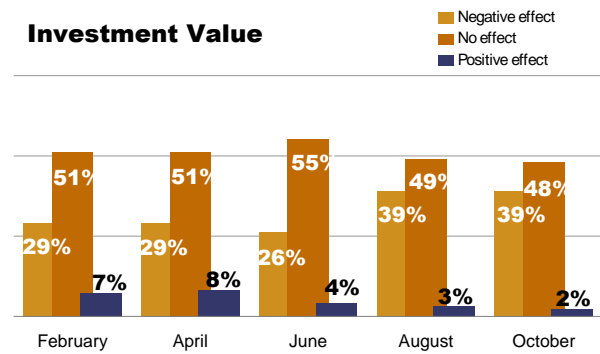


More than half of all U.S. (53%) donors believe the economy will improve more than two years from today.

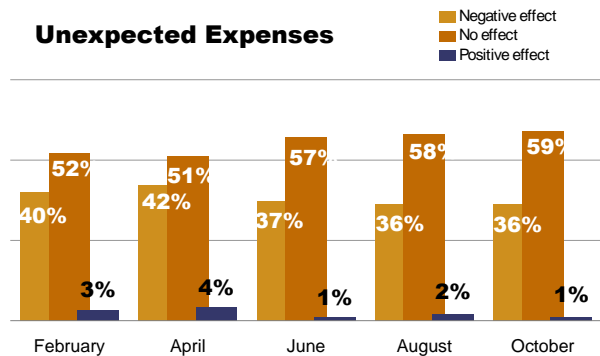


### Negative Effect of Investments Remains High

Holding steady from August, 39% of donors report the value of their investments as having a negative effect on their giving.



Also stable since August, 36% of donors say unexpected expenses negatively affect their giving.



### 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.

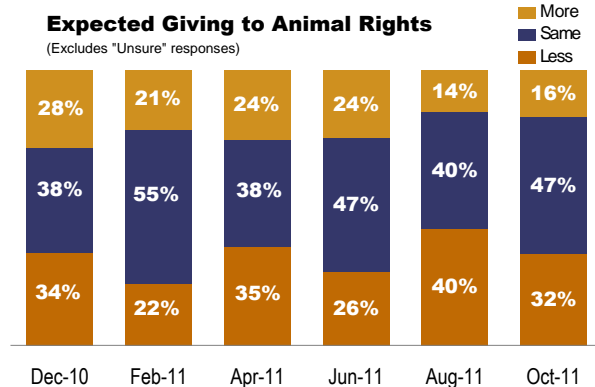
The sections below highlight the stated plans donors have for giving to each of the following nonprofit categories:

- 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 rose 3.2 points since last issue, to 83.2. The 6-month rolling average declined slightly to 82.4.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Animal Rights	92.0	89.7	84.8	84.0	80.0	83.2
6-mo Avg.	90.1	91.6	88.8	86.2	82.9	82.4



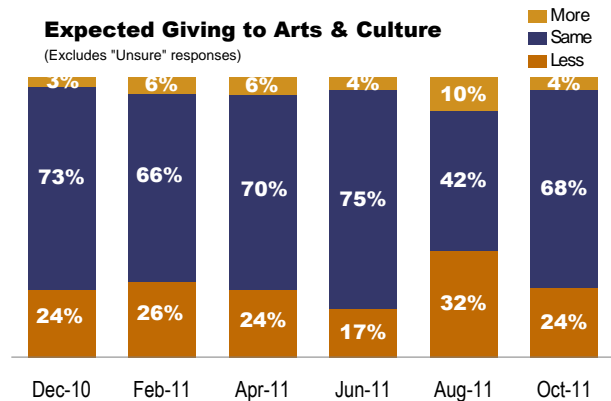
As of October, nearly half (47%) plan to donate the same amount to Animal Rights throughout 2011. One in three (32%) plan to give less and 16% plan to give more.

