Proven methodology for charities to make the best-informed decisions and raise more money.

The only monthly forecast and measurement of charitable giving by sector, source, and state in the U.S.

2016 Report Volume 1

including results through December

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About the Atlas of Giving

The Atlas of Giving is the only monthly forecast and measurement of charitable giving by sector, source, and state in the U.S. The Atlas of Giving uses proven methodology to help charities make best-informed decisions and raise more money.

Atlas models are amazingly accurate for national charitable giving forecasts as well as organization specific development programs.

The Atlas of Giving was developed recognizing that charitable giving is directly tied to 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 a 40-year period.

The research team used the most relevant identified factors to create 65 economic algorithms for charitable giving arranged by nine sectors (e.g. religion, education, environment), four sources (individuals, foundations, corporations, bequests), 50 states, and Washington DC.

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.) Atlas then provides analysis of their impact on current and future giving.

Reported economic variables are occasionally 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 data.

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 at info@atlasofgiving.com

Visit atlasofgiving.com to subscribe to the next report.

Atlas Products

There are three ways **ATLAS OF GIVING™** can increase your fundraising success:

ATLAS OF GIVING™ is the only resource for monthly results and forecasts of charitable giving in the U.S. This complimentary tool includes trends in giving for all charities nationwide detailed by **sector** (e.g. religion, health, education), **source** (individuals, foundations, corporations, bequests), and **state**.

ATLAS EXPRESS FORECAST™ provides projections specific to your organization. Subscribe to Atlas Express and access forecasts based on your charitable sector, geographic location, fiscal year timeframe, and sources of revenue from the last fiscal year. Utilize this cutting-edge resource to prepare and enhance your next budget or board report.

ATLAS CUSTOM PLANNING MODEL™ is game-changing informational technology that takes the guesswork out of budgeting, reporting, and benchmarking! This Atlas model is developed exclusively for your organization. Our PhD-level statisticians analyze and compare your nonprofit's gift history with dozens of economic and demographic variables to create an organization-specific revenue model for your charity. We keep your model updated using the most current information to forecast critical factors to your success.

2015 Year in Review Highlights

- 2015 U.S. charitable giving grew 4.6% for a total of $477.55 billion – the largest amount ever recorded.
- Charitable giving has grown 51% since the depth of the recession in 2009.
- Political giving competed for charitable gifts from both individuals and corporations.
- Individuals accounted for 73% of all 2015 giving. Giving from individuals grew 4.3% total.
- Foundations accounted for 15% of all 2015 giving. Grants from private foundations increased 6.9%, due in large part to the foundation asset growth experienced since 2010.
- Corporations accounted for only 5% of all 2015 giving. Giving from corporations grew only 3.3% – corporations have been keeping cash reserves at record levels.
- Bequests accounted for 7% of all 2015 giving. Giving from bequests increased 3.8%.
- 2015 giving growth was better than originally forecast largely due to stock market growth early in the year and continued improvement in employment.
- Charitable giving has grown to 3.5% of real GDP.
- 2015 environmental giving growth led all sectors with an 8.9% increase despite being the smallest sector.
- 2015 giving to churches grew, but only 2.4%.
- The best state giving growth came from Texas – up 6.6%.
- The worst state for giving growth was Alaska with only 2.3%.

2015 was a strange year for monthly giving:

- May, June, and July giving exceeded total year-end giving in October, November, and December.
- The performance of the stock market played a decisive role in monthly giving. The August and September market correction had a significant negative impact on charitable giving.
- Most university annual giving is strongest in May and June due to their fiscal years ending June 30. As the second largest sector (behind church giving), this contributed to the offset.
- Falling stock markets and rising interest rates created donor uncertainty at year end…especially December.
- Economic, demographic, and other events influence giving outcomes more than nonprofit organization size, plans, or talent in fundraising and solicitation.

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2015 Year in Review Highlights (cont.)

