



NONPROFIT FUNDRAISING SURVEY

Fundraising Impact of COVID-19

April 20 – May 1, 2020

LETTER FROM OUR CHAIRMAN

In order to better understand the immediate philanthropic impact of the COVID-19 pandemic on nonprofits, CCS conducted a broad scale fundraising survey of nonprofit organizations in all major philanthropic sectors.

This report reflects responses from 1,183 nonprofit organizations received between April 20th and May 1st, 2020. We believe the size of the data set and the timeliness of these responses provide an illuminating picture of the depth and the scale of the initial impact of the crisis on nonprofit sector fundraising.

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

- 63% percent of responding nonprofits cite a decline in fundraising since the start of the pandemic
- One-in-four nonprofits report a significant fundraising decline over this same period
- Nearly 80% of respondents expect a decline in fundraising results for the remainder of 2020, with half of these organizations expecting a significant decline
- Slightly more than half of those responding have launched special appeals in response to COVID-19
- Most nonprofits plan to continue with their major pre-existing campaign plans, despite the pandemic, with appropriate modifications
- Despite extraordinary fiscal challenges, few nonprofits have laid off or furloughed fundraising staff.

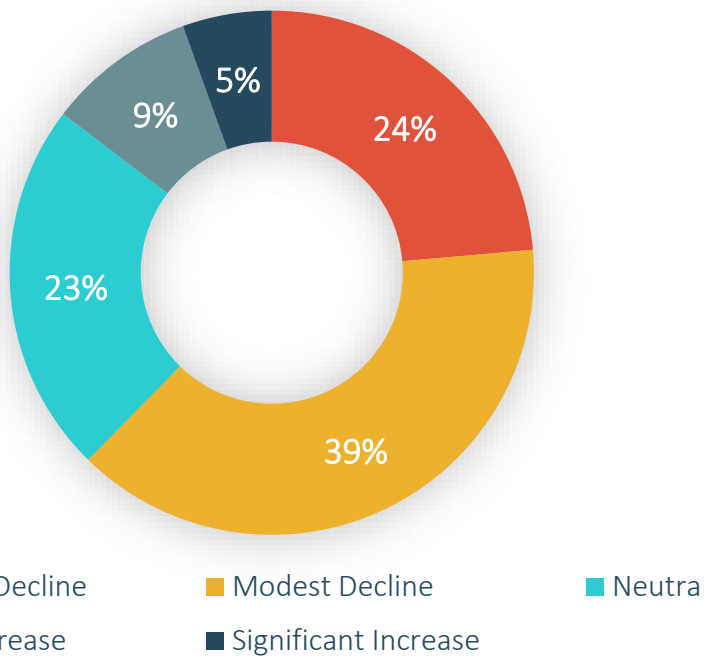
It is our hope that the information provided here will help guide your organization to make clear, thoughtful decisions through this crisis as well as in the future.

Robert Kissane
Chairman
CCS Fundraising

HOW THE COVID-19 CRISIS HAS AFFECTED FUNDRAISING THUS FAR

More than half of nonprofits responding have experienced a decline in philanthropic support since the outbreak of COVID-19.

