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INTRODUCTION

Dear Friends of nonprofit organizations,

The health of metropolitan Milwaukee’s nonprofit community matters.

Nonprofit organizations play an important role in the region. They provide needed services that educate children, protect the environment and make health care accessible. The area’s nonprofit arts organizations enrich our cultural lives.

But local nonprofits are also an important part of our local economy. According to a 2007 report by The Cultural Alliance of Greater Milwaukee, the nonprofit arts industry generates the equivalent of 8,359 jobs and has an economic impact of more than $249 million in metropolitan Milwaukee each year. When local nonprofits struggle, the community may experience both a reduction in access to services and a negative impact on the economy.

For the 12th year, it is our privilege, along with our sponsoring organizations, to present this annual report on charitable giving in the metropolitan Milwaukee area. The 2008 Report Card on Charitable Giving focuses on the gifting trends of our bellwether nonprofits since 1992. This year, a new dimension was added to give the community a clearer picture of what some nonprofits are experiencing right now. A survey of human services agencies completed in June, before the most recent financial market concerns, indicates a sector experiencing increased demand and decreased stability.

While overall giving was up 6% to a record $298.1 million, there are some findings that may be cause for concern:

- Overall giving to the bellwethers increased only because one funding organizations, the Greater Milwaukee Foundation, had an usually strong year for contributions in 2007. If contributions for the Foundation had mirrored previous years, actually giving to the bellwethers would have dropped 6%.
- Half of the sectors – environment, funding and health – saw increases in giving while the three largest sectors – arts and culture, education and human services experienced one year decreases.
- Gifts from individuals continue to be important to the bellwether organizations. However, only two sectors, environment and funding organizations, saw gifts from individuals increase.
- The bellwether organizations are also more pessimistic about the future than in previous years. One-third feel the state of philanthropy in metro Milwaukee is improving, compared to nearly 50% in 2007. Most also anticipate fewer gifts in 2008 because of the economic downturn.
- Our surveyed human services organizations are concerned about the state of philanthropy. Current demand for their services has caused more agencies to hire staff, while a significant percentage are concerned about their long-term sustainability.

When the economy is in flux, nonprofit organizations play in critical role in providing support to communities and individuals impacted by tough times. How well nonprofit organizations weather these difficult days themselves will be key in determining how well we can respond to the needs of our most vulnerable citizens.

Sincerely,

Douglas M. Jansson, President
Greater Milwaukee Foundation
## BELLWETHER ORGANIZATIONS

### ARTS AND CULTURE
- Channel 10/36 Friends
- Dance-Sing, Ltd.
- First Stage Milwaukee
- Florentine Opera Company
- Ko-Thi Dance Company
- Milwaukee Art Museum
- Milwaukee County Historical Society
- Milwaukee Public Library Foundation
- Milwaukee Public Museum
- Milwaukee Repertory Theatre
- Milwaukee Symphony Orchestra
- Skylight Opera Theatre

### HEALTH
- 16th Street Community Health Center
- AIDS Resource Center of Wisconsin
- BloodCenter of Wisconsin
- Columbia-St. Mary’s Foundation
- Medical College of Wisconsin
- Oconomowoc Memorial Hospital Foundation
- United Cerebral Palsy of Southeastern Wisconsin

### HUMAN SERVICES
- American Red Cross, Greater Milwaukee Chapter
- Boy Scouts of America, Milwaukee County Council
- Boys and Girls Clubs of Greater Milwaukee
- COA Youth and Family Services
- Daystar
- Girl Scouts of Milwaukee Area
- Goodwill Industries of Southeastern Wisconsin
- Hunger Task Force of Milwaukee
- Milwaukee Urban League
- Nonprofit Center of Milwaukee, Inc.
- Next Door Foundation
- Penfield Children's Center
- Planned Parenthood of Wisconsin
- United Community Center
- Wisconsin Humane Society
- YMCA of Metropolitan Milwaukee
- YWCA of Greater Milwaukee

### EDUCATION
- Alverno College
- Brookfield Academy
- Carroll College
- Catholic Memorial High School
- MATC Foundation
- Messmer High School
- Milwaukee Institute of Art & Design
- Partners Advancing Values in Education
- University School of Milwaukee
- Urban Day School
- UWM Foundation

### ENVIRONMENT
- Friends of Schlitz Audubon Center
- Park People of Milwaukee County
- Riveredge Nature Center
- Friends of Milwaukee’s Rivers (NEW)
- Ozaukee-Washington Land Trust (NEW)
- Urban Ecology (NEW)

