the exclusive resource for monthly U.S. charitable giving results and forecasts by sector, source and state

atlas of giving™

U.S. charitable giving:
2013 results & initial 2014 forecast

contents

faq

If you would like more information about the Atlas of Giving, how it was created or other ways it could benefit your organization, please visit the frequently asked questions section of our website. You may also contact us via email at info@atlasofgiving.com.

From time to time, reported economic variables are revised by the reporting entity. In cases where variables related to The ATLAS of Giving™ data are revised, our figures will be updated to reflect the most current reported data.

about the atlas of giving

The Atlas of Giving is the only comprehensive monthly estimate of charitable giving by sector, source and state in the U.S. The Atlas of Giving provides the only forecast of giving in the U.S.

The Atlas of Giving is built upon the fact that charitable giving is directly tied to specific economic, demographic and event factors. A team of 25 PhD level mathematicians, analysts and statisticians evaluated dozens of possible variables and their interactions with charitable giving outcomes over four decades. **The Atlas of Giving has determined exactly which specific factors correlate with charitable giving in the U.S.** The research team used the relevant identified factors to create 65 economic algorithms for charitable giving arranged by 9 sectors (religion, education, environment, etc.), 4 sources (individuals, foundations, corporations and bequests), and for 50 states and Washington DC. Each of these algorithms correlates to 42 years of published giving history with a coefficient of correlation of 91% to 99.8%.

Well-established macroeconomic measurements (retail sales, manufacturing, inventories, etc.) use the same type of econometric formulas (algorithms) to establish a benchmark. The benchmark is then used to measure changes, establish trends and create forecasts. Consistency and fidelity of the benchmark are vital. The Atlas of Giving uses this proven methodology for measuring and forecasting giving.

The Atlas is able to use its algorithms to measure total U.S. giving as it occurs monthly and provide an updated monthly forecast. Unlike any other charitable giving index or estimate, the Atlas also monitors current events (political changes, disasters, tax policy changes, important economic factors like unemployment, the stock market, consumer confidence, etc.) and provides analysis of their impact on current and future giving.

Atlas of Giving technology has also been used to develop specific predictive models for individual nonprofits and groups of associated nonprofits. These models have proven to be incredibly accurate.

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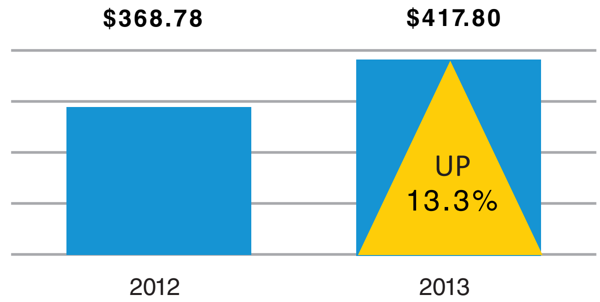
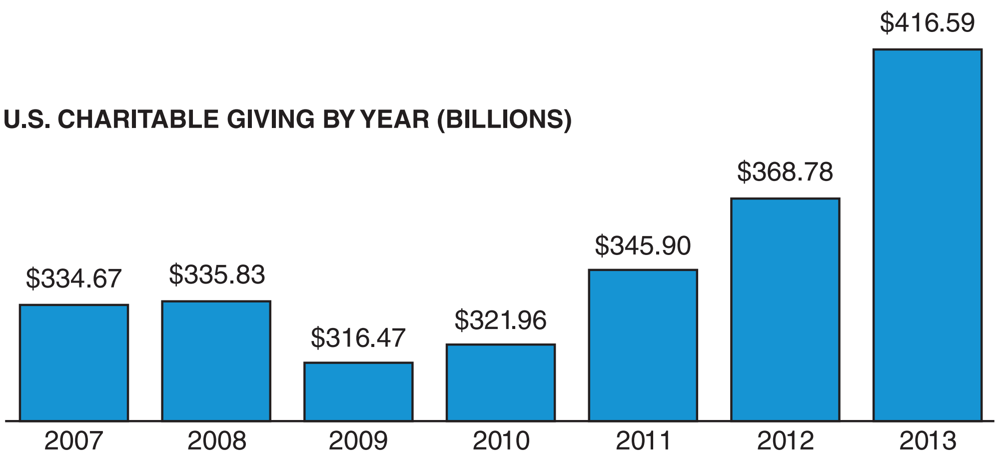
national results highlights

- 2013 charitable giving totaled $417.80 billion – the first year giving exceeded $400 billion.
- Overall, giving increased 13.3% from 2012.
- December giving was $36.98 billion.
- December giving increased 1.6% from November.