IMPACT TO FUNDRAISING YTD

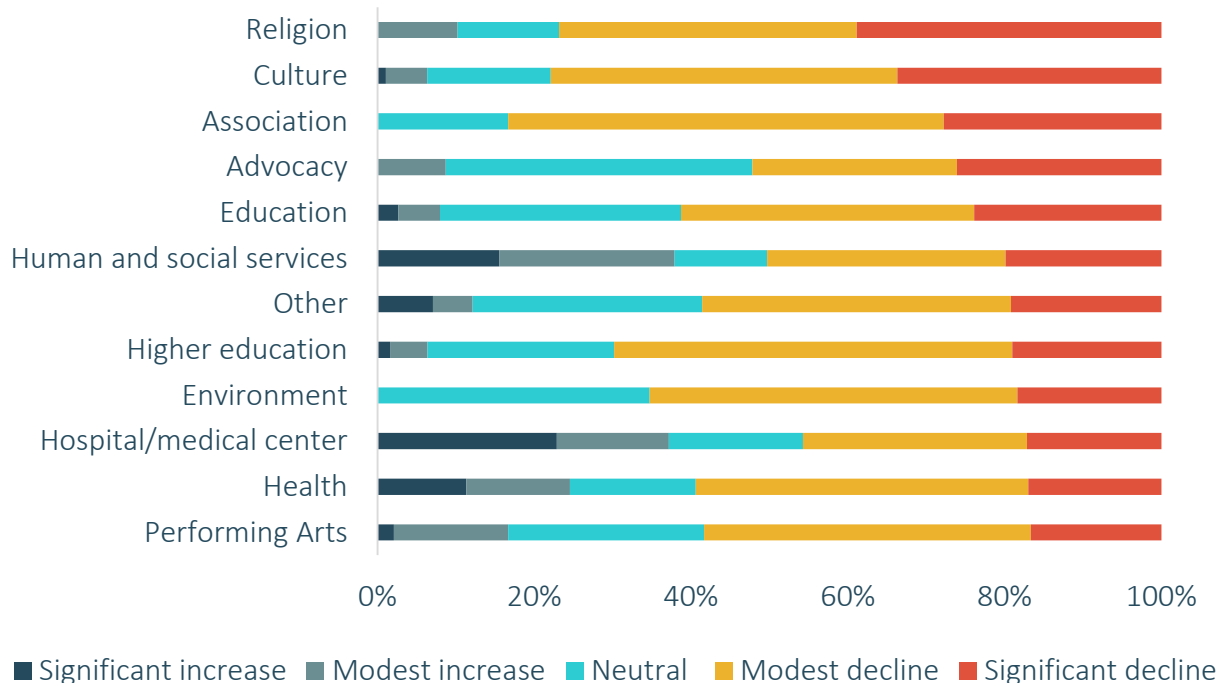


A quarter of respondents noted significant declines at their organizations. An equal percentage saw no changes, and nearly 15% of respondents noted increases.

Those citing increases were primarily hospitals, health and human service organizations.

Religious and cultural organizations are among those particularly hard hit.

IMPACT TO FUNDRAISING YTD BY SECTOR



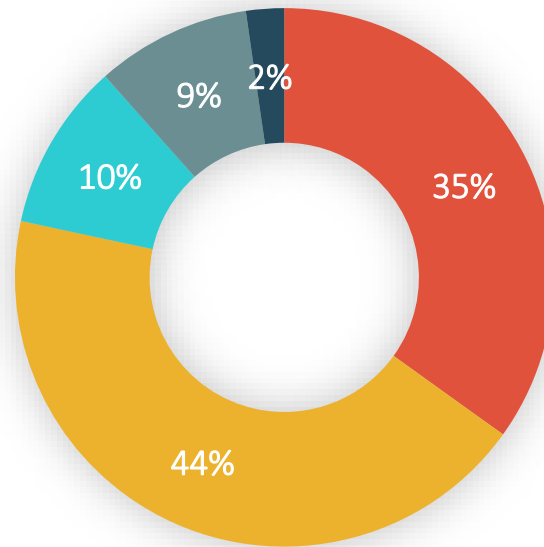
PROJECTED COVID-19 IMPACT THROUGH END OF YEAR

Over 75% of respondents expect declines by year end.

Overall, nonprofits are bracing for a downward trend in fundraising results throughout the remainder of the year.

