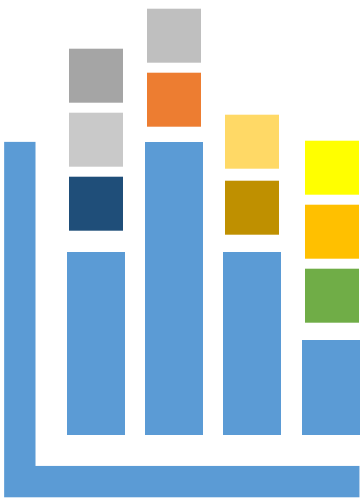


2017



# The Burk Donor Survey

Where Philanthropy is Headed in 2017

CANADIAN EDITION

Penelope Burk

October, 2017



CHICAGO | TORONTO | YORK, UK  
[www.cygresearch.com](http://www.cygresearch.com)

*I have a high regard for all the charities that I support. Therefore, it comes down to which invests the most in cultivating and recognizing my support. Everyone sends form letters, but only a few make personal contact and offer opportunities to see the results of my philanthropy. Not surprising, they are the ones that get more support.*

- one of nearly 5,000 Canadian donors in the 2017 Burk Donor Survey

***The Burk Donor Survey...Where Canadian Philanthropy is Headed in 2017***

Penelope Burk

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## Executive Summary

The Canadian edition of *The 2017 Burk Donor Survey* is the seventh annual research project studying Canadians' philanthropy and, specifically, how fundraising practices and beliefs affect the financial wellbeing of charitable organizations. The study is designed by author, researcher and fundraising expert, Penelope Burk, and published by her Hamilton-based company, Cygnus Applied Research, Inc. *The Burk Donor Survey* charts changes in giving year-to-year as well as how donors intend to give in the coming twelve-month period. Most important, each edition of the Survey features an investigation of donors' opinions about certain fundraising themes and issues that impact philanthropy so that Development professionals and their leaders and decision-makers can adjust their practices to meet donors' changing needs and preferences.

In addition to charting how Respondents gave in 2016 and what their giving intentions are for this year, *The 2017 Burk Donor Survey* explored several issues of interest to fundraisers and charities:

- Whether and how global and political issues are affecting Canadian donors' giving preferences and decisions this year;
- the profile of donors who give and do not give through Monthly (Recurring) Gifts Programs and how charities can strengthen this important midlevel fundraising strategy;
- what is motivating a growing number of donors to establish Donor-Advised Funds (DAFs); whether giving through DAFs is a satisfying experience, what DAF-holders' plans are for growing their funds in the future; and how fundraisers can build relationships with this new, independent kind of donor;
- which donors support adult children and/or aging parents and whether this financial commitment is compromising their philanthropy;
- whether donors gave all that they could in 2016 and, if not, what would unleash their philanthropy at a new level.

The full *2017 Burk Donor Survey Report* is available at [www.cygresearch.com](http://www.cygresearch.com). A simultaneous survey was conducted on the same topics with American donors. That report is published separately and is available at the same website address.

*I would give more to a charity that worked to fix the root cause of an issue, not just put a band-aid on it, by using a proven and believable approach. I'm OK with new approaches too if they are tested first to see if they can really make a difference.*

## Survey Methodology

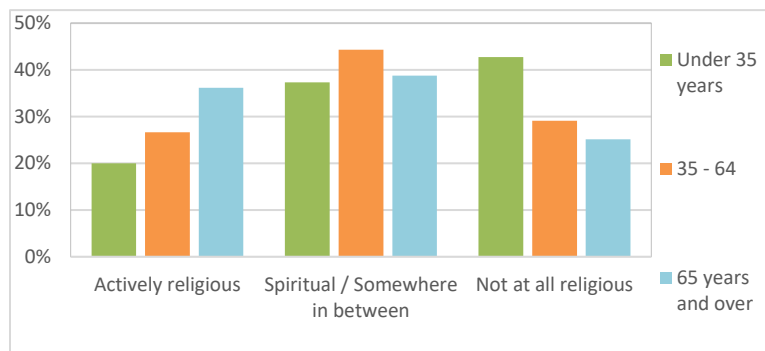
629,524 Canadian donors, known to have made at least one charitable gift in 2016 and/or 2015, were invited to participate anonymously in an online survey consisting of 94 questions. The survey was deployed between February 24 and April 7, 2017.

