



*Philanthropic Counsel... Making a Lasting Difference for Good*

## **Test Your Fundraising IQ**

*Based on 2017 figures from the 2018 Giving USA*

1. Overall charitable giving in the United States amounted to \_\_\_\_\_ in 2017: a) \$410.02 billion, b) \$325.54 billion, c) \$430.65 billion, or d) over \$450 billion.

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2. The largest portion of philanthropic contributions in 2017 came from: a) bequests, b) individuals, c) foundations, or d) corporations.

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3. The largest percentage of total giving in 2017 went to: a) education, b) human services, c) health, d) international affairs, e) public-societal benefit, f) arts, cultural and humanities, g) environment/animals, h) religion, i) foundations, or j) foundation grants to individuals.

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4. The largest increase in giving, 15.5% more in 2017 than in 2016 went to which of the following: a) educational institutions, b) human services, c) health, d) public-society benefit, e) arts, f) environment/animals, g) international affairs & development, h) religion, or i) foundations.

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5. Primary prerequisites for a community campaign success are: a) demonstrable and urgent need for support, b) identifiable sources of gifts, c) availability of top-flight leadership, d) adequate professional staff support for volunteers, e) unqualified commitment of the Board of Trustees, or f) a committed Executive team.

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6. The most cost-effective way to raise capital money is by: a) direct mail, b) telephone solicitation, c) person-to-person, or d) hiring professional solicitors.

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7. Which of the following accurately represents the size and number of gifts required to raise \$3,000,000 on a community capital campaign: a) the top gift must be in the range of 15-25% of the total objective, b) top 10 gifts must be 35% to 60% of the objective, c) divide the objective by the likely number of prospects to determine the average gift needed, or d) it depends in part on the type of community organization from a Catholic Church or University at lower percentages, to a cultural organization at a higher percentage.

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8. Sources of support for a major campaign must come from: a) present and past Board Members, b) staff, c) foundations, d) other better able to give individuals, e) corporations, f) previous donors, or g) grateful constituents/members.