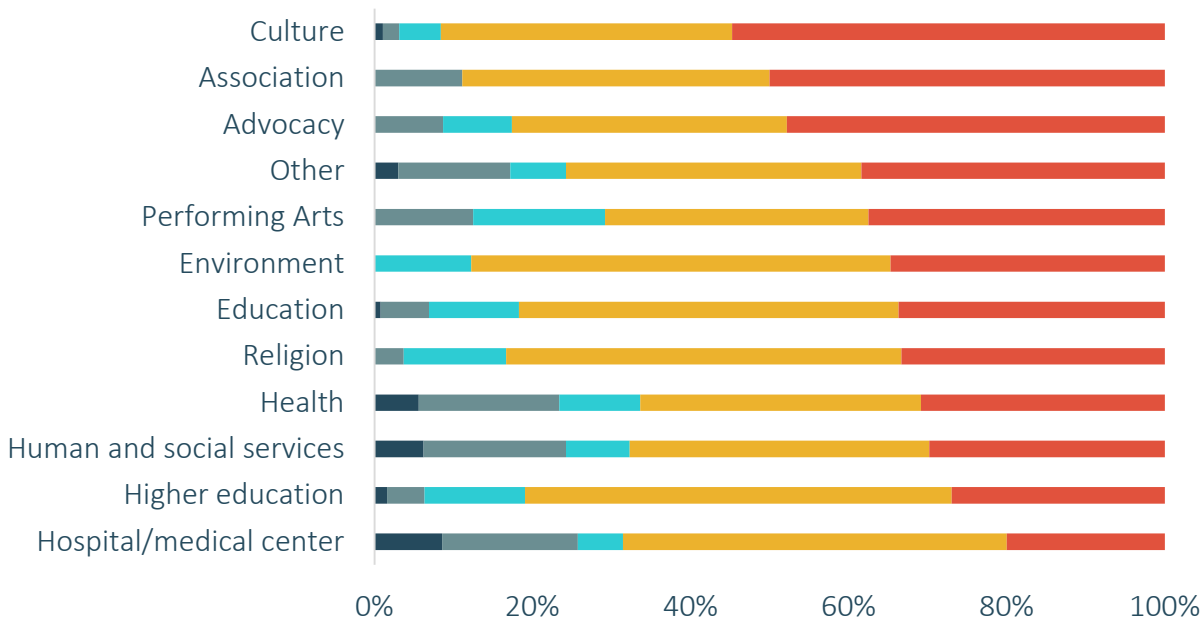
Only about **11%** of organizations surveyed believe they will see an increase.

ANTICIPATED IMPACT ON FUNDRAISING THROUGH END OF YEAR



■ Significant Decline ■ Modest Decline ■ Neutral
 ■ Modest Increase ■ Significant Increase

IMPACT TO FUNDRAISING THROUGH END OF YEAR BY SECTOR



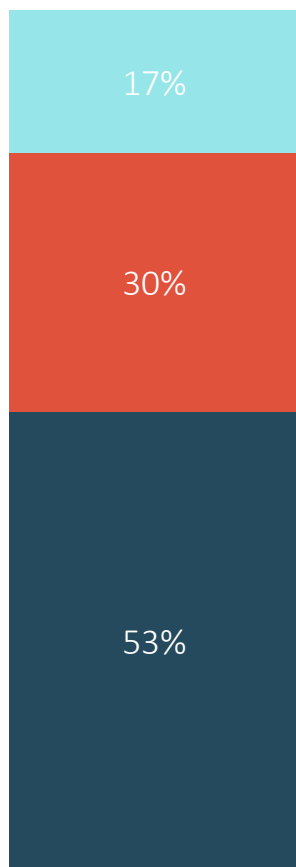
■ Significant increase ■ Modest increase ■ Neutral ■ Modest decline ■ Significant decline

A closer look at the data by sector shows that the majority of respondents in every sector has an expectation that their fundraising will decline through the remainder of 2020.

COVID-19 EMERGENCY FUNDS/ SPECIAL APPEALS

More than half of surveyed organizations have launched a special appeal in response to the pandemic.

