An Annotated Bibliography of Recent Literature in the Field of Donor Relations

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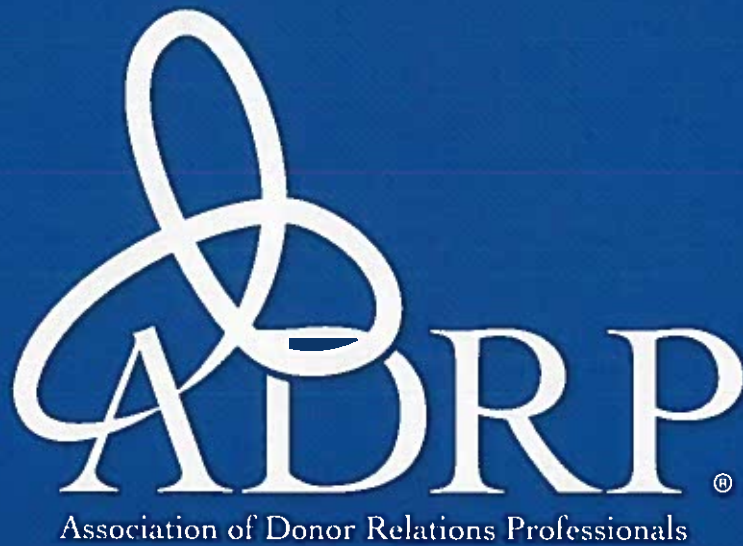
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ANNOTATED BIBLIOGRAPHIES

AbouAssi, K. (2013). Hands in the pockets of mercurial donors: NGO response to shifting funding priorities. *Nonprofit and Voluntary Sector Quarterly*, 42(3), 584–602.

Using a qualitative approach, the author examines the decisions of four Lebanese non-governmental organizations in the face of changing donor-funding patterns. AbouAssi analyzed the giving patterns of donors common to all four organizations and developed a typology to classify organizational responses to the donors' changing giving behaviors. The organizational responses were classified as exit (no longer seeking funding), voice (working with the donor and giving feedback to maintain the relationship), loyalty (organizational activity involuntarily changes in reaction to the donor's priorities), or adjustment (organizational activity voluntarily changes to align with donor priorities). AbouAssi concludes that organizational reactions to donors' funding shifts were in part determined by the degree to which organizations depended on external funding sources.

Keywords: donors, giving behavior, loyalty, priorities, typology

Ahern, T., & Joyaux, S. (2008). Keep your donors: *The guide to better communications & stronger relationships.* **Hoboken, NJ: John Wiley & Sons, Inc.**

Written to fill the gap between finding donors and retaining them, Ahern and Joyaux provide strategies for building relationship across all dimensions of the nonprofit organization and creating effective marketing and communications aimed toward donors. Specific techniques for building donor-centered programming and measuring effectiveness are also included.

Keywords: communication, donor-centered, guide, marketing, relationship-building, techniques

Barry, F., Henze, L., Lamb, D., & Swank, K. (2010). *Cultivating lifelong donors: Stewardship and the fundraising pyramid.* **Charleston, SC: Blackbaud.**

In this reference guide, the authors use a basic fundraising pyramid to demonstrate how organizations can cultivate all types of donors to maintain a sustainable development program. The guide is divided into four chapters and one bonus chapter, each highlighting a specific area of donor stewardship. Chapter one focuses on using social media to engage and cultivate relationships with donors. Chapter two teaches readers how to steward one-time donors to transform this audience into frequent givers. Chapter three covers transitional giving as a way to strengthen an organization's fundraising pyramid, and readers are guided through the process of moving donors toward greater levels of giving. Chapter four focuses on stewardship strategies for planned giving donors and tying stewardship to the organizational mission. The bonus chapter covers prospect research from the perspective of a professional who is not educated in this particular area of advancement and includes the basics of where to find relevant information about an organization's donor prospects.

BARRY, F., HENZE, L., LAMB, D., & SWANK, K. [CONTINUED]

Keywords: donor retention, engagement, giving levels, fundraising pyramid, guide, planned giving, prospect research, social media, stewardship, strategies, technology

Bennett, R. (2006). Predicting the lifetime durations of donors to charities. *Journal of Nonprofit & Public Sector Marketing, 15*(1-2), 45-67.

Bennett conducts a "donor lifetime value analysis" (DLV) to explore factors that encourage donors to maintain life-long relationships with charities. A mail-based survey was sent to U.K.-based donors who had given more than once to a specific charity. Donors were asked to determine their psychological and personal involvement with the charity and their giving behavior in relationship to the charity. Other information was collected through organizational databases. Results reveal that donors with high psychological involvement with the charity (coined as the "helpers high") and those with positive, warm feelings in response to donation acknowledgements are more likely to remain with the organization. In addition, a strong relationship was found between donor lifetime duration and the donor naming that charity in his or her will. Drawing from these findings, the author suggests that organizations provide donors with multiple options to give—thereby offering multiple touch points with donors—and ask donors about their giving preferences.

Keywords: acknowledgements, helper's high, involvement, lifetime value, market segmentation, psychological factors, relationship marketing

Bernal, E. R. (2016). Beyond compliance basics: Results-driven stewardship. *Journal of Donor Relations & Stewardship, 1*, 21–35.

Bernal draws from literature and professional experience to make the case for organizations' use of impact communications to steward donors. The author reviews minimum compliance regulations for nonprofits and discusses the value of communicating impact and compliance to donors beyond those basic requirements. Bernal suggests that honest nonprofit-to-donor dialogue about actual operational costs and organizational outcomes are valuable ways to steward supporters via enhanced trust and transparency.

Keywords: communication, compliance, donors, impact, outcomes, results-driven, stewardship, trust

Boenigk, S., & Scherhag, C. (2014). Effects of donor priority strategy on relationship fundraising outcomes. *Nonprofit Management and Leadership, 24*(3), 307–336.

Boenigk and Scherhag examine the efficacy of the use of donor priority strategy on donor satisfaction, giving patterns (upgrading or downgrading), and volunteering behavior within the context of a cultural organization. Donor priority strategy refers to the grouping of donors by donation levels and special benefits. Data were collected via a postal survey of nearly 4,000 donors to a European museum, among which the vast majority were lower-prioritized donors. Among other results, the findings reveal that an expectation to receive a special benefit positively affects both higher-prioritized and lower-prioritized donors' satisfaction with the

nonprofit. In addition, the use of priority strategies reduces donors' incentive to downgrade giving behavior and enhances donors' incentive to upgrade to the next level of priority.

Keywords: benefits, cultural, donor priority, satisfaction, segmentation, priority strategies, upgrading

Burk, P. (2003). *Donor-centered fundraising: How to hold on to your donors and raise much more money*. Hamilton, Ontario: Burk & Associates Limited.

Burk has written the standard guide for today's fundraising practice that focuses on a modern, donor-centered approach. Drawing from decades of fundraising experience and two national studies on donor retention, Burk presents chapters on the proper ways to acknowledge and thank donors, how to effectively communicate with donors, donor-centered recognition practices, and how to implement these practices in a cost-efficient manner. Readers are provided with systematic approaches for implementing suggested practices.

Keywords: acknowledgements, communication, donor-centered, donor relations, fundraising, guide, recognition

Burnett, K. (2002). *Relationship fundraising: A donor-based approach to the business of raising money* (2nd ed.). San Francisco: Jossey-Bass.

