



NONPROFIT FUNDRAISING SURVEY

Fundraising Impact of COVID-19

Edition II

May 21 - June 1, 2020

LETTER FROM OUR CHAIRMAN

CCS Fundraising is pleased to share the findings from our second edition of the Philanthropic Climate Survey – *Fundraising Impact of COVID-19* research report. This report reflects the responses of 1,014 individuals representing nonprofit organizations collected between May 21 and June 1, 2020. In addition to a set of new information, this report also includes comparisons to the data collected during the first edition of the survey that received 1,183 responses between April 20 and May 1.

We believe the size of the data set and the timeliness of these responses provide an illuminating picture of the depth and scale of the continued impact of the crisis on fundraising in the nonprofit sector.

The following are among the most significant findings of this survey:

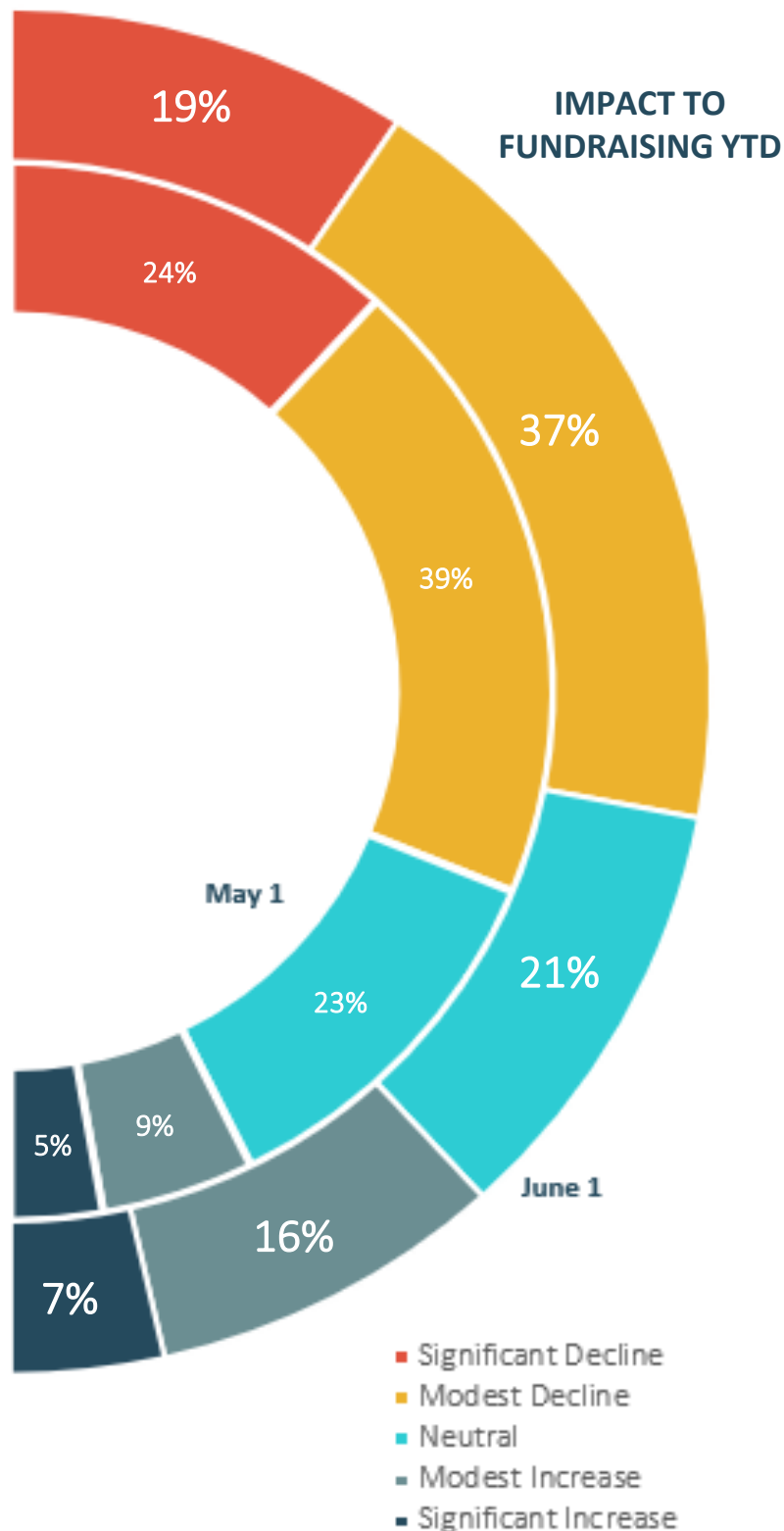
- The overall picture is notably more positive than it was a month ago, with fewer organizations reporting a negative impact on fundraising today, and a somewhat brighter outlook on fundraising projections for the rest of the year.
- Still, the picture remains challenging for nonprofits. More than 50% of nonprofits reported a fundraising decline.
- Expectations for declines in fundraising vary by type of fundraising program. Respondents demonstrated the most confidence in foundation giving, with 73% citing they expect giving from foundations to remain the same or increase through year end.
- Organizations are adapting - just under two-thirds of respondents reported that they were either considering or had held a virtual fundraising event. Similarly, nearly two-thirds of respondents reported undertaking a special appeal or emergency fund.
- Following trends seen in the first edition of this survey, most nonprofits plan to continue with their major pre-existing campaign plans, despite the pandemic, with appropriate modifications.
- The number of nonprofits reporting layoffs and furloughs of fundraising staff increased slightly from the last survey, though a majority of respondents (72%) reported that they either had no staffing changes or added staff.

As always, it is our hope that the information provided here will help guide your organization to make clear, thoughtful decisions through this crisis as well as in the future.

