
Institute of Fundraising Consultants Group SIG

17th November

Brad May – Sales & Marketing Director

2009 State of the Not-for-Profit Industry (SONI) Survey

European (and UK) Survey Results

17th November

Adrian Cutcliffe – Marketing Manager

In association with



The Resource Alliance

- “Resource Alliance was delighted to partner with Blackbaud once again for the annual SONI survey in Europe. Our mission is to provide not-for-profit organisations with access to training and information that will enable them to build their organisation fundraising capacity and SONI fulfils this remit perfectly. With the economic downturn impacting across the board, the survey provides an invaluable service to charities, helping them to assess progress against their peers and to make the right choices in terms of their investment.”

- “The Resource Alliance is a UK registered charity working to build the capacity of not-for-profit organisations worldwide to mobilise funds and local resources for their causes. It achieves this through training, knowledge sharing and networking activities worldwide. The Resource Alliance runs conferences, workshops and awards schemes all round the world, runs a qualification and accreditation scheme for developing world fundraisers, and has helped set up and support national fundraising organisations. It’s flagship activity is the International Fundraising Congress, held annually in Holland for the last 29 years and recognised globally as the best fundraising conference in the world.”



About the SONI survey

- Provides an overview how not-for-profits can help benchmark their operations:
 1. General Operations
 2. Fundraising
 3. Technology and Internet Usage
 4. Accountability and Stewardship

- UK Survey distributed directly to Blackbaud database and industry newsletters:
 - UK Fundraising
 - PF/CF Online
 - Charity Times
 - Blackbaud database
 - Arts Marketing Association

About the SONI survey

- European Survey ran June/July 2009.
 - 1063 responded to the country surveys - 647 completed
 - Ran in five countries:
 - France
 - Germany
 - Italy
 - Netherlands
 - Spain*
 - UK
- *Discounted due to responses.
- SONI survey has been running in UK for 3 years and developed and expanded across Europe for the past 2 years.

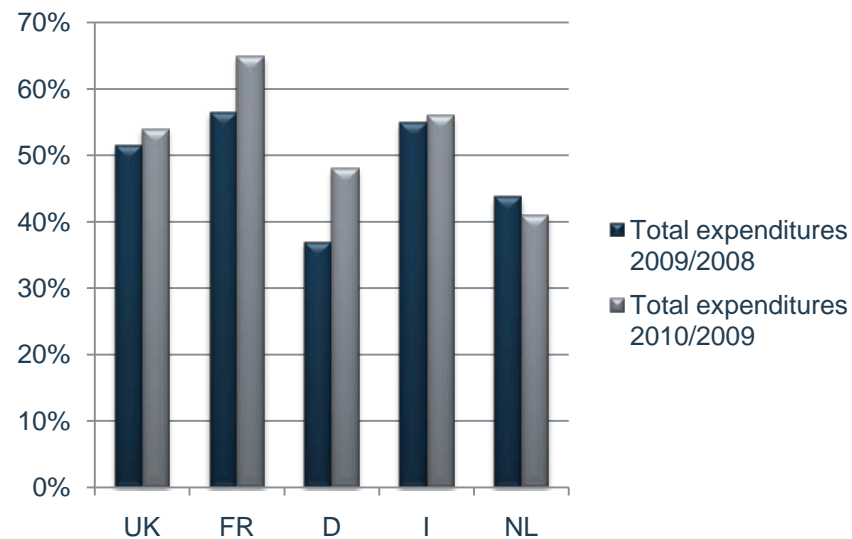
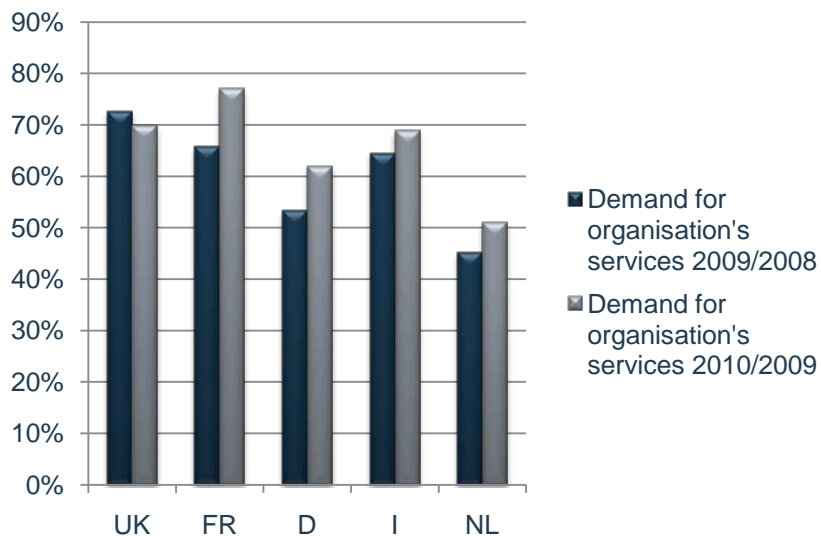
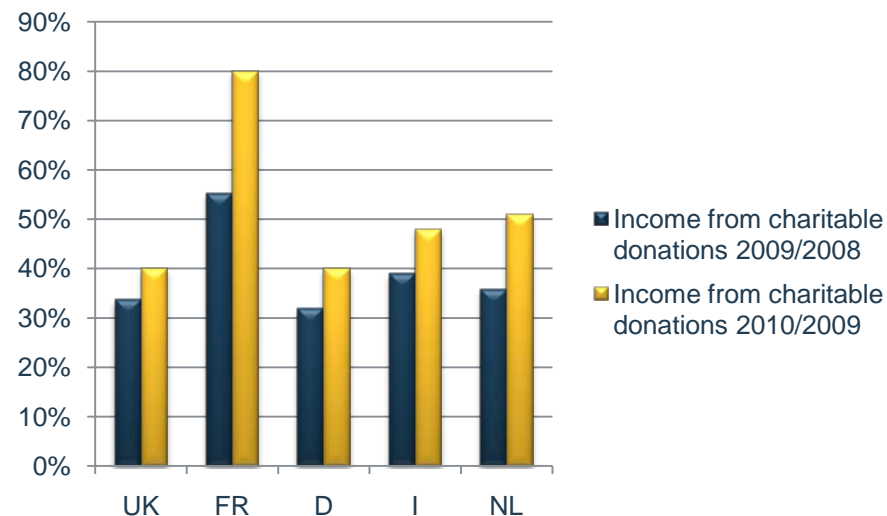
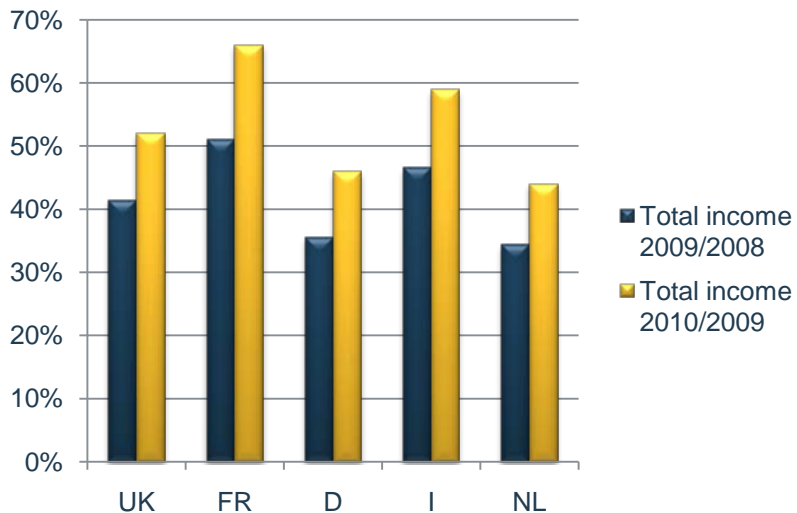


Respondents - Europe

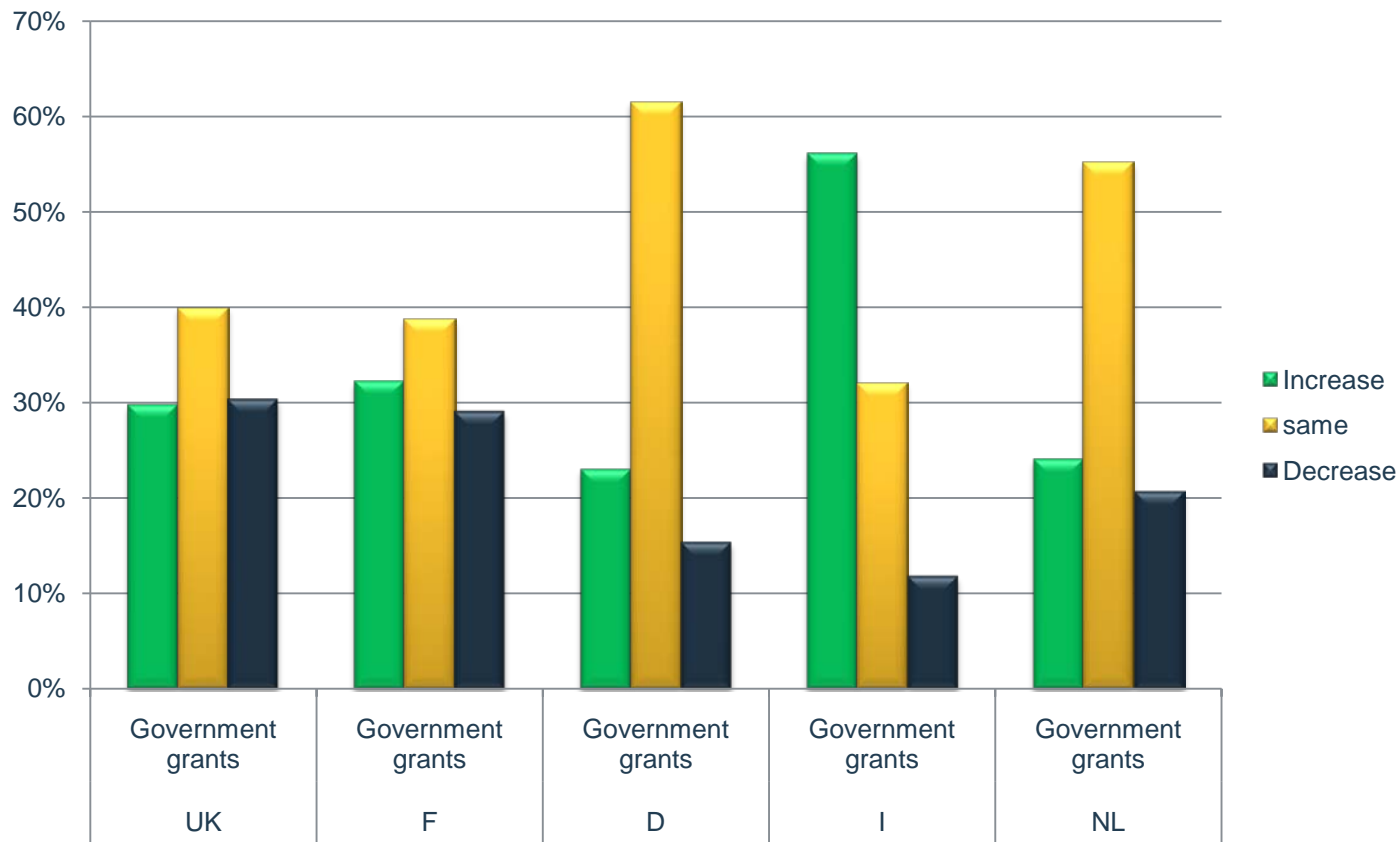
	France	Germany	Italy	Netherlands	UK
Executive/Management staff	23%	32%	27%	39%	39%
Programme staff	0%	0%	4%	2%	1%
Accounting/Finance	10%	0%	3%	2%	9%
Fundraising	50%	52%	28%	12%	28%
Marketing/Public relations	7%	3%	10%	5%	11%
Technology	0%	0%	3%	5%	3%
Human resources	0%	0%	4%	0%	1%
Administrative staff	7%	0%	8%	12%	6%
Membership	0%	0%	1%	0%	1%
Other	3%	13%	13%	22%	1%