In this second edition, Burnett offers strategies, tools, and techniques to development professionals to enhance effective communication with donors. Focused on relationship fundraising, Burnett uses case studies, donor profiles, and other means to teach professionals how to understand donors, build relationships with donors, effectively communicate with donors, and market to donors.

Keywords: communication, fundraising, guide, marketing, relationship fundraising, techniques

Chung-Hoon, T. L., Hite, J. M., & Hite, S. J. (2005). Searching for enduring donor relationships: Evidence for factors and strategies in a donor/organization integration model for fund raising. *International Journal of Educational Advancement, 6*(1), 34–53.

Chung-Hoon, Hite, and Hite explore how higher education institutions create enduring donor relationships for long-term fundraising effectiveness. The researchers utilize a theoretical framework called the Donor/Organization Integration Model (DOIM) and hypothesize that the more donors are embedded within an organization and the more "structural interaction" donors have with an organization the more "enduring" donors' relations will be. Using qualitative data gathered through interviews with development employees at three U.S.-based higher education institutions, Chung-Hoon, Hite, and Hite evaluate the data according to four "organizational integration strategies" within the DOIM. The researchers conclude, "the key to truly enduring donor relationships is finding a fully integrative focus and strategy for fund raising" that includes "integrating donors with the institution in terms of both relational embeddedness and formal structural interactions."

CHUNG-HOON, T. L., HITE, J. M., & HITE, S. J. [CONTINUED]

Keywords: donor relations, fundraising, higher education, networking, organizational planning, strategies

Chung-Hoon, T. L., Hite, J. M., & Hite, S. J. (2006). Organizational integration strategies for promoting enduring donor relations in higher education: The value of building inner circle network relationships. *International Journal of Educational Advancement, 7*(1), 2–19.

Chung-Hoon, Hite, and Hite use the Donor/Organization Integration Model (DOIM) to evaluate the effects that donor formality and embeddedness have on enduring donor relations and fundraising outcomes. The researchers specifically explore the relationship between high-level donors and 132 U.S. public universities using survey methodology. The results suggest that the more donors are engaged with and integrated into an organization the more likely donors will give major gifts and unrestricted funds. Those institutions that utilize the highest level of integration are also more likely to retain long-term (enduring) donors and donors who make principal-level gifts. The authors suggest that organizations utilize a "more complex relational and structural donor" interactional approach in achieving greater fundraising success.

Keywords: donor relations, engagement, higher education, integration, fundraising outcomes, major gifts, relationships, strategies, unrestricted giving

Emlen, J. (2007). *Intentional stewardship: Bringing your donors to their highest level of philanthropy.* **Washington, DC: Council for Advancement and Support of Education.**

Published by the Council for the Advancement and Support of Education (CASE), this book includes a comprehensive discussion on stewardship practices used in higher education. The first three chapters introduce the Donor's Bill of Rights and the fundamentals of intentional stewardship. The next three chapters detail technological approaches used for stewarding donors. The final chapters provide practical information for donor relations professionals working with a board, functioning in a decentralized environment, and tasked with measuring outcomes. This publication contains a number of useful guides, surveys, and resources to help donor relations professionals jumpstart or refine their stewardship programs.

Keywords: donor relations, guide, higher education, resources, stewardship, technology

Emlen, J. (2016). Professionalism in donor relations & stewardship. *Journal of Donor Relations & Stewardship, 1,* 89–118.

Emlen discusses the role of professionalism within the field of donor relations, drawing from sociology and other fields that "study the institutionalization of expertise." Applying key concepts from these fields to donor relations and stewardship, the author suggests two theories of professionalism relevant to donor relations: a "character and commitment model" and a "systems management professional model." Emlen further discusses how the professionalization of the donor relations field provides opportunities for evaluation, training, and establishing standards of conduct.

Keywords: donor relations, professionalism, standards, stewardship

Emlen, J., & Manner-McLarty, A. (2016). The role of shop size and configuration in providing donor relations services: An interview with Nancy Lubich McKinney. *Journal of Donor Relations & Stewardship, 1*, 121-132

In this interview, the editors of the *Journal of Donor Relations & Stewardship* consult former ADRP president Nancy Lubich McKinney on the distinctions between large and small, centralized and decentralized donor relations shops. McKinney makes the case for adaptive organizations that can change form between centralized and decentralized models as the need arises. The interview highlights key management traits required for each specific shop size, the difference between specialists and generalists, and the upsides and downsides of each particular donor relations model.

Keywords: donor relations, donor relations models, management

Feng, S. (2014). Getting lapsed donors back: An empirical investigation of relationship management in the post-termination stage. *Journal of Nonprofit & Public Sector Marketing, 26(2)*, 127-141.

Using a "proportional hazard model" and five-years of donor demographic and giving data from a large nonprofit organization in Southeast Asia, Feng specifically examines the probability of donor reactivation across demographic groups as an outcome of the timing of organizational communications. Results reveal that too frequent communications just prior to and after a donor's gift promote donation lapses. However, donors who have a longer-term relationship with an organization, have given larger gifts previously, or have a longer lapse period have a higher reactivation rate. Certain demographic characteristics also relate to a higher chance of donor reactivation: donors who are younger, male, employed in blue-collar or hourly work, or divorced.

Keywords: communication, fundraising, international, lapsed, marketing, reactivation, relationship management

Feudo, J. A. (2010). *Alumni relations: A newcomer's guide to success* (2nd ed.). Washington, DC: Council for Advancement and Support of Education.

This second edition of Feudo's original guide (1999) offers an overview of common but critical topics within the field of alumni relations. While useful for newcomers, seasoned professionals can also benefit from the information presented in this guide. Drawing from decades of alumni relations experience, Feudo offers practical advice on such topics as volunteer management, benchmarking, strategic planning, campaigns, affinity groups, young alumni, and reunions.

Keywords: alumni relations, benchmarking, campaign, guide, higher education, newcomers, planning, practical, strategic planning, volunteer

Grant, A. S., & Wolverton, M. (2003). Gaps in stewardship quality at three institutions. *International Journal of Educational Advancement,* 4(1), 45–64.

Grant and Wolverton examine the stewardship expectations and perceptions of major gift donors at three U.S. universities. Using qualitative methodology (interviews and focus groups comprised of 30 major gift donors and 74 development officers), the authors developed a Stewardship Quality Gap Model to identify the divisions between the universities' stewardship efforts and donors' stewardship expectations of gifts made to those universities. While the results vary by institution size, the authors identify the following gaps: development staff turnover, lack of consistency in stewardship efforts, lack of understanding of what donors expect in terms of stewardship, and lack of standard stewardship practices. Donors to institutions universally noted the importance of being acknowledged for their contributions and being notified about how their gifts were being used. The authors underline the importance of institutions investigating both their strengths and weaknesses in the area of stewardship and making appropriate changes.

Keywords: acknowledgement, development, donor perception, expectation, fundraising, higher education, major gifts, stewardship

Hetrick, J. L. (2008). *Effective donor relations.* **Hoboken, NJ: John Wiley & Sons, Inc.**

Focused exclusively on building a donor relations program, Hetrick provides techniques for developing each element of the program. Hetrick provides common issues that arise in the process of developing a donor relations program, as well as commonly required and useful documents and checklists to help guide the process.

Keywords: donor relations program, guide, techniques

Holloway, B. (2013). Using the phone to reduce donor attrition and drive loyalty. *International Journal of Nonprofit and Voluntary Sector Marketing,* 18(1), 31–35.