### FUNDING ORGANIZATIONS
- Community Health Charities of Wisconsin
- Greater Milwaukee Foundation
- Milwaukee Jewish Federation
- United Performing Arts Fund
- United Way of Greater Milwaukee
- United Way in Waukesha County
METHODOLOGY

Our 12th Annual Report Card on Charitable Giving analyzes 16 years of charitable giving to 56 bellwether organizations in the four-county (Milwaukee, Ozaukee, Washington, and Waukesha) metro area. Financial analysis is based on the information reported on IRS 990 forms filed by organizations in 2007, representing the 2006-07 fiscal year for most organizations and the 2006 calendar year for others. As in prior years, the Public Policy Forum and the Greater Milwaukee Foundation chose the bellwether organizations based on their willingness and ability to comply with the following requirements:

- An organization’s headquarters is in, and most of its donations come from, the four-county area;
- IRS 990 tax returns are available for the years studied;
- An organization’s direct charitable contributions are categorized based on those from individuals, businesses, foundations, and special events, as well as funds from capital campaigns, endowments, and bequests; and
- An organization’s willingness to complete a questionnaire regarding the future of philanthropy in the metro area.

Three organizations were dropped from last year’s report: Ice Age Park & Trail Foundation, which moved to Madison, WI; American Lung Association of Wisconsin, which now covers the upper Midwest; and Milwaukee Women’s Center, which has merged with Community Advocates. The data for these organizations from previous years were taken out of the analysis to ensure comparable results.

For purposes of this study, organizations are divided into two groups: service providers and funders. Funders are groups such as the Greater Milwaukee Foundation and the United Way that collect and distribute money to service providers.

Service providers are categorized into five sectors:

- **Arts and Culture**: Includes providers of both visual and performing arts, as well as cultural resources such as museums and libraries.

<table>
<thead>
<tr>
<th>Bellwether organizations by sector</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts/Culture</td>
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<tr>
<td>Education</td>
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<tr>
<td>Environment</td>
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<td>Funding</td>
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<tr>
<td>Health</td>
</tr>
<tr>
<td>Human Service</td>
</tr>
<tr>
<td><strong>Total organizations</strong></td>
</tr>
</tbody>
</table>

**Human Services**: The largest and most diverse bellwether category, this group provides services to the community.
This year we added three agencies to the environment sector analysis. These agencies were able to provide financial information since 1998, but were only able to breakdown their direct public support by source back to 2003. For these reasons these agencies are not included in the overall analysis of bellwether organizations.

This year we also surveyed additional human service organizations using the same survey instrument we asked the bellwether agencies to complete. The only difference was that the surveyed human services agencies were not asked to give us financial information. We sent an electronic survey to 157 human service agencies, and received responses from 57, a response rate of 36.3%.

An analysis by organization size is also included in this report. The bellwether organizations, with the exception of the funding organizations, are categorized by the total amount of gifts received in 2007.

There are some qualifications to the data that should be considered when drawing conclusions. First, numbers are primarily dependent upon those people within the organizations who report them. Second, it is possible that some donations are counted twice due to service providers reporting contributions that come from funding organizations. Finally, one large organization can skew the aggregate numbers due to its greater impact.
OVERALL TRENDS
Overview of charitable giving trends in metro Milwaukee

Overall contributions to the bellwether organizations were up 6% over last year, continuing the growth trend seen for the past two years. Chart 1.1 shows total contributions in 2007 at $298.2 million, representing a 34% increase over total contributions five years ago. Although there was overall increase from 2006 to 2007, this was mainly due to one organization having a very large one-year increase. One of the funding organizations had an increase of 143% or $38 million. If this one bellwether would have seen an increase more in line with previous years, gifts to the bellwethers would have decreased 6% from 2006 to 2007 and only increased 19% from 2003.

Due to fewer capital campaigns in 2006, capital contributions were down 64% over last year, to a total of $29.3 million. Over the past five years capital contributions have declined 24%, although this was not a straight-line trend. Depending on the year, capital contributions varied considerably.

Three of the six service sectors saw increases in total giving. The environmental organizations saw the largest increase in total gifts compared to last year, with an 82% increase to $6.1 million. Since 2003, giving to six environmental organizations has grown 70%. Most of this growth accrued to the three remaining original bellwether environmental organizations and not the three new environmental groups added to the analysis this year.

The next largest one-year difference in total contributions was seen in the funding organizations, which received $35 million more in 2007 than in 2006, a 32% increase. Since 2002, gifts to funding organizations have increased 24%, most of which was driven by two major community foundations.

The only other sector to have an increase in giving over last year was the health sector, with a 4% increase of $1.3 million. The five-year trend in the health sector has been an increase of 118%. Interestingly, the three sectors experiencing growth this year were the two smallest, environment and health, and the largest, funding.