The survey questionnaire was pretested with 1,392 Respondents from Cygnus' internal file of active donors. The response rate for the survey (Respondents completing some or all questions) was 1.1% representing 7,146 donors. The completion rate (the number of Respondents answering all questions) was 68% or 4,869 donors. The margin of error for this Study is +/- 1.4%, nineteen times out of twenty.

Cygnus enjoys a robust participation in its national and international research studies thanks to the kind assistance of prominent charitable organizations whose leaders reach out to their active donors on Cygnus' behalf. This year, twenty-four Canadian charities and institutions partnered with Cygnus on this project.

## Respondents' Characteristics

58% of Canadian Respondents in *The 2017 Burk Donor Survey* were female; 4% were under the age of 35, 43% were between 35 and 64, and 53% were 65 or older. Among all characteristics, age was the most revealing when Respondents' opinions, preferences and philanthropic behavior were studied.



Religious conviction is a strong motivator for giving to all types of charitable organizations, not just to religious causes. Since 2010, each Canadian

edition of *The Burk Donor Survey* has noted that actively religious donors give more than those who are less or not at all religious. In the 2017 Survey, young donors were the least likely to refer to themselves as actively religious (20%) when compared with middle age donors age 35-64 (27%) and donors 65 years or older (36%).

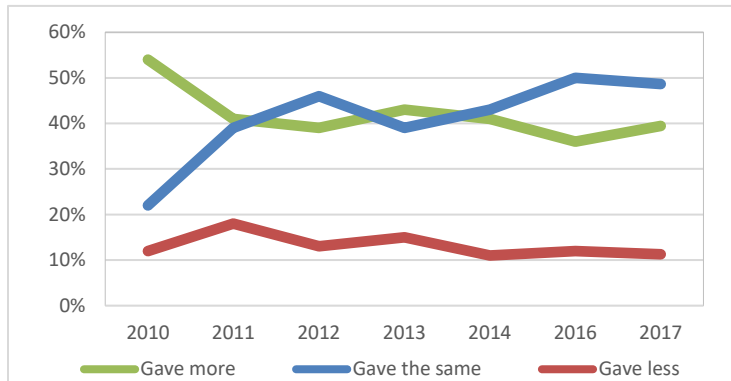
For the first time, *The Burk Donor Survey* asked Respondents about their political affiliation. 23% referred to themselves as Conservatives, 31% Liberals, 11% New Democrats, and 11% did not align themselves with any political party.

*Thanks for the survey, it made me confirm my commitment to the causes I support and clarified why I do so.*

*I think we need to build a bolder culture of giving that is motivated by more of a social consensus with peer support and celebration, and not just rely on individual, private philanthropy. I'm a member of a "100 Men Who Care" chapter and it's a great motivator to give routinely.*



## How Donors Gave in 2016



39% of Respondents said they gave more money to charitable causes in 2016 than in the year before (up somewhat from 36% in last year's Survey). *The Burk Donor Survey's* youngest donors were more

likely to have increased their giving last year (53%) compared with either middle age or senior donors (39%), though giving was up among all donors, regardless of age. Though young Respondents were very active donors in 2016, the impact of their giving on Development operations may not have been as strongly felt as their numbers might imply. This is because the average annual total gift value of donors under the age of 35 was significantly less at \$1,100 than either middle age (\$4,500) or senior donors (\$6,000).