	France	Germany	Italy	Netherlands	UK
Animal-related	0%	3.3%	1%	9%	2%
Aquarium or zoo	0%	0%	0%	0%	1%
Arts and cultural	3.3%	3.3%	8%	6%	18%
Community and youth	3.3%	0%	7%	0%	7%
Environmental	0%	0%	3%	3%	4%
Foundation (private)	3.3%	3.3%	2%	37%	1%
Foundation (public)	0%	0%	1%	0%	1%
Healthcare	13.3%	13.3%	26%	11%	21%
Higher education	13.3%	3.3%	4%	0%	9%
International	13.3%	20%	15%	23%	4%
Religious	13.3%	13.3%	3%	9%	6%
School	3.3%	0%	1%	0%	3%
Social service	10%	20%	1%	3%	11%
Other	23.3%	20%	28%	0%	11%

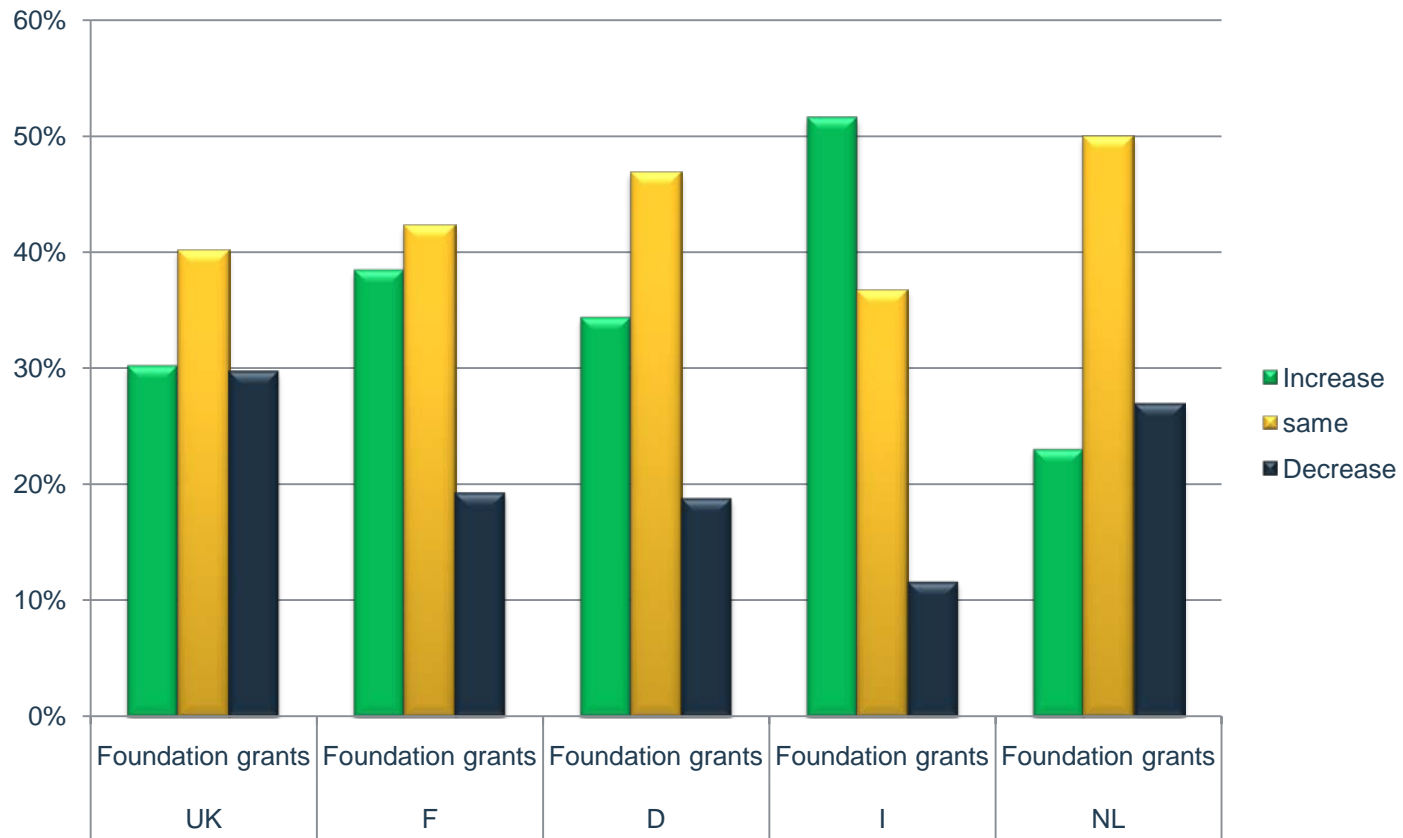
General operations implies general optimism!



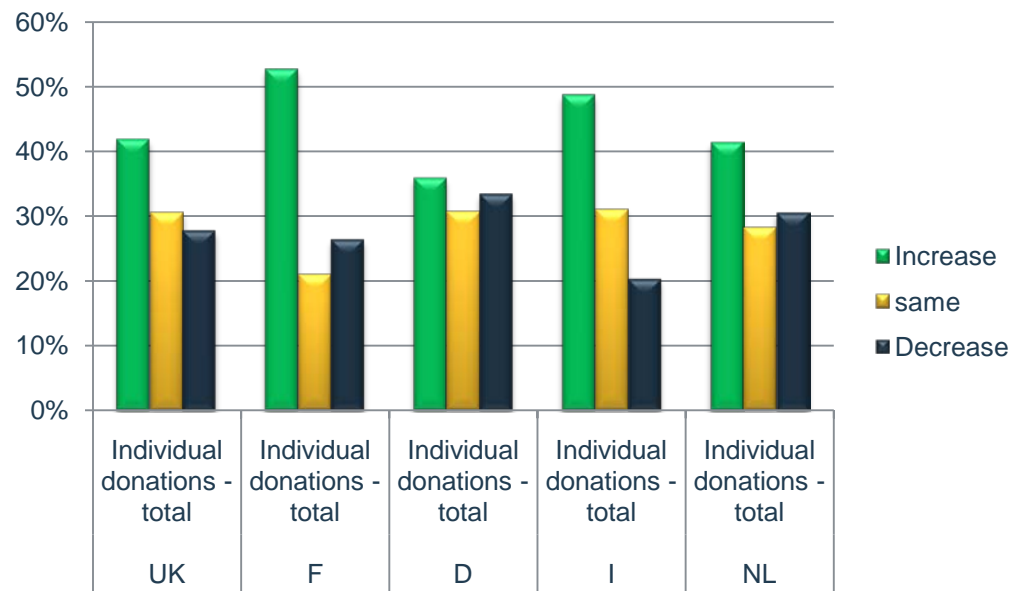
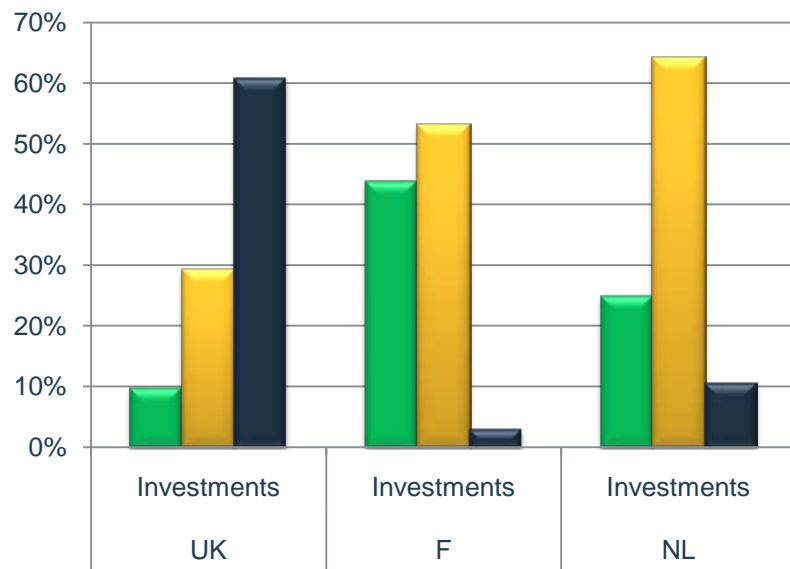
Organisation's funding from each source to change this year compared to last year? – Governments Grants



