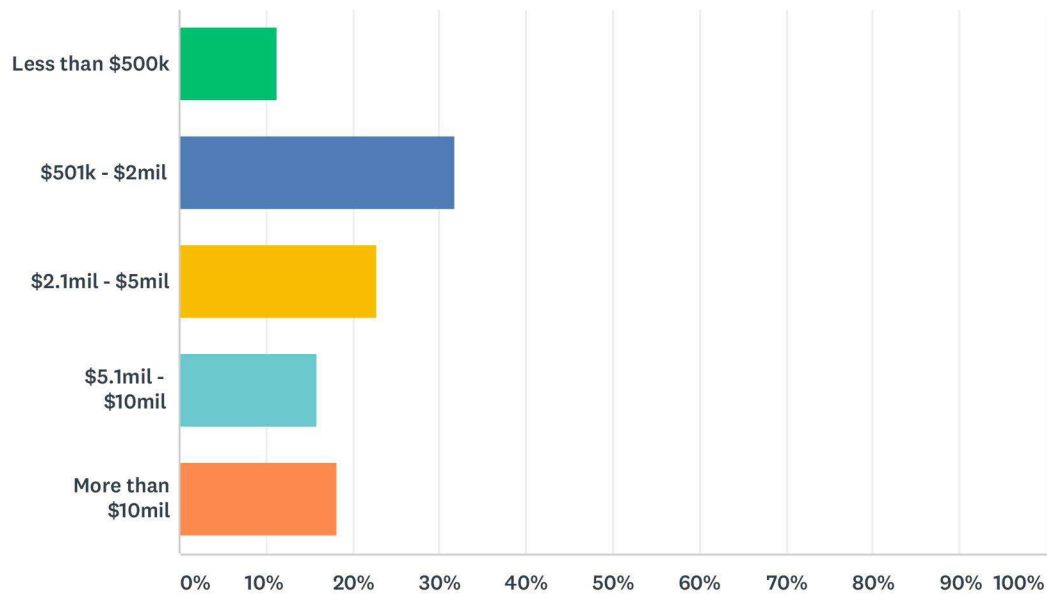


2018 Annual Giving Survey

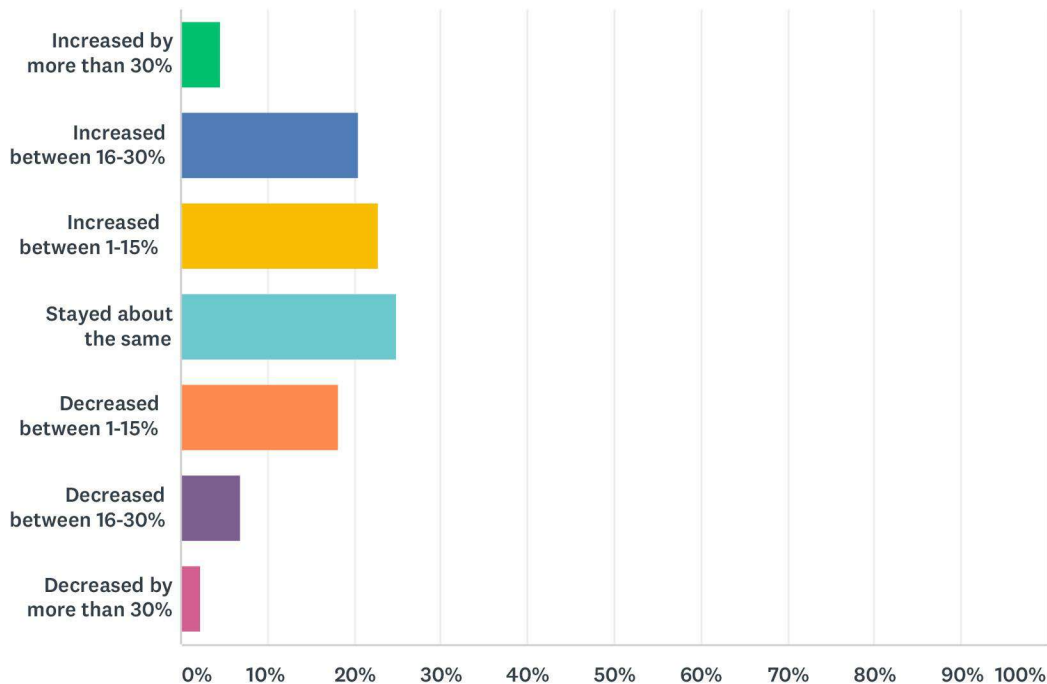
Q5 In what range were your mission's 2018 annual expenses?