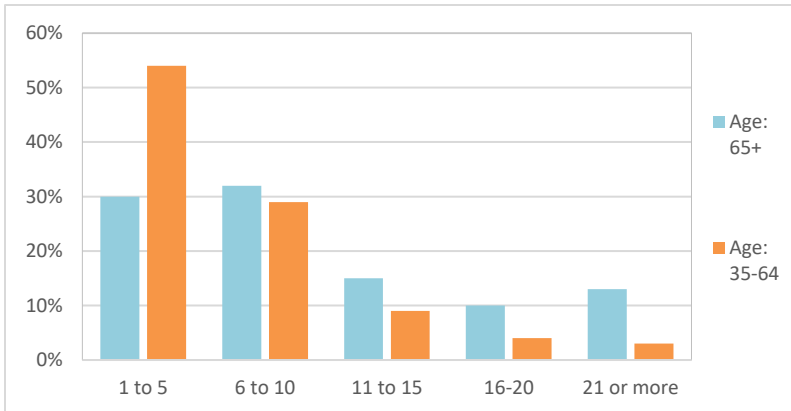
Only 11% of Respondents gave less money last year than the year before (the lowest recorded, along with the 2014 edition, since the Canadian Survey was first published in 2010). 49% of Respondents gave approximately the same in 2016 as they did in 2015.

Among donors who gave more in 2016 than in 2015, their own financial stability was the main reason behind their more generous giving (43%). But, 31% were impressed with the performance of some or all causes they supported in 2015 and that inspired them to give more the next year, a credit to charities that have improved their communication and stewardship practices. 31% gave more in response to natural disasters such as the Fort McMurray wildfires and flooding in eastern Canada. 35% responded to a special request such as a capital campaign, in memoriam request or a reunion year campaign.

Change in their personal financial situation was the leading cause among donors who gave less in 2016 than in 2015 (59% of the 11% of Respondents who decreased their giving). The economy was still a factor but only for 18% of these Respondents, down slightly from 19% last year and down from a high of 26% in the 2011 Survey.

A significant fundraising opportunity exists with the 49% of donors whose giving remained the same between 2015 and 2016. Their own financial stability and their tendency to budget the same for philanthropy one year to the next far outweighed all other reasons for maintaining their philanthropy at the same level. This likely means that are failing to influence a greater desire to give among donors in this group.

*It is always easier to consider increased donations if I can relate financially to the project. \$500.00 does nothing in the context of a \$5 Billion building campaign; however, it could cover the cost of training a street teen in a self-supportive skill. I might donate \$1000.00 to allow an underprivileged child to go a summer camp. I need to believe that my donation can make a difference, rather than just be part of a major fundraising campaign.*

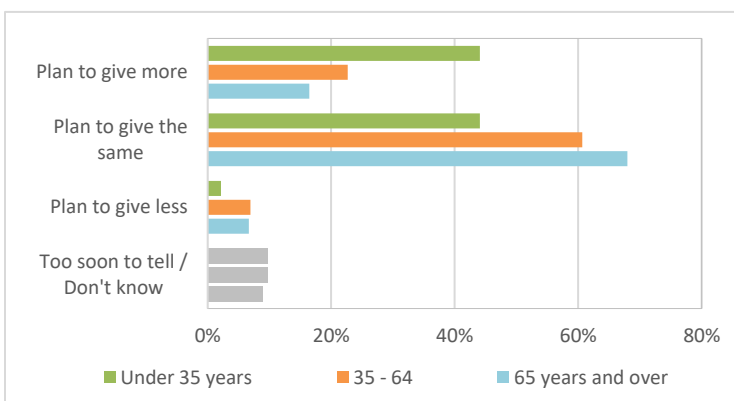


81% of Respondents supported the same number of causes in 2016 as they did in 2015. However, among those who gave to more or fewer causes,

Respondents were more likely to have added to (12%) than cut back on (7%) the number of charities they supported last year. When the long-term trend is taken into account, however, there is a decided difference in the number of causes that middle age and older donors support. Last year, 54% of middle age donors gave to between one and five organizations while only 7% supported more than fifteen causes. Among donors 65 or older, however, 30% contributed gifts to five or fewer causes while 23% supported more than fifteen. This is important information for charities that are largely dependent on volume-based fundraising programs. Diversifying Development operations now is vital in order to sustain net revenue over the long term. This means applying more human and financial resources to building major and planned gifts fundraising programs because they rely less on volume of donors participating and more on sustaining and growing average gift value.