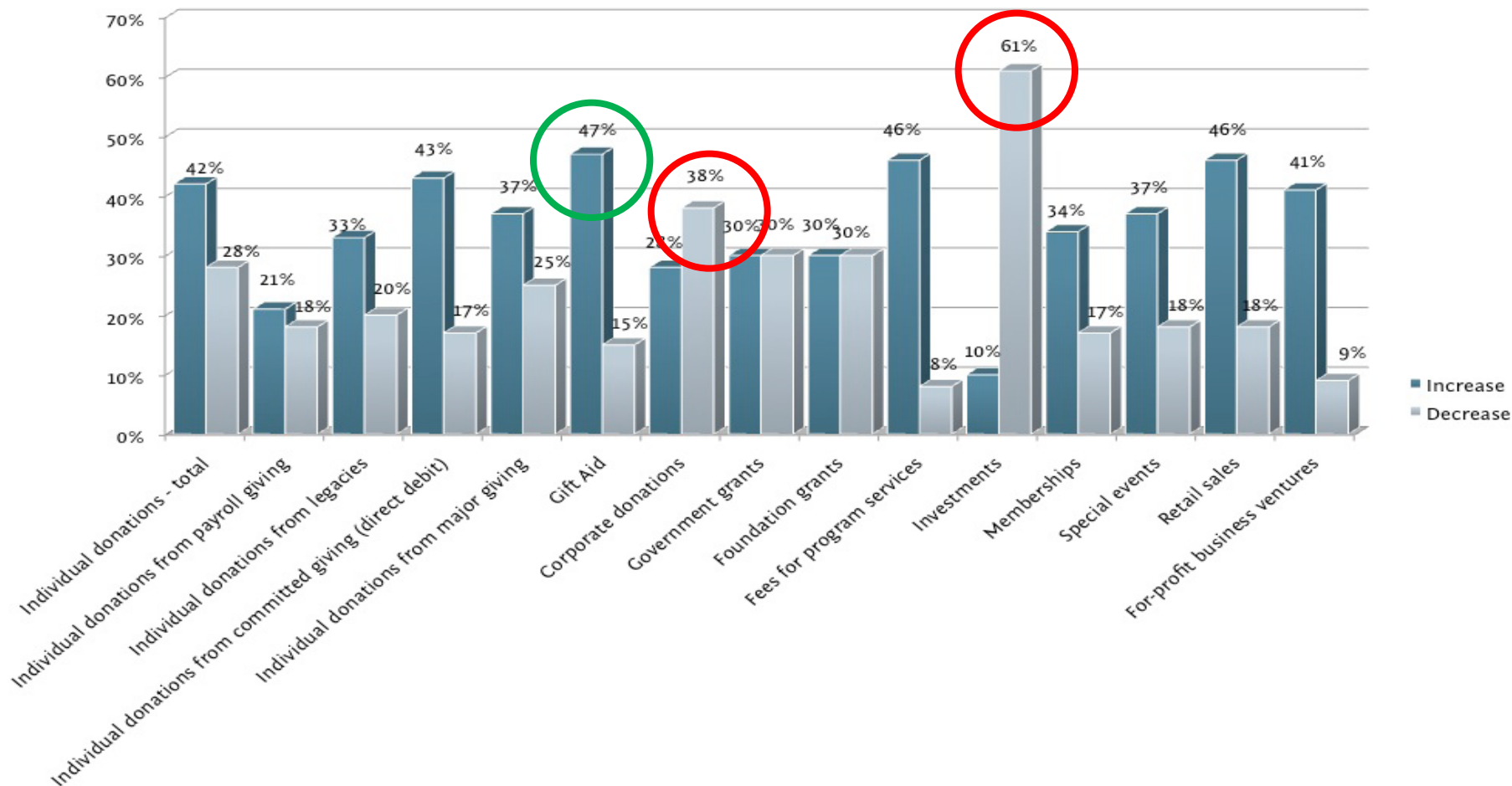
Organisation's funding from each source to change this year compared to last year? – Foundation Grants



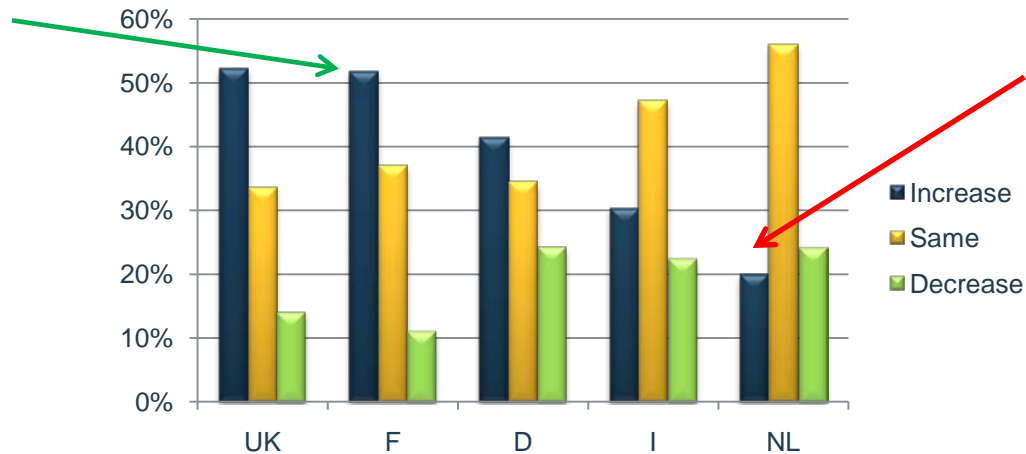
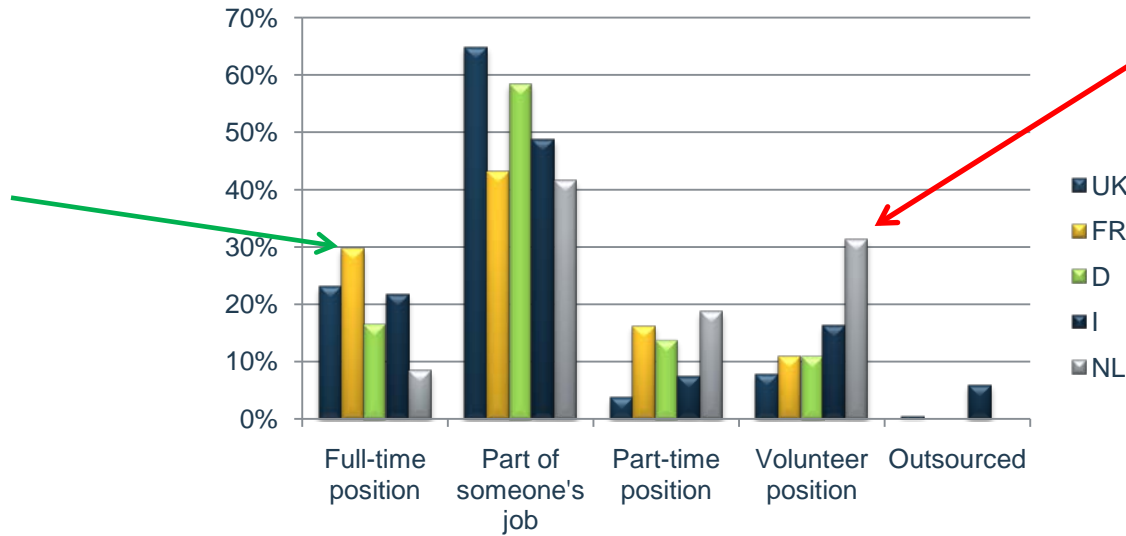
Organisation's funding from each source to change this year compared to last year?



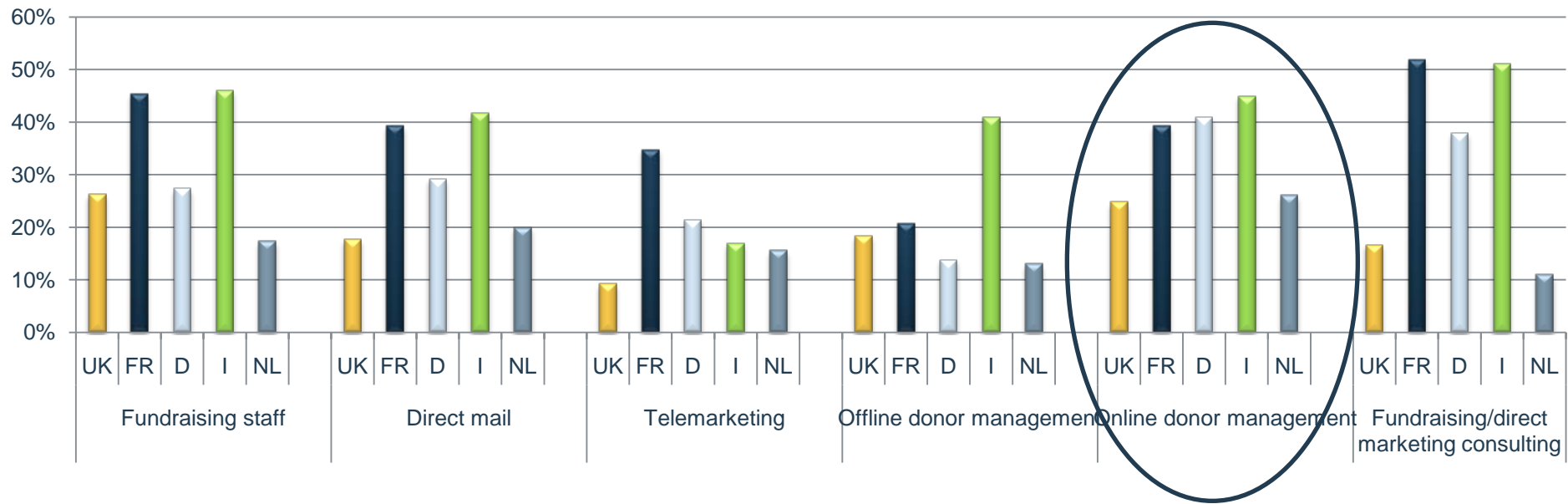
How do you expect your organisation's funding from each source to change 2009 compared to 2008? (UK)



Major donor fundraising



How do you expect your organisation's financial investments in fundraising to change 2009 compared to 2008?