The Atlas of Giving has definitively determined that economic and demographic events drive fundraising results to a greater degree than nonprofit organizational talent, plans, and solicitation efforts. A nonprofit's fundraising portfolio (who they raise money from and when) and how economics, demographics and other events affect those donors determines the success or failure of fundraising activities.

The charitable economy experiences both yin and yang. Individual giving accounts for almost 2/3 of American giving. With better employment numbers, giving benefits. However, under-employment and those who have stopped looking for work have a detrimental effect on giving. Low oil prices help some by providing additional disposable income but also create tens of thousands of newly unemployed individuals from the oil sector and its related businesses. This has a significant negative impact – especially regionally.

Positive factors that affected 2015 giving:

- Low oil prices created more disposable family and corporate income.
- Low interest rates also provided more disposable income.
- Early year growth in the stock market made a positive contribution.
- Technology and innovation have made giving easier and less expensive (crowd funding, online event support, giving apps, social media, online auctions).
- Donor advised funds are adding billions to the charitable economy, especially when stock markets and real estate are doing well.
- Millennials are proving to be more charitable than their parents.

Negative factors that affected 2015 giving:

- Low oil prices create regional problems in individual and corporate giving.
- Low interest rates prevent some on fixed incomes from giving.
- Political campaigns siphon money away from the charitable economy, especially from individual donors.
- Smaller, more nimble organizations are taking charitable giving market share from larger, older legacy brand charities.

Initial 2016 Charitable Giving Forecast

2016 U.S. Giving is expected to total $489.82 billion - a growth of only 2.6%

- Currently, the 2.6% growth rate is projected to be consistent from month to month throughout the year.
- The recent and ongoing stock market correction will be a major factor in slow giving growth.
- Higher interest rates will also be a negative factor.
- Usually higher interest rates herald coming inflation – not good for giving.
- Political giving will have a significant negative impact on 2016 giving.
- Continuing low oil and gas prices will be a bright spot.
- Ongoing improvement in unemployment will also help giving.

Important trends for 2016:

- Nonprofits that can nimbly adjust to changing economic conditions will perform best.
- Oil prices will dictate much of the results for 2016.
- The success of new fundraising campaigns will be determined by the current state of the economy.

Recommendations for 2016:

- Pay attention to stock market activity. Take advantage of a rally with a campaign to major gift donors.
- Continue to reconnect with and retain past donors.
- Cater to millennials with mission results and financial efficiency. Organizations with the best measurable mission results will prevail.
- Use technology to reach millennial donors.
- Don't budget based on results from last year. Follow the forecast and adjust if needed.

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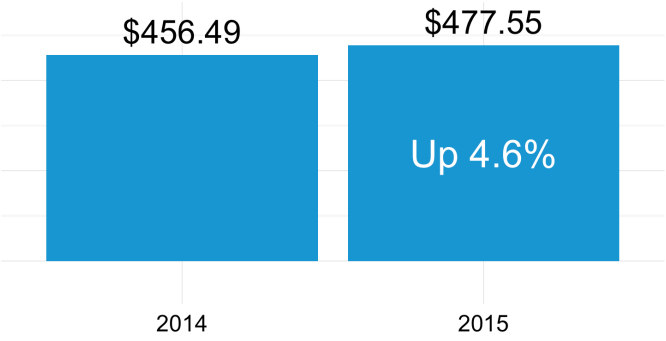
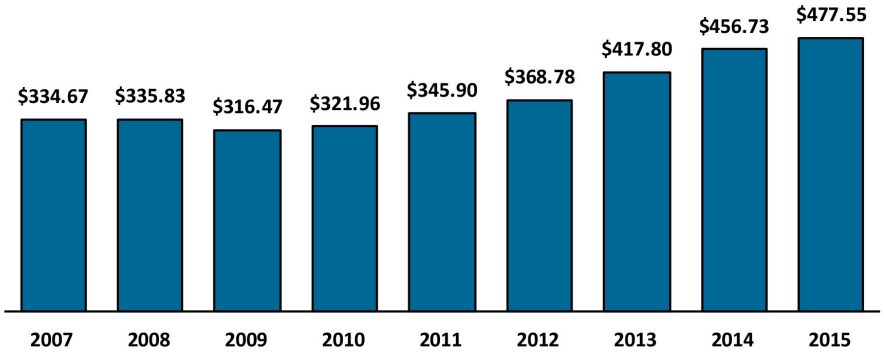
National Results Highlights

- Year to date charitable giving through December totals $477.55 billion.
- YTD giving is up 4.6% from 2014.
- December giving decreased 0.9% from November.