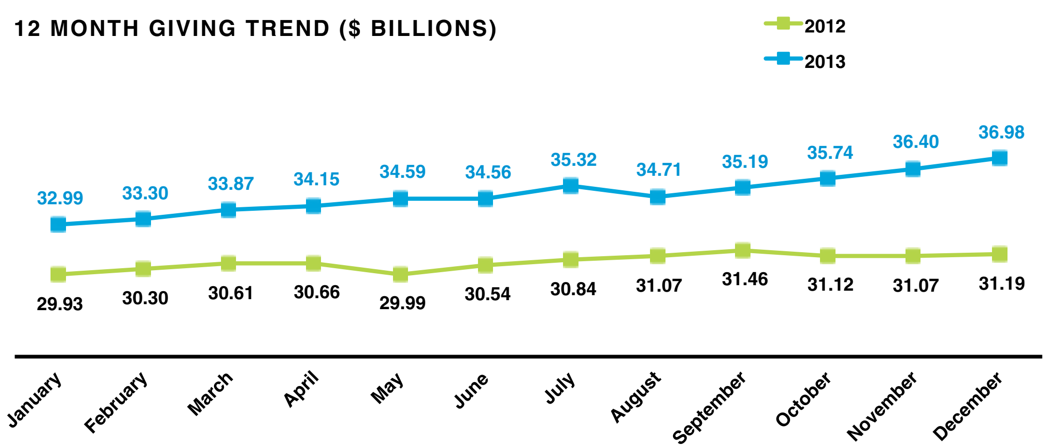
CALENDAR YTD TREND ($ BILLIONS)



U.S. CHARITABLE GIVING BY YEAR (BILLIONS)



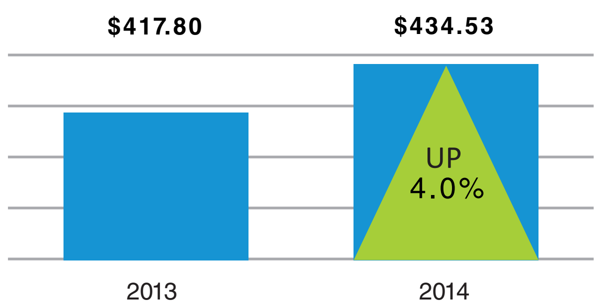
12 MONTH GIVING TREND ($ BILLIONS)