The largest decline in total giving since 2006 was seen by the education sector, with a 25%, or $13 million, drop. However, the five-year trend is still positive for the education organizations, at 59% growth.

Similarly, the arts and culture and the human services sectors experienced one-year decreases in giving while maintaining five-year increases. Arts and culture bellwethers received $7.7 million less in gifts in 2007,
17% decline, while human services bellwethers received $1 million less, a 3% decline.

**Gifts by type and source**

As noted above, capital contributions declined significantly this year overall. Each sector experiences a different capital climate; this year the arts and culture sector saw a 90% decrease in capital gifts, while the health organizations saw an over fifty-fold increase in capital giving, from $86,000 to $5.1 million. All other sectors had declining capital gifts compared to last year.

Regarding the source of gifts, this year saw a continuation of the trend of declining foundation gifts, with a 10% decline from 2006 and a 2% decline since 2002. Business and individual gifts continued to grow, however, at a rate of 10% and 8%, respectively, over last year. Both business and individual gifts have grown in the double-digits since 2002.

**Comparing philanthropic and economic trends**

**Chart 1.2** shows the overall giving trend since 1992 as compared to inflation and the Dow Jones. Giving has outpaced inflation, but lags behind stock market growth over the period.

**Chart 1.3** compares local giving to national patterns. Metro Milwaukee tends to give more to arts and culture and funding organizations than the national average.
ARTS & CULTURE

Although total giving to Arts and Culture organizations increased 23% from 2003 to 2007, giving decreased 17% from 2006 to 2007, the second worst decrease among the six sectors for that period. Between 1992 and 2007, total giving increased 163%. When adjusted for inflation, giving to the arts and culture bellwethers increased 10% between 2003 and 2007.


Both individual and foundation gifts to the arts and culture sector decreased from 2006 to 2007, while business gifts increased 37% (to $6.9 million). Between 2003 and 2007, business giving increased 47%. Individual gifts increased 50% from 2003 to 2007, but decreased 33% from 2006 to 2007. Foundation giving decreased 10% from 2006 to 2007, while increasing 73% between 2003 and 2007.
Government grants received by arts and culture bellwethers totaled $5.0 million in 2007, a decrease 6.6% from 2003. From 2006 to 2007 government grants decreased 2.9%. Since 1992, government grants received by the arts and culture sector have more than doubled. Program revenue decreased 6% from 2006 to 2007. From 2003 to 2007 program revenue received by the arts and culture bellwethers decreased 19%. Since 1992, program revenue has increased 93%.

In 2007, 51% of the total gifts received by arts and culture bellwethers came from individuals, 12 percentage points lower than in 2006. In 2003, individual gifts accounted for 48% of the total gifts. In 2007, total gifts accounted for 49% of the total revenue received by arts and culture bellwethers, five percentage points lower than in 2006, but six percentage points higher than in 2003. Fundraising costs equated to 15% of the total gifts received in 2007, compared to 11% in 2006. In 2003 fundraising costs equated to 19% of the total gifts.
EDUCATION

Giving to education bellwethers decreased 25% from 2006 to 2007, the largest one-year decrease among the sectors. Despite the decrease in giving during this most recent year, there has been an increase since 2003 of 59%. Giving to the education sector totaled $39 million in 2007, the second highest total since 1999. Since 1992, giving to education bellwethers has increased 90%.

Capital campaign contributions to the education bellwethers totaled $12.3 million in 2007, about $10 million less than in 2006. Since 2003, capital campaign contributions have decreased 9%, which since 1992, capital campaign contributions have increased 119%.

Individual, business, and foundation gifts to the education bellwethers all decreased from 2006 to 2007. Individual gifts totaled $22.9 million in 2007, a decrease of 20% from 2006, but an increase of 71% from 2003. Business gifts decreased 23% from 2006 to 2007, while almost doubling since 2003. Foundation giving to the education sector decreased 48% from 2006 to 2007, though it increased 28% from 2003 to 2007. Since 1992, foundation giving to education bellwethers increased only 5%.
Government grants received by the education bellwethers increased 11% between 2006 and 2007, but decreased 2% from 2003 to 2007. Since 1992, government grant revenue has increased 60%. Program revenue makes up a large portion of the total revenue received by education bellwethers. Between 2006 and 2007, program revenue increased 9%, and it increased 37% between 2003 and 2007. Since 1992, program revenue has increased 128%.

