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November 26, 2002

Charitable Organizations and the Economy
GuideStar Survey Conducted November 7-21, 2002

E-mail invitations sent: 32,960*
Survey participants: 2,725
Response rate: 8%
Responses received from all 50 states, Puerto Rico, Guam, Europe, India, UK
*To addressees at public charities and private foundations

Survey question: "What type of nonprofit is your organization?"

- 2,683 responses
- 86.9% public charity
- 13.1% private foundation/grantmaker

Survey question: "Does your organization accept contributions?"

- 2,705 responses
- 96.2% yes
- 3.8% no

Contribution Levels January-October 2002

Survey question: "Compared to January-October last year, did total contributions to your organization increase, decrease, or stay about the same in January-October 2002?"

National and Regional Results (table on next page)

- Nationally, nearly 70 percent of the participants reported that contributions had decreased or stayed the same
- Nationally, nearly half reported that contributions had decreased
- Regionally, results remarkably similar for New England, Mideast, Southeast, Great Lakes, and Plains, with nonprofits reporting decreases of 44.2 percent-46.6 percent
- Problem slightly less severe in the Great Lakes and Plains regions. Some 16.7 percent of Great Lakes organizations and 15.5 percent of Plains nonprofits reported that contributions had "decreased greatly," compared to 20.7 percent in New England, 20.9 percent in the Mideast, and 21.4 percent in the Southeast.
- Problem more severe in the Rocky Mountains, Southwest, and Far West. Some 53.3 percent of Rocky Mountains nonprofits, 52.5 percent of Southwest organizations, and 51.4 percent of Far West nonprofits reported that contributions had decreased.
- Problem most severe in Rocky Mountains states; 29.0 percent of nonprofits from that region reported that contributions had "decreased greatly."

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Region	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
National	2,604	20.9%	26.7%	**47.6%**	**22.2%**	**27.6%**	22.1%	5.5%	2.7%
New England	193	20.7%	23.3%	**44.0%**	**24.9%**	**28.5%**	20.2%	8.3%	2.6%
Mideast	494	20.9%	25.7%	**46.6%**	**22.7%**	**28.0%**	22.9%	5.1%	2.8%
Southeast	505	21.4%	24.6%	**46.0%**	**22.8%**	**28.7%**	23.0%	5.7%	2.6%
Great Lakes	338	16.7%	27.5%	**44.2%**	**23.1%**	**29.3%**	24.6%	4.7%	3.3%
Plains	148	15.5%	27.0%	**42.5%**	**25.0%**	**30.4%**	25.0%	5.4%	2.0%
Rocky Mountains	107	29.0%	24.3%	**53.3%**	**19.6%**	**27.1%**	21.5%	5.6%	0%
Southwest	238	22.7%	29.8%	**52.5%**	**18.9%**	**26.0%**	23.1%	2.9%	2.5%
Far West	541	22.2%	29.2%	**51.4%**	**20.0%**	**25.2%**	19.0%	6.2%	3.3%

New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont
Mideast: Delaware, Maryland, New Jersey, New York, Pennsylvania, Washington, D.C.
Southeast: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia
Great Lakes: Illinois, Indiana, Michigan, Ohio, Wisconsin; Plains: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota
Rocky Mountains: Colorado, Idaho, Montana, Utah, Wyoming
Southwest: Arizona, Oklahoma, New Mexico, Texas
Far West: Alaska, California, Hawaii, Nevada, Oregon, Washington

Results by Organization Size

- Organizations whose annual expenditures total $25,000-$99,000 and $250,000-$499,999 are having the hardest time; some 50.2 percent of the former and 54.0 percent of the latter reported that contributions had decreased.
- Nonprofits whose annual expenditure total $20 million or more are enjoying the most financial success; some 40.0 percent reported that contributions had increased, albeit modestly for most of them.