Robert Kissane
Chairman
CCS Fundraising

HOW THE COVID-19 CRISIS HAS AFFECTED FUNDRAISING THUS FAR

Fundraising results improved during the month of May.

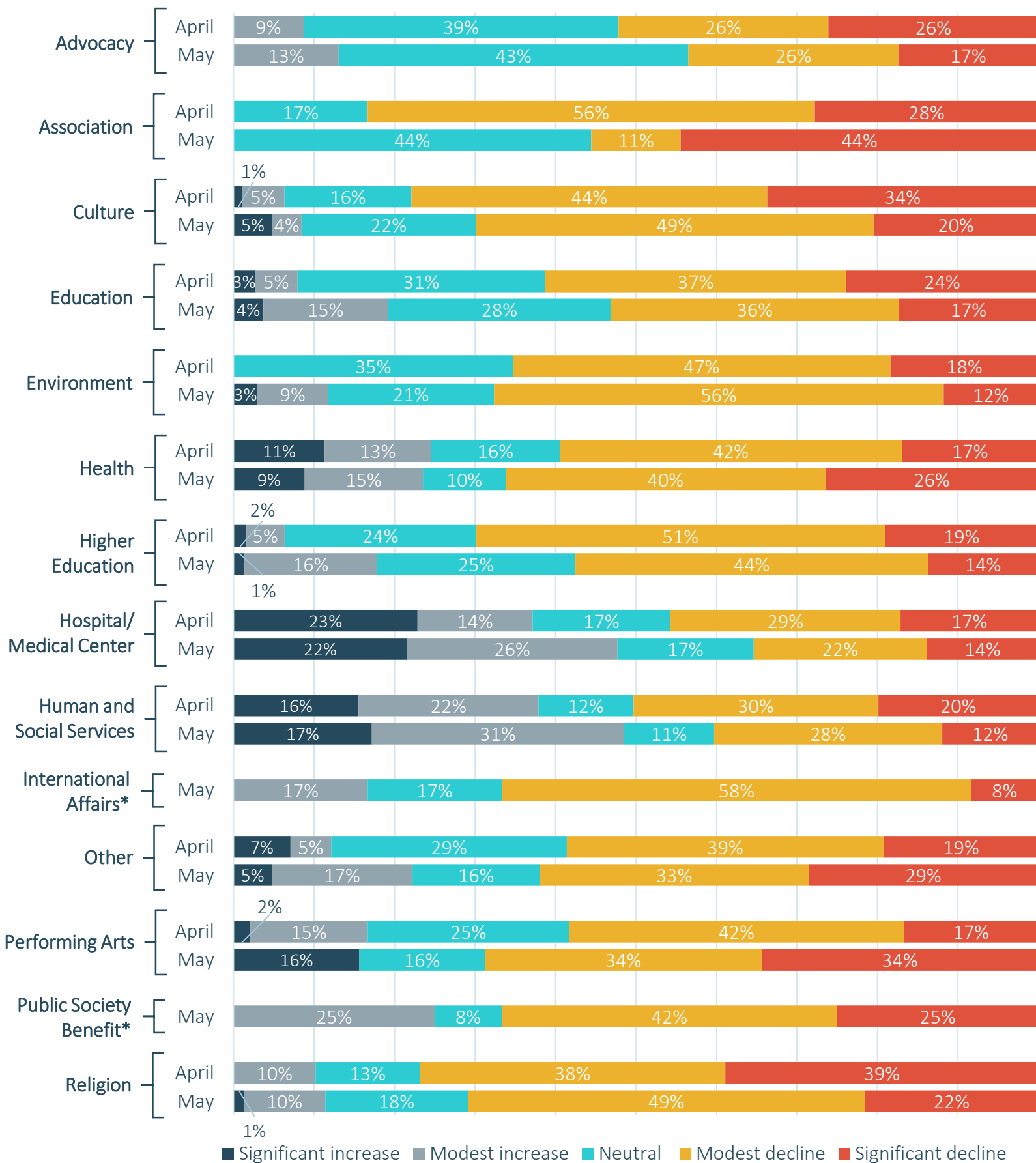


While the picture is still challenging for nonprofits, when comparing the reported results from the first edition of this survey (which closed May 1) against this edition (which closed June 1), fundraising has improved markedly.

Fundraising increases have been reported by 23% of respondents, while only 14% cited increases on May 1.

Decreases to fundraising results were reported by 63% of respondents on May 1, while this number reduced to 56% for the June 1 report.