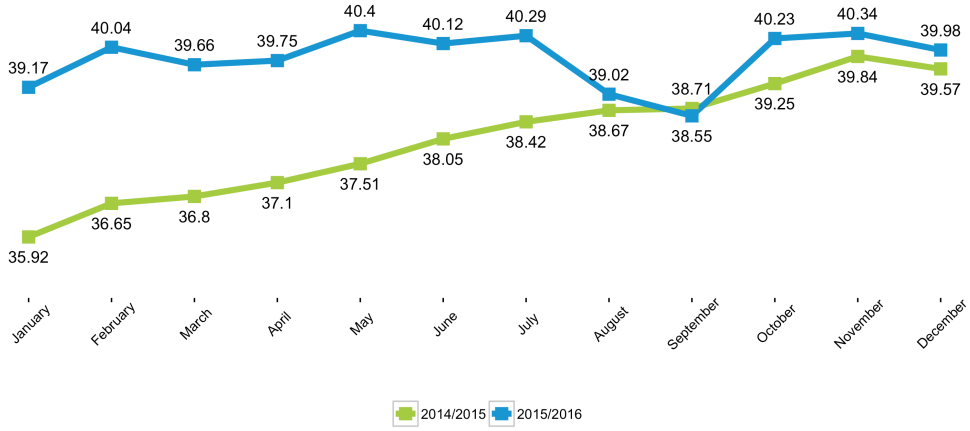
CALENDAR YTD TREND ($ BILLIONS)



U.S. Charitable Giving by Year ($ billions)