Analyzing stewardship contact data from a Pell & Bales donor loyalty campaign, Holloway investigates whether the employment of loyalty telephone calls reduces donor attrition. Among other findings, the research reveals that loyalty calls to donors that do not include an additional ask increases future engagement and support. Loyalty calls reduced long-term donor attrition by at least 10% in one case and short-term donor attrition by 30% for recent donors in another case. Holloway suggests that nonprofits invest more in building relationships with donors using follow-up calls and other practices.

Keywords: attrition, donor, fundraising, loyalty, phone, relationships

Knowles, P., & Gomes, R. (2009). Building relationships with major-gift donors: A major gift decision-making, relationship-building model. *Journal of Nonprofit & Public Sector Marketing, 21(4)*, 384-406.

Knowles and Gomes analyze the effectiveness of the AID-TIM to cultivate and drive major gift fundraising. The model stands for "awareness and understanding, interest and involvement, desire to help, trial gift, information about what and how to give, and major gift action." The authors posit that the AID-TIM model can fill the need for a data-driven fundraising structure specifically for raising major gifts. The paper analyzes the elements and benefits of the model and provides how-to instruction for specific aspects of the framework.

Keywords: donors, fundraising, involvement, major gifts, relationship-building, relationship marketing

Lindahl, W. E. (2009). *Principles of fundraising: Theory and practice*. Burlington, MA: Jones & Bartlett Learning.

Lindahl tackles fundraising from multiple angles using theoretical models, historical perspectives, and practical approaches. Drawing most heavily from the marketing field, Lindahl provides perspectives on fundraising in terms of theology, ethics, psychology, sociology, law, economics, and more. Lindahl includes discussions on cultivation and stewardship within a chapter on "The Fundraising Process." Useful for both theoretical and practical purposes, this publication is useful for donor relations professionals who seek a comprehensive yet broad understanding of the fundraising field.

Keywords: fundraising, history, marketing, practical approaches, principles, theoretical

Manner-McLarty, A. (2016). A call for donor recognition strategy. *Journal of Donor Relations & Stewardship, 1*, 37–67.

Manner-McLarty provides a plan of action for establishing donor-recognition strategy. Drawing from existing literature on donor relations, the author defines donor-recognition strategy, discusses the broad contexts for use of this strategy within nonprofits, and outlines meaningful ways to build a donor-recognition program that incorporates ROI measures. Manner-McLarty provides recommendations for donor-recognition activities that mutually benefit donors and organizations, as well as matrices that include donor-recognition activities, strategy documents, and templates.

Keywords: communication, donor recognition, donor relations, strategy, stewardship

Merchant, A., Ford, J. B., & Sargeant, A. (2010). 'Don't forget to say thank you': The effect of an acknowledgement on donor relationships. *Journal of Marketing Management, 26*(7-8), 593–611.

Merchant, Ford, and Sargeant present two studies that test the effects of gift acknowledgements on donors' continued relationship with a nonprofit organization. In study 1, the researchers collected survey data from 478 donors to a public radio station to evaluate how gift acknowledgements and frequency of donations affect three psychological measures (future donation intentions, commitment, and emotional utility) of donor relationship with the nonprofit. The results of study 1 reveal that thank you notes to less frequent donors increases these donors' future gift intentions, commitment, and emotional bond with the organization.

In study 2, using an experimental approach and survey data collected from 111 American university students, the researchers examined how gift acknowledgements enhance the emotional connection between the donor and a hypothetical nonprofit. Results of study 2 reveal that the use of a thank you note enhances donors' positive emotions toward the organization while minimizing negative perceptions. Together, the studies confirm that acknowledgements in the form of thank you notes foster stronger emotional connections between donors and the nonprofit organizations they support.

Keywords: acknowledgements, commitment, donor relations, emotions, psychological factors, stewardship, thank you notes

Metrick, L. A. (2005). Successful strategies for effective stewardship. *New Directions for Philanthropic Fundraising, 2005*(49), 29–41.

Metrick tested donor-centered stewardship approaches on donor attrition, overall giving, and major gifts within the context of a Catholic hospital foundation. Utilizing an experimental design, Metrick implemented a stewardship program during the foundation's "acquisition appeal" to fund a new clinic. Metrick divided donors into two groups, of which both received thank you notes within 48 hours of their donation. The experimental group, however, also received a thank you call from either a staff or board member and, later, a personalized letter incorporating key elements from Burk's (2003) donor-centered approach to stewarding donors. Results reveal that while both the control and experimental groups renewed donations at the same rate, a slightly higher percentage of donors in the experimental group gave more during his or her second donation. In addition, subsequent major and planned gifts in the experimental group were larger than those made by donors in the control group. Results of this study were not statistically evaluated.

Keywords: acknowledgements, donor-centered, major gifts, phone calls, strategies, stewardship, thank you notes

Nathan, A., & Hallam, L. (2009). A qualitative investigation into the donor lapsing experience. *International Journal of Nonprofit and Voluntary Sector Marketing, 14(4),* 317-331.

Nathan and Hallam explore the "donor journey" experiences of lapsed donors, including "recruitment, communications, tipping points and decisions to lapse." This qualitative study employed 12, three-hour workshops with participants who were past or present donors to a list of selected British charities and conducted 110 semi-structured phone interviews. The results suggest that donors lapse, not because of certain character traits, but because "charities are not doing a good enough job at following through and re-affirming people's decisions to give." Poor communication, ingratitude, large yet unexplained organizational changes, and unfulfilled promises were among reasons cited by donors for reasons for stopping donations. Nathan and Hallam conclude with steps toward building a successful retention program based on the findings within this study and the accompanying literature.

Keywords: communication, donor relations, lapsed donors, relationships, retention

Ostrander, S. A. (2007). The growth of donor control: Revisiting the social relations of philanthropy. *Nonprofit and Voluntary Sector Quarterly, 36(2),* 356-372.

In 1990, Ostrander first developed a framework of philanthropy as an interactive, mutually beneficial relationship between the donor and the nonprofit. In this article, Ostrander explores recent trends in donor control through this analytical lens. Utilizing a literature review and trend analysis, the author debates whether philanthropy has become off balance as donors gain more relational power. The analysis concludes with suggestions for what nonprofits might bring to the donor-recipient relationship in terms of increasing their influence.

Keywords: control, donor, philanthropy, recipient, social relations

Powell, D. B. (2016). Required or elective? The importance of creative writing skills to the practice of donor relations and stewardship. *Journal of Donor Relations & Stewardship, 1,* 69-87.

Powell argues for the necessity of strong writing skills among donor relations professionals and within the context of a strong donor relations program. Drawing from professional experience and key pieces of literature, the author emphasizes that in order to draw support from donors, donor relations professionals must effectively communicate with donors. Powell provides a number of practical resources for development of writing skills, an overview of different writing styles, and best practices for promoting excellent writing within organizations.

Keywords: communication, donor relations, practical, professionals, resources, writing

Sargeant, A. (2001). Managing donor defection: Why should donors stop giving?
   New Directions for Philanthropic Fundraising, 2001(32), 59–74.

Sargeant examines donor "defection" using analogous literature on the for-profit sector and a hybrid qualitative/quantitative approach. Sargeant conducted 10 focus groups to determine possible reasons for donor attrition, then developed and distributed a postal survey to a stratified random sample of 10,000 lapsed and active donors who had contributed to one of 10 U.S.-based charities. Both groups of respondents were asked to report on their giving activity to the charity and provide demographic information; lapsed donors were offered additional questions about why they stopped giving. Results reveal that the largest portion of respondents (54.0%) stopped giving because they could no longer afford to give, followed by 36.2% who stopped giving to support another cause. Other common reasons included not being acknowledged by the charity, not remembering the gift, service quality, and life transitions, among others. Sargeant concludes by providing in-depth analysis about the results, including the changes charities must make to retain donors.