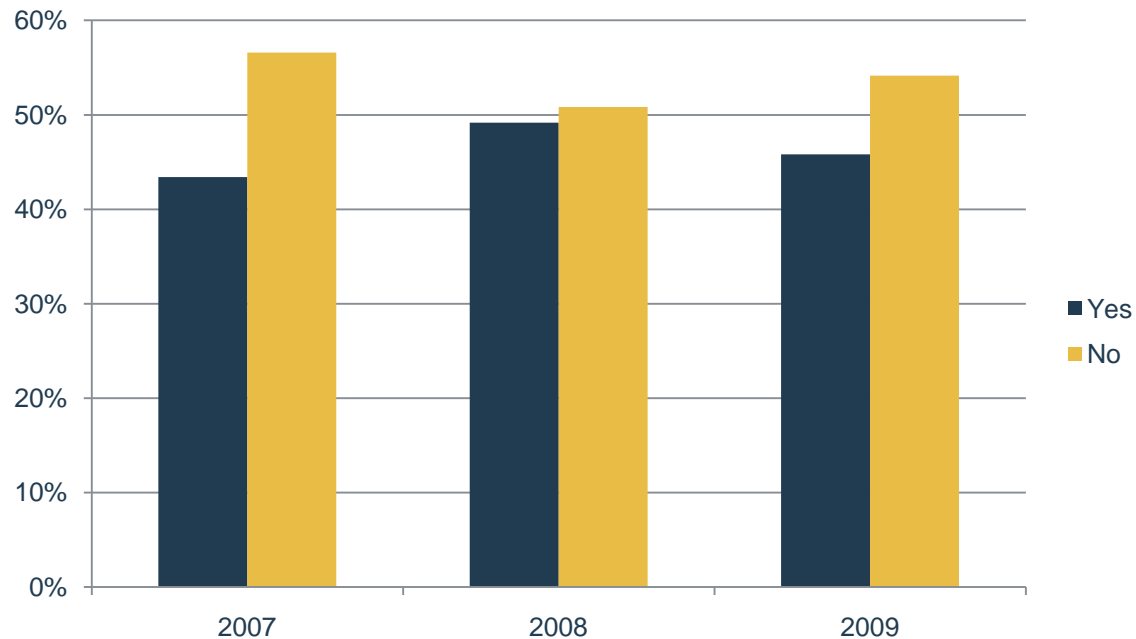
Blackbaud SONI UK

We think online is making some noise!

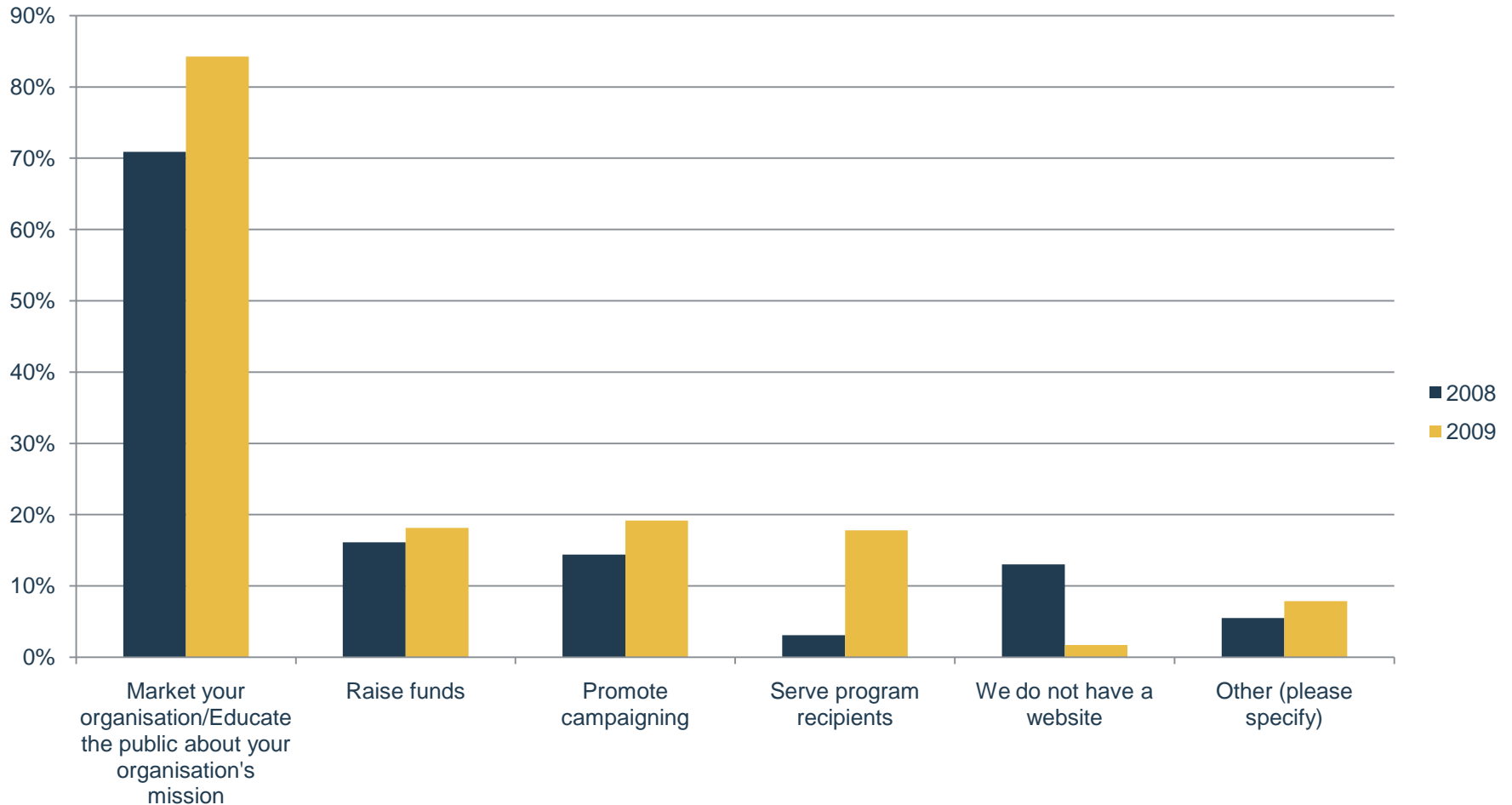
In association with



Does your organisation actively raise funds online?

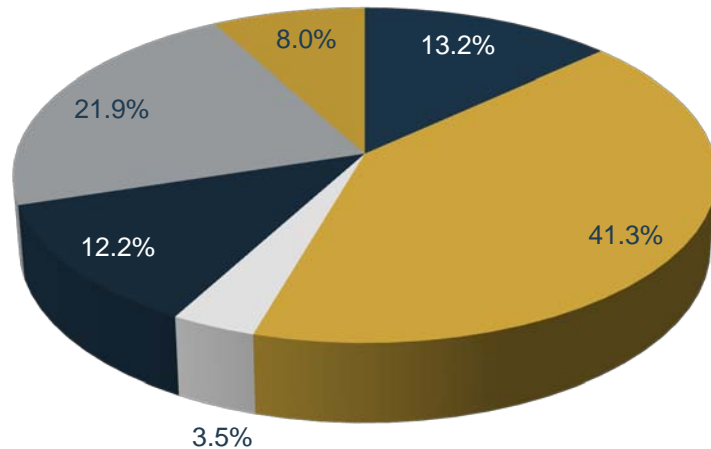
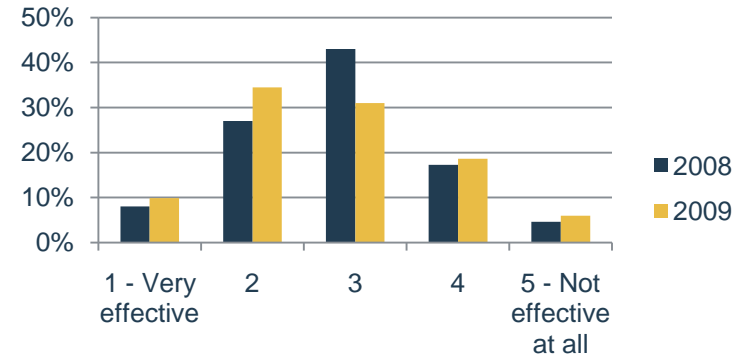


What is the primary purpose of your organisation's website?