Size (Based on Total Annual Expenditures)	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
<$25,000	342	25.7%	17.5%	**43.2%**	**29.5%**	**22.2%**	17.2%	5.0%	5.0%
$25,000-$99,999	348	28.4%	21.8%	**50.2%**	**21.8%**	**24.9%**	20.4%	4.5%	3.4%
$100,000-$249,999	406	21.2%	27.1%	**48.3%**	**22.9%**	**26.8%**	20.9%	5.9%	2.0%
$250,000-$499,999	324	22.8%	31.2%	**54.0%**	**17.6%**	**26.2%**	21.3%	4.9%	2.2%
$500,000-$999,999	329	21.6%	28.3%	**49.9%**	**18.8%**	**29.2%**	22.5%	6.7%	2.1%
$1 mil-$4,999,999	551	16.0%	29.2%	**45.2%**	**22.0%**	**31.0%**	25.4%	5.6%	1.8%
$5 mil-$19,999,999	186	10.8%	34.4%	**45.2%**	**22.6%**	**30.6%**	23.1%	7.5%	1.6%
$20 mil or more	75	8.0%	26.7%	**34.7%**	**24.0%**	**40.0%**	34.7%	5.3%	1.3%
Don't know	22	27.3%	13.6%	**40.9%**	**22.7%**	**18.1%**	13.6%	4.5%	18.2%

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Results by Subject Area

- The five categories that saw the greatest decrease were:

    1. Animal Related: 59.9 percent decrease overall; 34.7 percent "decreased greatly"; 25.2 percent "decreased modestly"
    2. Philanthropy, Voluntarism, Grantmaking Foundations: 53.0 percent decrease overall; 21.2% "decreased greatly"; 31.8 percent "decreased modestly"
    3. Housing, Shelter: 51.6 percent decrease overall; 22.9 percent "decreased greatly"; 28.6% "decreased modestly"
    4. Human Services: 51.6 percent decrease overall; 23.2 percent "decreased greatly"; 28.4% "decreased modestly"
    5. Public, Societal Benefit: 51.5 percent decrease overall; 27.8% "decreased greatly"; 23.7% "decreased modestly"

Subject Area*	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
Animal Related	147	34.7%	25.2%	**59.9%**	**19.0%**	**19.7%**	19.7%	0.0%	1.4%
Arts, Culture, Humanities	394	22.6%	26.6%	**49.2%**	**22.1%**	**26.4%**	21.3%	5.1%	2.2%
Civil Rights, Social Action, Advocacy	195	22.6%	27.7%	**50.3%**	**20.5%**	**25.6%**	21.5%	4.1%	3.6%
Community Improvement, Capacity Building	286	21.0%	23.1%	**44.1%**	**23.8%**	**28.3%**	20.6%	7.7%	3.8%
Crime, Legal Related	58	15.5%	29.3%	**44.8%**	**22.4%**	**24.1%**	17.2%	6.9%	8.6%
Diseases, Disorders, Medical Disciplines	122	29.5%	20.5%	**50.0%**	**22.1%**	**26.3%**	19.7%	6.6%	1.6%
Education	768	22.5%	23.3%	**45.8%**	**22.5%**	**28.7%**	21.9%	6.8%	3.0%
Employment, Job Related	141	21.3%	27.0%	**48.3%**	**19.9%**	**29.1%**	23.4%	5.7%	2.8%
Environmental Quality, Protection, Beautification	164	22.6%	27.4%	**50.0%**	**23.2%**	**24.4%**	20.1%	4.3%	2.4%
Food, Agriculture, Nutrition	124	21.8%	20.2%	**42.0%**	**23.4%**	**33.1%**	26.6%	6.5%	1.6%
Health—General, Rehabilitative	314	20.4%	27.1%	**47.5%**	**22.0%**	**27.1%**	18.5%	8.6%	3.5%
Housing, Shelter	293	22.9%	28.6%	**51.6%**	**21.5%**	**23.9%**	18.8%	5.1%	3.1%
Human Services	703	23.2%	28.4%	**51.6%**	**20.9%**	**23.9%**	19.5%	4.4%	3.6%
International, Foreign Affairs, National Security	85	27.1%	18.8%	**45.9%**	**23.5%**	**28.3%**	25.9%	2.4%	2.4%
Medical Research	53	22.6%	17.0%	**39.6%**	**30.2%**	**28.3%**	20.8%	7.5%	1.9%
Mental Health, Crisis Intervention	171	22.8%	22.2%	**45.0%**	**17.0%**	**33.4%**	24.6%	8.8%	4.7%