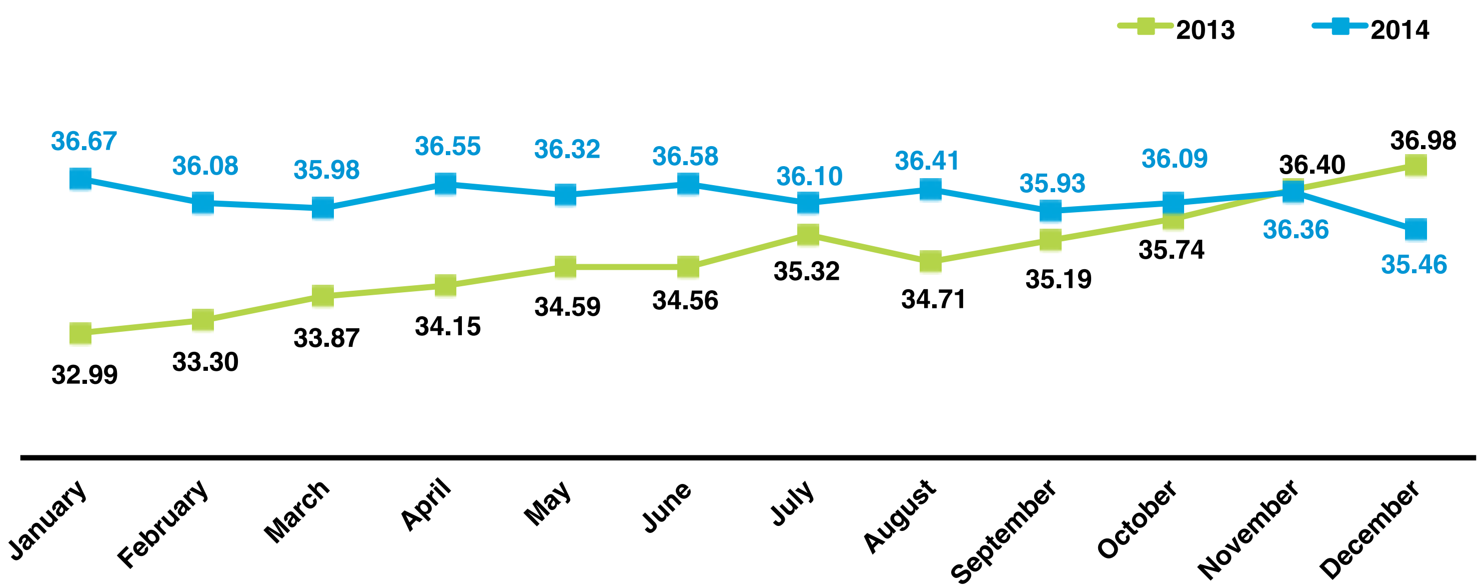
national forecast

- The forecast indicates that 2014 giving will total $434.53 billion, a 4.0% increase.
- Next month giving will total $36.67 billion.
- January giving will decrease 0.8% from December.

CALENDAR YEAR FORECAST ($ BILLIONS)



12 MONTH GIVING FORECAST ($ BILLIONS)



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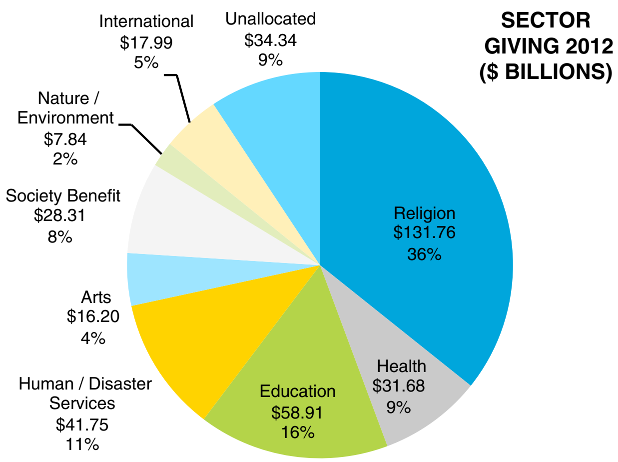
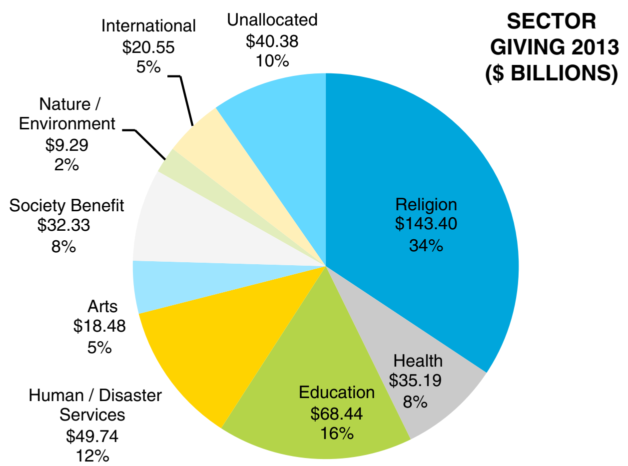
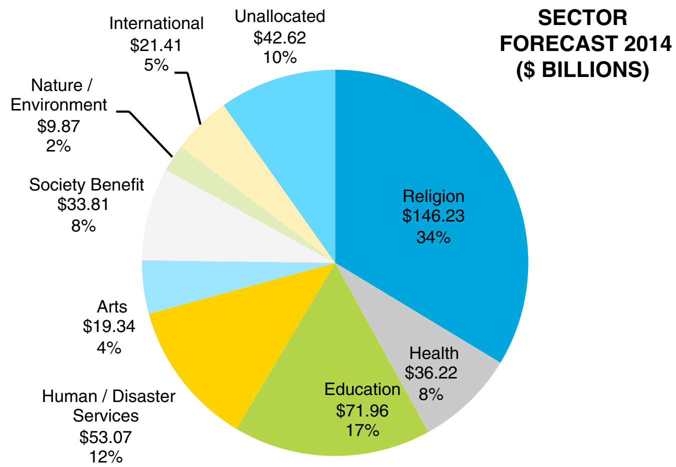
giving by sector at a glance