### Arts, Culture, and Humanities

The Index among donors to Arts and Culture organizations stands at 90.1, an increase of 4.9 points over the past two months.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Arts & Culture	103.1	88.0	88.8	89.3	85.2	90.1
6-mo Avg.	93.9	95.6	93.3	88.7	87.8	88.2

A wide majority (68%) plan to give the same amount to this sector in 2011 as in 2010.

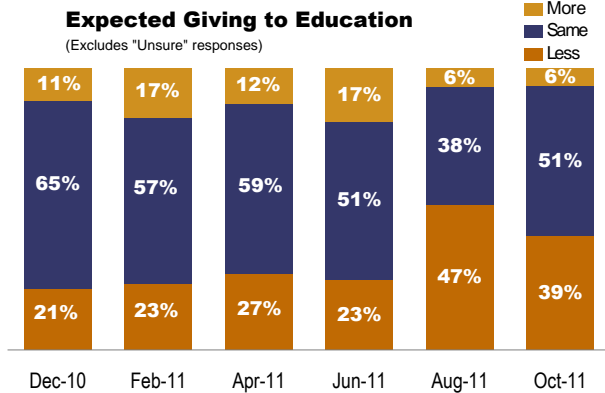


### Educational Institutions & Programs

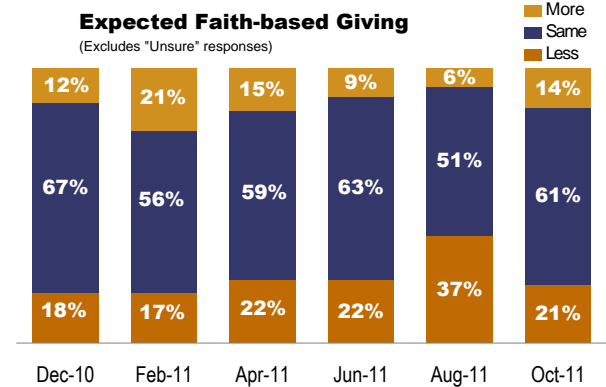
Confidence among donors to Educational Institutions has risen 2.8 points since August to 87.4.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Education	97.7	93.8	93.8	90.5	84.6	87.4
6-mo Avg.	92.7	95.0	95.1	92.7	89.6	87.5

About half the donors to Education (51%) now plan to donate the same to this sector as last year. Two in five (39%) plan to give less this year.



Three in five donors (61%) presently plan to give the same amount to Faith-based organizations this year as last. One in five (21%) say they will donate less and 14% plan to donate more.



**Environmental Protection**

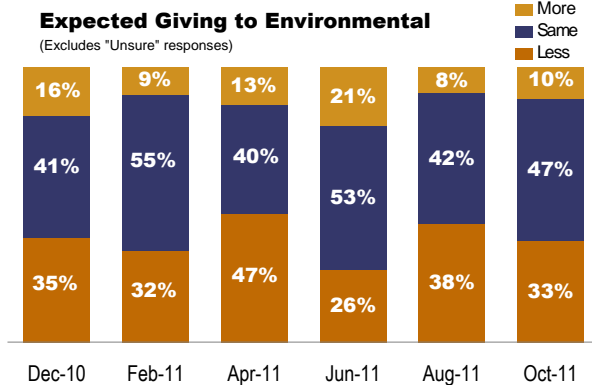
The DCI for Environmental charities has increased 3.1 points this issue to 88.2.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Environmental	92.9	90.8	93.5	87.2	85.1	88.2
6-mo Avg.	90.9	92.0	92.4	90.5	88.6	86.8