**SPECIAL APPEALS/
EMERGENCY FUNDS**



■ Yes ■ No ■ Under Consideration

Hospitals, healthcare, and human service organizations represent sectors reporting the highest percentage of respondents that have launched emergency funds or special appeals in response to COVID-19.

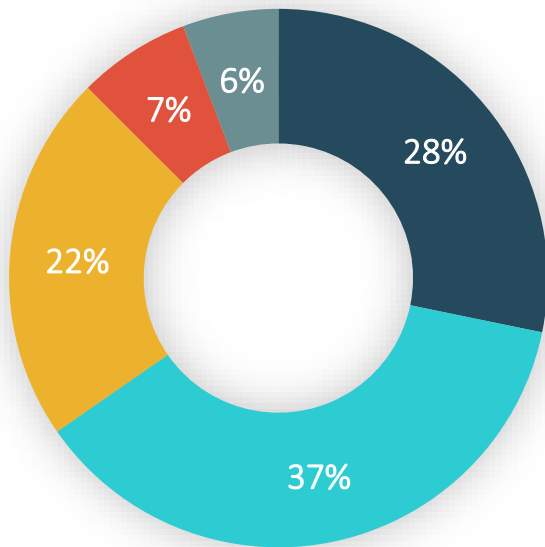
The majority of higher education institutions have also launched such appeals.

Associations, religious groups, advocacy and environmental organizations were least likely to create a fund or launch a special fundraising appeal.

FUNDRAISING APPEAL STRATEGIES DURING COVID-19

65% of organizations have continued to make appeals at the same or greater rate as before.

DEGREE OF CHANGE IN CURRENT FUNDRAISING APPEALS

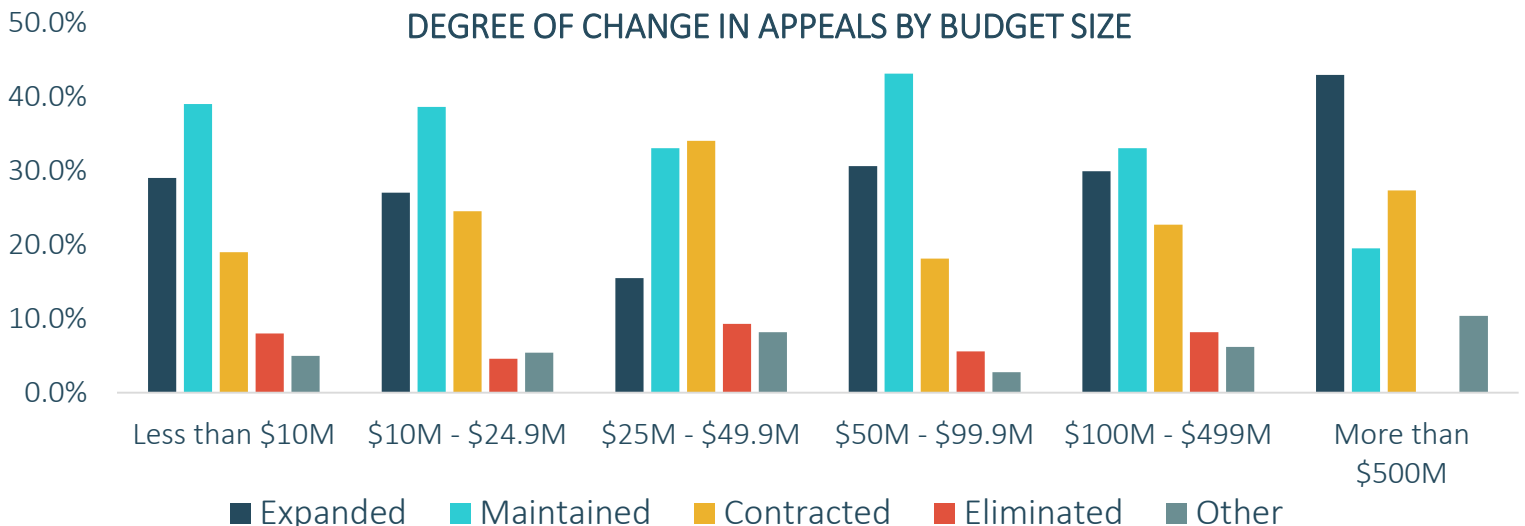


Over a quarter of respondents have expanded appeals while an equal percentage eliminated or contracted them.