- Giving proportions by sector in 2014 will change slightly.
- Religion will remain the largest giving sector, although its portion continues to decline.
- Overall giving is projected to increase by only 4.0% in 2014, compared to a 13.3% increase from 2012 to 2013.
- The most significant 2014 increase will be in human / disaster services – up 6.7%.







sector trends and forecast

Sector Summary	National	Religion	Health	Education	Human / Disaster Services	Arts	Society Benefit	Nature / Environment	International	Unallocated
2013	**13.3%**	**8.8%**	**11.1%**	**16.2%**	**19.1%**	**14.1%**	**14.2%**	**18.5%**	**14.2%**	**17.6%**
versus same month last year	18.6%	13.8%	15.7%	22.2%	24.9%	18.8%	19.1%	22.1%	19.7%	23.3%
past 3 months	16.9%	12.0%	14.8%	19.7%	23.4%	17.8%	17.8%	21.9%	17.8%	21.5%
past 6 months	14.8%	10.1%	12.4%	18.0%	20.6%	15.6%	15.8%	20.1%	15.6%	19.1%
past 12 months	13.3%	8.8%	11.1%	16.2%	19.1%	14.1%	14.2%	18.5%	14.2%	17.6%
versus last month	1.6%	1.5%	1.6%	2.0%	1.6%	1.2%	1.4%	1.2%	1.7%	1.4%
2014	**4.0%**	**2.0%**	**2.9%**	**5.1%**	**6.7%**	**4.7%**	**4.6%**	**6.2%**	**4.2%**	**5.5%**
versus same month last year	11.2%	8.7%	9.6%	13.3%	14.1%	11.0%	11.4%	12.3%	11.7%	13.3%
next 3 months	8.6%	6.2%	7.6%	10.4%	11.3%	8.8%	9.0%	10.4%	8.7%	10.4%
next 6 months	7.2%	4.9%	6.1%	8.7%	10.3%	7.6%	7.7%	9.3%	7.5%	9.1%
next 12 months	4.0%	2.0%	2.9%	5.1%	6.7%	4.7%	4.6%	6.2%	4.2%	5.5%
versus this month	-0.8%	-0.8%	-1.0%	-1.1%	-0.4%	-1.2%	-1.0%	-1.2%	-0.5%	-0.6%