Website management & effectiveness

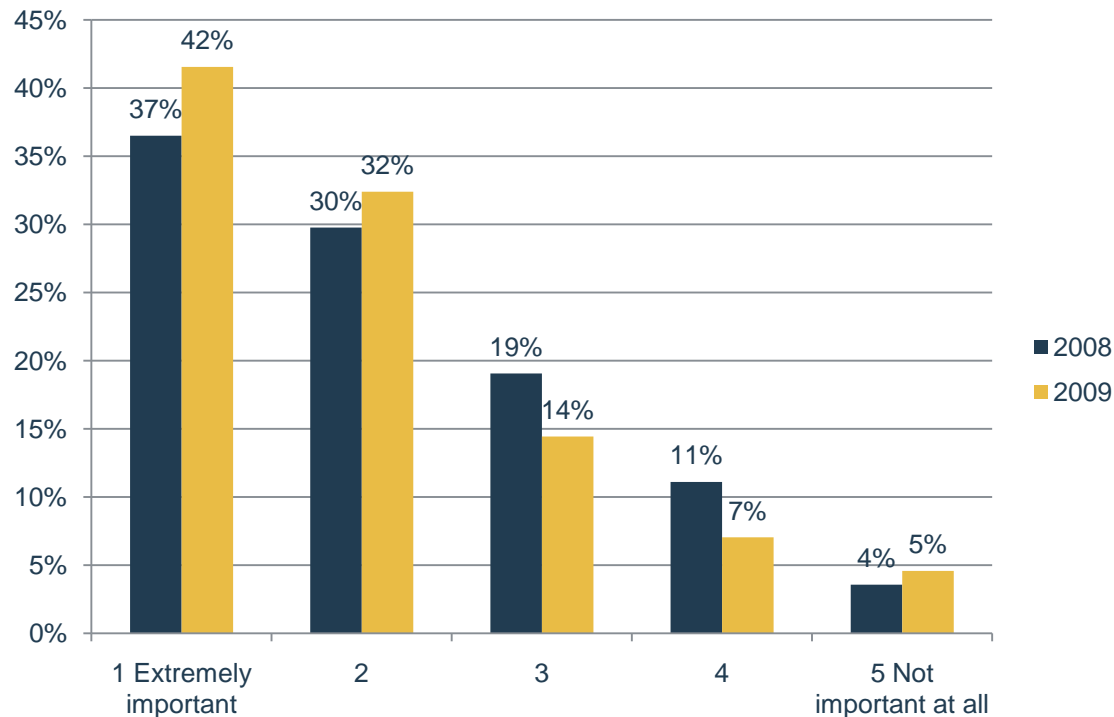
How effective is your organisation's website at meeting your organisation's strategic Internet goals?



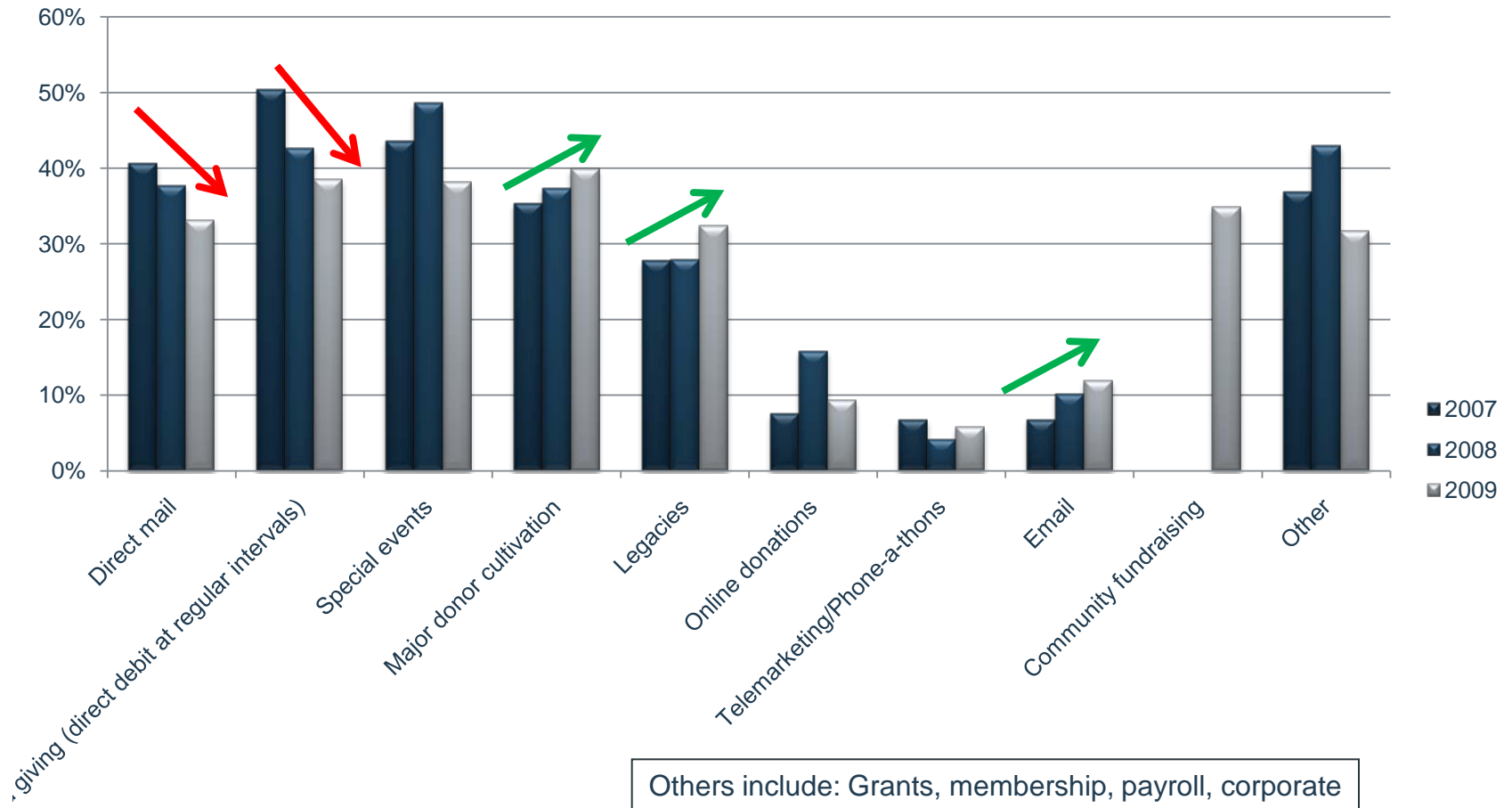
- Fundraising/Development
- Marketing
- Membership
- Technology services
- Executive
- Other (please specify)

Which functional area has primary responsibility for managing the content and driving the direction of your organisation's website?

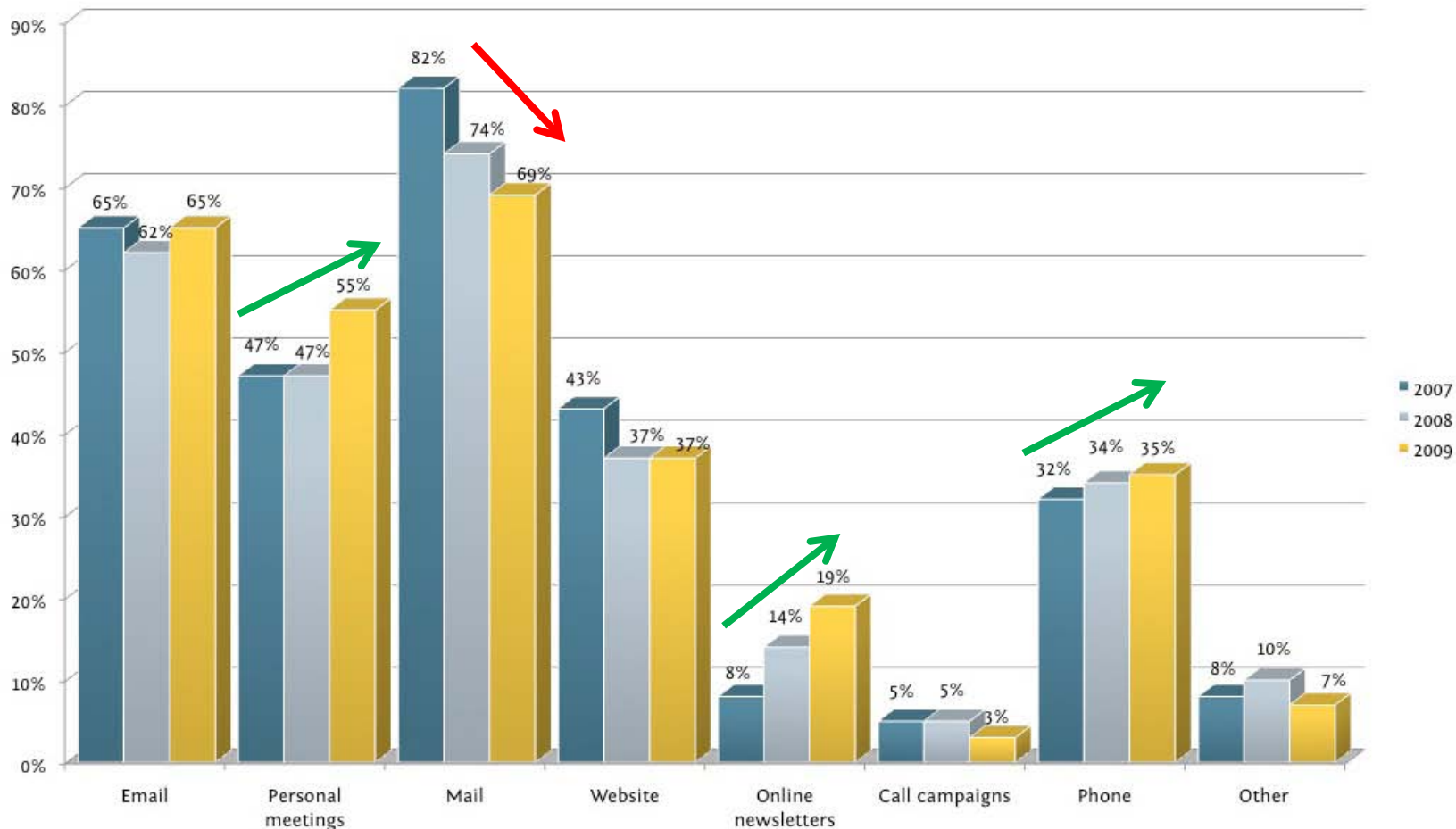
How important is communication with your donors and other supporters over the web and through email?