*While I tend to focus my local giving on basic food, clothing, shelter-type causes, I am increasingly inclined to give to causes beyond Canada's borders where the need is immediate, say in refugee relief or support for human rights.*

### Donors' Giving Intentions for 2017



A majority of Respondents (63%) expects to give about the same in 2017 as they contributed in 2016. The ratio is 3:1 for donors who plan to give more (20%) than less (7%) and the Survey's youngest donors are

the driving force behind the solid percentage who is planning to give more generously in 2017. This is an indication that young donors' employment situation is more solid and they are moving up the seniority ladder more quickly due to the rapid rate of retirement among baby boomers. As before, Respondents' personal financial ability to give more generously is the main driver of their positive intentions for

giving this year (56%) but concern for the welfare of charities in a fluctuating economy is still a contributing factor (29%).

Among the one in five Respondents planning to give more in 2017, 23% are motivated to do so because they are satisfied with the performance of one or more charities they supported last year, up significantly from 18% in last year's study.

Young donors are particularly optimistic with 44% planning to give more (up from 37% last year). By comparison, only 23% of middle age and 16% of older donors plan to give more in 2017. The giving expectations of the survey's most generous donors are especially notable with 23% planning to give more (up from 22% in the previous survey) while only 12% plan to give less.

Among the 63% of Respondents planning to give the same this year as last, two out of three said they are financially able to maintain but not grow their philanthropy. However, in another question these donors were asked if they had given all that they were able last year or whether they could have actually given more; more than half admitted that, yes, they could have given more generously than they did. There is a real opportunity to influence this large majority of Canadian donors to move their giving up, but they need a persuasive, specific case that will motivate them to give more. Selling the brand or the organization as a whole will not inspire these stay-the-course donors to give more. Designated (restricted) giving to a program, project, or area of focus that is specific and measurable is essential.

So, too, is eliminating fundraising practices that donors find irritating, especially over-solicitation and sending donors premiums or token gifts. When charities send donors these unwanted trinkets they are sending a clear signal that they did not need all the money donors contributed.

### *How Donors Are Changing the Ways in Which They Give*

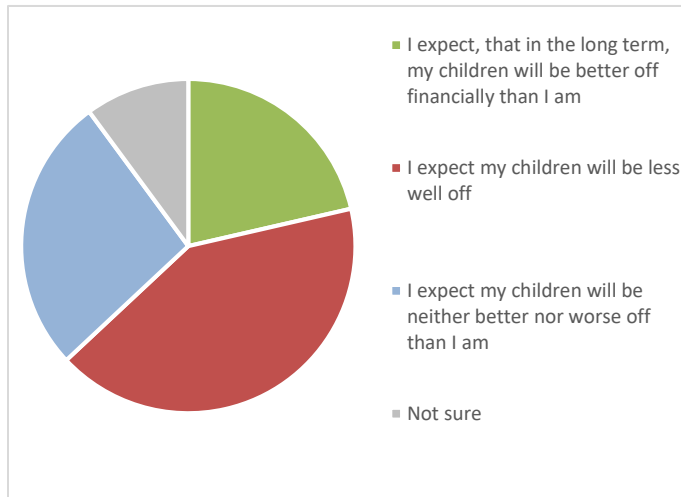
Direct mail remained the most common way in which donors transacted gifts in 2016 (46%), that is until age is taken into account. 59% of the survey's oldest donors but only 13% of those under the age of 35 responded to direct mail appeals. Online giving and sustaining (recurring) giving are enjoying increasing popularity among all Respondents, but especially among young donors. The percentage of donors with experience giving via social media and crowdfunding campaigns is still relatively modest at 15% though this figure has doubled in the last two years.