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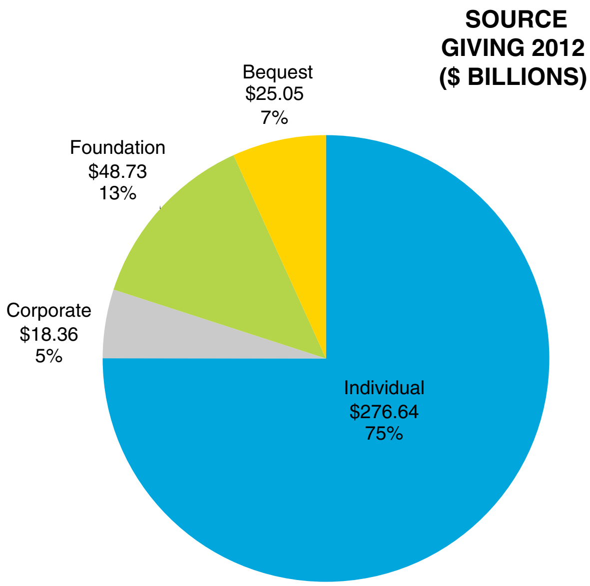
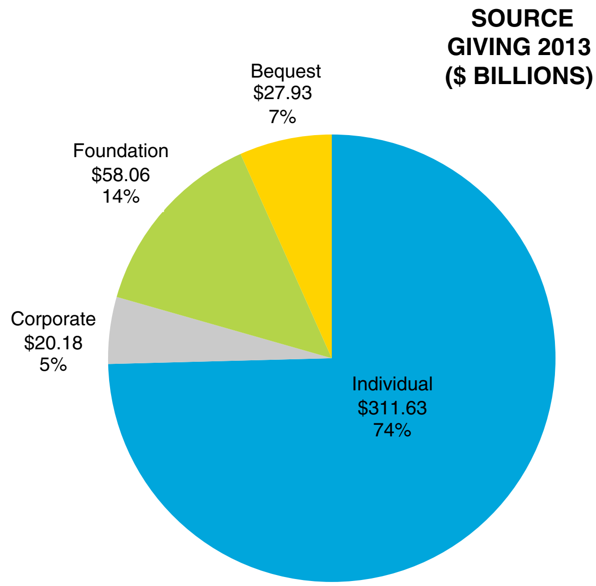
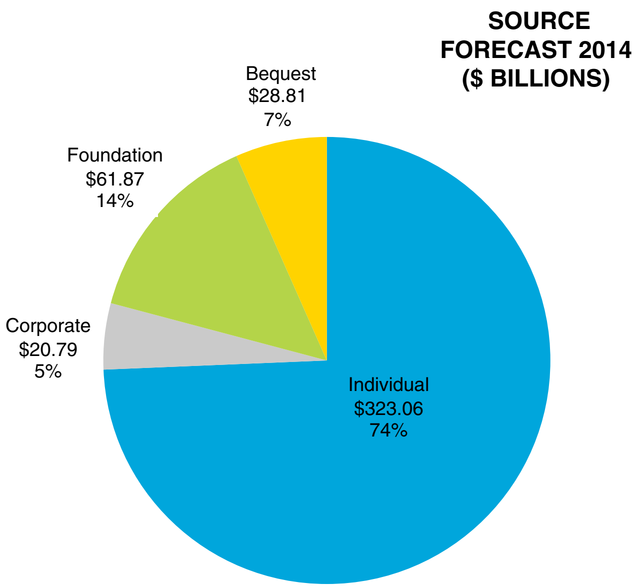
giving by source at a glance

- Charitable gift sources will remain at steady proportions in 2014, unchanged from 2013.
- Foundation gifts will increase the most in 2014 – up 6.6%.
- Corporate gifts will account for the smallest growth in 2014 at 3.0%.







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source trends and forecast

Source Summary	National	Individual	Corporate	Foundation	Bequest
2013	**13.3%**	**12.6%**	**9.9%**	**19.1%**	**11.5%**
versus same month last year	18.6%	17.9%	14.8%	24.9%	16.6%
past 3 months	16.9%	16.1%	13.4%	23.3%	14.7%
past 6 months	14.8%	14.1%	11.3%	20.8%	12.9%
past 12 months	13.3%	12.6%	9.9%	19.1%	11.5%
versus last month	1.6%	1.5%	1.7%	1.8%	1.7%
2014	**4.0%**	**3.7%**	**3.0%**	**6.6%**	**3.2%**
versus same month last year	11.2%	10.8%	10.0%	14.1%	9.9%
next 3 months	8.6%	8.2%	7.4%	11.4%	7.6%
next 6 months	7.2%	6.9%	6.0%	10.2%	6.3%
next 12 months	4.0%	3.7%	3.0%	6.6%	3.2%
versus this month	-0.8%	-0.8%	-1.1%	-0.8%	-0.8%

state giving (alabama – mississippi)