Keywords: attrition, lapsed donors, loyalty, relationship, retention, service quality

Sargeant, A. (2001). Relationship fundraising: How to keep donors loyal. *Nonprofit Management and Leadership, 12(2),* 177–192.

Sargeant examines donor lapses and attrition through the lens of relationship marketing theory using a hybrid qualitative/quantitative approach. Sargeant first conducted eight focus groups to determine possible reasons for donor attrition and then developed and distributed a postal survey to a stratified random sample of 10,000 lapsed and active donors who had contributed to one of 10 U.K.-based charities. Both groups of respondents were asked to report on their giving activity to the charity and provide demographic information; lapsed donors were offered additional questions about why they stopped giving. Results reveal that the largest portion of respondents (26.5%) stopped giving because they chose to support another cause. A slightly smaller percentage (22.3%) stopped giving because they could no longer afford to give. Other common reasons included not remembering the gift, life transitions, lack of identification with the organization, and service quality, among others. Using relationship-marketing theory, Sargeant provides in-depth analysis about the results, including key differences between active and lapsed donors.

Keywords: attrition, lapsed donors, loyalty, relationship marketing, service quality

Sargeant, A. (2008). Donor retention: *What do we know and what can we do about it?* **[White paper]. Retrieved January 29, 2017 from https://www.friends.edu/wp-content/uploads/2015/08/ElectronicReference.pdf**

This paper presents a review of the literature from the fields of marketing and fundraising focused on factors that lead to donor retention and attrition. Sargeant reviewed articles that were most current in the field through 2008 and used the following keywords: "customer/ donor retention," "loyalty," "attrition," and "switching behavior." The author's post-review

analysis were summarized into the categories of "key drivers of loyalty," "triggers" for donor lapses or switches, and "value determinants" for the donor's support of an organization. Among a number of other recommendations, Sargeant suggests that nonprofits focus on building donor loyalty and improve service quality to retain donors.

Keywords: attrition, fundraising, lapsed donors, literature review, loyalty, marketing, relationship, retention, service quality, switching, values

Sargeant, A., & Hudson, J. (2007). Donor retention: An exploratory study of door-to-door recruits. *International Journal of Nonprofit and Voluntary Sector Marketing, 13*(1), 89–101.

Sargeant and Hudson examine the impact of door-to-door donor recruitment on long-term donor retention using data from five large U.K. charities. Ten thousand active and non-active donors who had given via a door-to-door method were randomly selected and questioned about their reason for any lapse in giving, satisfaction with the charity, and their relationship with the charity. Results from the nearly 2,000 participants reveal that lapsed donors were less likely to have a genuine interest in the supported cause and more likely to have felt pressure to sign up for a donation program. The authors suggest that recruiting agencies vet donors for sincere interest in the nonprofit and employ a two-step recruiting process wherein households are visited a second time to secure a recurring donation.

Keywords: door-to-door, lapsed donors, retention, satisfaction, solicitation

Sargeant, A., & Jay, E. (2011). *Building donor loyalty: The fundraiser's guide to increasing lifetime value* (1st ed.). Indianapolis, IN: Jossey-Bass.

This book serves as a practical guide to building donor loyalty and increasing donor retention and value. The research-backed strategies included in this publication derive from data provided by 20,000 nonprofit organizations. Case studies provide context to help guide readers toward deeper understanding of the strategies incorporated throughout the text. Theories for giving are balanced with practical suggestions for donor-retention activities, from researching and segmenting donors to managing service quality and recognition programs.

Keywords: case studies, guide, lapsed donors, lifetime value, loyalty, practical, service quality, recognition, retention, strategies

Sargeant, A., & Lee, S. (2004). Donor trust and relationship commitment in the U.K. charity sector: The impact on behavior. *Nonprofit and Voluntary Sector Quarterly, 33*(2), 185–202.

This study examines how the factors of "trust, relationship commitment, and giving behavior" interrelate in the context of U.K.-based nonprofit organizations. To test these factors, Sargeant and Lee sent a postal survey to 1,000 randomly sampled donors to four organizations. Drawing from organizational, consumer, and sociological literature, among others, the authors devised a model to test a number of hypotheses about how trust and relationship commitment affect giving. Relying on data drawn from the 334 usable responses, Sargeant and Lee found that trust and relationship commitment appear to be positively related, while relationship commitment and giving appear to be positively related. The authors explore various mediating factors that either serve to strengthen or weaken the relationship between these variables and offer practical solutions for nonprofits working to increase donor engagement and retention.

Keywords: donor, giving, practical, relationship commitment, retention, trust

Sargeant, A., & Shang, J. (Eds.). (2010). *Fundraising principles and practice* **(1st ed.). Indianapolis, IN: Jossey-Bass.**

Intended for both professionals and students, this textbook covers the scope of fundraising practice and draws from various theories of giving and best-practice fundraising methodologies. Readers are provided with opportunities to engage in practical exercises and to test learned concepts. A chapter on donor retention and development explores such topics as building loyalty, relationship fundraising, segmenting, and calculating donor value. Relevant to donor relations professionals, a section on public trust as a method to build donor confidence is also included.

Keywords: development, donor, donor relations, donor value, guide, practical, principles, segmentation, stewardship, student, relationship, retention, textbook, trust

Scherhag, C., & Boenigk, S. (2013). Different or equal treatment? Donor priority strategy and fundraising performance assessed by a propensity score matching study. *Nonprofit Management and Leadership, 23*(4), 443–472.

Scherhag and Boenigk test whether the use of donor priority (unequal) strategy results in greater fundraising effectiveness and efficiency as compared to using a generalized (equal) fundraising approach. Using qualitative and quantitative analyses of nearly 100 German cultural institutions, including data collected from donors and fundraising managers, the authors conclude that priority strategy results in increased fundraising effectiveness and efficiency in comparison with organizations that do not employ donor priority strategy. The authors suggest that organizations "develop relationship-building strategies with the aim of achieving a higher fundraising performance than their competitors."

Keywords: arts, culture, fundraising, priority strategy, relationship-building, strategic planning, strategies

Sloan, M. F. (2009). The effects of nonprofit accountability ratings on donor behavior.
Nonprofit and Voluntary Sector Quarterly, 38(2), 220–236.

Sloan examines the impact that accountability ratings have on donor behavior. Using a regression model, Sloan evaluated the relationship between revenue data from a sample of charities based in New York State and Wise Giving Alliance ratings for these organizations. A sample of New York-based organizations without any ratings was used as a comparison sample. The results reveal that charities with a "pass" rating received a statistically significant higher level of donations, while organizations with a "did not pass" rating were not significantly statistically impacted. Sloan hypothesizes that poor ratings are not impactful on donors' decisions to give. Yet, Sloan encourages donors to be informed consumers concerning those organizations to which they give.

Keywords: accountability, charity standards, ratings

Taylor, J. H. (Ed.). (2016). *Advancement services: Enhancing fundraising success* (3rd ed.). Washington, DC: Council for Advancement and Support of Education.

Over the course of 30 chapters, Taylor and a host of contributors provide an update to this how-to guide for advancement services. Chapters focus on advancement from multiple perspectives, including managerial, functional, data management, prospecting, stewardship, and more. Contributors, who are experts in the field, provide their own insights and professional best practices.