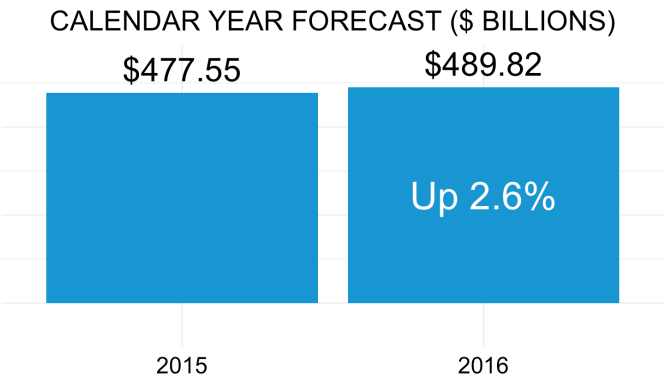


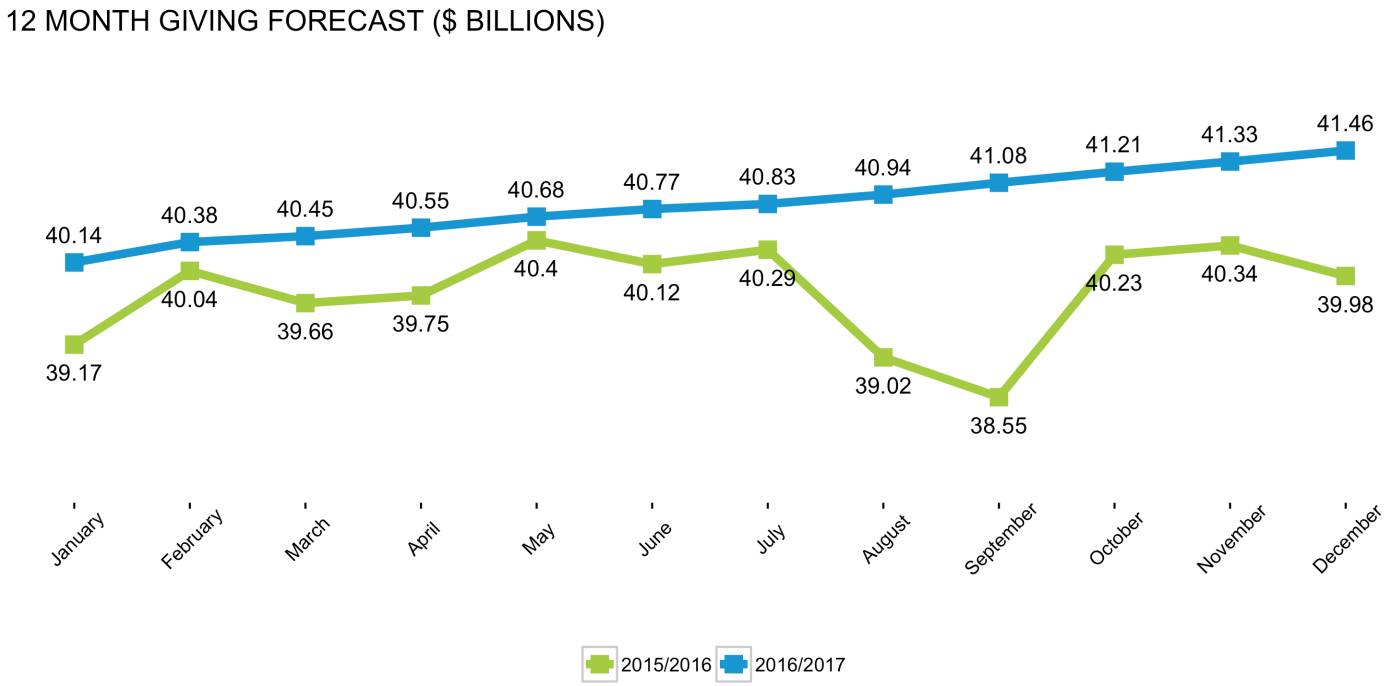
12 MONTH GIVING TREND ($ BILLIONS)



National Forecast

- The forecast indicates that 2016 giving will total $489.82 billion.
- 2016 will finish 2.6% higher than 2015.
- Next month giving will total $40.14 billion.
- January giving will increase 0.4% from December.