- Expanded
- Maintained
- Contracted
- Eliminated
- Other

The nonprofits with largest operating budgets were most likely to have expanded their fundraising appeals.

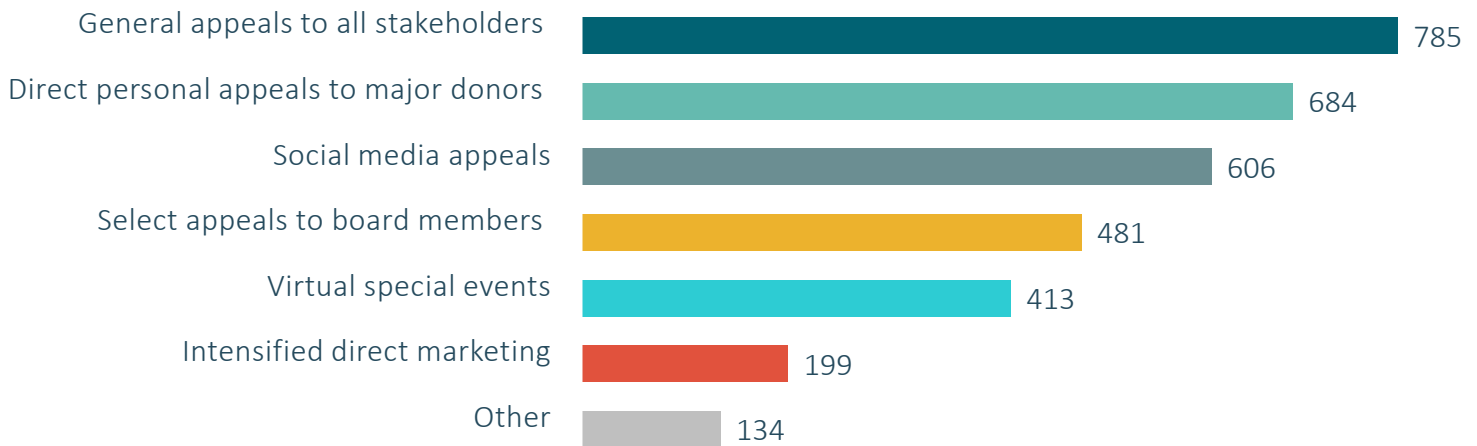
DEGREE OF CHANGE IN APPEALS BY BUDGET SIZE