Donors and philanthropy are adapting with the times, often faster than charities or their fundraisers are adapting to keep pace. Cost and the perception of cost feature prominently today in donors' decisions about which causes they will or will not support. 86% of Respondents are more likely to reduce support or stop giving to not-for-profits whose administrative costs appear to be too high; 80% now stop supporting or reduce support to causes that spend too much on fundraising. This is a

*What would unleash my philanthropy? First, don't send me a thank you for my donation and a request for more money in the same message. Second, don't send me cards, gift wrap, baubles, etc. when you are asking for a donation. If I give to you I don't need a bribe, and if you are wasting money on this junk then I feel you will waste mine the same way.*

significant change from ten years ago when cost-per-dollar raised barely registered with donors as a reason to stop giving or reallocate their giving budget.

On the positive side, 51% of Respondents conduct more research before making giving decisions today than they did five years ago. Donors who put time into researching charitable causes rather than giving without making that effort, tend to give more generously.

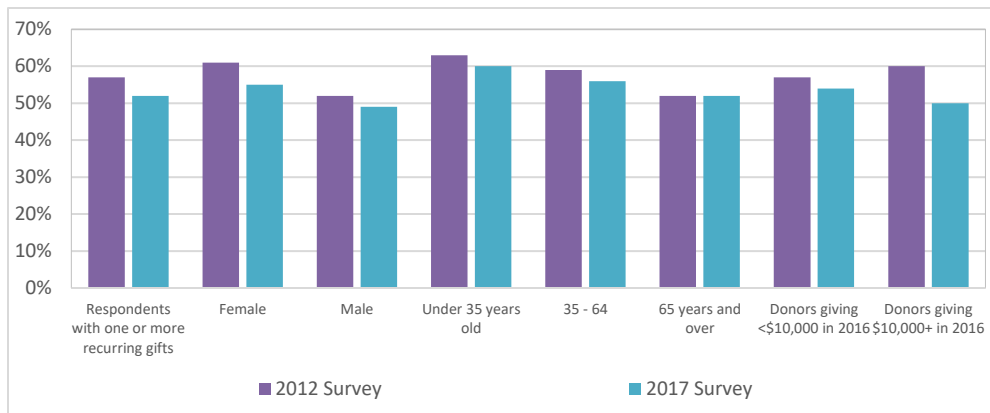


Personal and family situations, both anticipated and unexpected impact philanthropy. Approximately one in three donors with adult children say they are giving less, at least temporarily, so that they can redirect resources to provide assistance to family members.

*In fact, this survey has helped me realize that I would like to be more generous in philanthropic giving. I like the idea of monthly donations and wish my employer had an employee giving program.*

### Sustaining/Recurring Gifts

The 2017 Burk Donor Survey updated the research on Monthly Giving that was first conducted in 2012. The percentage of Respondents with one or more monthly gifts has risen slightly in the last five years from 49% to 52% and age accounts for much of



that growth. 60% of young donors made sustaining gifts in 2016 compared with only 46% in 2011. According to experts who manage Monthly Giving Programs, fundraisers have made a concerted effort to convert donors acquired via text messaging, phone and crowdfunding campaigns, giving methods that are more

commonly used by younger supporters. Gift value overall has declined over the last five years, however, and again this is likely the result of a surge in young donors who are unable to give as generously as middle age or older donors.

Concern over fundraising cost and over-solicitation make Monthly Giving programs more attractive to donors, but fundraisers are doing a better job at selling these programs to donors as well. The statement, “charities made a compelling case for becoming a monthly donor” rose from 3.8 on a 7-point scale in 2012 to 4.6 this year. In the end, though, altruism drives donors’ migration to Monthly Giving more than does anything else. “Monthly Gifts assure charities of a stable source of funds for their projects” rated a 5.8 score on the 7-point scale.