About 55 percent of responding ministries reported 2018 annual expenses between \$500k and \$5 Million. Another 11 percent said their expenses were below that amount, while 36 percent reported annual expenses in excess of \$5 Million.

2018 Annual Giving Survey

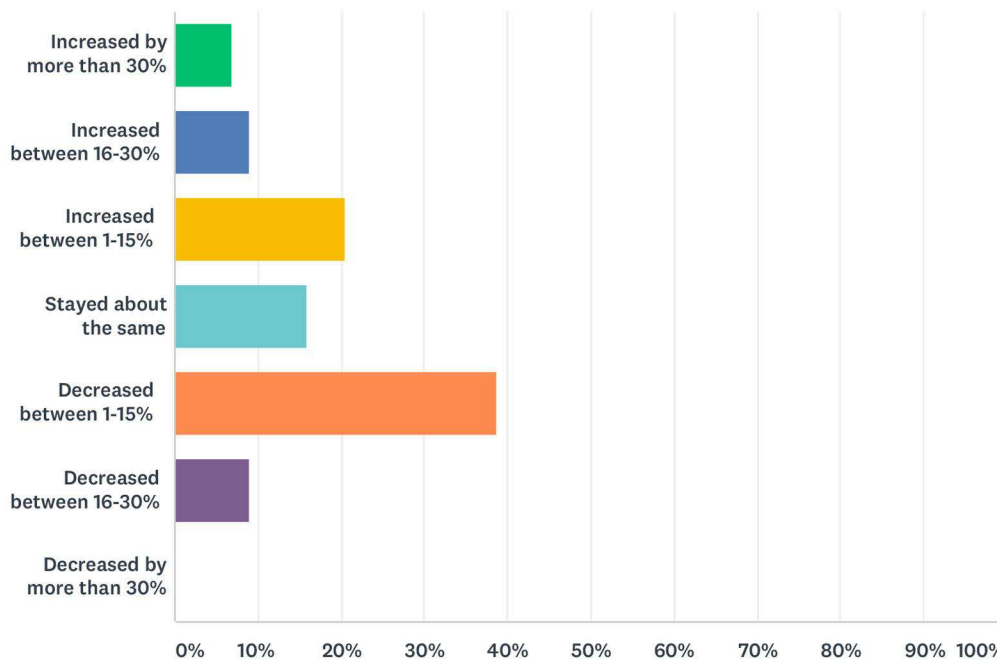
Q6 How did your 1st quarter private, charitable giving (January through March) in 2018 compare to your private giving levels in 1st quarter of 2017 (monetary gifts...we'll ask about GIK later)?



Comparing first quarter, private giving in 2018 to the same in 2017, there were no significant increases or decreases overall. Most ministries stated that giving stayed about the same or increased a small percentage from 2017 to 2018.