IMPACT TO FUNDRAISING YTD BY SECTOR



*No April data available

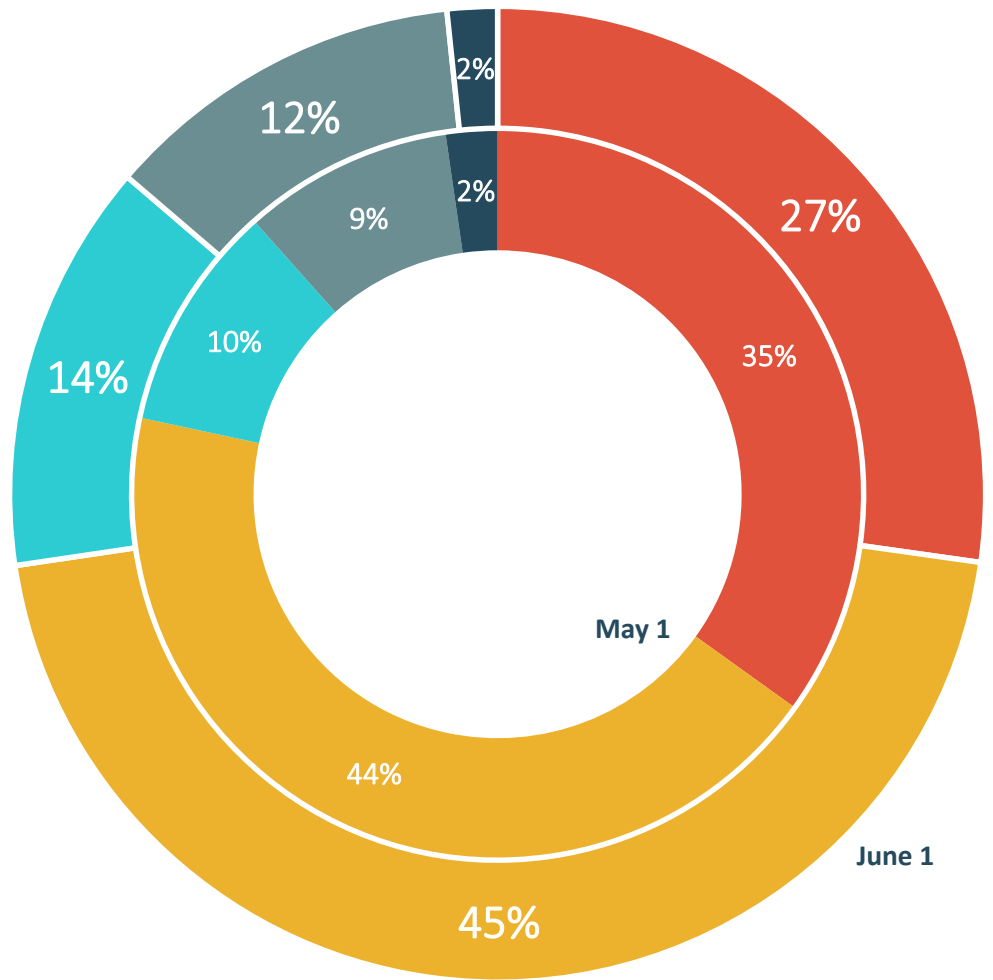
PROJECTED COVID-19 IMPACT THROUGH END OF YEAR

Nearly 72% of respondents expect declines by year end, fewer than reported in May.

ANTICIPATED IMPACT ON FUNDRAISING THROUGH END OF YEAR

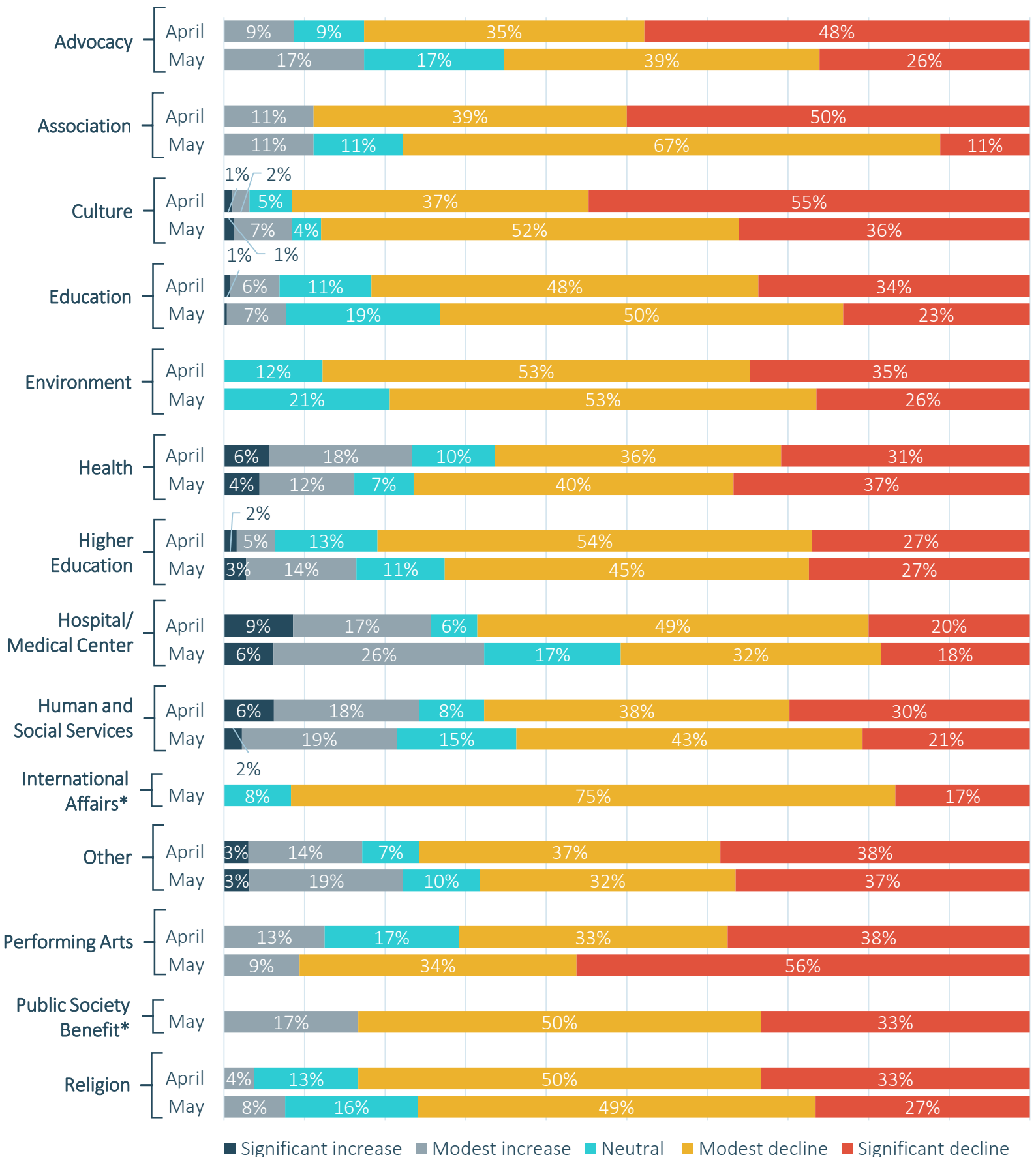
The sentiment regarding expectations through the end of the year is also improving.