RESULTS	versus last month	2013	versus same month last year	past 3 months	past 6 months	past 12 months	next month forecast	2014	next month versus same month last year	next 3 months	next 6 months	next 12 months
National	**1.6%**	**13.3%**	**18.6%**	**16.9%**	**14.8%**	**13.3%**	**-0.8%**	**4.0%**	**11.1%**	**8.6%**	**7.2%**	**4.0%**
Alabama	1.1%	13.3%	17.4%	16.2%	14.3%	13.3%	-1.1%	3.5%	8.7%	6.9%	5.8%	3.5%
Alaska	0.9%	13.5%	17.3%	16.0%	14.5%	13.5%	-0.9%	3.3%	8.6%	6.9%	5.7%	3.3%
Arizona	1.0%	13.3%	17.2%	16.2%	14.3%	13.3%	-1.0%	3.4%	8.7%	6.8%	5.8%	3.4%
Arkansas	1.1%	13.3%	17.2%	16.1%	14.3%	13.3%	-1.1%	3.4%	8.7%	6.8%	5.7%	3.4%
California	1.3%	9.5%	12.6%	11.5%	10.5%	9.5%	0.3%	4.5%	9.6%	7.8%	6.6%	4.5%
Colorado	1.0%	13.2%	17.2%	16.1%	14.3%	13.2%	-1.0%	3.5%	8.9%	6.9%	5.8%	3.5%
Connecticut	1.1%	13.2%	17.2%	16.1%	14.3%	13.2%	-1.1%	3.5%	8.8%	6.9%	5.8%	3.5%
Delaware	1.3%	13.3%	17.8%	16.3%	14.4%	13.3%	-1.3%	3.5%	8.7%	7.2%	6.0%	3.5%
District of Columbia	1.1%	13.3%	17.3%	16.2%	14.3%	13.3%	-1.1%	3.4%	8.8%	6.9%	5.8%	3.4%
Florida	2.6%	15.8%	23.8%	20.7%	18.2%	15.8%	0.2%	5.7%	18.0%	13.7%	11.8%	5.7%
Georgia	1.1%	13.3%	17.2%	16.2%	14.3%	13.3%	-1.1%	3.4%	8.7%	6.9%	5.8%	3.4%
Hawaii	0.6%	13.2%	17.1%	16.0%	14.3%	13.2%	-0.6%	3.4%	8.7%	6.8%	5.7%	3.4%
Idaho	0.7%	13.3%	17.4%	16.2%	14.5%	13.3%	-0.7%	3.2%	8.9%	6.7%	5.6%	3.2%
Illinois	3.1%	17.0%	26.8%	23.2%	19.7%	17.0%	-1.3%	4.6%	18.5%	13.4%	10.5%	4.6%
Indiana	1.2%	13.3%	17.4%	16.1%	14.3%	13.3%	-1.1%	3.5%	8.9%	6.9%	5.8%	3.5%
Iowa	1.1%	13.3%	17.2%	16.1%	14.4%	13.3%	-1.1%	3.5%	8.8%	7.0%	5.9%	3.5%
Kansas	1.2%	13.2%	17.5%	16.3%	14.3%	13.2%	-1.2%	3.5%	8.9%	7.0%	5.9%	3.5%
Kentucky	1.2%	13.3%	17.3%	16.1%	14.3%	13.3%	-1.2%	3.4%	8.6%	6.8%	5.7%	3.4%
Louisiana	1.0%	13.2%	17.3%	16.2%	14.3%	13.2%	-1.0%	3.5%	8.9%	7.0%	5.8%	3.5%
Maine	1.7%	13.3%	18.3%	16.7%	14.4%	13.3%	-1.6%	3.4%	9.0%	6.8%	5.7%	3.4%
Maryland	1.1%	13.3%	17.2%	16.2%	14.3%	13.3%	-1.1%	3.4%	8.7%	6.9%	5.8%	3.4%
Massachusetts	1.1%	13.2%	17.2%	16.2%	14.3%	13.2%	-1.0%	3.5%	8.9%	6.9%	5.8%	3.5%
Michigan	1.2%	13.3%	17.2%	16.1%	14.3%	13.3%	-1.0%	3.4%	8.8%	6.8%	5.8%	3.4%
Minnesota	1.1%	13.3%	17.4%	16.2%	14.4%	13.3%	-1.1%	3.4%	8.7%	6.9%	5.8%	3.4%
Mississippi	1.2%	13.2%	17.7%	16.1%	14.2%	13.2%	-1.2%	3.4%	8.7%	6.7%	5.7%	3.4%

state giving (missouri – wyoming)