Keywords: advancement, best practices, donor relations, guide, practical, stewardship

Tempel, E. R., Seiler, T. L., & Burlingame, D. F. (Eds.). (2016). *Achieving excellence in fundraising* (4th ed.). Indianapolis, IN: John Wiley & Sons.

Now in its fourth edition, *Achieving Excellence in Fundraising* continues to be one of the most-referenced guides to fundraising by skillful practitioners. Along with covering the standards of fundraising practice, including fundamental principles and techniques, this edition provides up-to-date peer-reviewed research on the motivations for giving, giving by specialty groups, selecting campaign counsel, and fundraising in the digital age. Discussion on stewardship, accountability, and donor relations is integrated throughout the publication.

Keywords: accountability, annual giving, fundraising, guide, major gifts, motivation, practical, principles, relationships, standards, stewardship, techniques, technology

Thompson, J. D., Katz, S., and Briechle, P. (2010). A high level annual fund without the annual ask. *International Journal of Educational Advancement, 9(4),* 273–279.

Authored by three professionals working in higher education development offices, this article examines a new annual fund model that prioritizes the donor experience without the cost of conducting an annual campaign. The article describes the creation, strategy, and structure behind The George Eastman [giving] Circle at the University of Rochester that provided new ways and traditions for members to give. The circle was successful in cultivating a steady stream of unrestricted annual donations, as well as donors who are likely to give future major or planned gifts.

Keywords: advancement, annual fund, development, fundraising, giving circle, higher education

Waters, R. D. (2008). Applying relationship management theory to the fundraising process for individual donors. *Journal of Communication Management, 12(1),* 73–87.

Waters explores the donor-nonprofit relationship using relationship management theory. Specifically, Waters evaluated the effect this type of relationship has on giving behavior and retention using the organisation-public [sic] relationship (OPR) measurement, which incorporates the relationship dimensions of trust, commitment, satisfaction, and control mutuality. Data were collected from 120 donors to a large Californian healthcare nonprofit via electronic survey who were either annual donors or major donors. Results reveal that donors with more favorable impressions of the organization maintained a longer-term relationship than those who did not. Moreover, repeat (non-lapsed) donors noted stronger relational ties with the organization than did those who made just one-time gifts. The author offers a number of recommendations to address the need for increased donor cultivation in nonprofit organizations.

Keywords: annual giving, commitment, cultivation, donors, major gifts, relationship, relationship management, retention, satisfaction, trust

Waters, R. D. (2009). The importance of understanding donor preference and relationship cultivation strategies. *Journal of Nonprofit & Public Sector Marketing, 21(4),* 327–346.

Using the co-orientation model of interpersonal communication theory, Waters examines relationship cultivation in the context of three nonprofit healthcare institutions. A random sample of donors to the healthcare nonprofits received a mailed survey and were asked to evaluate their relationship with the nonprofit and its fundraisers. A majority of fundraisers for these institutions completed similar surveys. Statistical analysis was conducted to ascertain the extent to which the beliefs of donors and fundraisers about the donor-organization relationship were similar. Results were evaluated according to six cultivation strategies and reveal that donors generally viewed the strategies in a less favorable light than did the fundraisers. Donors were most favorable to nonprofits using openness as a cultivation strategy

and less favorable toward networking. Waters concludes that organizations should invest more time on cultivations strategies that incorporate interpersonal communication, which donors and nonprofits value similarly.

Keywords: co-orientation model, communication, cultivation, fundraising, relationship, strategies

Waters, R. D. (2010). Increasing fundraising efficiency through evaluation: Applying communication theory to the nonprofit organization–donor relationship. *Nonprofit and Voluntary Sector Quarterly, 40*(3), 458–475.

Waters analyzes how positive donor relationships are formed and sustained using the Organization-Public Relationship (OPR) framework. Over 1,700 surveys were administered to randomly sampled donors at three nonprofit hospitals in the Western United States to test three hypotheses and two research questions concerning nonprofit perception by both major and annual gift donors. Using the OPR to analyze results, the author concludes that nonprofits must spend more time enhancing donor relationships while demonstrating and communicating that the organization is socially and financially accountable.

Keywords: communication, evaluation, fundraising, organization-public relationship

Waters, R. D., & Feneley, K. L. (2013). Virtual stewardship in the age of new media: Have nonprofit organizations' [sic] moved beyond Web 1.0 strategies? *International Journal of Nonprofit and Voluntary Sector Marketing, 18*, 216–230.

This study examines the virtual stewardship strategies and preferences of 100 large nonprofits. Using content analysis and comparing nonprofits' stewardship practices on websites and official Facebook pages, Water and Feneley evaluated nonprofits' use of reciprocity, responsibility, reporting, and relationship nurturing. Results reveal that nonprofits prefer to use websites significantly more often than Facebook to cultivate relationships with donors.

Keywords: cultivation, relationship, stewardship, strategies, virtual

Weerts, D. J., & Ronca, J. M. (2007). Profiles of supportive alumni: Donors, volunteers, and those who "do it all." _International Journal of Educational Advancement, 7(1),_ 20–34.

Drawing data from a survey of 1,441 alumni of a large research university, Weerts and Ronca examine those characteristics that distinguish active versus non-active alumni in terms of their financial, political, or volunteer support of the university. Results are oriented within the constructs of social exchange and expectancy theories and the investment model, and alumni are categorized as either inactive, a volunteer, a donor, or a supporter. Among several findings, results reveal that factors outside of the institution's control, such as age and employment, are strongly associated with the likelihood that alumni will give to the university. In addition, those alumni who hold an expectation to give or volunteer, as well as those who attend university events, are much more likely to give and volunteer. The authors suggest that institutions cultivate active alumni who do not yet give or volunteer to increase a sense of alums' institutional connection.

Keywords: alumni, cultivation, donor characteristics, giving, higher education, social exchange theory, supporter, volunteer

Wester, L. M. (2015). _The 4 pillars of donor relations._ Denver, CO: Academic Impressions.

Wester addresses four key aspects underpinning successful donor relations: acknowledgement, stewardship/impact reporting, recognition, and engagement. This book focuses on applying these four pillars to improve first-time donor retention. Wester provides a number of tools to help practitioners execute donor relations strategies with primary donor retention in mind.

Keywords: acknowledgement, donor relations, engagement, guide, practical, recognition, stewardship

Wester, L. M. (2015). _T-Rexes vs kangaroos and other stories: Improving your fundraising and donor relations._ Berne, IN: DRG LLC.

This book is a collection of blog posts from Wester's website and other short, anecdotal articles on donor relations. Meant to be read in snippets, this book covers a range of topics, including donor focus, gratitude, attrition, generational donor myths, events, ROI, communications, strategies, writing techniques, and more.

Keywords: anecdotes, donor relations, practical, strategies, techniques

Winterich, K. P., Mittal, V., & Aquino, K. (2013). When does recognition increase charitable behavior? Toward a moral identity-based model. *Journal of Marketing, 77*(3), 121–134.

Winterich, Mittal, and Aquino used an identity-based model that incorporates morality as a construct to examine the effectiveness of recognition as a solicitation and cultivation strategy for giving and volunteering. Morality was defined in terms of internalization (the degree to which moral traits are integrated within one's self) and symbolization (the degree to which moral traits are a reaction to the world). The authors developed three studies to evaluate morality as a mediating factor between the donor/volunteer and the nonprofit's recognition of the donation/volunteer act. Results across the studies indicate that donors with "high moral identity symbolization" and low internalized morality are more likely to give or volunteer when recognition is involved. Donors and volunteers with a high level of internalized moral identity are not influenced by recognition. The authors suggest that organizations use targeted recognition strategies, such as allowing donors/volunteers to opt-in or opt-out of recognition opportunities.