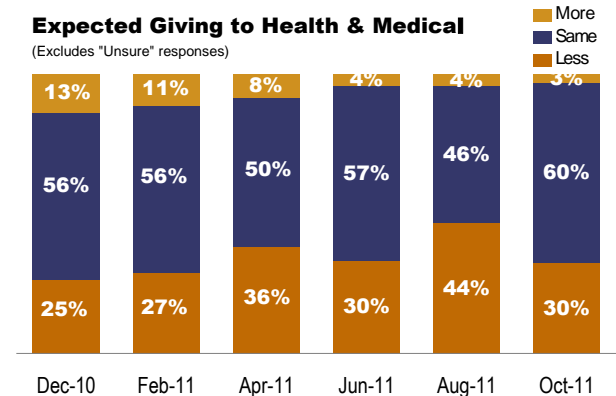
**Health and Medical Charities**

With a score of 87.1, confidence among donors to Health and Medical charities is up 2.4 points since last issue.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Health and Medical	93.8	88.4	91.2	89.7	84.7	87.1
6-mo. Avg.	90.8	91.8	91.1	89.8	88.5	87.2



Today, 60% plan give the same amount to Health-related organizations, while 30% plan to give less.



One in three donors to the Environmental sector (33%) currently plan to give less throughout 2011. Approximately half (47%) plan to give the same dollar amount.

**Faith-based Charities**

The Index for Faith-based organizations has jumped 5.5 points since August to 90.1. The rolling average for this sector stands at 89.5.

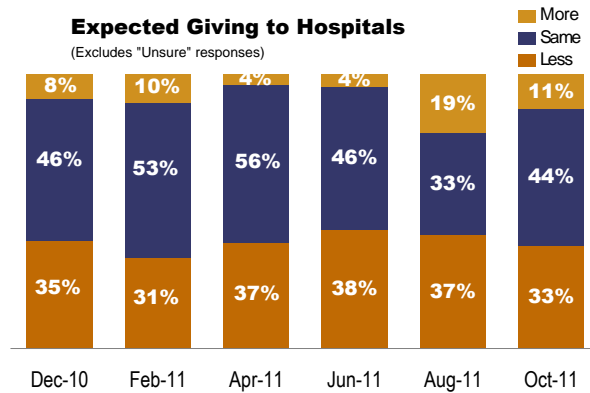
Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Faith-based	97.3	92.8	91.8	93.7	84.6	90.1
6-mo. Avg.	92.5	93.8	94.0	92.8	90.0	89.5

### Hospitals & Hospital Foundations

The DCI for Hospitals and their Foundations rose 4.4 points in October. At 85.9, the sector's current score and rolling average are identical.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Hospitals	94.4	92.6	91.0	90.2	81.5	85.9
6-mo. Avg.	92.0	93.8	92.7	91.3	87.6	85.9

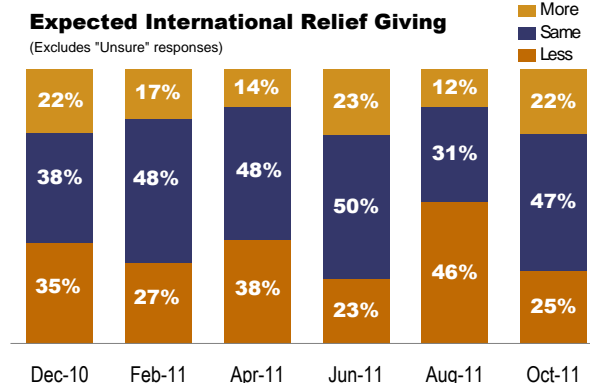
This issue, 44% of Hospital donors plan to give the same amount and 33% plan to give less. One in ten (11%) expect to give more.



### Int'l Relief & Sponsorship

Up four points over two months, the Index for International Relief charities is 94.2 (the highest of any sector in October).