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Subject Area*	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
Mutual/Membership Benefit	30	16.7%	33.3%	**50.0%**	**16.7%**	**30.0%**	30.0%	0.0%	3.3%
Philanthropy, Voluntarism, Grantmaking Foundations	85	21.2%	31.8%	**53.0%**	**23.5%**	**18.8%**	15.3%	3.5%	4.7%
Public Safety, Disaster Preparedness, Relief	79	17.7%	32.9%	**50.6%**	**26.6%**	**21.6%**	12.7%	8.9%	1.3%
Public, Societal Benefit	194	27.8%	23.7%	**51.5%**	**22.2%**	**25.2%**	18.0%	7.2%	1.0%
Recreation, Sports, Leisure, Athletics	124	19.4%	25.0%	**44.4%**	**27.4%**	**26.7%**	19.4%	7.3%	1.6%
Religion	241	15.3%	27.0%	**42.3%**	**20.3%**	**34.0%**	28.2%	5.8%	3.3%
Science and Technology Research Institutes, Services	34	26.5%	14.7%	**41.2%**	**41.2%**	**14.7%**	11.8%	2.9%	2.9%
Social Science Research Institutes, Services	25	16.0%	24.0%	**40.0%**	**32.0%**	**20.0%**	20.0%	0.0%	8.0%
Unclassified	37	13.5%	13.5%	**27.0%**	**24.3%**	**35.1%**	24.3%	10.8%	13.5%
Youth Development	505	21.8%	27.7%	**49.5%**	**18.0%**	**28.9%**	22.6%	6.3%	3.6%
Don't Know	2	-	-	-	-	-	-	-	-

*Participants could select more than one subject area

Anticipated Contribution Levels, November-December 2002

Survey question: "Compared to the total contributions your organization received in November and December last year, do you think total contributions to your organization in November and December 2002 will increase, decrease, or be about the same?"

National and Regional Results (table on next page)

- Nationally, more nonprofits thought contributions would decrease (36.7 percent) or stay the same (30.6 percent) rather than increase (24.4 percent)
- Nonprofits in the Rocky Mountains and Far West were most pessimistic, with 40.2 percent of Rocky Mountains organizations and 43.2 percent of Far West nonprofits predicting an overall decrease. In both regions, however, a greater proportion of organizations expected a modest decrease.
- Great Lakes organizations were most optimistic, with 28.5 percent predicting an increase in contributions. Only 1.5 percent of Great Lakes nonprofits anticipated that donations would "increase greatly," however, with 27.0 percent predicting a modest increase.

Region	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
National	2,602	10.7%	26.0%	**36.7%**	**30.6%**	**24.4%**	21.9%	2.5%	8.2%
New England	191	9.9%	26.2%	**36.1%**	**34.0%**	**20.4%**	18.3%	2.1%	9.4%
Mideast	494	10.9%	26.1%	**37.0%**	**30.8%**	**23.9%**	21.9%	2.0%	8.3%
Southeast	506	10.1%	22.1%	**32.2%**	**33.6%**	**25.7%**	22.9%	2.8%	8.5%
Great Lakes	337	8.9%	24.9%	**33.8%**	**30.0%**	**28.5%**	27.0%	1.5%	7.7%
Plains	148	10.1%	21.6%	**31.7%**	**37.2%**	**23.7%**	22.3%	1.4%	7.4%
Rocky Mountains	107	13.1%	27.1%	**40.2%**	**31.8%**	**24.3%**	23.4%	0.9%	3.7%
Southwest	238	8.8%	27.7%	**36.5%**	**29.0%**	**22.3%**	20.6%	1.7%	12.2%
Far West	541	13.1%	30.1%	**43.2%**	**26.8%**	**23.0%**	18.7%	4.3%	7.0%