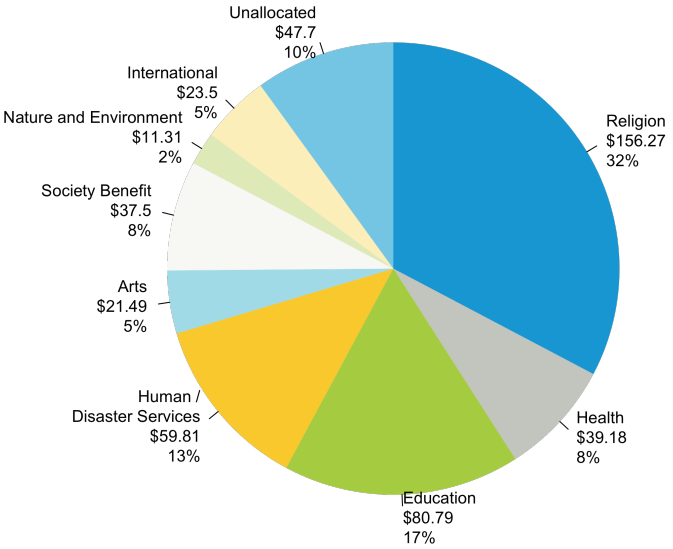




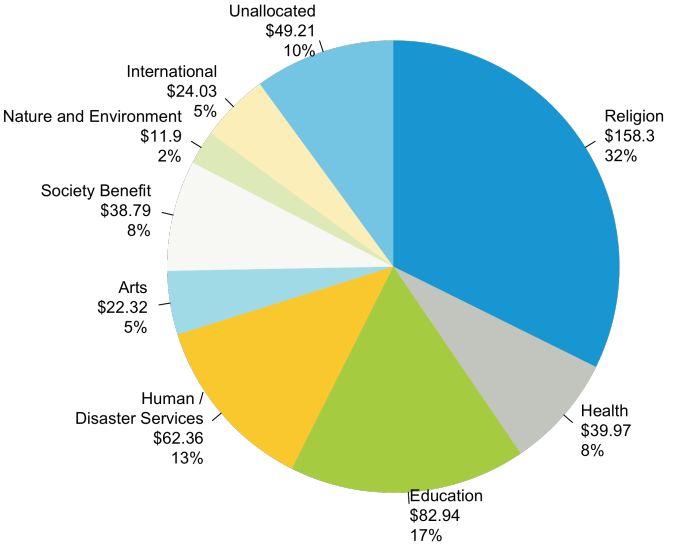
Giving by Sector at a Glance

- Giving proportions by sector in 2016 will change only slightly.
- Religion will remain the largest giving sector at 32%.
- Overall giving is projected to increase by 2.6% in 2016.
- The most significant 2016 change will be in Nature and Environment - up 5.2%.

SECTOR GIVING 2015 ($ BILLIONS)



SECTOR FORECAST 2016 ($ BILLIONS)



Sector Results and Forecast

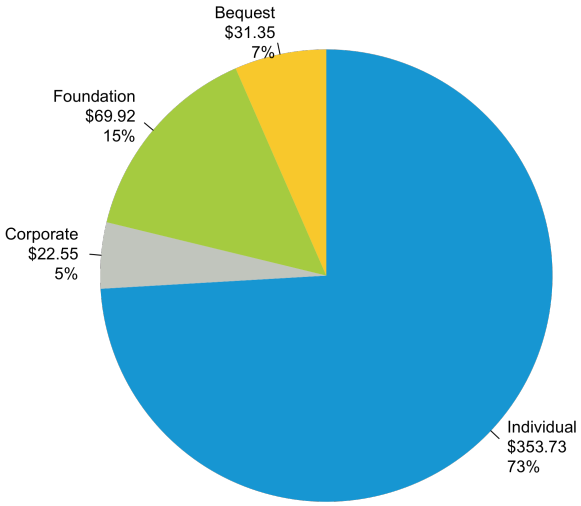
Changes in current and forecasted charitable giving are detailed below by sector.

Sector Summary	National	Religion	Health	Education	Human / Disaster Services	Arts	Society Benefit	Nature and Environment	International	Unallocated
CYTD Results	**4.6%**	**2.4%**	**3.2%**	**6%**	**6.7%**	**6.1%**	**5.7%**	**8.9%**	**4.6%**	**6%**
Versus Dec 2014	1%	-0.4%	-2.4%	2.1%	3.3%	2.3%	1.9%	4.3%	0.5%	2.3%
Past 3 Months	1.6%	0%	-0.5%	2.3%	3.3%	3.4%	2.9%	5.9%	1.2%	2.6%
Past 6 Months	1.7%	-0.1%	0.6%	2.5%	3.4%	3.4%	2.9%	5.8%	1.4%	2.7%
Past 12 Months	4.6%	2.4%	3.2%	6%	6.7%	6.1%	5.7%	8.9%	4.6%	6%
Versus Nov 2015	-0.9%	-0.7%	-2.7%	-0.4%	-0.6%	-1.1%	-0.9%	-1%	-1%	-1%
CY Forecast	**2.6%**	**1.3%**	**2%**	**2.7%**	**4.3%**	**3.9%**	**3.4%**	**5.2%**	**2.3%**	**3.2%**
Versus Jan 2015	3.7%	2.3%	2.7%	4.1%	5.3%	4.4%	4.7%	5.2%	4.1%	4.5%
Next 3 Months	3.6%	2.1%	2.9%	4.1%	5.6%	4%	4.2%	5.5%	3.9%	4.5%
Next 6 Months	4.2%	2.6%	3.5%	4.8%	6.4%	4.4%	4.6%	5.3%	4.4%	5.5%
Next 12 Months	4.9%	3%	4.1%	5.9%	7.7%	4.5%	4.8%	5.1%	5.3%	6.8%
Versus Dec 2015	0.4%	0.2%	0.3%	0.4%	0.4%	0.5%	0.6%	0%	1%	0.7%