While the majority of nonprofits responding to this survey (72%) expect a decline, this is a lower proportion than the 79% who reported in May that they were expecting declines.



- Significant Decline
- Modest Decline
- Neutral
- Modest Increase
- Significant Increase

IMPACT BY SECTOR THROUGH END OF YEAR



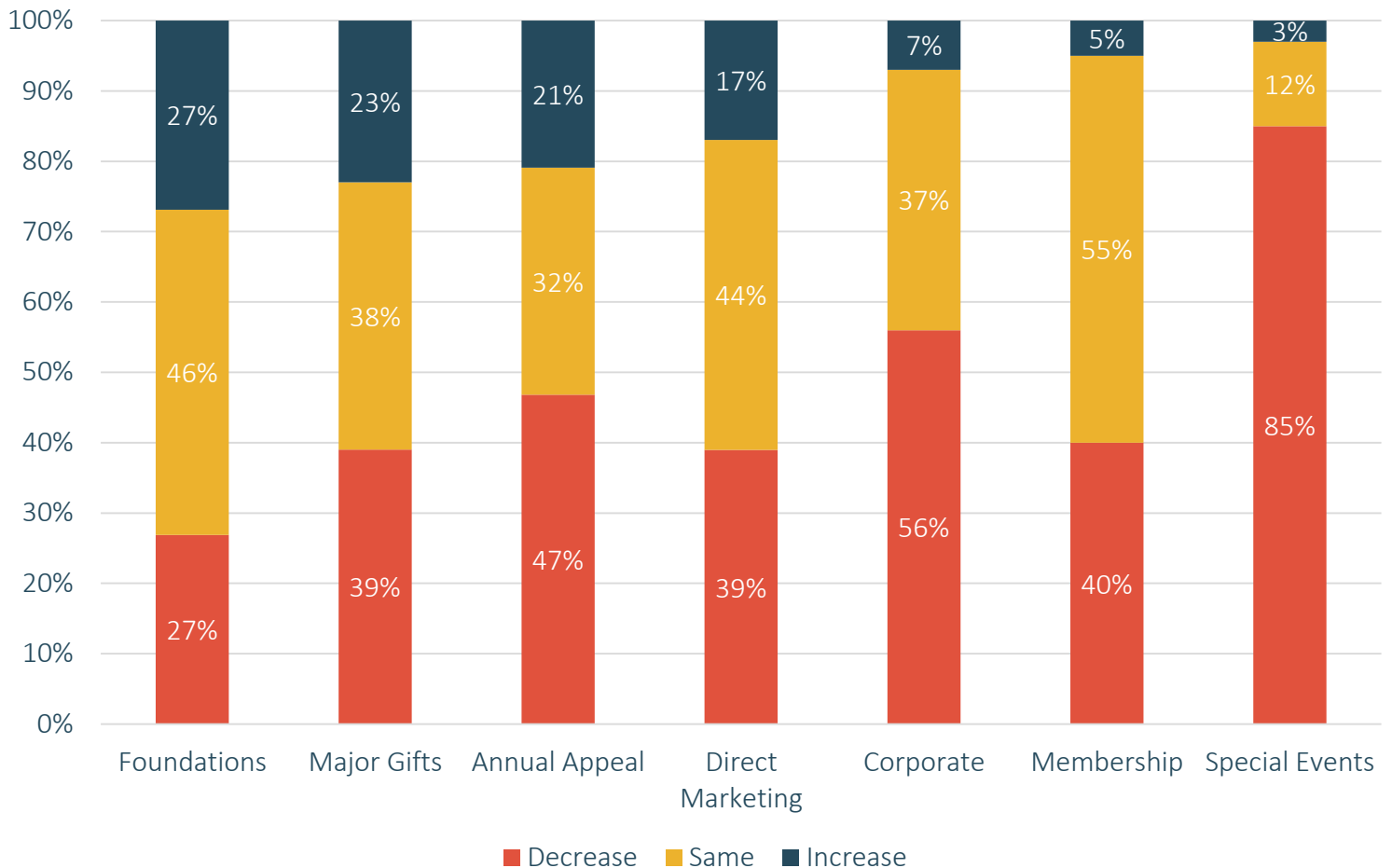
*No April data available

PROJECTED COVID-19 IMPACT THROUGH END OF YEAR BY FUNDRAISING PROGRAM

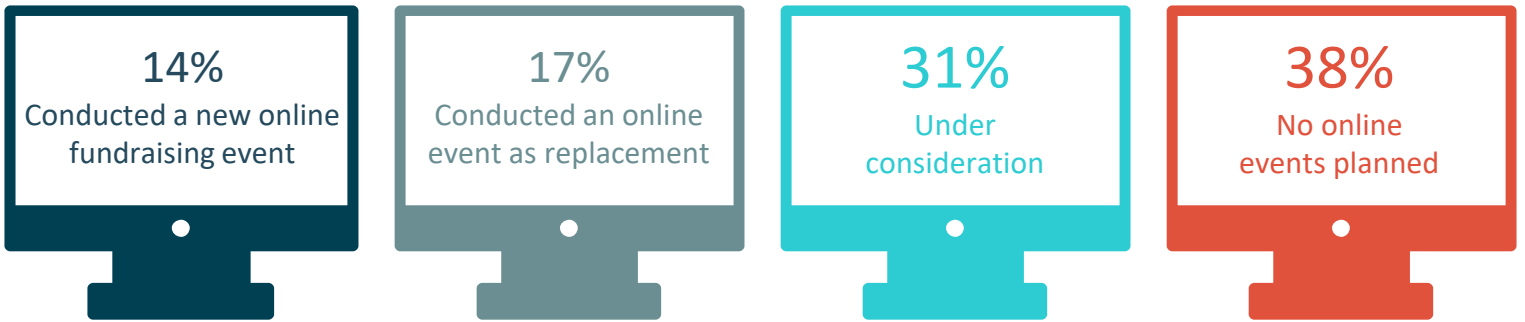
Expectations vary across fundraising programs, but the highest level of confidence appears to rest with continued (or increased) grants from foundations.