FUNDRAISING STRATEGIES AND DONOR ENGAGEMENT METHODS

PRIORITIZED FUNDRAISING STRATEGIES

of Responses

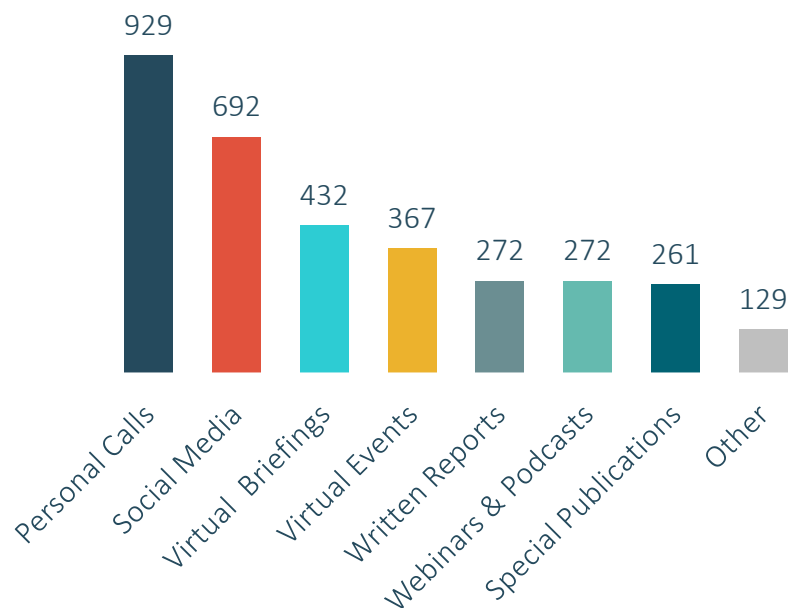


Major donor strategies with direct appeals are a high priority during this time, with a continued focus on general appeals to all stakeholders reported as the only priority strategy cited more often

While social media and virtual contact are playing a prominent role in donor engagement during this period of physical distancing, the most utilized method of donor engagement has been personal phone calls.

DONOR ENGAGEMENT METHODS

of Responses



CHANGES IN CASE FOR SUPPORT

The majority of nonprofits responding are adapting their case for support during this crisis.

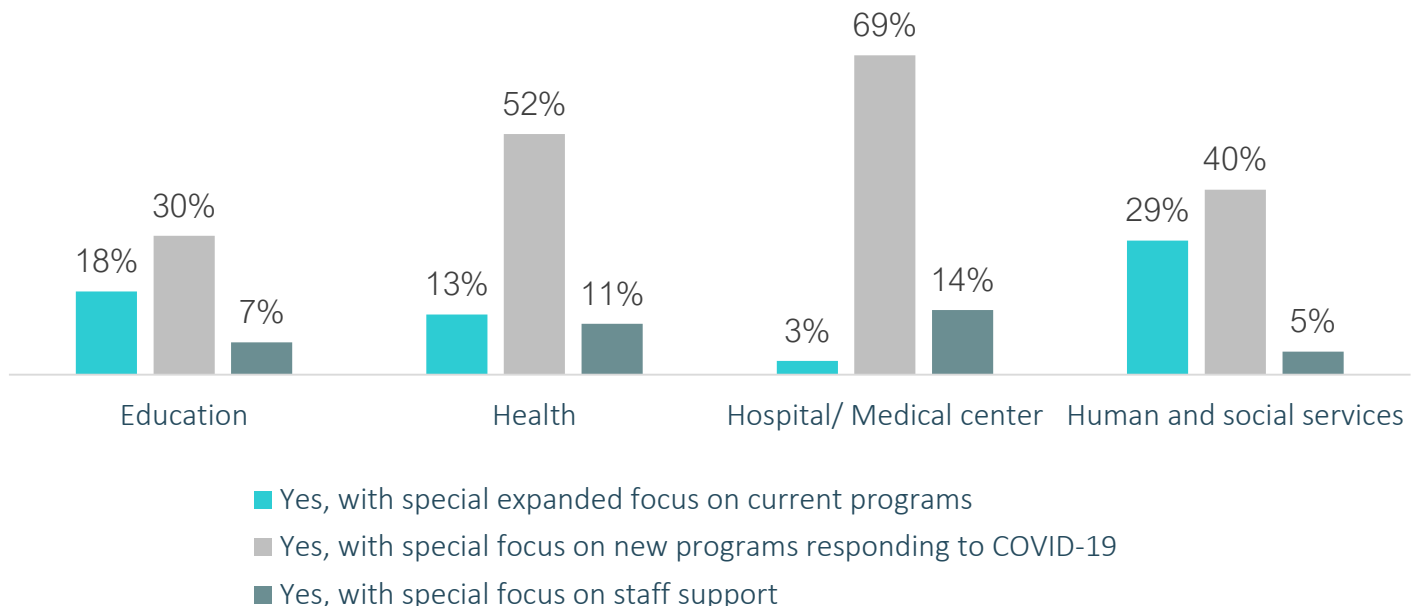
CHANGES TO CASE FOR SUPPORT



Nonprofits are adjusting or expanding their case for support to include new COVID-related programs as well as an enhanced focus on current programs.