2018 Annual Giving Survey

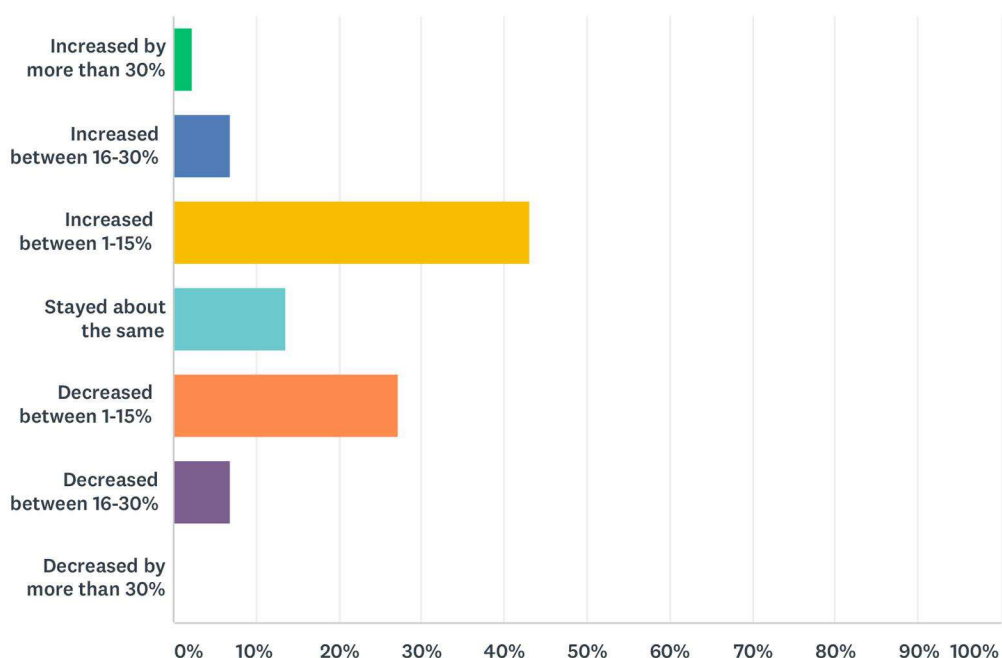
Q7 How did your 4th quarter private, charitable giving (October through December) in 2018 compare to your private giving levels in 4th quarter of 2017 (monetary gifts...we'll ask about GIK later)?



Comparing fourth quarter, private giving in 2018 to the same in 2017, 48 percent said their 2018 giving in the fourth quarter lagged behind 2017; 16 percent reported no significant change; and 36 percent saw their private giving in the fourth quarter of 2018 exceed 2017's last three months.

2018 Annual Giving Survey

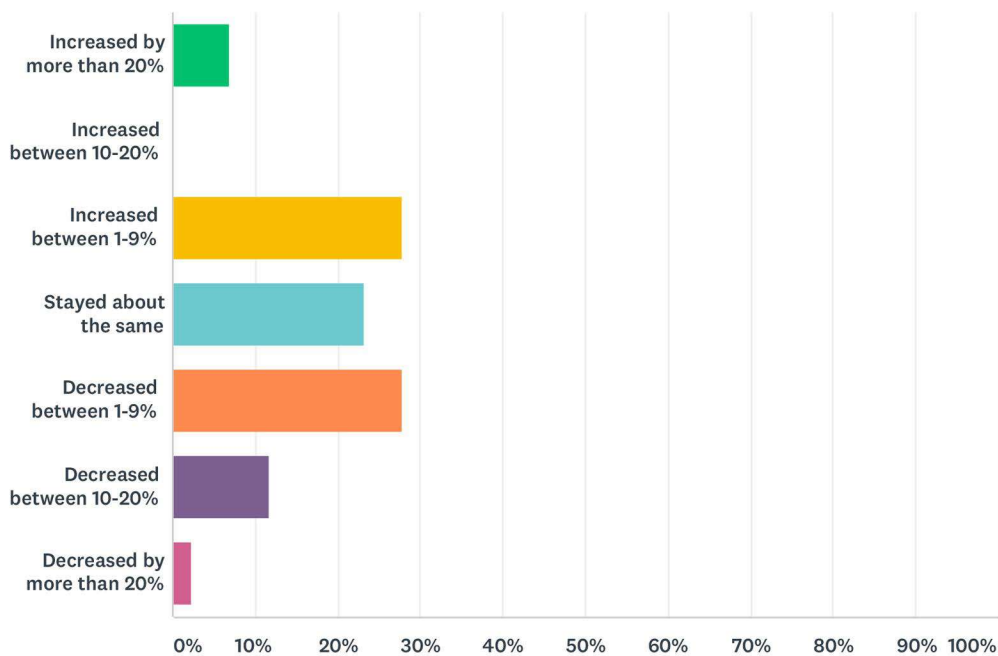
Q8 Overall, how did your private, charitable giving levels in all of 2018 compare to your private giving levels in all of 2017 (monetary gifts...we'll ask about GIK later)?