Nearly 1 in 4 respondents expect an increase in their major gifts programs, and 1 in 5 project an increase in their annual appeal.

Special events (85%) and corporate giving (56%) are the programs with the highest reported expectations for 2020 declines.



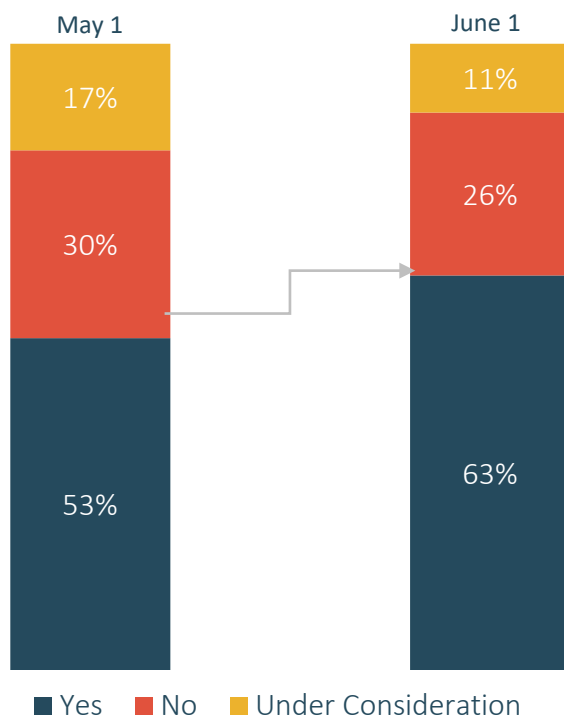
ONLINE FUNDRAISING EVENTS & COVID-19 EMERGENCY FUNDS



Nearly 1 in 3 nonprofit respondents (31%) have conducted an online fundraising event (something new or a replacement for a pre-existing physical event), while another 31% are considering hosting one.

The remaining 38% of respondents are not currently planning an online fundraising event.

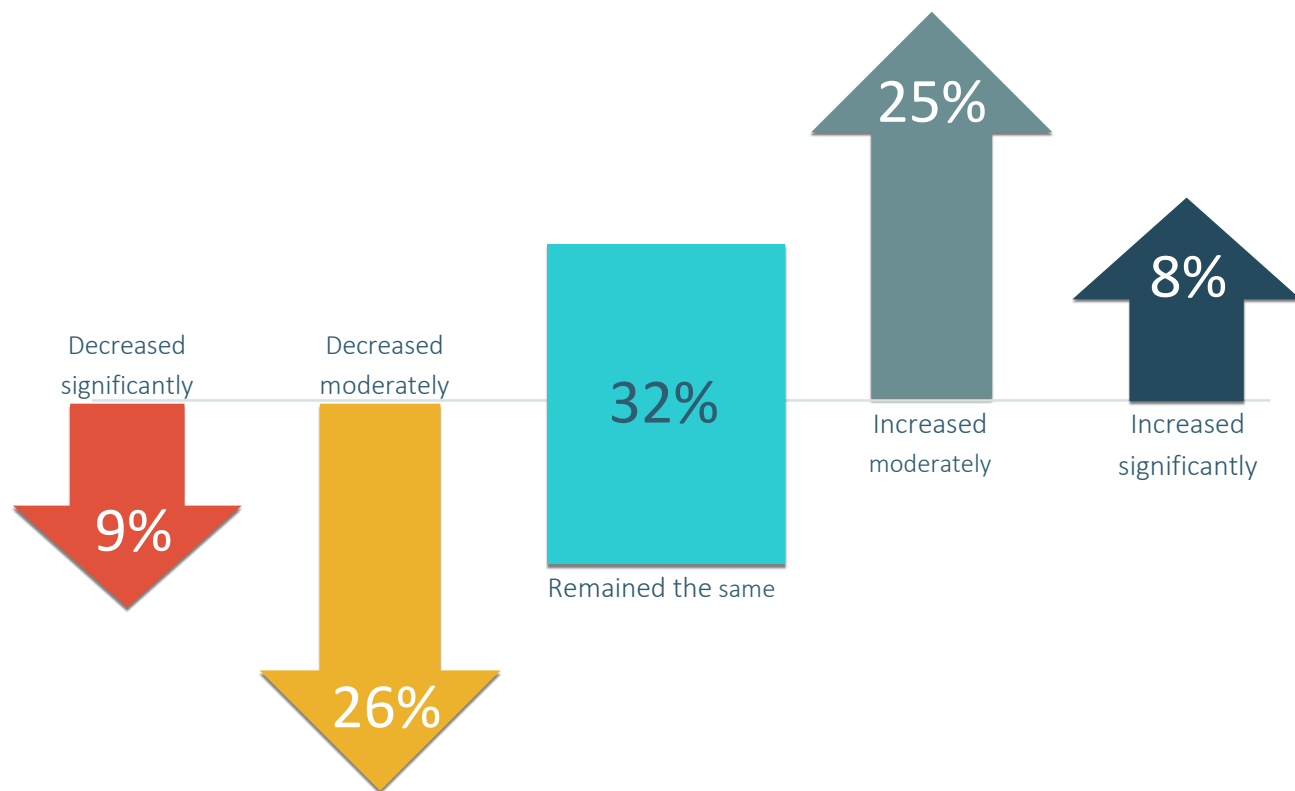
SPECIAL APPEALS/ EMERGENCY FUNDS



The proportion of nonprofits who established an emergency fund or conducted a special appeal increased during the month of May, jumping from 53% to 63%.