The sectors reporting the greatest adjustments to their case for support are education, healthcare, and human services organizations.

SECTORS WITH MOST UPDATES TO CASES FOR SUPPORT

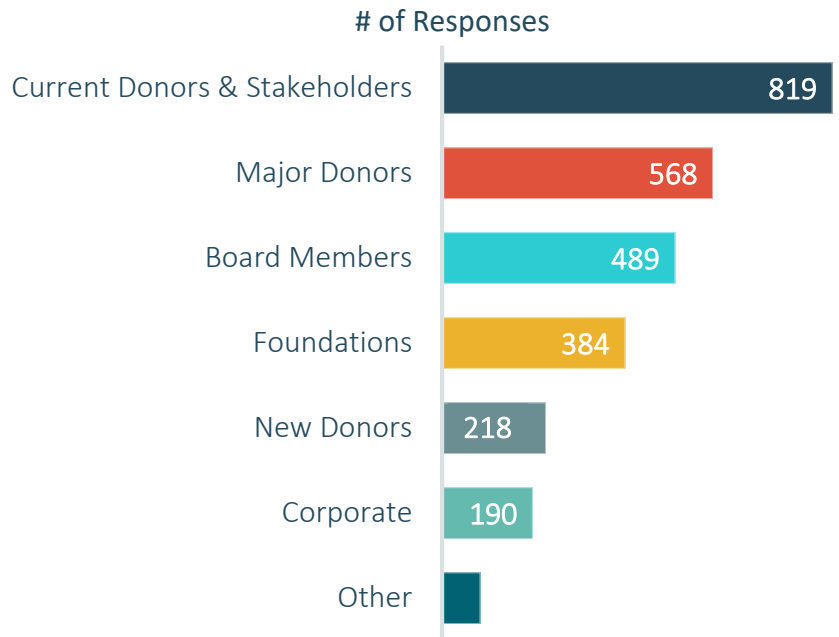


PRIMARY SOURCES OF SUPPORT AND MAJOR CAMPAIGN STRATEGIES

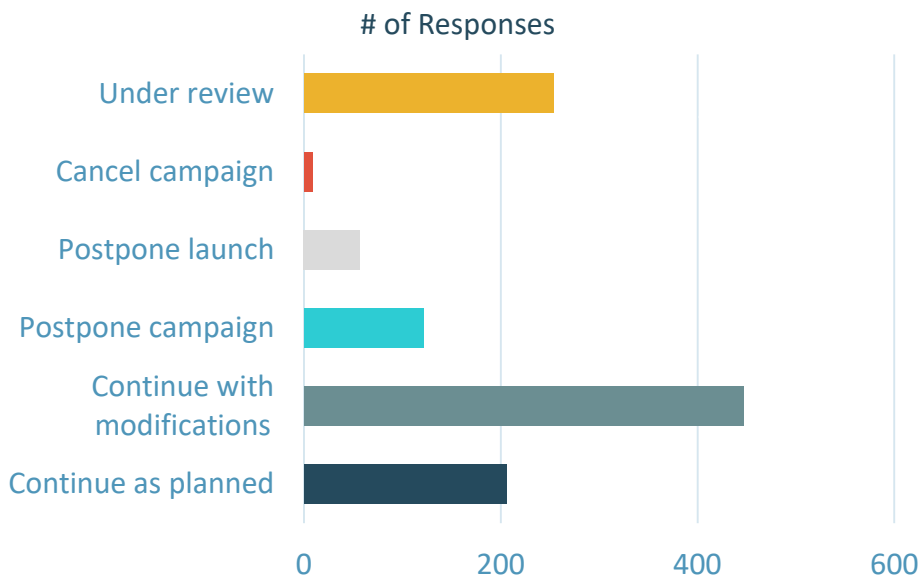
Most organizations conducting major campaigns plan to continue these efforts, often with modifications.