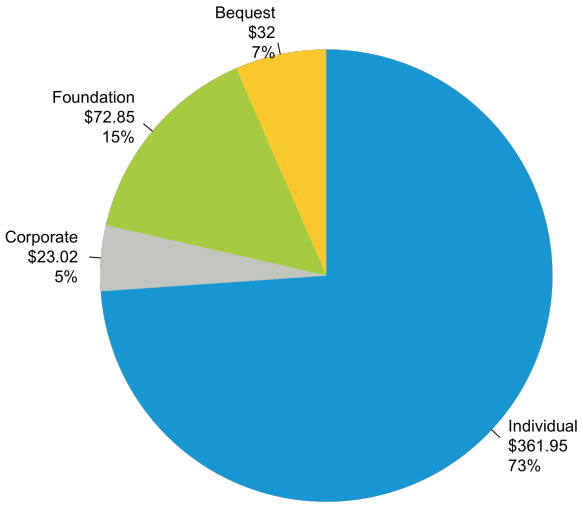
Giving by Source

- Charitable gift sources will change slightly in 2016
- Foundation gifts will increase the most in 2016 - up 4.2%
- Corporate gifts will increase the least in 2016 - up 2.1%

SOURCE GIVING 2015 ($ BILLIONS)



SOURCE FORECAST 2016 ($ BILLIONS)



Source Results and Forecast

Changes in current and forecasted charitable giving are detailed below by source.

Source Summary	National	Individual	Corporate	Foundation	Bequest
CYTD Results	**4.6%**	**4.3%**	**3.3%**	**6.9%**	**3.8%**
Versus Dec 2014	1%	0.7%	0%	3.3%	0.4%
Past 3 Months	1.6%	1.4%	0.7%	3.4%	0.9%
Past 6 Months	1.7%	1.4%	0.4%	3.7%	1%
Past 12 Months	4.6%	4.3%	3.3%	6.9%	3.8%
Versus Nov 2015	-0.9%	-0.9%	-1.1%	-0.7%	-0.8%
CY Forecast	**2.6%**	**2.3%**	**2.1%**	**4.2%**	**2.1%**
Versus Jan 2015	3.7%	3.4%	3.2%	5.4%	3.4%
Next 3 Months	3.6%	3.3%	2.8%	5.5%	3.2%
Next 6 Months	4.2%	3.9%	3.1%	6.3%	3.6%
Next 12 Months	4.9%	4.6%	3.5%	7.4%	4%
Versus Dec 2015	0.4%	0.3%	0.5%	0.6%	0.4%

Giving by State (Alabama — Mississippi)

Changes in current and forecasted charitable giving are detailed below by state.