RESULTS	versus last month	2013	versus same month last year	past 3 months	past 6 months	past 12 months	next month forecast	2014	next month versus same month last year	next 3 months	next 6 months	next 12 months
Missouri	1.1%	13.3%	17.3%	16.2%	14.4%	13.3%	-1.1%	3.4%	8.7%	6.8%	5.8%	3.4%
Montana	1.3%	13.3%	17.4%	15.9%	14.3%	13.3%	-1.2%	3.3%	8.1%	6.7%	5.5%	3.3%
Nebraska	1.3%	13.1%	17.4%	15.9%	14.1%	13.1%	-0.9%	3.5%	9.1%	7.0%	5.9%	3.5%
Nevada	1.2%	13.3%	17.6%	16.4%	14.4%	13.3%	-1.2%	3.4%	8.7%	6.9%	5.8%	3.4%
New Hampshire	1.4%	13.3%	17.6%	16.3%	14.6%	13.3%	-1.4%	3.3%	9.0%	6.7%	5.9%	3.3%
New Jersey	1.1%	13.2%	17.2%	16.1%	14.3%	13.2%	-1.1%	3.4%	8.8%	6.9%	5.8%	3.4%
New Mexico	1.0%	13.2%	17.0%	16.0%	14.2%	13.2%	-1.0%	3.5%	8.8%	6.9%	5.9%	3.5%
New York	5.3%	28.4%	49.0%	41.7%	33.9%	28.4%	-2.9%	5.0%	31.9%	21.7%	15.8%	5.0%
North Carolina	1.0%	13.3%	17.3%	16.2%	14.3%	13.3%	-1.0%	3.4%	8.8%	6.9%	5.8%	3.4%
North Dakota	1.3%	13.8%	18.8%	17.2%	15.1%	13.8%	-1.3%	3.2%	8.7%	7.2%	5.9%	3.2%
Ohio	1.2%	13.3%	17.2%	16.1%	14.3%	13.3%	-1.1%	3.4%	8.8%	6.9%	5.8%	3.4%
Oklahoma	1.0%	13.3%	17.4%	16.2%	14.4%	13.3%	-1.0%	3.5%	8.7%	6.8%	5.8%	3.5%
Oregon	1.1%	13.3%	17.2%	16.2%	14.3%	13.3%	-1.1%	3.5%	8.8%	7.0%	5.8%	3.5%
Pennsylvania	3.1%	15.9%	25.9%	22.2%	18.5%	15.9%	-1.5%	3.9%	17.8%	12.6%	9.7%	3.9%
Rhode Island	0.9%	13.4%	17.2%	15.8%	14.3%	13.4%	-0.9%	3.4%	8.5%	6.9%	5.8%	3.4%
South Carolina	1.1%	13.3%	17.3%	16.2%	14.3%	13.3%	-1.1%	3.5%	8.7%	6.9%	5.8%	3.5%
South Dakota	1.1%	13.4%	16.7%	16.4%	14.4%	13.4%	-1.1%	3.4%	8.4%	6.3%	5.5%	3.4%
Tennessee	1.0%	13.3%	17.1%	16.1%	14.3%	13.3%	-1.0%	3.4%	8.8%	6.9%	5.8%	3.4%
Texas	1.8%	10.0%	16.2%	14.2%	12.2%	10.0%	-0.3%	5.5%	12.1%	9.4%	9.5%	5.5%
Utah	1.0%	13.2%	17.2%	16.2%	14.4%	13.2%	-1.0%	3.5%	8.6%	6.8%	5.8%	3.5%
Vermont	2.0%	13.0%	18.6%	17.1%	14.6%	13.0%	-2.0%	3.6%	8.7%	7.1%	6.0%	3.6%
Virginia	1.1%	13.2%	17.3%	16.2%	14.3%	13.2%	-1.0%	3.5%	8.8%	6.9%	5.8%	3.5%
Washington	1.1%	13.3%	17.3%	16.2%	14.3%	13.3%	-1.0%	3.4%	8.8%	6.9%	5.8%	3.4%
West Virginia	1.3%	13.2%	17.8%	16.3%	14.3%	13.2%	-1.3%	3.4%	9.0%	6.9%	5.9%	3.4%
Wisconsin	1.1%	13.3%	17.2%	16.1%	14.3%	13.3%	-1.0%	3.4%	8.7%	6.8%	5.8%	3.4%
Wyoming	1.2%	13.4%	17.6%	16.2%	14.4%	13.4%	-1.1%	3.3%	8.9%	6.7%	6.0%	3.3%