Current donors and stakeholders are the primary supporters cited by more than 68% of respondents

PRIMARY SOURCES OF CURRENT SUPPORT



CHANGES TO MAJOR CAPITAL OR COMPREHENSIVE CAMPAIGNS



Nonprofits report that they plan to stay the course (with some modifications) regarding their campaign plans.

Only 9 respondents (less than 1%) noted campaign cancellations.

FUNDRAISING STAFF LAYOFFS/ FURLOUGHS

Despite economic hardship, three-quarters of the survey respondents indicated they had not had fundraising staff layoffs or furloughs to date.

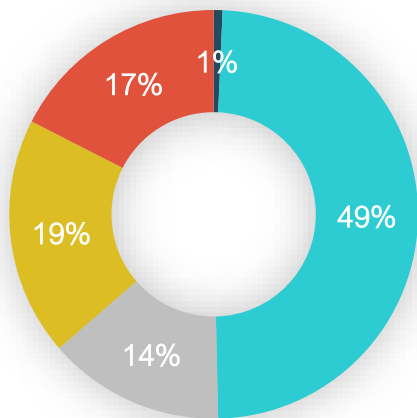
FUNDRAISING STAFF LAYOFFS/ FURLOUGHS



- No, some additions
- No
- Under consideration
- Yes, modest reductions
- Yes, significant reductions

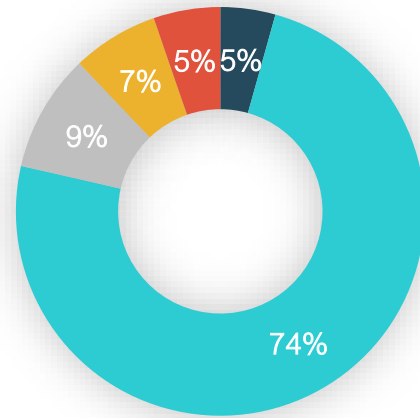
The cultural and performing arts sectors are the hardest hit, with the health, education, and human services sectors citing the least amount of fundraising staff reductions.

LAYOFFS IN CULTURAL & PERFORMING ARTS SECTORS



- No, some additions
- No
- Under consideration
- Yes, modest reductions
- Yes, significant reductions

LAYOFFS IN HEALTH, EDUCATION & HUMAN SERVICES SECTORS



- No, some additions
- No
- Under consideration
- Yes, modest reductions
- Yes, significant reductions

About CCS

CCS Fundraising, founded in 1947, is a strategic consulting firm that partners with nonprofits for transformational change. Experts in campaign and development strategy, CCS helps plan and implement fundraising initiatives that help organizations make a bigger impact—locally, nationally, and globally. CCS currently manages campaign goals of over \$15B.

Over the course of the past seven decades, thousands of leading nonprofits – large and small – have benefitted from the individualized attention they receive from our fundraising specialists. Every day, hundreds of CCS experts are working in close step with organizations of all sizes, implementing the latest innovations and cutting-edge strategies to maximize program results.

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 April 20 – May 1, 2020.

All responses were submitted voluntarily and represent reflections from 1,183 professionals at nonprofits both within and outside of the United States. Their sector representation is outlined below:

| | | | |
|-------------|-----|----------------------------|-----|
| Advocacy | 23 | Higher Education | 63 |
| Association | 18 | Hospitals/ Medical Centers | 35 |
| Cultural | 95 | Human & Social Services | 161 |
| Education | 377 | Other | 99 |
| Environment | 49 | Performing Arts | 48 |
| Health | 106 | Religion | 108 |



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