74% of Respondents with monthly gifts arrangements are very or extremely satisfied with this form of giving. And, approximately one in four agreed that they are more likely to consider a major or planned gift to an organization they support through Monthly Giving than to one that they donate to in other ways.

### *A First Look at Donor-Advised Funds*

Donor-Advised Funds (DAFs) are the fastest growing philanthropic giving program at a major gift level in Canada and the United States, so Development professionals are keenly interested in the degree to which they are advantageous to fundraising. Fundraisers have some concerns, especially whether fundholders are establishing high value DAFs rather than granting that generous sum directly to charitable organizations. They also wonder whether DAF-holders have cut themselves off from communications and personal contact that are instrumental in convincing donors to give generously.

Only 3% of Respondents qualified to respond to questions in this part of the survey, so findings are interesting but anecdotal. 73% of Canadian Respondents with DAFs have already made grants from their funds and most (79%) made their first grant(s) within a year after establishing their DAFs. 60% of fundholders say they now give more generously to charity since establishing their DAFs and 34% give approximately the same.

95% of fundholders continue to give directly to charities in addition to granting from their funds, which means that fundraisers still have an avenue by which they can communicate with these donors in order to interest them in making more generous contributions. While the majority of Fundholders is not open to increasing the total value of grants they allocate from their DAFs this year, some have suggested that better information on what their grants are accomplishing, designated (restricted) giving options and matching gift opportunities would inspire them to grant more generously.

*I expect to retire in the next 5 years. That said, I am in my peak earning years now, so if I retire on my terms and at a time of my choosing, I should be able to continue to maintain charitable giving at my current level. I could give more now, but want to be able to maintain what I give throughout my retirement.*

## *Are Donors Giving All that They Can?*

35% of Canadian Respondents in *The Burk Donor Survey* said they could have given more generously last year (up from 27% in the previous year's survey). And, among donors who gave \$10,000 or more to charitable causes last year, 32% said they still could have given more.

## *Recommendations*

*The 2017 Burk Donor Survey Report* includes sixty-three graphs and tables illustrating statistical findings from the Survey plus twenty-six recommendations on how fundraisers can use this information to raise more money.

*My husband died 2 years ago and he was supporting several charities. I contacted each charity by phone and asked to have my husband's name taken off their mailing list. I am still receiving letters addressed to my husband from some of these charities soliciting his continued support. This is very off-putting.*

## *Appendix I - 2017 Canadian Burk Donor Survey Partners*

Boys and Girls Clubs of South Coast BC  
Canadian Federation of Humane Societies  
Canadian Lutheran World Relief  
Canadian Mental Health Association, Windsor-Essex County Branch  
Canadian Red Cross  
Children's Aid Foundation  
Children's Hospital of Manitoba  
Conestoga College  
Good Shepherd Centre  
Habitat for Humanity Southern Alberta  
Heart & Stroke Foundation  
Markham Stouffville Hospital Foundation  
McMaster University  
North York General Hospital Foundation  
SAIT Polytechnic  
St. Joseph's Health Care Foundation  
The Arthritis Society  
United Way of Burlington & Greater Hamilton  
United Way of Thunder Bay  
Victoria Cool Aid Society  
West Coast Environmental Law  
West Parry Sound Health Centre Foundation  
Wood's Homes  
YMCA-YWCA of the National Capital Region

## Appendix ii – Donor-Centred Fundraising

*Donor-Centred Fundraising*<sup>®</sup> is an approach to raising money that inspires donors to remain loyal longer and give more generously. It is easy to understand; it focuses on the things that make fundraising profitable; and it comes from donors themselves.