Comparing year-round, private giving in 2018 to all of 2017, just over half the responding ministries said giving increased overall. About 16 percent saw no significant change, while 34 percent said 2018 giving lagged behind 2017 giving.

2018 Annual Giving Survey

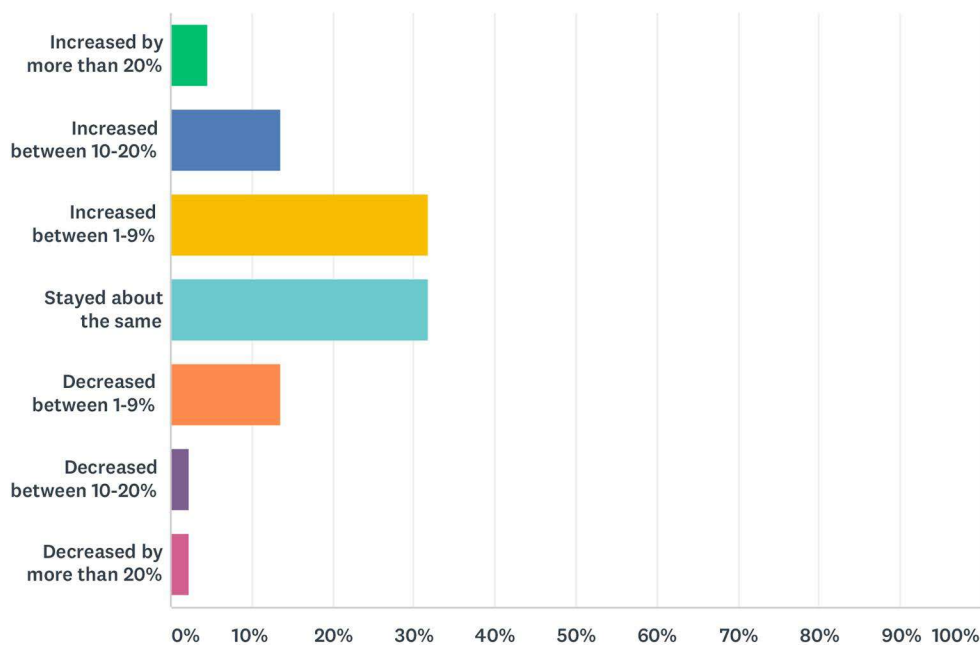
Q9 How did your number of individual donors in 2018 compare to your number of individual donors in 2017 (people who gave money...we'll ask about GIK later)?



With the number of ministries acquiring more individual donors and the number of ministries losing individual donors being about the same from 2017 to 2018, there is no significant change in the giving force.