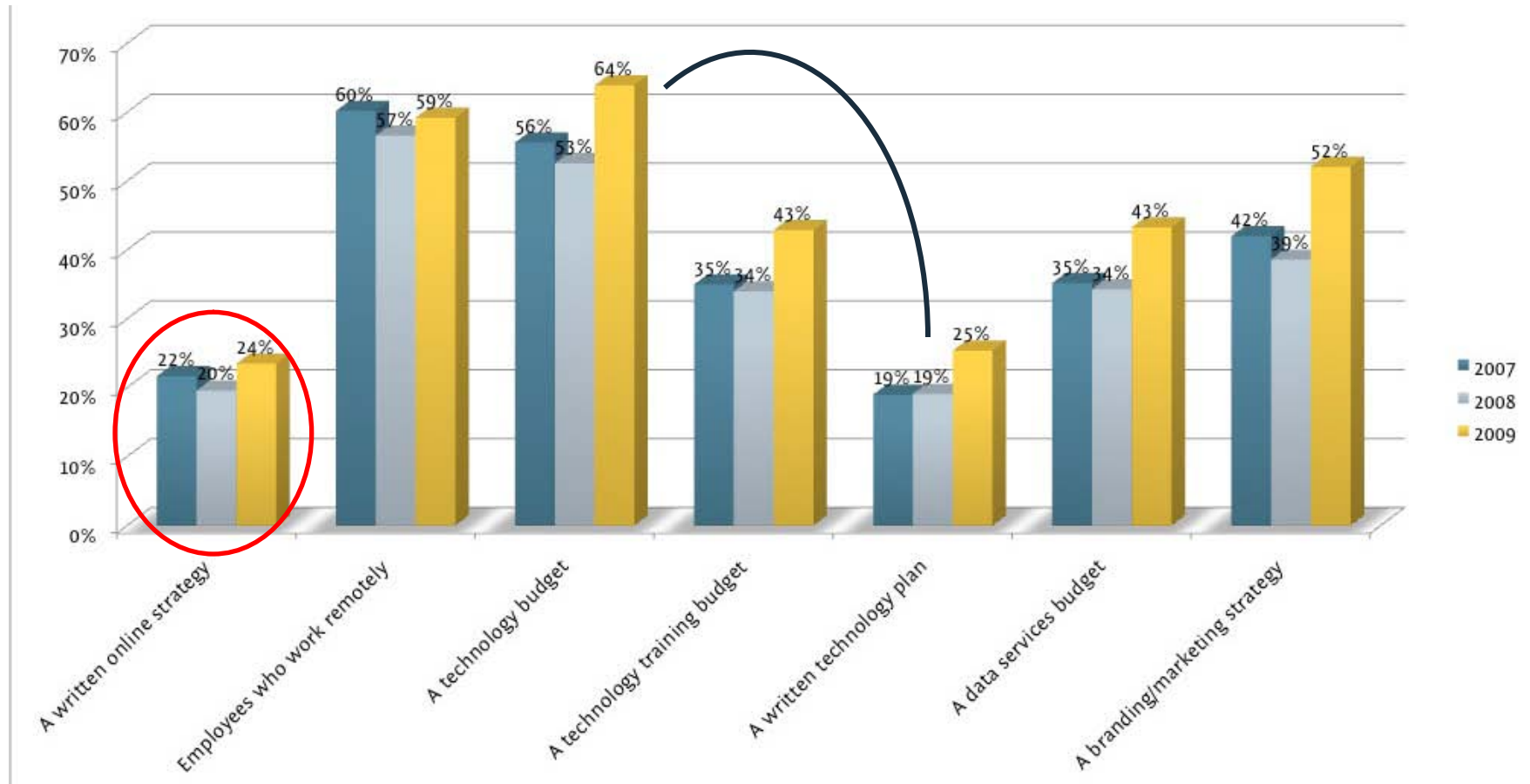
Top fundraising drivers 2007 to 2009



How not-for-profits most commonly communicate with their donors



Does your organisation have the following?



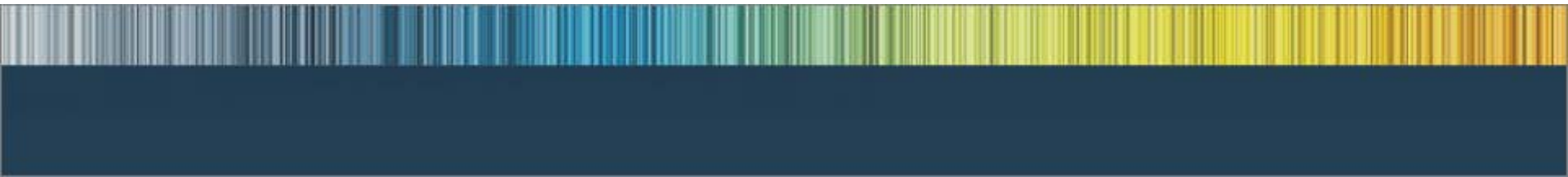
Blackbaud SONI Europe

Questions?

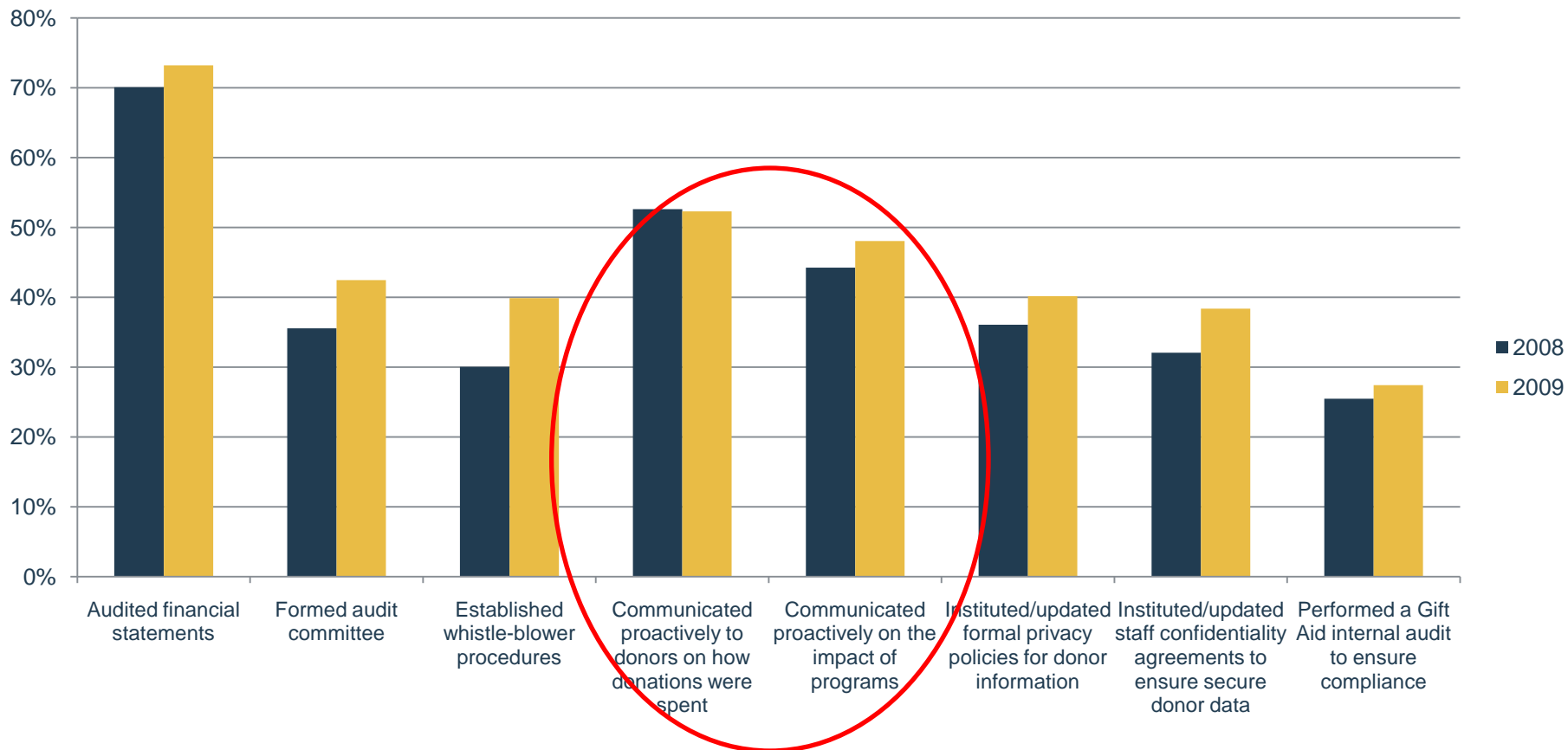
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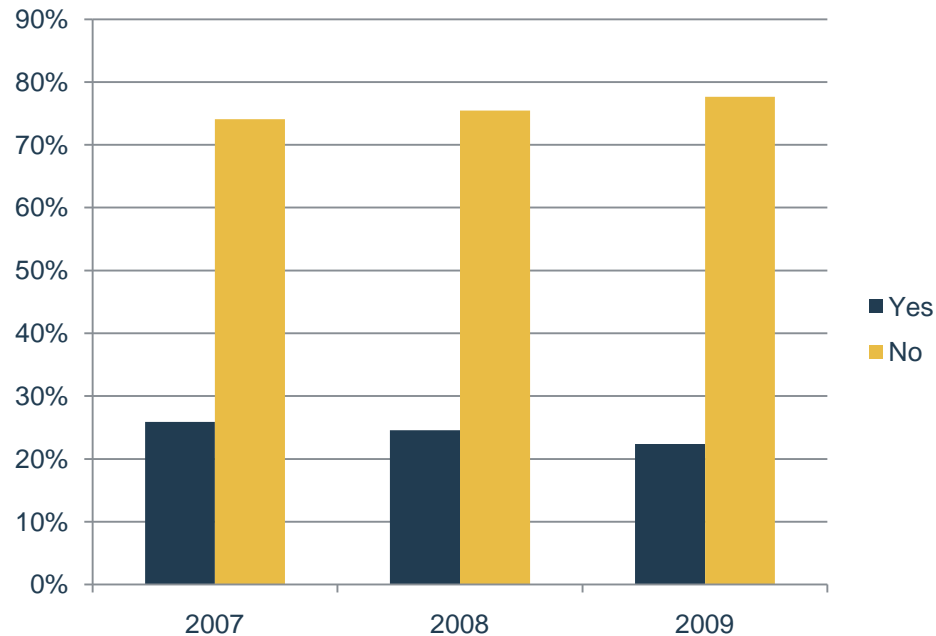
General Operations