*Donor-Centred Fundraising* fulfills a donor's three essential requirements:

- receiving prompt and meaningful acknowledgement whenever a gift is made;
- having the gift assigned to a specific program, project or initiative more narrow in scope than the mission of the charity;
- receiving a report, in measurable terms, on what was accomplished with the last gift before being asked for another.

Penelope Burk's formula for retention and generous giving was first published in Canada in 2000 as *Thanks!...a Guide to Donor-Centred Fundraising* and in 2003 in the United States as *Donor-Centered Fundraising*. The timing of these publications coincided with the growing frustration among fundraising professionals concerning premature donor attrition and whether/how an attrition rate that had reached 90% could be mitigated.

In 2013 and 2014, *The Burk Donor Survey* asked donors once again to consider what motivates them to stay loyal and make increasingly generous gifts to certain causes while abandoning others soon after they started giving. Specifically, the studies investigated whether donor retention and generosity could be influenced early – ie, between acquisition and first renewal where donor attrition is the highest (65%) and gift values are the lowest. This is especially important because of the compounding advantage of an improvement in early retention. For instance, just a 5% improvement in early retention over what a not-for-profit is currently experiencing can result in an improvement in revenue of nearly 50%.

Several factors contribute to this healthy increase but one of the most important is that 49% of first-time donors give less than they could intentionally but are prepared to be more generous if they receive the donor-centred stewardship they need before being asked to give again. Most important, improvement in early retention and gift value has a long-lasting impact as donors continue to be solicited over years. This is especially important today as the number of donors being acquired through mass marketing programs (the primary vehicles for acquisition and early renewal) is in decline. Their April, 2017 report which measured fundraising in the fourth quarter of 2016<sup>39</sup> recorded a five-year net decline in the number of donors giving through direct marketing (direct mail, telemarketing, online giving) of 7.5% and a five-year net decline in new donors (i.e., donors giving for the first time to a particular not-for-profit) of 17.2%.

For fundraising to be increasingly profitable in the future, even as competition for donors and dollars increases, charities should prepare to rely on fewer donors making more generous gifts. According to donors, *Donor-Centred Fundraising* is the strategy that will achieve this goal.

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<sup>39</sup> Target Analytics Index of Direct Marketing Fundraising Q4 2016, H Flannery, P Grainger, R Harris, C Rhine, Target Analytics, a division of Blackbaud, South Carolina, April, 2017



The *Burk Donor Survey* asked Respondents to consider this illustration of a donor-centred approach:

*Soon after making a gift for the first time, you receive a prompt and appealing letter of thanks in which you are told about the program/project to which your gift will be assigned. Later, you receive an evidence-based update on how that program has progressed and the role that donors' gifts have played. Only after that are you asked to give again.*

Table 8 compares actual national performance benchmarks in fundraising with donors' responses to three questions connected with the statement above.

**Table 8:** Comparing Traditional and Donor-Centred Fundraising Strategies on Retention and Gift Value

Question	Traditional Fundraising Gift Renewal/Gift Value/ Generosity	Donor-Centred Fundraising Gift Renewal/Gift Value/ Generosity
Likelihood of giving again the next time donor is asked	35% of new donors renew sometime within the next year, though not necessarily the next time they are asked	67% would definitely or probably renew the next time they were asked
Likelihood of making a larger gift	21.8% of donors who renew make a larger gift	52% would definitely or probably make a larger gift when they renew
Likelihood of continuing to give indefinitely	<10% of donors continue to give to the same not-for-profit beyond five asks or campaigns	67% would definitely or probably continue supporting a donor-centred not-for-profit indefinitely