UNRESTRICTED FUNDING LEVELS DURING COVID-19 VS. PRE-COVID

Similar amounts of nonprofits have seen their unrestricted funding increase during the pandemic as those who have seen it decrease. About 1 in 3 have not experienced any change in their unrestricted dollars.



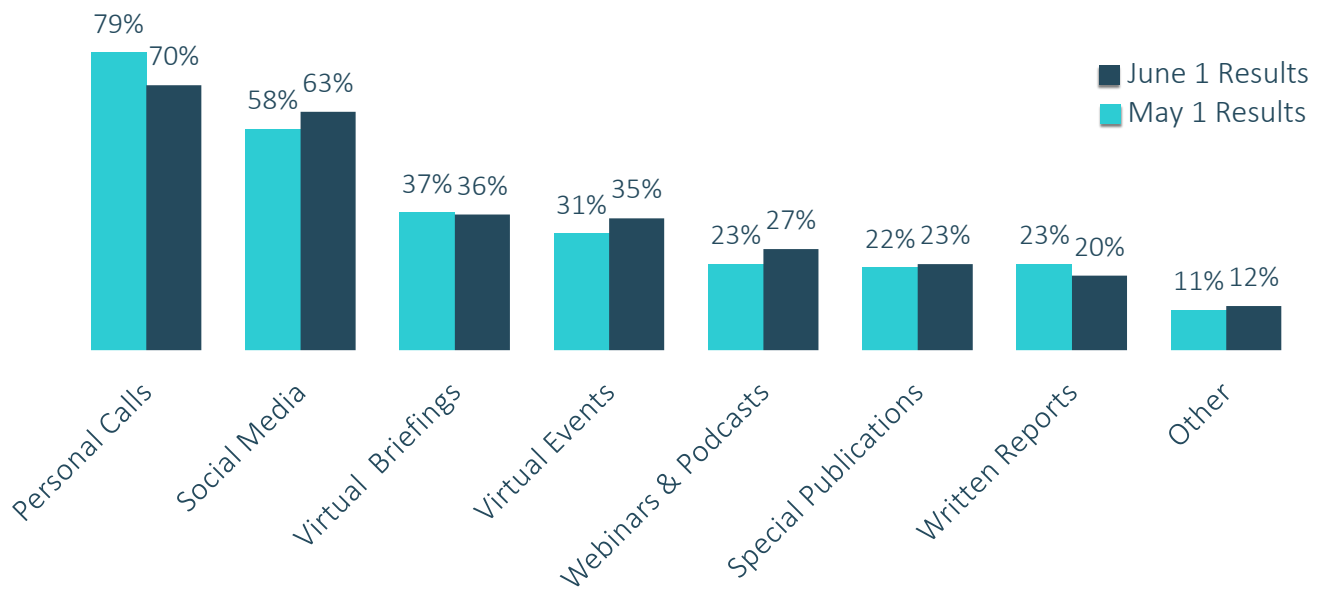
Health and Religion were the sectors with the highest number of significant decreases to unrestricted funds, while Human and Social Services and Performing Arts saw more significant increases than any other sectors.



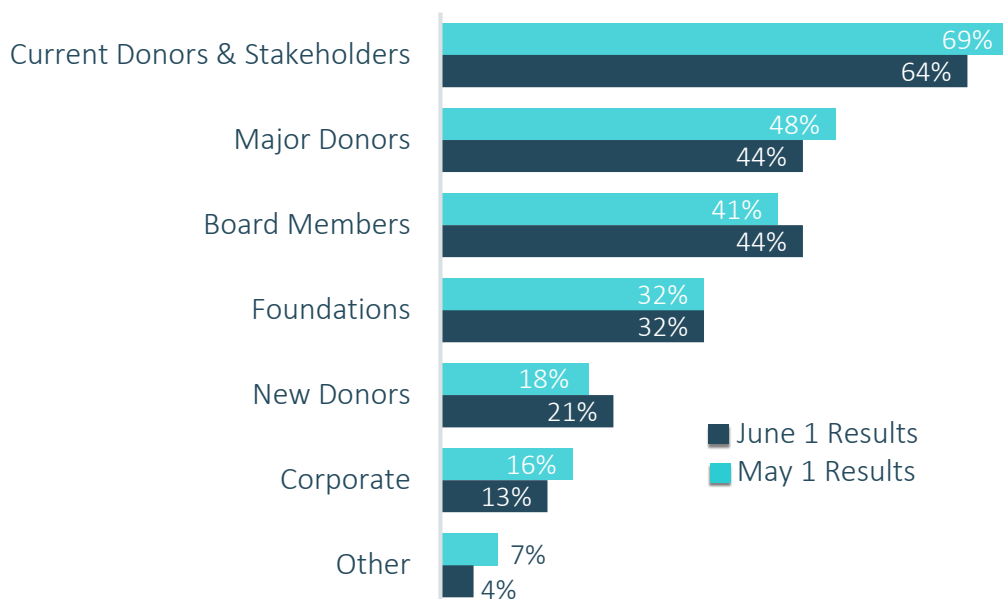
DONOR ENGAGEMENT METHODS & PRIMARY SOURCES OF SUPPORT

Donor engagement methods leveraging technology have risen during the month of May, with an increased percentage of respondents citing their use of social media, virtual events, and webinars/podcasts.