2018 Annual Giving Survey

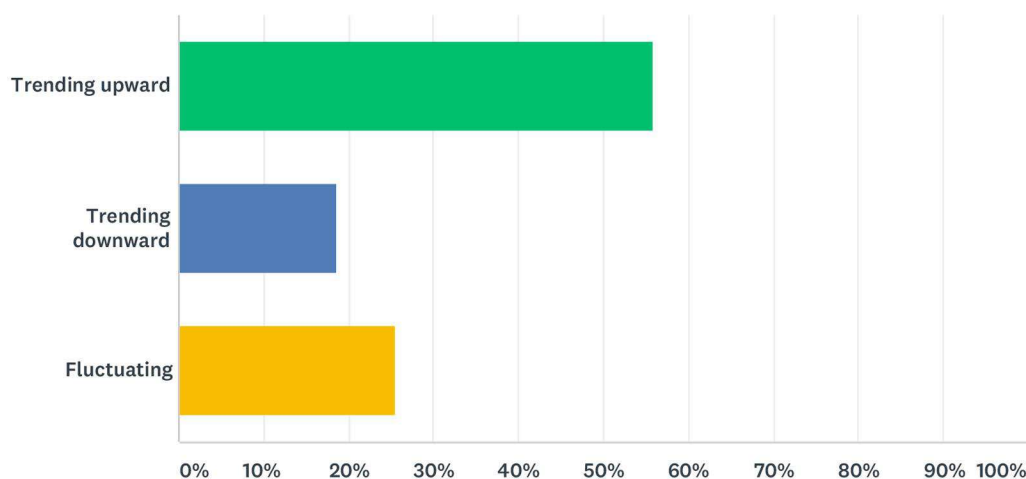
Q10 How did the average private gift amount in 2018 compare to the average private gift amount in 2017 (monetary gifts...we'll ask about GIK later)?



Comparing the average private gift amount in 2018 to the same in 2017, half of the responding missions reported the amount increased, 32% said the amount was stable, and just 18% saw the average gift decrease to some degree.

2018 Annual Giving Survey

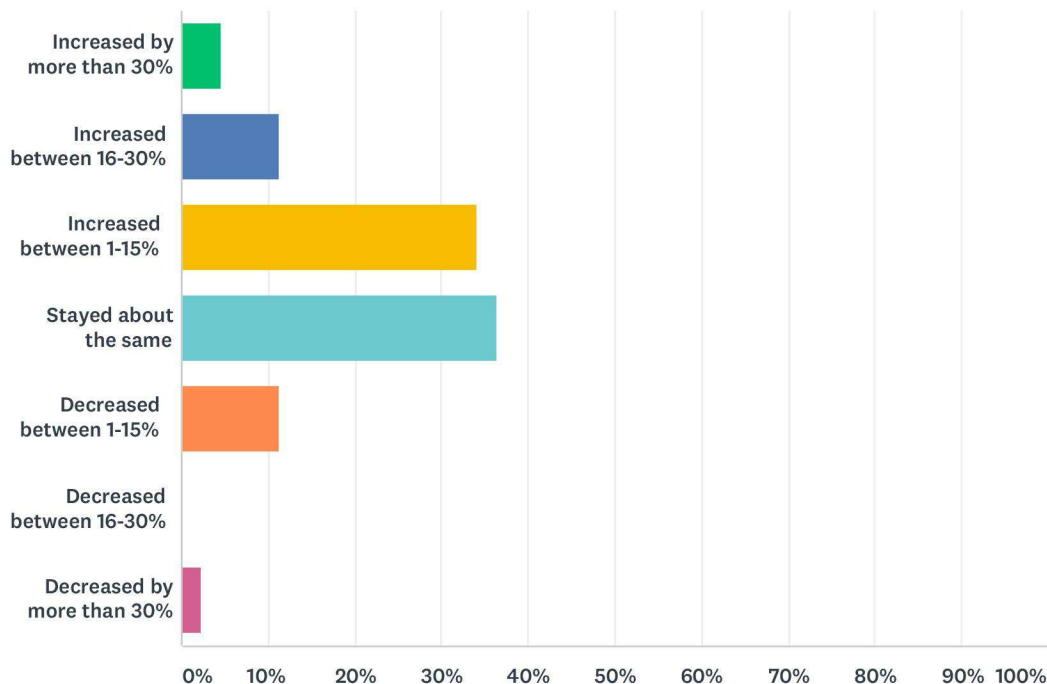
Q11 In general, how would you describe cash donations at your mission over the past four years?



Fifty-six percent of responding ministries reported that cash donations over the past four years (2015-2018) are trending upward, while only 19% are seeing a downward trend.