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Int'l Relief and Development	102.1	95.7	92.2	92.8	90.2	94.2
6-mo. Avg.	95.6	97.8	96.7	93.6	91.7	92.4



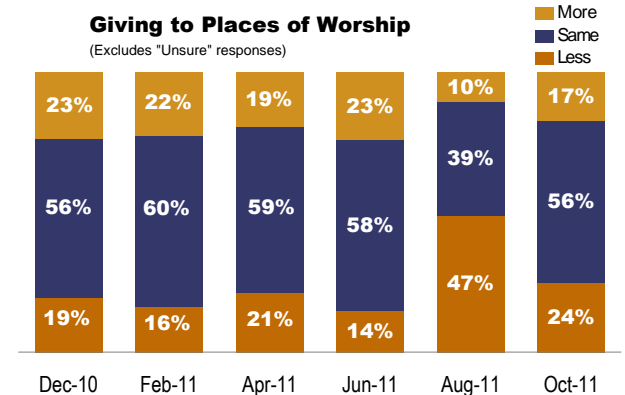
Despite consistently high DCI scores, expected giving to this sector remains largely unstable. As of October, 47% plan to give the same amount, while 25% plan to give less and 22% plan to give more.

### Places of Worship

The Index for Places of Worship climbed 4.2 points to 87.7 in October.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Places of Worship	94.6	90.0	92.0	90.8	83.5	87.7
6-mo. Avg.	91.7	92.5	92.2	90.9	88.8	87.3

A majority (56%) now report plans to give the same this year compared to last year. One in four (24%) plan to give less.

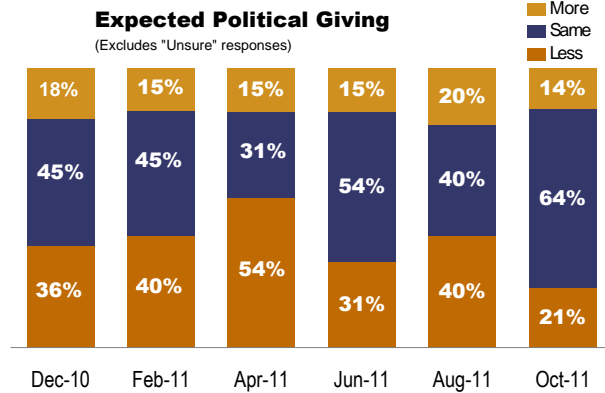


### Political & Advocacy

The DCI for Political and Advocacy groups has jumped 7 points since August to 91.3. Notably, confidence scores for this sector tend to fluctuate severely.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Political and Advocacy	98.7	91.3	85.5	100.1	84.3	91.3
6-mo. Avg.	91.3	94.2	91.8	92.3	90.0	91.9

In October, 64% report plans to give the same amount to the sector throughout 2011. One in five (21%) expect to give less and 14% expect to give more.

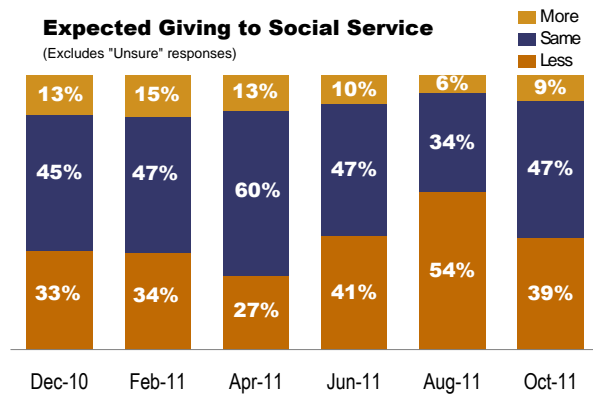


**Social Service**

The Index for Social Service organizations has increased 3.1 points in the past two months, standing at 88.2.

Sector	Dec '10	Feb '11	Apr '11	Jun '11	Aug '11	Oct '11
Social Svcs	95.6	88.6	91.3	91.0	85.1	88.2
6-mo. Avg.	90.1	91.4	91.8	90.3	89.1	88.1

Up 13% from August, 47% of donors currently plan to give the same amount to the sector in 2011 as they did in 2010. Two in five (39%) plan to give less this year.



**Methodology**

This Donor Confidence Report poll was conducted November 15-17, 2011 among 524 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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