Keywords: charitable behavior, cultivation, giving, recognition, moral identity, solicitation, volunteer

Zhuang, J., Saxton, G. D., & Wu, H. (2011). *Publicity vs. impact in nonprofit disclosures and donor preferences: A sequential game with one nonprofit organization and N donors* (Research Report No. 99). Retrieved November 19, 2016 from CREATE Research Archive website: http://create.usc.edu/sites/default/files/publications/publicityvs. impactinnonprofitdisclosuresanddonorpreferenc.pdf

Zhuang, Saxton, and Wu used a game-theory model to examine the effect that nonprofits' disclosure of information has on attracting higher levels of contributions. Specifically, the authors examined how disclosure of an organization's progress on a fundraising campaign and organizational performance, such as efficiency and management, influences potential donors to give. Results of the model reveal that level of charitable giving is positively influenced by "the amount of value-relevant disclosure made by the nonprofit organization." Disclosures of effectiveness, publicity, and cost were found to be particularly preferential among donors in terms of level of charitable giving. The authors suggest that additional research be conducted concerning the maximal level of informational disclosure and donors' responses to such disclosure.

Keywords: communication, disclosure, game theory, giving

OTHER RESOURCES

Association for Healthcare Philanthropy (AHP)
www.ahp.org

AHP is a professional organization dedicated to advancing experts working in the healthcare fundraising space. AHP offers online education, international conferences in healthcare philanthropy, career development tools, and a resource platform called The AHP Huddle. Further, AHP annually publishes the *Report on Giving*, which benchmarks philanthropy in healthcare from a survey of member organizations.

Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)
www.arnova.org

ARNOVA is a leading U.S.-based association that promotes research on nonprofits, voluntary action, philanthropy, and civil society. ARNOVA hosts an annual academic conference; publishes the journal *Nonprofit and Voluntary Sector Quarterly*; and conducts webinars aimed at practitioner and academic audiences. Membership is required to access certain materials.

Association of Advancement Services Professionals (AASP)
http://www.advserv.org/

AASP is a professional association that "provides education, professional development, and networking opportunities to its members and promotes the professional status of advancement services in the philanthropic community." AASP hosts webinars, symposia, and an annual summit for advancement professionals, and the AASP website provides a library of best practices and resources in partnership with ADRP and APRA.

Association of Donor Relations Professionals (ADRP)
www.adrp.net

ADRP is a professional association for those who work in donor relations and stewardship. The core purpose of the Association of Donor Relations Professionals is to advance philanthropy through elevating donor relations and stewardship. ADRP hosts educational workshops and conferences to build professional expertise and publishes a monthly e-newsletter for association members. ADRP also provides a digital knowledge center of archived webinars, presentations, and whitepapers for members.

Association of Fundraising Professionals (AFP)
www.afpnet.org

AFP is an association for fundraising professionals, represented by U.S.-based and international chapters. The association offers research, professional development opportunities, and directories and hosts national and regional conferences. AFP also publishes e-newsletters and *Advancing Philanthropy* and sponsors the research behind The Fundraising Effectiveness Project.

Association of Professional Researchers for Advancement (APRA)
www.aprahome.org

Unique from other associations, APRA is a 30-year old association that focuses on supporting professionals who use data, information, and analysis in driving fundraising forward. APRA University is the association's virtual learning platform and offers webinars and courses in data analytics, campaigns, relationship management, prospect research, and other topics. The association also offers podcasts, virtual speakers presenting in a TED-talk style, and two annual professional conferences.

Barna Group
www.barna.org

The Barna Group is a domestic research firm focused on studying faith, culture, generational trends, philanthropy, and other topics. Barna Group publishes *Barna Trends*, a review of major research studies that analyze cultural, social, and religious trends.

BBB Wise Giving Alliance
www.give.org

The Better Business Bureau (BBB) Wise Giving Alliance promotes ethical standards for giving and provides evaluations on national charities. Three times per year, the BBB Wise Giving Alliance publishes the *Wise Giving Guide*, a magazine covering charity accountability and other charity evaluations. National, regional, and local charities can be accredited by the BBB through the Wise Giving Alliance for conformity to the Standards of Charity Accountability.

Blackbaud Institute
http://institute.blackbaud.com/

Blackbaud Institute is a research entity focused on generating knowledge about the philanthropic sector through collaboration with industry professionals. Reports include analysis on generational giving, national philanthropic giving trends, and legislation in the sector. The research is offered free of charge in the resource library.

Bruce R. Hopkins' Nonprofit Counsel
http://hopkinsnonprofitcounsel.com/

The Bruce R. Hopkins' Nonprofit Counsel is a monthly newsletter focused on nonprofit law, tax regulations, court rulings, and other essential legal matters concerning the nonprofit sector. Topics such as online fundraising and laws governing different types of donations are particularly pertinent to fundraisers. Certain content is available free of charge, and the newsletter is available in both print and digital subscription formats.

Center for Disaster Philanthropy (CDP)
www.disasterphilanthropy.org

CDP advises donors on meaningful giving to humanitarian crises and collates information on giving to disasters. CDP, in partnership with Foundation Center, annually produces Measuring the State of Disaster Philanthropy: Data to Drive Decisions, which analyzes the current philanthropic footprint in disaster funding. CDP also compiles research and provides best practices in disaster giving and funding spotlights.

CFRE International
www.cfre.org

CFRE International is the international certification program for fundraising professionals and is considered the gold standard of fundraising certification. The website provides listings of approved providers of the certification and guides for applying and attaining the certification.

The Chronicle of Philanthropy
www.philanthropy.com

The Chronicle is the leading trade publication for the nonprofit and philanthropic sector. Apart from compiling news and analysis on the sector, the Chronicle publishes annual data, including The Philanthropy 400, The Philanthropy 50, and How America Gives. Most articles and resources are available only to subscribers.

Connected to Give
www.connectedtogive.org

Connected to Give is a network of foundations and Jewish federations that produce Connected to Give reports, which analyze the intersection between religion and philanthropy. Part of the core research team is comprised of professionals from the Indiana University Lilly Family School of Philanthropy, Fordham University, the Hebrew Union College-Jewish Institute of Religion, and GBA Strategies. Topics include specific studies of Jewish giving, American religious giving trends, giving circles, and legacy giving.

Corporate Philanthropy Report

http://www.corporatephilanthropyreport.com/

The *Corporate Philanthropy Report* is a newsletter covering issues within the corporate giving sector, specifically from a nonprofit's perspective. Specific issues include giving trends, nonprofit funding patterns, expert advice on gift cultivation, and relevant policy or regulatory changes. Certain content is available free of charge, and the newsletter is available in both print and digital subscription formats.

Council for Advancement and Support of Education (CASE)

www.case.org

CASE is an international consortium of development professionals working in educational institutions. The association offers professional development opportunities, such as conferences, webinars, and workshops, and has built a comprehensive library on advancement and fundraising topics. CASE also publishes *Currents*, a magazine for association members focused on development in education. The CASE Fundraising Index (CFI) is a fundraising forecast conducted once per year by polling senior fundraising professionals in various educational subfields.