New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont
Mideast: Delaware, Maryland, New Jersey, New York, Pennsylvania, Washington, D.C.
Southeast: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia
Great Lakes: Illinois, Indiana, Michigan, Ohio, Wisconsin
Plains: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota
Rocky Mountains: Colorado, Idaho, Montana, Utah, Wyoming
Southwest: Arizona, Oklahoma, New Mexico, Texas
Far West: Alaska, California, Hawaii, Nevada, Oregon, Washington

Results by Organization Size

- Organizations whose annual expenditures total $250,000-$499,999 and $5 million-$19,999,999 are least optimistic about contribution levels they will receive in November and December, with 43.4 percent of the former and 40.7 percent of the latter predicting that contributions will decrease. In both cases, however, substantially more organizations anticipate a moderate decrease than predict a great decrease.
- Nonprofits whose annual expenditure total $25,000-$99,999 are most optimistic about future contributions, with 28.3 percent predicting that donations will increase in November and December. Most, however, expect the growth to be modest.

Size (Based on Total Annual Expenditures)	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
<$25,000	343	16.0%	14.6%	**30.6%**	**34.4%**	**21.3%**	17.5%	3.8%	13.7%
$25,000-$99,999	346	13.9%	22.3%	**36.2%**	**27.2%**	**28.3%**	24.9%	3.4%	8.4%
$100,000-$249,999	406	8.9%	30.0%	**38.9%**	**31.8%**	**24.0%**	20.9%	3.1%	6.2%
$250,000-$499,999	325	11.7%	31.7%	**43.4%**	**26.5%**	**24.0%**	20.9%	3.1%	6.2%
$500,000-$999,999	328	8.5%	26.8%	**35.3%**	**31.1%**	**26.8%**	25.6%	1.2%	6.7%
$1 mil-$4,999,999	551	9.1%	26.9%	**36.0%**	**31.6%**	**25.5%**	23.0%	2.5%	6.9%
$5 mil-$19,999,999	187	8.6%	32.1%	**40.7%**	**29.9%**	**23.0%**	20.9%	2.1%	6.4%
$20 mil or more	73	5.5%	24.7%	**30.2%**	**37.0%**	**24.7%**	23.3%	1.4%	8.2%
Don't know	22	18.2%	18.2%	**36.4%**	**27.3%**	**9.1%**	9.1%	0.0%	27.3%

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Results by Subject Area

- The majority (53.0 percent) of organizations in the philanthropy, volunteerism, and grantmaking category predicted a decrease in contributions in November and December, with nearly equal numbers expecting a great decrease (21.2 percent) and a modest decrease (21.8 percent).
- A number of international, foreign affairs, and national security (45.9 percent) and animal related (42.5 percent) nonprofits also anticipate decreased contribution levels in November and December. Only 13.7 percent of animal related organizations predict that contributions will decrease greatly, however, compared to 27.1 percent of organizations in the international, foreign affairs, and national security category.
- Unclassified and religion nonprofits were most optimistic about contributions in November and December, with 34.2 percent of the former and 28.9 percent of the latter predicting that donations would increase. In both cases, however, the organizations anticipating a modest increase outnumbered those predicting a great increase.