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9. People give something to fund-raising campaigns because: a) they believe in the cause, b) they need a tax break, c) they are asked by the right person, or d) the institution needs the money.
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10. Which of the following truths were confirmed by a study funded by the Rockefeller Bros. Foundation: a) the more volunteers you have, the more money raised, b) real dollars are raised face-to-face, c) the worthiest causes receive the most support, or d) campaigns are successful primarily due to committed leadership.
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11. The toughest items to raise money for is: a) equipment, b) renovations, c) endowment, d) debt reduction, e) administrative offices, f) new construction, g) program support, or h) operations sponsorship.
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12. The primary reason for people refusing to volunteer is: a) lack of time, b) distrust of institutions, c) unable due to health, d) they work elsewhere, e) won't go door to door, or f) they feel they have done enough for charity.
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13. The most generous givers are people who: a) are married or widowed, b) have higher education, c) are Protestants, d) are in professional organizations, e) are between the ages of 50-64 years old, f) have higher incomes, or g) attend religious services.
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14. The solicitation approach preferred most often by over 75% of large donors is: a) by letter, b) by the chief financial officer, c) by a stranger who is easy to talk to, d) by a person they know well, or e) email/phone.
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15. Nearly 60% of wealthy households who stopped giving to a charitable organization attributed their change in philanthropic behavior to: a) a negative experience with the organization's staff, b) an increase in scope of their charitable giving, c) no longer feeling connected to the organization, or d) an increase in private, disposable spending, or e) they were asked too many times.
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16. While charitable giving is increasing year to year in the U.S. some studies show that fewer may be giving as only what percent of taxpayers reported charitable giving: a) 10%, b) 16%, c) 24%, or d) 49%.
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17. A recent study from the Chronicle of Philanthropy suggests that a contributing factor to the recent decline in the number of taxpayers reporting charitable giving involves not-for-profit organizations: a) not courting the well-heeled and slighting the small donor, b) relying too heavily on the younger generation by heavily investing in social media marketing, c) decreasing the size of their development departments, or d) they haven't done anything, it's just that fewer individuals are giving while those giving are giving more.
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18. A successful capital or comprehensive campaign can result in: a) higher annual support, b) broader community interest, c) a broader donor base, d) new leadership, or e) increased public awareness.
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19. The Bill & Melinda Gates Foundation has started efforts to increase giving by average Americans. *Giving by All* commits between \$2 million to \$3 million a year to 10 not-for-profit organizations in order to increase the share of income Americans give beyond 2% annually. Research goals of *Giving by All* include: a) test how storytelling affects giving, b) test donor segmentation, c) convene networks of giving circles, d) use behavioral science to explore how people give and develop ways to increase giving, or e) conduct research on gender and philanthropy.
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20. Which is true: a) people hear 7% of what we say, b) 55 % of what people read from our conversation is non-verbal, or c) 38% of what people hear from us is “how we say it.”
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21. The most cost-effective way for a prospective donor with highly appreciated securities to give to a not-for-profit institution is to: a) sell the stock and donate the proceeds, b) give the stock directly to the organization, c) set up a charitable trust funded by the securities, d) write a codicil to one’s will, or e) other.
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22. Which are widely considered by major, national not-for-profit institutions as appropriate donor rights: a) disclosure on how the legislature plans to use donated resources, b) to be informed of those on the Board, c) to have access to recent financial statements, d) to receive appropriate gift acknowledgment and recognition, e) to be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law, f) to be informed whether those seeking donations are volunteers, employees or hired solicitors, or g) to have the opportunity for their names to be deleted from mailing lists that may be shared.
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23. The effective cost of someone with \$250,000 or more annual income making a \$100,000 gift to a not-for-profit is: a) \$60,400, b) 51,500, c) it depends upon the state in which the donor lives, or d) whatever their tax advisor says based upon tax rates and individual circumstances.
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24. A survey of Stanford University seven-figure donors revealed the following donor attributes: a) they owned their own business, b) they gave in a capital campaign context, c) they had made multiple gifts in the past, d) they were likely to be Board members, or e) other.
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25. Tax law offers charitable-giving incentives only to those who itemize their donations – about 30% of taxpayers. Offering the deduction to all would give average Americans more reason to give. Research by the Indiana University Lilly Family School of Philanthropy suggests such a change could increase giving by: a) \$5 Billion+, b) \$800,000+, c) a negligible amount, or d) \$1 Billion+.
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26. Reasonable fund-raising costs are: a) 25% for annual giving, b) 100% for donor acquisition, c) 10% for capital campaigns, or d) it depends on the type and age of the institution.
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27. Which of the following reflect contemporary challenges in fund-raising volunteer management: a) increased competition for their time, b) higher professional expectations, c) increased wariness of fund-raising campaigns, or d) great concern about liability.
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28. Phonothons can still be effective vehicles for fund-raising in: a) community campaigns, b) youth organizations, c) educational institutions, or d) religious organizations.
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29. How many registered charities (501(c)(3) nonprofits) are there in the US as of 2017: a) 850,000, b) 900,000, c) 1.5 million, or d) 3 million.
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30. New England's creative economy generates how much in cultural tourism dollars? a) \$880 million, b) \$1.9 billion, c) \$3 billion, or d) \$6.6 billion.
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31. What percentage of donors involve children in grant-making decisions: a) 8%, b) 41%, c) 15%, or d) 81%.
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32. True or False: People who made their money from a family-owned business or a start-up company tended to give far more, on average, than those who derived their money from other sources.
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33. True or False: A greater proportion of older billionaires give to international causes, and the environment.
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34. It is estimated that between \_\_\_\_ trillion to \_\_\_\_ trillion in charitable bequests will be made between 1998-2052: a) \$8.3 to \$14.7, b) \$6.6 to \$27.4, c) \$10 to \$25.3, or d) \$29.2 to \$45.
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35. According to a recent study, donors who were asked to give in person by someone they knew gave what percent more to secular charities when compared with telephone, mail, or email requests from someone they knew: a) 19%, b) 23%, c) 30%, d) 50%.

Sources:

2016 Million Dollar Gift Reports, Indiana University Lilly Family School of Philanthropy

Bloomerang. *State of Major Gift Fundraising 2017*

[Foundationcenter.org/findfunders/statistics](http://Foundationcenter.org/findfunders/statistics)

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Gunther, Marc. *A Giving Challenge for the Masses*. The Chronicle of Philanthropy 10.2017.

Hake, Brian and Warneke, Kevin. *Trust the Process*. Advancing Philanthropy 10.2018

Lindsay, Drew. *Breaking the Charity Habit*. The Chronicle of Philanthropy 10.2017.

Answers:

- 1.) A
- 2.) B [bequests 9%, individuals 70%, foundations 16%, corporations 5%]
- 3.) H [a) education 14%, b) human services 12%, c) health 9%, d) international affairs 6%, d) public-societal benefit 7%, f) arts, cultural and humanities 5%, g) environment/animals 3%, h) religion 31%, i) foundations 11%, j) foundation grants to individuals 2%]
- 4.) I
- 5.) All
- 6.) C
- 7.) A, B, & D
- 8.) A, D, F, & G
- 9.) C
- 10.) A & D
- 11.) D & E
- 12.) A
- 13.) All
- 14.) D
- 15.) C
- 16.) C
- 17.) A
- 18.) All
- 19.) All
- 20.) All
- 21.) B & C
- 22.) All
- 23.) D
- 24.) All
- 25.) D
- 26.) All
- 27.) All
- 28.) C & D
- 29.) C
- 30.) D
- 31.) B
- 32.) True
- 33.) False
- 34.) B
- 35.) A