DONOR ENGAGEMENT METHODS



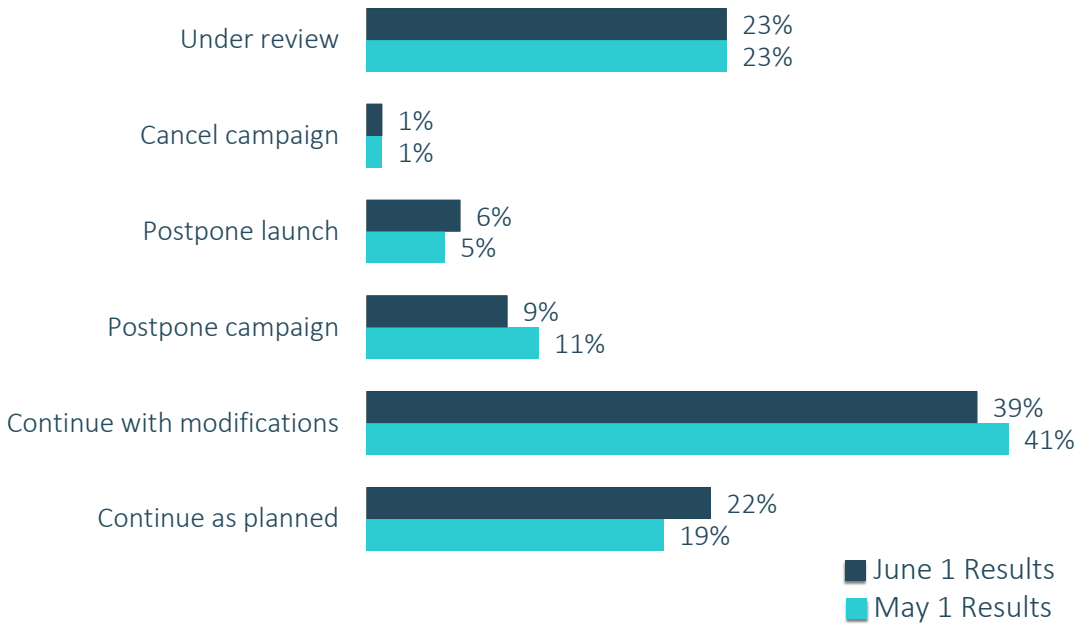
PRIMARY SOURCES OF CURRENT SUPPORT



Comparing June results to May results, there were slight increases for new donors and board members coupled with decreases for current donors, major donors, and corporate donors.

CAMPAIGN CHANGES & ADJUSTMENTS TO FUNDRAISING GOALS

CHANGES TO MAJOR CAPITAL OR COMPREHENSIVE CAMPAIGNS

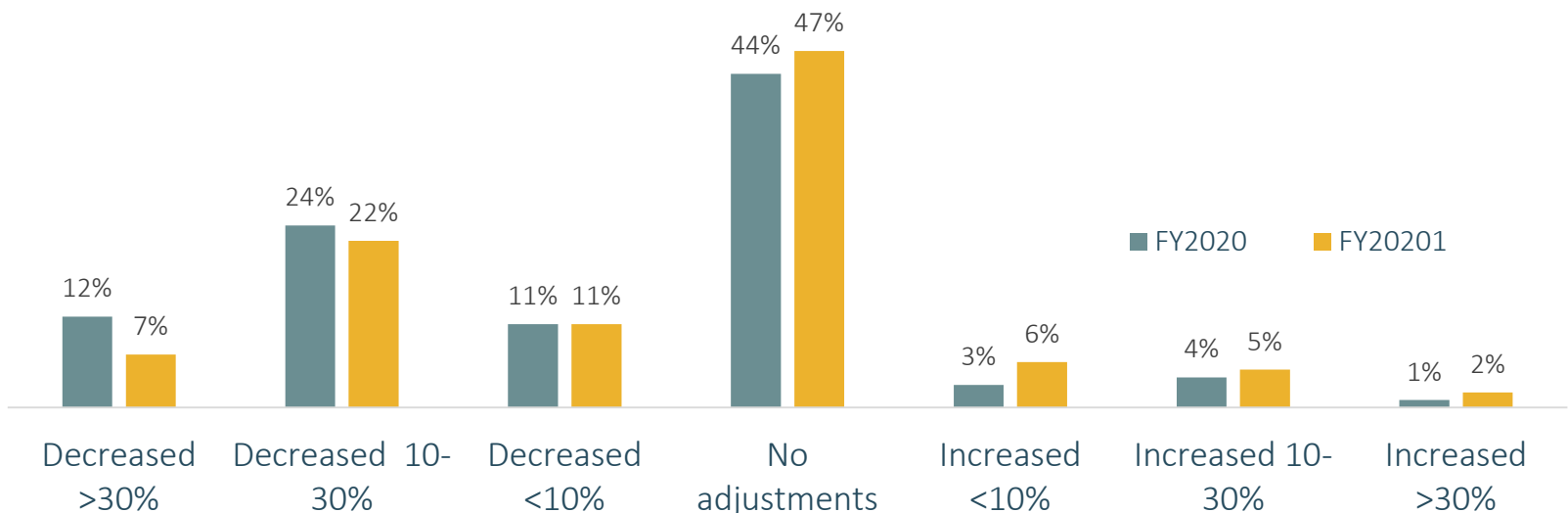


Nonprofits continue to report as of June 1 that they plan to stay the course (with some modifications, but fewer than reported on May 1) regarding their campaign plans.

As they did in the previous month's survey, 1% of respondents noted campaign cancellations.