Council for Aid to Education (CAE)

www.cae.org

CAE is an independent organization providing assessment and research services to a wide variety of educational institutions. CAE publishes the *Voluntary Survey of Education* (VSE), an annual survey of higher education institutions. The VSE compiles fundraising data from a national representative sample of educational organizations and is considered one of the most comprehensive sources on private education giving in the U.S. In addition to the VSE, CAE provides assessment tools to measure student outcomes.

Council on Foundations

http://www.cof.org/

The Council on Foundations is an association comprised of leaders from foundations and corporations. The council hosts networking and leadership opportunities, annual conferences, and research on public policy and provides aggregated lists of resources by topic. Some research is restricted to association members.

European Fundraising Association (EFA)

http://www.efa-net.eu/

EFA is a network of European fundraising associations that offers a fundraising certification program and hosts events for exchanging knowledge, such as Skillshare and other capacity-building workshops. Resources include case studies and other types of fundraising research and principles for ethical fundraising.

Evangelical Council for Financial Accountability (ECFA)
www.ecfa.org

ECFA is an accreditation organization that establishes standards for financial accountability and performance in "Christ-centered" religious bodies. Reporting organizations include churches, missions, youth programs, and other religiously affiliated nonprofits. In addition to accreditation services, ECFA produces podcasts, a knowledge center, and webinars and publishes the results of various surveys regarding religious giving.

Foundation Center
www.foundationcenter.org

Foundation Center is a leading resource of foundation data and analysis, both domestically and worldwide. Additionally, the organization partners with other philanthropic institutions to produce a wide range of research, such as funding to support human rights, disaster philanthropy, and peace and security.

The Fund Raising School, Indiana University
www.philanthropy.iupui.edu

The Fund Raising School at Indiana University Lilly Family School of Philanthropy provides practical courses geared toward development professionals. Sixteen courses and two certificates are offered online and in person. Webinars and customized professional training in fundraising are also offered. Topics of training include nonprofit management, proposal and grant writing, social entrepreneurship, planned giving, major gifts, capital campaigns, and more.

The Fundraising Effectiveness Project by the Association of Fundraising Professionals
http://afpfep.org/

The Fundraising Effectiveness Project (FEP) is an ongoing research study and data collection project supported by the Association of Fundraising Professionals (AFP) and researched by the Urban Institute. The survey collects fundraising data from a sample of nonprofits and examines the gain/loss ratio of fundraising activity by the organizations. FEP also examines donor retention as a supplemental addendum and provides tools to measure a nonprofit's fundraising "fitness" through the Growth in Giving initiative. The reports and tools are available online free of charge.

Fundraising Institute Australia (FIA)
https://www.fia.org.au/

FIA is Australia's association of fundraisers and development professionals. FIA provides fundraising standards, certifications, and other professional development opportunities, as well as publications, awards, and scholarships. Some resources are only available to association members.

The Giving Institute
www.givinginstitute.org

The Giving Institute is a trade association that promotes standards of fundraising and develops leaders in the philanthropic sector. Membership is comprised of fundraising consulting and nonprofit service firms. In addition to publishing *Giving USA*, The Giving Institute offers members professional development opportunities and professional affiliations with national and international fundraising associations.

Giving USA: The Annual Report on Philanthropy
www.givingusa.org

Giving USA: The Annual Report on Philanthropy is the leading study on charitable giving trends in the U.S. *Giving USA* analyzes sources of charitable giving and flows of funds to the charitable subsectors. The publication analyzes giving at a macro-level and tracks trends over a 60-year period. *Giving USA* is produced by the Giving USA Foundation and is a public service initiative of The Giving Institute. It is researched and written by the Indiana University Lilly Family School of Philanthropy.

Grassroots Institute for Fundraising Training (GIFT)
http://www.grassrootsfundraising.org/

GIFT promotes fundraising and social justice movements and provides fundraising training institutes, fellowship programs, consulting services, and webinars on various fundraising topics. GIFT also publishes the *Grassroots Fundraising Journal*, which compiles articles from sector thought leaders.

GuideStar: The National Database of Nonprofit Organizations
www.guidestar.org

GuideStar is a national database of nonprofit information that compiles tax data, mission statements, reputation, governance, and other statistics. GuideStar also offers premium data services, such as custom datasets or nonprofit financial analysis. Certain services are free, but others require purchase or subscription.

Imagine Canada
http://www.imaginecanada.ca/

Imagine Canada supports Canadian charities by offering resources, networking opportunities, and membership services. Imagine Canada publishes the *Sector Monitor* report, a compilation of information on the Canadian charitable sector, public policy, business, and other topics.

Independent Sector (IS)
www.independentsector.org

IS is a national membership organization that brings together nonprofits, foundations, and corporate entities for social impact. IS additionally advocates and spreads awareness on public policy issues, such as charitable giving, tax and fiscal policy, donor-advised funds, human resource compliance, and others. Toolkits and other resources for both public and member use are also available on the IS website.

Indiana University Lilly Family School of Philanthropy
https://philanthropy.iupui.edu/

The Indiana University Lilly Family School of Philanthropy (school) is an academic institution housed at Indiana University's Indianapolis campus. Focused on the promotion and development of the philanthropic sector, the school is one of a few in the world that focuses on philanthropy as a research and training area. The school offers traditional and career-oriented degrees and continuing education courses and produces *Giving USA: The Annual Report on Philanthropy, The Philanthropy Outlook*, and the *U.S. Trust Study of High Net Worth Philanthropy.* The school also houses the Lake Institute on Faith & Giving and the Women's Philanthropy Institute.

International Society for Third-Sector Research (ISTR)
www.istr.org

ISTR is a leading international association promoting and disseminating research in the areas of philanthropy, civil society, and the nonprofit sector. ISTR publishes *Voluntas: International Journal of Voluntary and Nonprofit Organizations,* a leading compilation of scholastic research on nonprofits and philanthropy. Additionally, ISTR publishes working papers and reports and offers opportunities for emerging scholars in this field. ISTR hosts an annual conference that features prominent keynote speakers and paper presentations from leading researchers.

Lake Institute on Faith & Giving, Indiana University
www.philanthropy.iupui.edu

The Lake Institute on Faith & Giving is a program of the Indiana University Lilly Family School of Philanthropy. Tasked with promoting knowledge on giving and fundraising for religious organizations, the institute offers special courses and seminars on faith-based giving. The institute also compiles essential resources that analyze the intersection between faith and philanthropy.

Learning to Give

http://www.learningtogive.org/

Learning to Give is a web-based platform that provides lessons and resources for teaching philanthropy and civic engagement to students in kindergarten through 12th grade. The classroom-based model provides lessons written and evaluated by teachers that touch on a wide range of philanthropic topics and include free online support. The goal of the initiative is to cultivate opportunities for students to give and be involved in their communities.

Marts & Lundy

www.martsandlundy.com

Marts & Lundy is a fundraising consulting firm servicing the U.S., the U.K., and Canada. The firm provides resources and reports on fundraising best practices and sponsors *The Philanthropy Outlook,* an annual publication forecasting charitable giving in the U.S.

National Association of Charitable Gift Planners (CGP)

https://charitablegiftplanners.org/

CGP sets professional standards for charitable gift planners, provides educational resources, sponsors research on the sector, and hosts the annual National Conference of Charitable Gift Planners. CGP also promotes standards and best practices in the profession of gift planning.