Subject Area*	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
Animal Related	146	13.7%	28.8%	**42.5%**	**27.4%**	**21.2%**	17.1%	4.1%	8.9%
Arts, Culture, Humanities	392	10.7%	28.6%	**39.3%**	**30.1%**	**24.7%**	22.7%	2.0%	5.9%
Civil Rights, Social Action, Advocacy	195	13.8%	23.1%	**36.9%**	**30.3%**	**24.7%**	22.1%	2.6%	8.2%
Community Improvement, Capacity Building	286	13.3%	24.5%	**37.8%**	**31.5%**	**22.0%**	19.2%	2.8%	8.7%
Crime, Legal Related	58	6.9%	24.1%	**31.0%**	**31.0%**	**18.9%**	17.2%	1.7%	19.0%
Diseases, Disorders, Medical Disciplines	121	13.2%	18.2%	**31.4%**	**31.4%**	**28.1%**	24.0%	4.1%	9.1%
Education	766	13.1%	24.8%	**37.9%**	**30.8%**	**23.8%**	20.8%	3.0%	7.6%
Employment, Job Related	142	14.8%	21.1%	**35.9%**	**31.0%**	**26.0%**	22.5%	3.5%	7.0%
Environmental Quality, Protection, Beautification	161	10.0%	25.5%	**35.5%**	**34.2%**	**21.1%**	19.9%	1.2%	9.3%
Food, Agriculture, Nutrition	124	12.9%	21.0%	**33.0%**	**29.8%**	**27.4%**	24.2%	3.2%	8.9%
Health—General, Rehabilitative	313	14.7%	23.0%	**37.7%**	**27.8%**	**24.6%**	21.7%	2.9%	9.9%
Housing, Shelter	292	12.0%	28.1%	**40.1%**	**27.7%**	**23.6%**	21.9%	1.7%	8.6%
Human Services	701	12.6%	26.7%	**39.3%**	**28.5%**	**22.1%**	20.7%	1.4%	10.1%
International, Foreign Affairs, National Security	85	27.1%	18.8%	**45.9%**	**23.5%**	**28.3%**	25.9%	2.4%	2.4%
Medical Research	51	9.8%	13.7%	**23.5%**	**35.3%**	**31.4%**	27.5%	3.9%	9.8%
Mental Health, Crisis Intervention	170	9.4%	25.3%	**34.7%**	**31.8%**	**21.2%**	20.0%	1.2%	12.4%

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Subject Area*	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
Mutual/Membership Benefit	30	3.3%	36.7%	**40.0%**	**26.7%**	**20.0%**	20.0%	0.0%	13.3%
Philanthropy, Voluntarism, Grantmaking Foundations	85	21.2%	21.8%	**53.0%**	**23.5%**	**18.8%**	15.3%	3.5%	4.7%
Public Safety, Disaster Preparedness, Relief	79	13.9%	24.1%	**38.0%**	**30.4%**	**22.8%**	20.3%	2.5%	8.9%
Public, Societal Benefit	194	16.0%	20.6%	**36.6%**	**35.1%**	**19.0%**	14.9%	4.1%	9.3%
Recreation, Sports, Leisure, Athletics	123	8.9%	30.1%	**39.0%**	**32.5%**	**25.2%**	23.6%	1.6%	3.3%
Religion	242	9.1%	21.5%	**30.6%**	**30.2%**	**28.9%**	24.8%	4.1%	10.3%
Science and Technology Research Institutes, Services	34	14.7%	20.6%	**35.3%**	**41.2%**	**20.5%**	17.6%	2.9%	2.9%
Social Science Research Institutes, Services	25	12.0%	28.0%	**40.0%**	**24.0%**	**28.0%**	24.0%	4.0%	8.0%
Unclassified	38	7.9%	13.2%	**21.1%**	**28.9%**	**34.2%**	28.9%	5.3%	15.8%
Youth Development	503	10.3%	26.2%	**36.5%**	**26.1%**	**28.2%**	25.4%	2.8%	9.1%
Don't Know	2	-	-	-	-	-	-	-	-

*Participants could select more than one subject area

Private Foundations/Grantmakers

Survey question: "If your organization awards grants, has the total amount of moneys you awarded in January-October 2002 increased, decreased, or stayed about the same compared to the total amount awarded in January-October last year?"

- Most (40.2 percent) of the organizations that provide funding for charitable purposes reported that the amounts they had awarded had decreased; 17.2 percent stated that total moneys granted had "decreased greatly," and 23.0 percent said the amounts awarded had "decreased modestly."
- Only 17.5 percent of nonprofits said total moneys awarded had increased; 14.3 percent characterized the increase as modest and 3.2 percent as great.

	# Orgs	↓ greatly	↓ modestly	Total ↓	About the same	Total ↑	↑ modestly	↑ greatly	Don't know
National	378	17.2%	23.0%	**40.2%**	**27.8%**	**17.5%**	14.3%	3.2%	14.6%