Appendix iii

# DONOR-CENTRED LEADERSHIP

## What it takes to build a high performance fundraising team

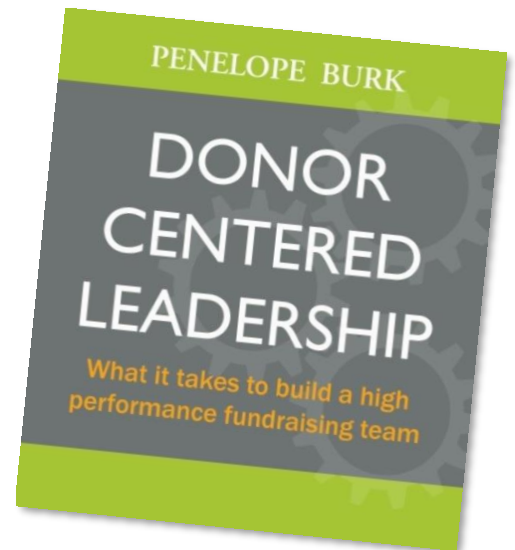
In *Donor-Centred Leadership* Penelope Burk tackles one of our most frustrating and costly problems – the high turnover rate of staff and the financial toll it takes on charities. In plain language, backed by compelling research with over 12,000 fundraisers, Board members, CEOs, and donors, Penelope reveals how charities can raise much more money by bringing staff attrition under control.

While the book speaks directly to decision-makers, *Donor-Centred Leadership* is also an essential resource for fundraisers at any level, including Development staff working in or aspiring to management and leadership positions. Penelope puts real numbers to the coming exodus of senior fundraisers on the verge of retirement and offers a win-win solution that capitalizes on young workers' eagerness for more responsibility and earlier promotion.

*Donor-Centred Leadership* exposes mistaken beliefs and out-of-date practices that make it harder for fundraisers to raise money and much easier for them to move on. And it goes further to examine an issue sitting just below the surface – the role that Leadership Volunteers play in fundraising. Penelope presents a riveting case for focusing Board members' attention on the things they do best and which donors say will unleash their philanthropy at a whole new level.

Written in a style that is distinctly hers and with her trademark humor, Penelope draws readers through a narrative punctuated by compelling research data and real-life stories towards a conclusion that is nothing short of inspiring. *Donor-Centred Leadership* is a must-read for everyone in fundraising and in the not-for-profit sector.

[www.cygresearch.com/dcl](http://www.cygresearch.com/dcl)



*“Game-changing books don’t come along often, so this could be the most important book about fundraising that you’ll buy in what, as Penelope Burk comprehensively illustrates, is likely to be your all-too-short and under-fulfilled career. That said, maybe you should invest in more copies, one each for your board and senior management team, then spread them around as compulsory reading, the first vital step towards bringing about – in your not-for-profit at least – the sea change that fundraising really needs.”*

- Ken Burnett, Fundraising Author and Lecturer

## Appendix iv

# 2018 Burk Donor Survey

## Call for Partners

### ABOUT THIS PROJECT:

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The Burk Donor Survey attracts over 20,000 North American donors each year. The impressive volume of survey Respondents enables reliable observations and recommendations based on age, gender, religious conviction, geographical location and several other measures. This, combined with questions that ask donors to look ahead at their plans for philanthropy in the near future, make the Burk Donor Survey a uniquely valuable resource to fundraisers and charities.

The participation of so many donors is made possible by dozens of prominent charities that notify their donors of this study and encourage them to participate. In return, partners receive these benefits:

- **FREE!** The *Burk Donor Survey National* report, authored by Penelope Burk, containing complete statistical findings on every question, comparisons with previous years' data, and practical recommendations for improving fundraising performance immediately;
- **FREE!** A private, interactive webinar facilitated by Penelope Burk exclusive to partners to discuss the survey's findings;
- A comparison of findings from a single partner's donors with the national results, available to partners at a highly discounted fee.

### FEATURED CONTENT IN THE 2018 SURVEY:

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**The 2018 Survey will feature an in-depth study on Planned Giving**, including familiarity with types of planned gifts, donors' current planned gifts commitments, willingness of other donors to consider planned gifts, planned gifts marketing and its impact on donors, and much more.

For more information or to sign up as a Partner in the 2018 Burk Donor Survey, please visit:

<http://www.cygresearch.com/bds2018>