National Association of Independent Schools (NAIS)

www.nais.org

NAIS is a membership association of independent, private K-12 schools in the U.S. NAIS produces research; guidance on ethical standards, leadership, and governance; and professional development for association members. NAIS also provides benchmarking resources in the form of statistical tables at the national and regional levels, including data on philanthropic giving to association schools.

National Catholic Development Conference (NCDC)

http://ncdc.org/

NCDC is a fundraising collective for Catholic organizations and other related ministries and is the U.S.' largest association of charitable religious fundraisers. NCDC publishes articles related to fundraising in the religious sector and hosts newsletters and blogs by sector leaders.

National Committee for Responsive Philanthropy (NCRP)
www.ncrp.org

NCRP promotes philanthropic funding that serves marginalized and underserved populations. Areas of interest include social and economic inequality, social justice advocacy, human rights and racial justice, and democracy issues. In addition to foundation grantmaking, NCRP has recently broadened its scope to include high-net-worth donors who do not make grants through foundations. NCRP provides impact assessments, sponsors movements to promote giving to targeted subsectors, and publishes analysis related to social justice philanthropy.

National Council for Voluntary Organizations (NCVO)
www.ncvo.org.uk

NCVO is a U.K.-based association serving the voluntary sector and associated organizations. NCVO publishes the *UK Civil Society Almanac*, an annual study of the U.K. voluntary sector and registered charities. Additionally, NCVO organizes an annual research conference focused on the voluntary sector and supports research through the Institute for Volunteering Research. Many of the reports and analyses are available for free.

National Council of Churches (NCC)
www.nationalcouncilofchurches.us

NCC is a leadership community for Christian churches of multiple denominations, including Protestant, Orthodox, Evangelical, and others. NCC focuses on collaboration and cooperation on a variety of social issues within its member organizations and emphasizes Christian unity and interfaith cooperation. NCC periodically produces data on U.S. denominational giving.

National Council of Nonprofits (NCN)
https://www.councilofnonprofits.org

NCN is the nation's largest network of nonprofits. The council provides resources related to advocacy; boards and governance; employment; ethics and accountability; financial management; fundraising; and leadership. Additionally, the council offers state-based economic impact reports concerning nonprofits' economic impact and aggregates research on nonprofits and philanthropy.

National Philanthropic Trust (NPT)
www.nptrust.org

NPT is a nonprofit advisor and provider of charitable asset management tools and is the largest national independent provider of these giving vehicles. Annually, NPT publishes the *Donor-Advised Fund Report*, a national-level dataset on donor-advised fund giving and grantmaking activity in the U.S.

Network for Good
www.fundraising123.org

Network for Good provides donor management and other fundraising software specifically geared toward small nonprofits. It provides a free fundraising resource library populated with templates, guides, giving courses, webinars, and other curated content.

Nonprofit Business Advisor
http://www.nonprofitbusinessadvisor.com/

Nonprofit Business Advisor is a monthly newsletter focused on fundraising, financial management, operations, human resources, and compliance for the nonprofit industry. Certain content is available free of charge, and the newsletter is available in both print and digital subscription formats. An advisory board comprised of nonprofit consultants in the areas of legal counsel, tax law, and organizational infrastructure oversees the content of the newsletter.

Nonprofit Finance Fund (NFF)
www.nonprofitfinancefund.org

NFF is a community development financial institution that focuses on investments and research to the nonprofit sector. NFF employs innovative funding strategies, such as social impact bonds and outcome-based financing. NFF provides reports and best practice documents and publishes *State of the Sector* surveys, which evaluate trends within the social sector.

Nonprofit Quarterly (NPQ)
www.nonprofitquarterly.com

NPQ is a news source covering fundraising, philanthropy, nonprofit management, public policy, and other key developments within the social sector. In addition to daily updates, NPQ offers webinars and other special guides related to numerous topics in philanthropy and nonprofit affairs.

Nonprofit Research Collaborative (NRC)
www.npresearch.org

NRC is an independent research organization focused on fundraising. Founded as a collaborative effort by the Association of Fundraising Professionals (AFP), the National Center for Charitable Statistics (NCCS), Giving USA Foundation, and other key partners, NRC draws on a large network of data to produce the findings within its reports. NRC typically publishes two annual reports that cover fundraising results in winter and summer and a third report that covers a specific topic, such as bequests, campaigns, or donor retention strategies.

The Nonprofit Times (NPT)
www.nptimes.org

NPT is a news organization that covers all topics related to nonprofit leadership, fundraising, management, marketing, and other issues. NPT also compiles a listing of nonprofit service firms in its Marketplace section and manages a library of white papers and webinars collated from multiple sources.

Planned Giving Today
www.pgtoday.com

Planned Giving Today is a monthly newsletter covering the planned giving sector. Available by subscription, the newsletter covers client relationships, tax and financial instrument issues, economic trends, and other relevant information.

Successful Fundraising
http://www.successfulfundraising.net/

Successful Fundraising is a monthly compilation of reports, articles, strategies, and analyses on a variety of development topics submitted by development professionals, such as campaign planning, donor recognition, donor software, and planned gifts. The report is delivered via print or electronic subscription formats.

The Tax Foundation
www.taxfoundation.org

The Tax Foundation is a policy nonprofit focused on tax issues and tax reform. In addition to policy advocacy, the Tax Foundation provides practical resources on federal and state taxes law and processes. The Tax Foundation's Center for Legal Reform advocates for tax policy reform and files court briefs at the federal and state levels. Specific to the nonprofit sector, the foundation publishes articles and analyses related to charitable deductions, the estate tax, and other topics.

Theatre Communications Group (TCG)
www.tcg.org

TCG is a national organization promoting professional American theatre. TCG provides networking and professional development opportunities, distributes grants to theatres and individual artists, and is the nation's largest independent publisher of dramatic literature. Annually, TCG publishes *Theatre Facts*, an in-depth report on fiscal performance in the nonprofit theatre field. *Theatre Facts* draws from the annual TCG Fiscal Survey of member theatres.

United Way Worldwide
www.unitedway.org

United Way Worldwide is the umbrella organization for regional and local United Way chapters. A public-society benefit organization, United Way supports community initiatives worldwide with a focus on income, education, and health. United Way's research publications include volunteer surveys, case studies, annual reports, and white papers.

Urban Institute, Center on Nonprofits and Philanthropy
www.urban.org

Urban Institute is a national public policy research agency specializing in nonprofits, civil society, and social impact. Within the institute, the Center on Nonprofits and Philanthropy hosts events and publishes the *Fundraising Effectiveness Survey Report* and the *Nonprofit Almanac*. Research is available free of charge.

Urban Institute, National Center for Charitable Statistics (NCCS)
www.nccs.urban.org

NCCS is a national database of data on the domestic charitable and nonprofit center. A project of Urban Institute's Center on Nonprofits and Philanthropy, NCCS provides aggregated and granular nonprofit data by working closely with the IRS, nonprofit organizations, and other entities.

Women's Funding Network (WFN)
www.womensfundingnetwork.org

WFN is a worldwide consortium of gender-focused foundations and other funders. In addition to hosting networking opportunities, the network produces research reports on women's and girls' issues. WFN also compiles an interactive map of where funding in support of gender issues is directed worldwide.

Women's Philanthropy Institute, Indiana University (WPI)
www.philanthropy.iupui.edu

WPI at the Indiana University Lilly Family School of Philanthropy is an initiative focused on driving research, training, and awareness of women's philanthropy and women's roles in the charitable sector. Aside from producing annual research, WPI also offers customized programs and seminars, courses, and annual conferences focused on the issue of gender and giving.