notable observations for 2013

- Giving growth was fueled largely by significant gains in stock prices. Dow up 26%, S&P up 29%, Nasdaq up almost 40%
- Other contributing factors included improved employment, growing real estate values, little inflation, low interest rates, and a growing GDP.
- Church giving is growing at less than half the rate of the fastest growing sectors like Environment and Human Needs.
- Individual "mega-gifts" of $100 million or more accounted for about 1% of all US giving
- Donor Advised Funds are significantly impacting the charitable economy.
- Giving to Human Needs organizations and Environmental causes has been especially robust since the recession.
- Significant charitable assets are moving away from family foundations and into donor advised funds where there is less cost and there are fewer management issues.
- Giving to education and donor advised funds is closely tied to stock and real estate values.
- The lingering effects of high unemployment continue to hurt churches and organizations that rely on many small gifts from many small donors.
- Publicity related to the Affordable Care Act appears to be having a negative impact on giving to hospitals and health charities.
- Giving to churches and religious organizations is a shrinking proportional share (34% in 2013, down from 36% in 2012 and 37% in 2010), but it is still the largest giving sector in the U.S. This proportional decline is a function of several years of high unemployment combined with shrinking church membership and attendance.
- There seems to be a relationship between media coverage and charitable giving response. In 2013, this effect was most noticeable with giving to environmental causes and to Human Needs organizations.
- The popularity of making gifts online continues to grow.
- Higher payroll taxes in 2013 did not have a significant impact on giving.
- Giving is primarily a function of specific economic, demographic, and event factors.

atlas of giving™

ATLAS OF GIVING™ is the exclusive monthly resource for nationwide U.S. charitable giving results and forecasts. It provides monthly results and trends information for the past 12 months, as well as forecasts for the coming year. This complimentary detailed resource includes U.S. charitable giving results and forecasts by **sector** (religion, health, education, etc.), **source** (individuals, bequests, etc.) and **state**.

EXPRESS CUSTOM FORECAST can provide your organization's giving forecast based on last fiscal year's results coupled with the Atlas giving intelligence. Results are even personalized on a state level. Benefit from this quantum leap forward in fundraising to help project your next fiscal year receipts.

ULTIMATE PLANNING MODEL applies the same methods used to create the Atlas of Giving to develop a forecasting algorithm unique to your organization. For example, your nonprofit's gift history and other information can be combined with economic and demographic variables to develop a unique revenue model. Realize exponential return on investment from this revolutionary opportunity.

How much money will <u>YOU</u> raise next quarter … next year?

The same methods that were used to create the Atlas of Giving™ can be employed to create an Ultimate Planning Model for <u>your</u> organization. We can identify a unique forecasting algorithm that is specifically tailored to an individual nonprofit. Your organization's giving history and other information is used with economic and demographic variables to develop a custom revenue version. The Atlas Premiere forecasting tool creates efficiencies and opportunities that have never before been available…

- ✓ Schedule fundraising activities and campaigns to maximize their potential
- ✓ Plan budgets with more precision than ever
- ✓ Realize exponential return on investment

Email today for more information.

info@atlasofgiving.com

The Atlas of Giving is updated monthly based on the most current data available to help you make educated decisions and raise more money.

atlas of giving™

Be the first to see the future of charitable giving!

Visit atlasofgiving.com to sign up to receive an email notice when the next report is available.