State	CYTD Results	Versus Dec 2014	Past 3 Months	Past 6 Months	Past 12 Months	Versus Nov 2015	CY Forecast	Versus Jan 2015	Next 3 Months	Next 6 Months	Next 12 Months	Versus Dec 2015
National	4.6%	1.0%	1.6%	1.7%	4.6%	-0.9%	2.6%	3.7%	3.6%	4.2%	4.9%	0.4%
Alabama	3.8%	2.2%	1.5%	1.1%	3.8%	0.0%	1.1%	4.4%	4.4%	5.1%	6.2%	2.2%
Alaska	2.3%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	9.1%	9.1%	9.1%	9.1%	9.1%
Arizona	3.9%	1.5%	1.0%	1.3%	3.9%	0.0%	0.9%	4.5%	4.5%	5.2%	6.4%	2.9%
Arkansas	3.7%	0.0%	0.0%	0.6%	3.7%	0.0%	0.6%	3.8%	3.8%	5.1%	6.4%	0.0%
California	5.7%	3.1%	3.7%	3.7%	5.7%	-0.6%	5.1%	1.8%	1.5%	1.8%	1.8%	-2.8%
Colorado	3.7%	0.0%	1.0%	1.0%	3.7%	-1.4%	1.0%	4.4%	4.9%	5.4%	6.3%	2.9%
Connecticut	3.7%	1.6%	1.1%	1.4%	3.7%	0.0%	1.2%	4.8%	4.3%	5.0%	6.2%	1.6%
Delaware	3.5%	0.0%	0.0%	0.0%	3.5%	0.0%	0.6%	0.0%	4.4%	5.6%	6.1%	0.0%
D.C.	4.0%	0.0%	0.0%	0.7%	4.0%	0.0%	1.0%	3.8%	3.8%	5.1%	6.4%	3.8%
Florida	5.9%	0.4%	1.8%	1.6%	5.9%	-1.7%	4.7%	3.7%	3.2%	3.7%	3.8%	-2.0%
Georgia	3.9%	0.9%	0.6%	1.1%	3.9%	0.0%	0.9%	4.6%	4.6%	5.2%	6.3%	1.8%
Hawaii	2.7%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	6.2%	6.2%	6.2%	7.3%	6.2%
Idaho	2.6%	0.0%	0.0%	0.0%	2.6%	0.0%	0.0%	7.7%	7.7%	7.7%	8.3%	7.7%
Illinois	6.4%	0.0%	1.7%	1.4%	6.4%	-1.5%	4.9%	3.9%	3.5%	4.1%	4.2%	-1.4%
Indiana	3.9%	1.4%	0.9%	1.4%	3.9%	0.0%	1.0%	4.1%	4.1%	5.0%	6.0%	2.7%
Iowa	4.0%	2.8%	1.8%	1.4%	4.0%	0.0%	1.1%	2.7%	3.6%	4.5%	6.1%	2.7%
Kansas	3.4%	0.0%	1.0%	1.0%	3.4%	0.0%	1.0%	3.0%	3.0%	4.0%	6.1%	3.0%
Kentucky	3.9%	0.0%	0.8%	1.2%	3.9%	-2.3%	1.4%	4.8%	3.9%	4.3%	5.8%	2.3%
Louisiana	3.8%	0.0%	0.6%	0.9%	3.8%	-1.7%	0.9%	3.5%	4.7%	4.9%	6.2%	1.7%
Maine	3.6%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	5.6%	6.9%	7.6%	0.0%
Maryland	3.9%	0.0%	1.3%	1.3%	3.9%	-1.2%	1.1%	3.8%	4.2%	5.0%	6.2%	1.2%
Massachusetts	3.7%	1.0%	0.7%	0.8%	3.7%	0.0%	1.1%	4.0%	4.3%	5.1%	6.2%	1.9%
Michigan	3.8%	1.0%	0.7%	1.0%	3.8%	0.0%	1.0%	4.9%	4.5%	5.2%	6.2%	1.9%
Minnesota	3.5%	0.0%	0.5%	0.9%	3.5%	-1.4%	1.3%	4.2%	4.2%	4.9%	6.2%	1.4%
Mississippi	4.2%	0.0%	1.4%	1.4%	4.2%	0.0%	1.4%	4.0%	4.0%	4.7%	6.3%	4.0%

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Giving by State (Missouri — Wyoming)

Changes in current and forecasted charitable giving are detailed below by state.