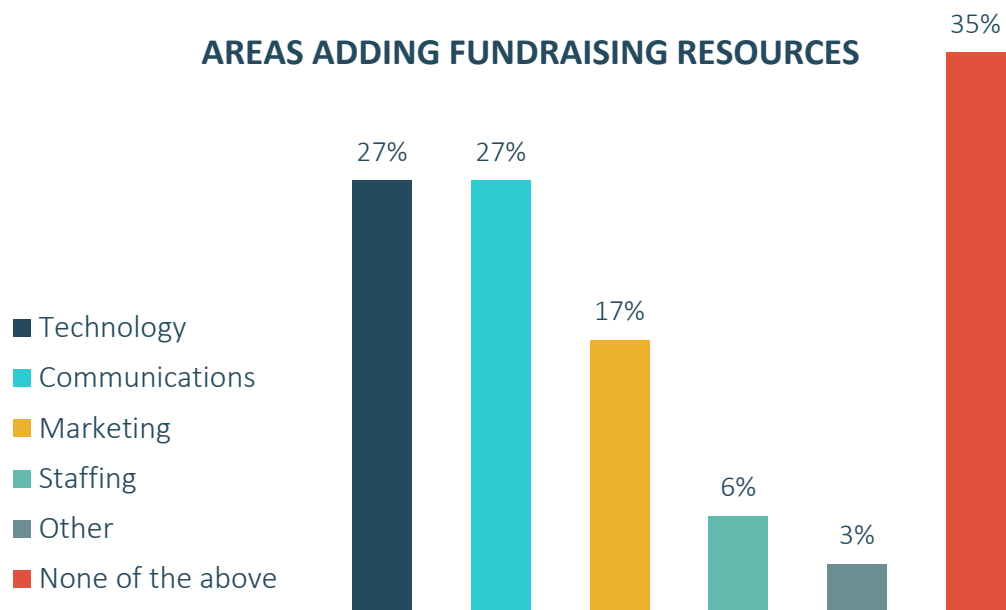
Fundraising goals have been adjusted downward for FY2020 in nearly half of the responses, while 4 in 10 report downward adjustments for FY2021.

ADJUSTMENTS TO FUNDRAISING GOALS



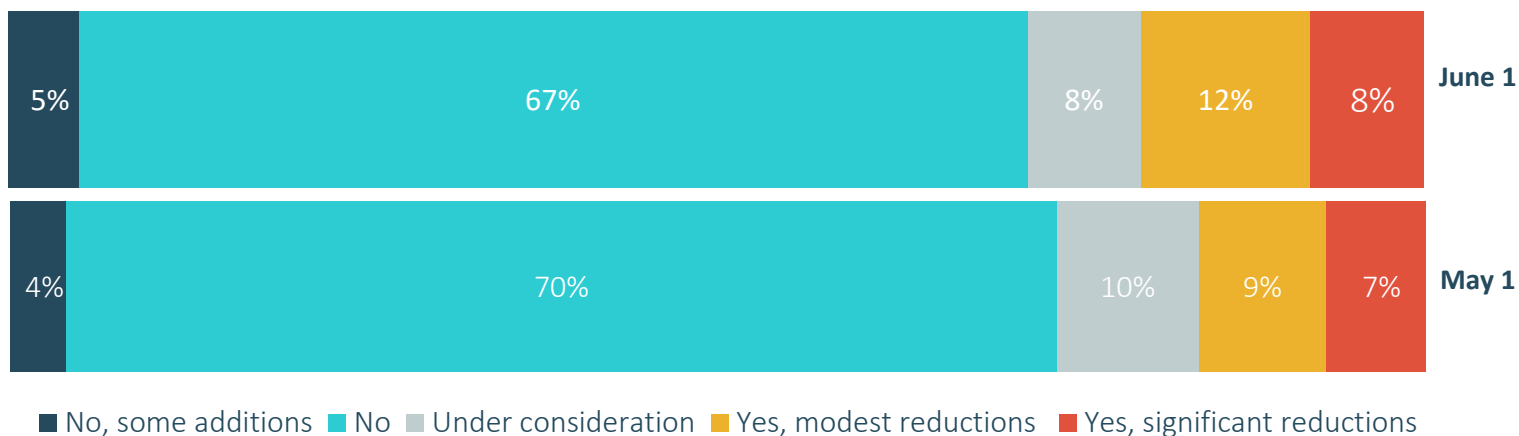
FUNDRAISING RESOURCE ADDITIONS & FUNDRAISING STAFF LAYOFFS/FURLOUGHS

AREAS ADDING FUNDRAISING RESOURCES



Investments are reported as having been made primarily in technology and communications, while 1 in 3 nonprofits are not adding fundraising resources in any category.

FUNDRAISING STAFF LAYOFFS/FURLOUGHS



While those nonprofits citing staff reductions increased slightly when comparing responses from May 1 to June 1, the combined amount of nonprofits who either added staff or had no staffing change reduced by only 1% (73% to 72%).

About CCS

CCS Fundraising is a strategic consulting firm that partners with nonprofits, providing a wide range of services that support and strengthen their fundraising programs. Founded in 1947, CCS operates in more than a dozen offices in countries around the world.

The firm’s experts—skilled in campaign and development strategy—work closely with organizations of all sizes across nonprofit sectors. For more information, visit ccsfundraising.com.

CCS Fundraising is an active corporate member and strategic partner of many prominent philanthropic membership organizations including:

- Founding member and major support partner of the Giving Institute and Giving USA
- Association of Healthcare Professionals
- Association of Fundraising Professionals
- Council for Advancement and Support of Education (CASE)
- International Catholic Stewardship Council

About This Report

This report was generated based upon data collected via an online questionnaire administered by CCS Fundraising between the dates of May 21 – June 1, 2020.

All responses were submitted voluntarily and represent reflections from 1,014 professionals at nonprofits both within and outside of the United States. Their sector representation is outlined in the accompanying chart.

Percentages have been rounded throughout the report, which, in some cases, leads to a total that does not equal 100.

Advocacy	24
Association	9
Cultural	86
Education	281
Environment/ Animals	39
Health	69
Higher Education	81
Hospitals/ Medical Centers	72
Human & Social Services	141
International Affairs	14
Performing Arts	32
Public Benefit	15
Religion	82
Other	69



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