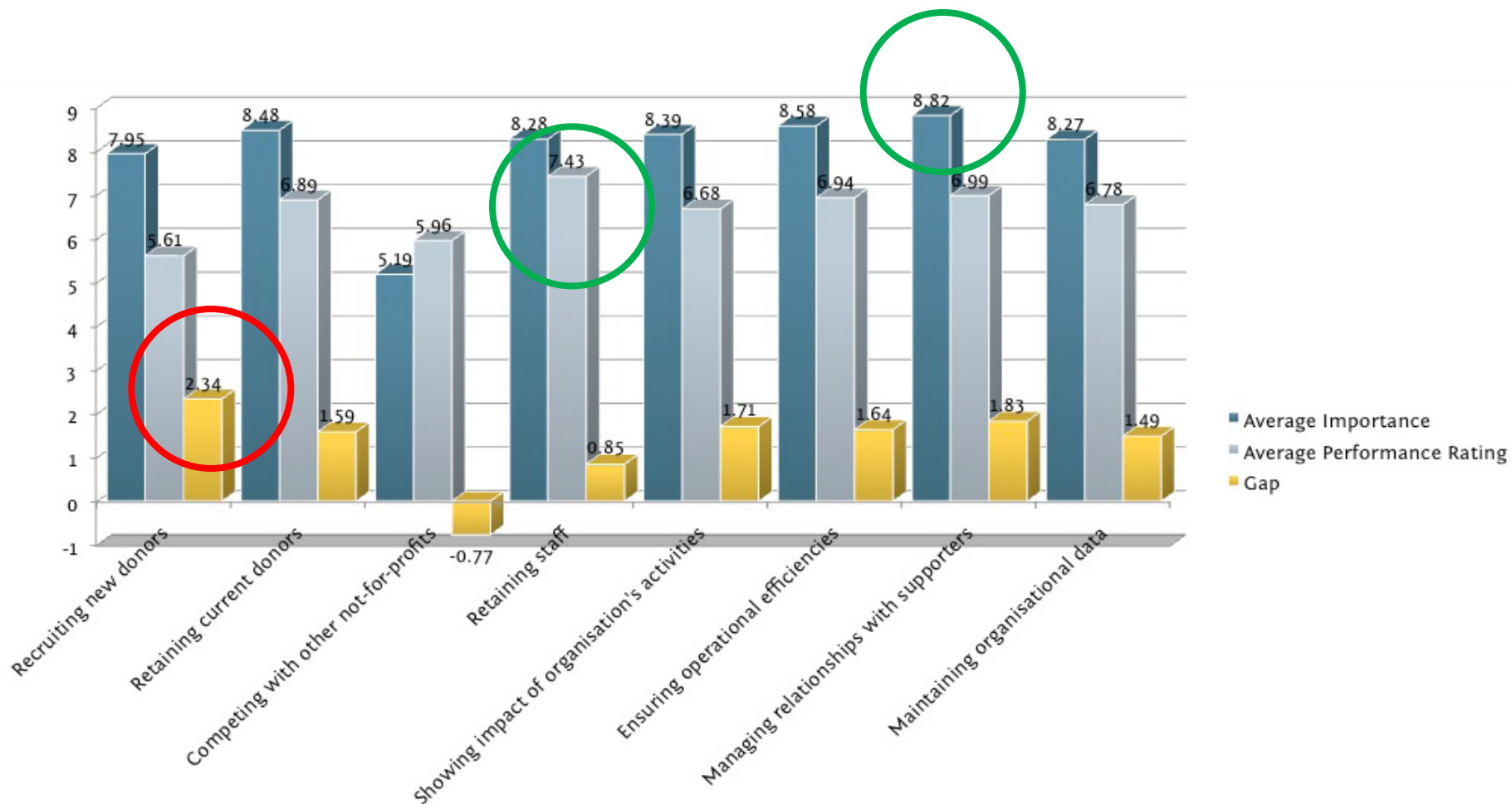
For each of the following practices, please indicate the action your organisation has taken.



Has your organisation seen an increased demand from donors on how their contributions were spent?



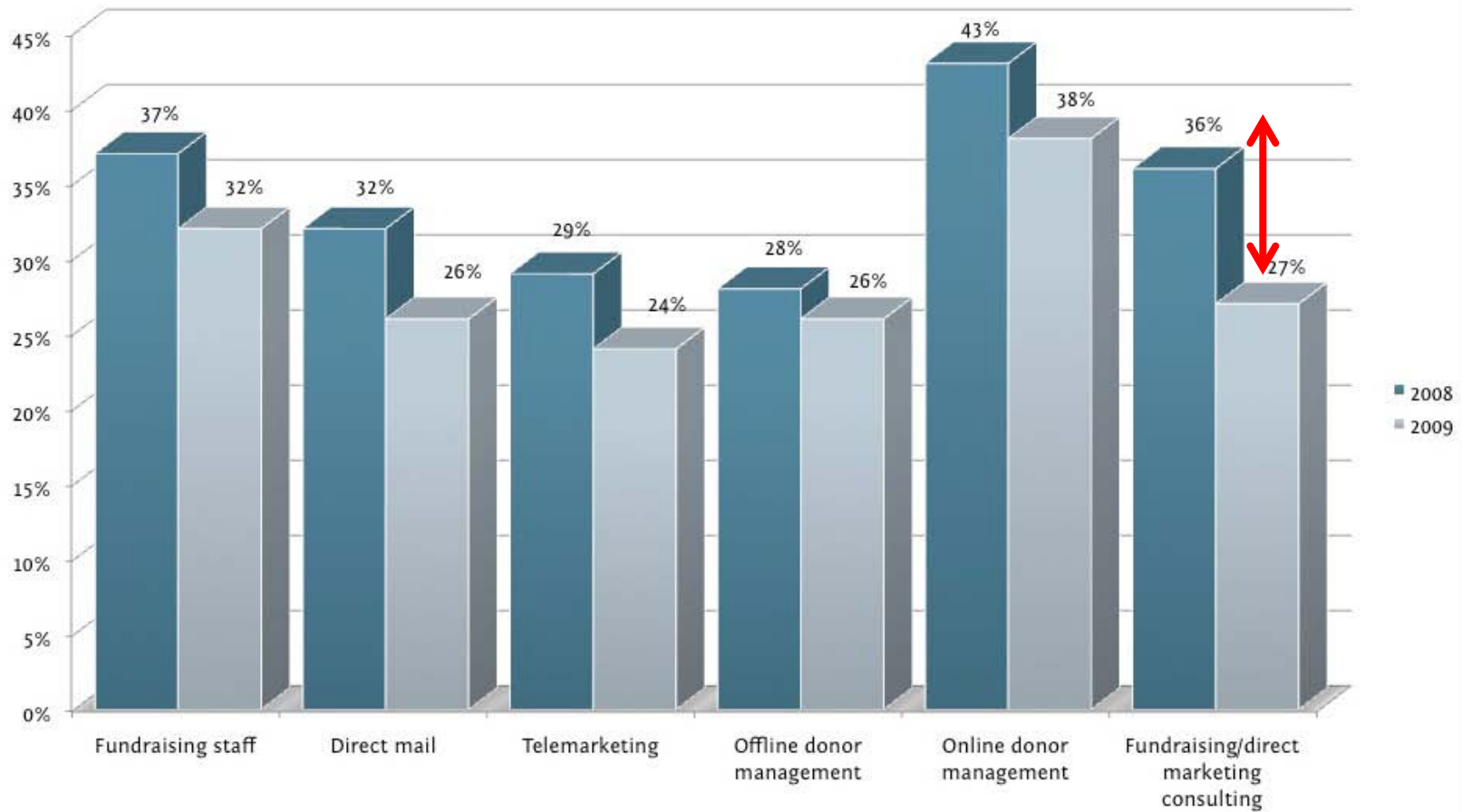
How important are the following to your organisation? And compared to the performance.