State	CYTD Results	Versus Dec 2014	Past 3 Months	Past 6 Months	Past 12 Months	Versus Nov 2015	CY Forecast	Versus Jan 2015	Next 3 Months	Next 6 Months	Next 12 Months	Versus Dec 2015
Missouri	3.5%	0.0%	0.5%	0.8%	3.5%	-1.5%	1.3%	4.7%	4.1%	4.9%	6.2%	1.5%
Montana	4.3%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%	0.0%	0.0%	5.2%	0.0%
Nebraska	4.3%	0.0%	3.0%	2.3%	4.3%	-4.3%	1.5%	4.5%	4.5%	5.2%	5.5%	0.0%
Nevada	3.5%	0.0%	0.0%	1.1%	3.5%	0.0%	1.0%	3.1%	5.2%	5.7%	6.7%	0.0%
New Hampshire	3.7%	0.0%	0.0%	1.2%	3.7%	0.0%	1.2%	7.1%	7.1%	7.1%	7.0%	0.0%
New Jersey	3.9%	0.8%	0.8%	1.2%	3.9%	-0.8%	1.1%	3.8%	4.1%	5.0%	6.1%	1.5%
New Mexico	4.4%	5.3%	3.4%	2.6%	4.4%	0.0%	2.1%	0.0%	1.7%	3.3%	4.6%	0.0%
New York	3.7%	0.6%	0.7%	1.0%	3.7%	-0.6%	1.1%	4.2%	4.3%	5.0%	6.2%	1.9%
North Carolina	3.9%	0.9%	0.9%	1.2%	3.9%	-0.9%	1.0%	3.5%	4.4%	5.1%	6.2%	1.7%
North Dakota	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	14.3%	14.3%	14.3%	11.6%	0.0%
Ohio	3.5%	0.0%	0.5%	0.8%	3.5%	-0.8%	1.1%	3.9%	4.2%	5.1%	6.2%	1.5%
Oklahoma	4.1%	0.0%	1.8%	1.3%	4.1%	-2.6%	1.3%	5.3%	3.4%	4.3%	5.6%	2.6%
Oregon	4.2%	0.0%	1.5%	1.5%	4.2%	-2.2%	0.9%	4.4%	4.4%	5.1%	6.2%	2.2%
Pennsylvania	5.6%	-0.5%	1.2%	0.8%	5.6%	-1.5%	4.4%	4.4%	3.7%	4.3%	4.5%	-0.9%
Rhode Island	0.8%	0.0%	0.0%	0.0%	0.8%	0.0%	2.3%	9.1%	9.1%	9.1%	7.4%	0.0%
South Carolina	3.8%	0.0%	0.0%	0.8%	3.8%	0.0%	1.2%	4.7%	4.7%	5.0%	5.9%	2.3%
South Dakota	4.9%	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	0.0%	0.0%	3.7%	7.4%	0.0%
Tennessee	3.9%	1.5%	1.0%	1.3%	3.9%	0.0%	1.1%	4.5%	4.4%	5.2%	6.2%	1.4%
Texas	6.6%	2.8%	3.9%	3.8%	6.6%	-1.1%	5.8%	2.4%	2.1%	2.3%	2.4%	-3.1%
Utah	3.5%	0.0%	0.0%	0.6%	3.5%	0.0%	0.8%	3.3%	4.4%	5.6%	6.6%	0.0%
Vermont	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Virginia	3.8%	0.0%	0.6%	1.2%	3.8%	-0.9%	1.0%	4.4%	4.4%	5.1%	6.2%	1.7%
Washington	3.5%	0.0%	0.7%	0.9%	3.5%	-1.1%	1.3%	4.4%	4.0%	5.0%	6.1%	2.2%
West Virginia	5.1%	6.7%	4.3%	3.3%	5.1%	0.0%	2.1%	6.7%	2.1%	3.2%	4.7%	0.0%
Wisconsin	4.0%	0.0%	1.0%	1.3%	4.0%	-1.5%	1.2%	4.6%	4.1%	5.1%	6.2%	1.5%
Wyoming	4.1%	0.0%	4.0%	4.1%	4.1%	-11.1%	5.9%	12.5%	3.8%	1.9%	0.9%	0.0%