2018 Annual Giving Survey

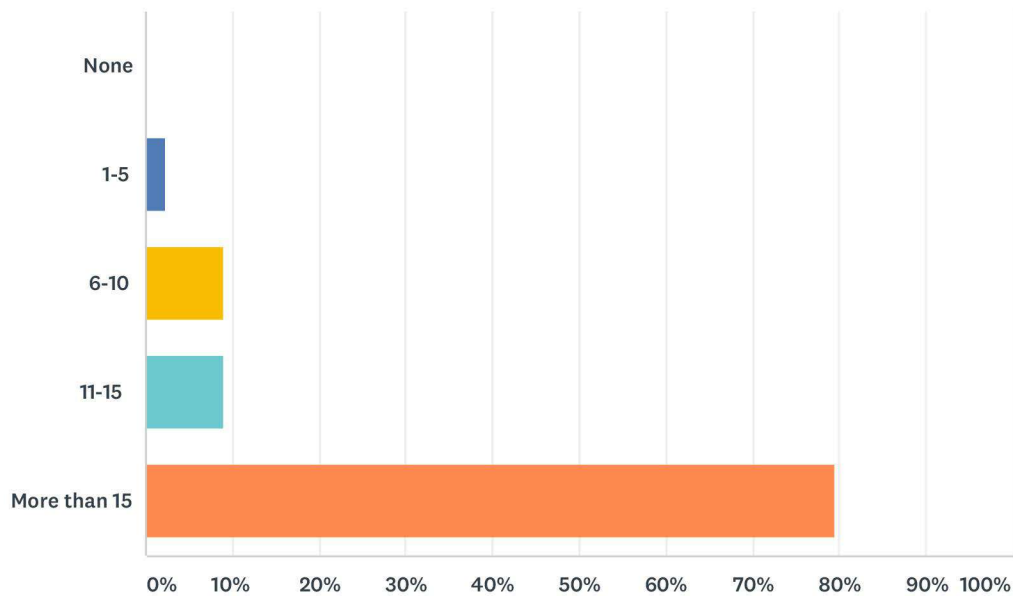
Q12 Overall, how did the value of your gifts-in-kind donations from private, individual donors in all of 2018 compare to your gifts-in-kind donations from private, individual donors in all of 2017?



Fifty percent of responding ministries experienced an increase in gift-in-kind values; 36% remained stable in this area; and just 14% said gift-in-kind values were down from 2017 compared to 2018.

2018 Annual Giving Survey

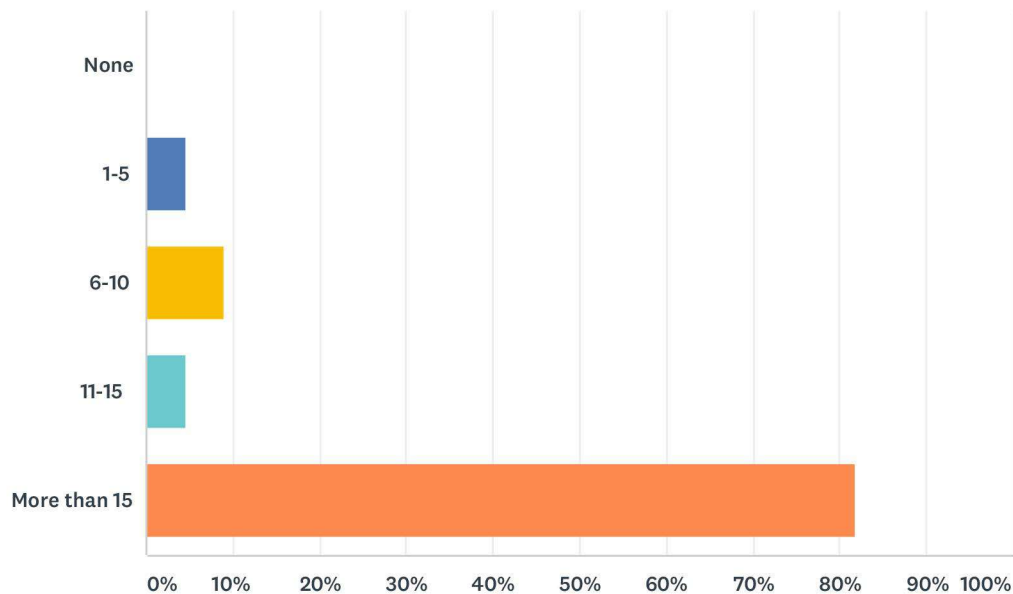
Q13 How many churches gave money to your ministry in 2018?