Fundraising and Communications



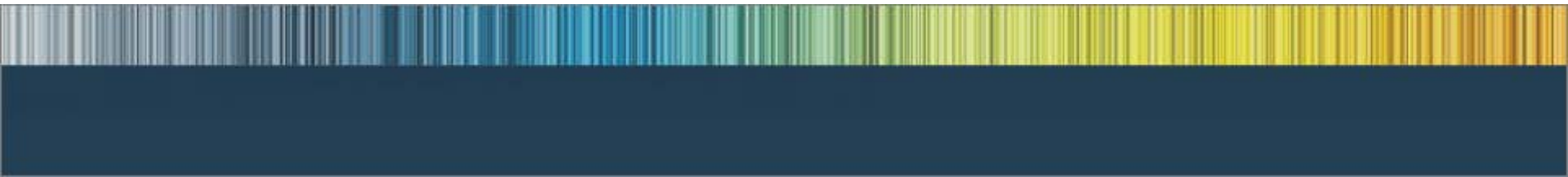
Financial investments 2009 v 2008



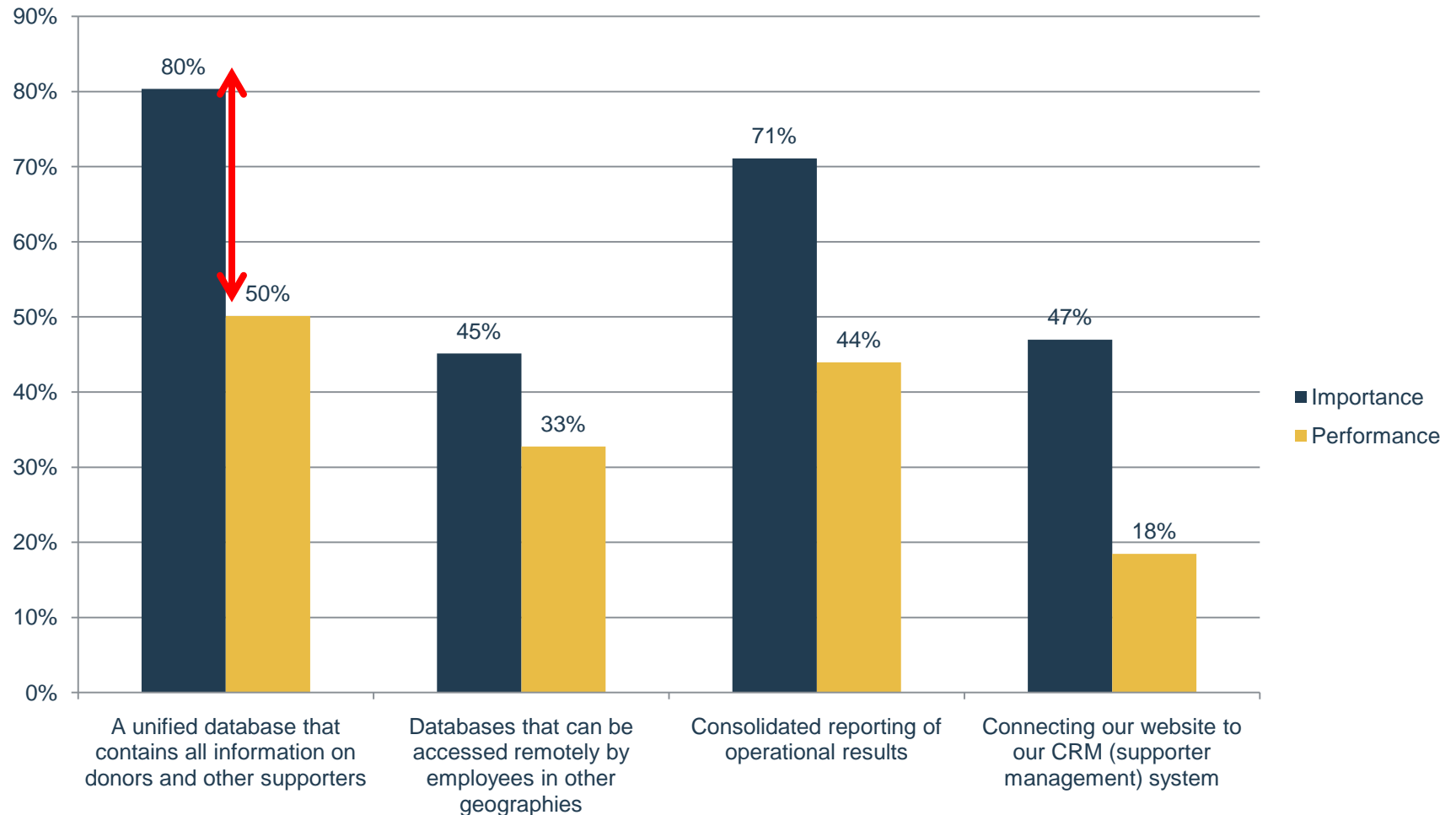
Where is the money going?

- All show decline...
- Largest investment in online
- Largest decline – outsourcing (consultants)

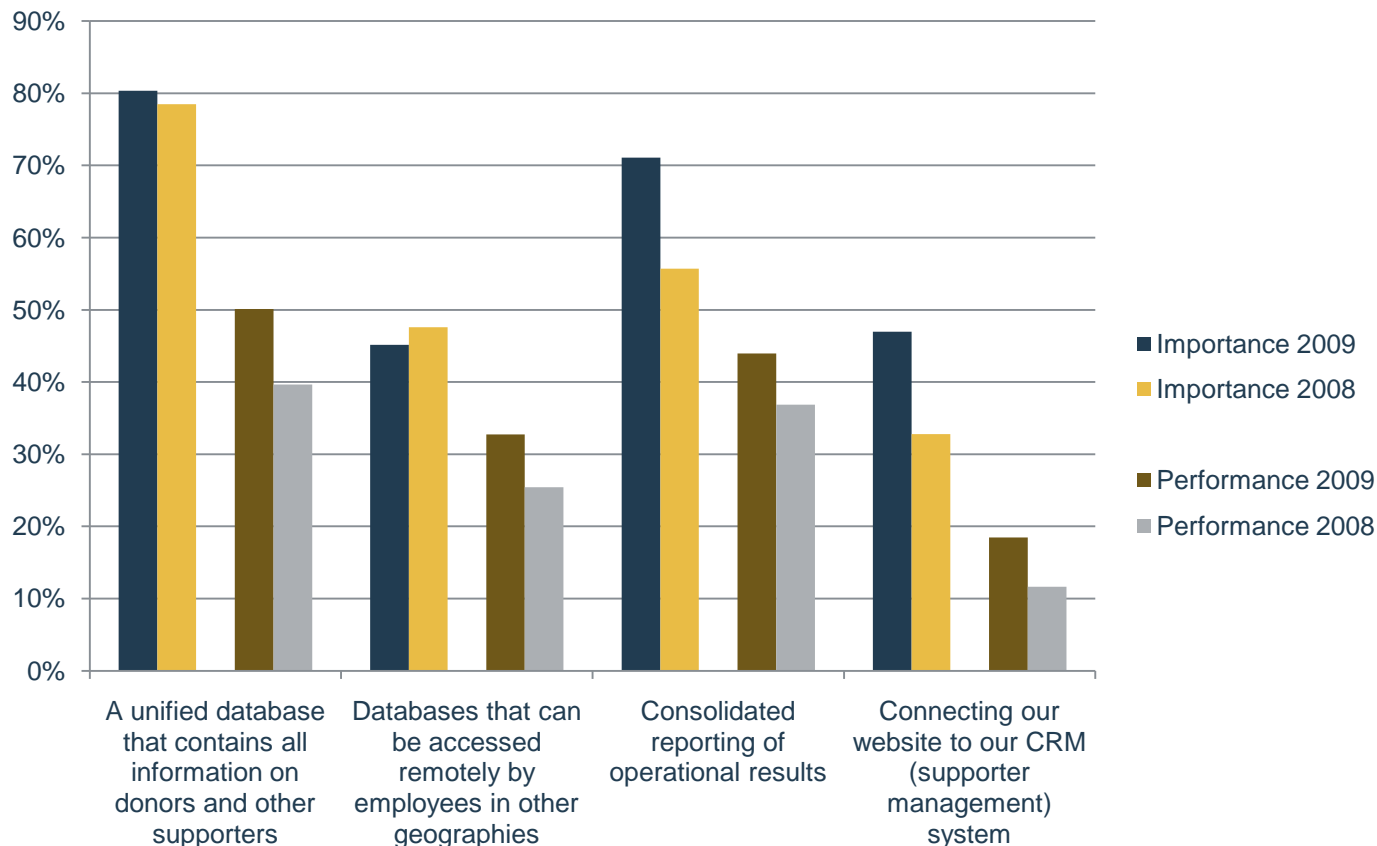
Technology



How you rate your organisation in achieving the following.



How you rate your organisation in achieving the following.

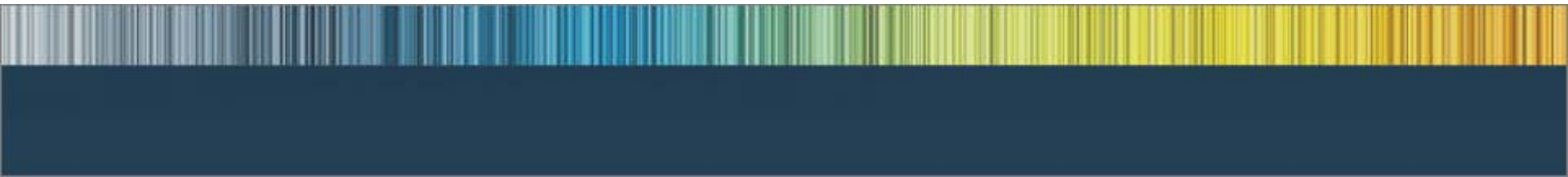


In all cases (except one) not-for-profits report improvements in Importance and Performance year on year

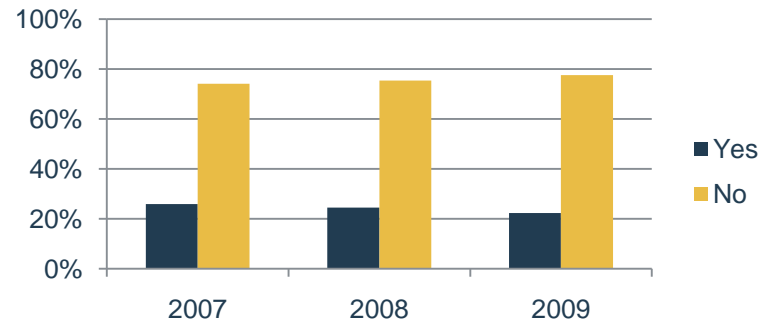
Who's online?

- Key to communication strategies
- Reported that under 50% raise funds online
- Who looks after the website?
 - Impact on strategy
 - Impact in written place

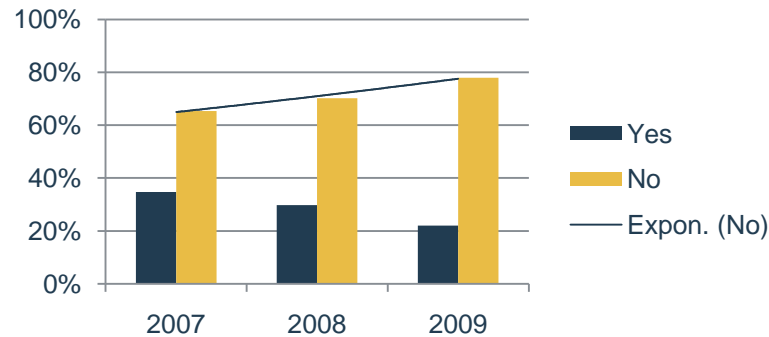
Supporter demands!



Has your organisation seen an increased demand from donors on how their contributions were spent?



Has your organisation seen an increased demand from donors asking that their contributions be restricted for a certain purpose?



How is this move toward increased restricted gifts affecting your organisation?