About 80% of ministries said they had more than 15 (the highest number) churches give money to the organization in 2018.

2018 Annual Giving Survey

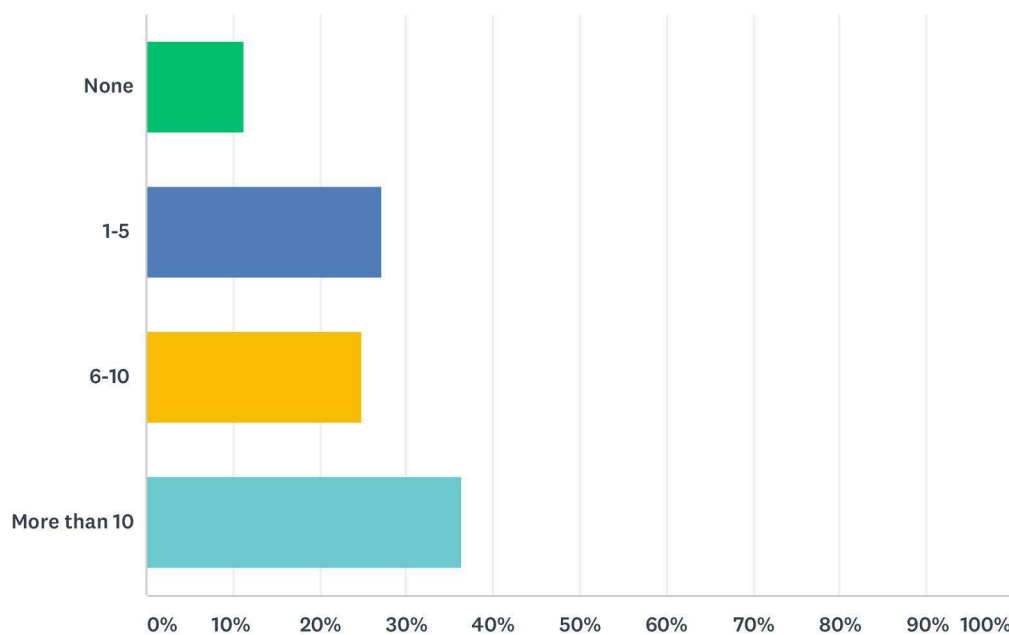
Q14 How many businesses gave money to your ministry in 2018?



About 80% of ministries said they had more than 15 (the highest number) businesses give money to the organization in 2018.

2018 Annual Giving Survey

Q15 How many grants (government or private foundations) did you receive in 2018?



About 36% of ministries said they received more than 10 (the highest number) grants from either government or private agencies; 25% reported 6-10 grants; 27% had 1-5 grants; and 12% said they had no grants in 2018.



Thoughts:

Donors may not be feeling the urgency to give in the fourth quarter like they have traditionally.

One possible reason for the change is tax reform, which increased the standard deduction, thus decreasing the number of people who itemize and take advantage of the charitable deduction.

Giving is up overall, but it's possible that many donors realized late in the year that their donations wouldn't be helpful to their tax situation. The next couple of years may tell us more.

Campaigns to promote year-end giving could recognize the potential effect of tax reform and focus on the importance of the ministry that happens late in the year.

Members should also consider leveling out budget expectations to some degree.

We'll keep working to protect charitable giving, and we'll keep you informed.

Some members have speculated that giving trends may have been affected by geography and natural events. The data seems to indicate that, while giving trends were mostly consistent by state, every region maintained a high level of diversity. See the map below for a visual representation of how Q418 differed from Q417, by state.