Contributions received by the education bellwethers accounted for 22% of their total revenue in 2007, the lowest since 2004. In 2006, contributions equaled 27% of total revenue, the highest since 1999. Individual gifts accounted for 59% of the total contributions in 2007, the highest percentage ever. In 2006, individual gifts equaled 54% of the total contributions. Fundraising expenditures equated to 12% of the total contributions in 2007, the highest since 2003, when it also equaled 12%. In 2006, fundraising costs equated to 7% of the total contributions, the lowest since 2000.
ENVIRONMENT

For this year’s report, we added three agencies to the environment sector, increasing the total number of environment agencies to six. These new agencies were able to provide financial data since 1998, but were only able to break down their direct public support by giving source back to 2003. Consequently, these three new agencies are not included in the overall bellwether analysis, but are included in this analysis of the sector.

Total giving to the environment agencies totaled $6.1 million in 2007, 82% higher than in 2006. Since 2003, total giving increased 70%. In 1992, total giving equaled $1.1 million. Total giving in 2007 was the second highest total since 1998, only behind 2002’s total of $8.6 million.

Individual, business and foundation giving all increased for the environment agencies from 2006 to 2007. Foundation giving saw the largest increase at 118%, to $3.5 million, while also growing 70% between 2003 and 2007. Individual giving increased 41% from 2006 to 2007, to $1.6 million, and 36% since 2003. Business giving increased 11% from 2006 to 2007, to nearly half a million dollars, and 13% from 2003 to 2007.
Government grants and program revenue are a small part of the total revenue received by environment agencies. Government grants totaled $237,058 in 2007, a decrease of 19% from 2006, but a significant increase since the 1998 total of $30,948. Between 2003 and 2007, government grants increased 255%. Program revenue has shown a steady increase, growing 238% between 1998 and 2007. From 2006 to 2007, program revenue increased 75%.

Contributions make up a large portion of the total revenue received by the environment agencies. In 2007, contributions consist of 77% of total revenue, the highest since 2003, when contributions equaled 79% of total revenue. In 2006, contributions equaled 62% of total revenue. Looking back over a longer period, contributions accounted for 55% of total revenue in 1998. Individual gifts accounted for just over a quarter (26%) of the total contributions received in 2007. In 2006, individual gifts accounted for 34% of the total contributions. Fundraising expenditures equated to 20% of the total contributions received in 2007, nine percentage points lower than in 2006. In 2003, fundraising expenditures equated to 14% of the total contributions received.
FUNDING ORGANIZATIONS

Funding organizations experienced a one-year increase of more than $35 million, or 31.5%, from 2006 to 2007, totaling $146.3 million in 2007. Between 2003 and 2007, giving increased 24%. The large one-year increase was due primarily to one organization, Greater Milwaukee Foundation, experiencing an increase in giving of $38 million. If the 2006 to 2007 increase in giving to the Greater Milwaukee Foundation was equal to the 2005-2006 increase, the overall funding organization increase would have been 2%.


Between 2006 and 2007, individual and business giving to funding organizations increased, while foundation giving decreased. Individual giving increased 40% between 2006 and 2007, from $73.3 million to $102.4 million, which is now double the amount of individual gifts in 2003. Business giving increased 37% between 2006 and 2007, to $39.1 million, but only 29% between 2003 and 2007. Since 1992, business giving has increased almost 200%. Foundation giving to the funding organizations decreased 53% from 2006 to 2007 to $3.4 million. Since 2003’s high of $15.9 million, foundation giving has decreased 79%, and since 1992, foundation giving has decreased 5%.
Government grants received by funding organizations totaled about $101,000 in 2007, compared to about $69,000 in 2006. In 2003, government grants also totaled about $69,000. Program revenue totaled $2.1 million in 2007, 8% less than in 2006. Between 2003 and 2007, program revenue decreased 52%, while since 1992, program revenue has increased 19%.

Contributions received by funding organizations accounted for 76% of the total revenue received in 2007, seven percentage points higher than in 2006. In 2003, contributions accounted for 92% of the total revenue. Individual gifts accounted for 70% of the total contributions received in 2007, the highest since 2001, when it also was 70%. In 2003, individual gifts accounted for 55% of the total contributions. Fundraising expenditures equated to 5% of the total contributions in 2007, the lowest since 1994.
HEALTH

Contributions to the health bellwethers totaled $36.2 million, the highest ever. Contributions to health bellwethers grew $1.3 million, or 4%, from 2006 to 2007. Since 2003, contributions to health bellwethers increased 118%, and since 1992, they increased 254%, or $26 million.

Capital campaign contributions to health bellwethers totaled $5.2 million, the highest total since 2001. Capital campaign contributions totaled $86,100 in 2006. Between 1992 and 2007, capital campaign contributions grew 160%.

Individual and business contributions both experienced one-year decreases between 2006 and 2007. Individual gifts decreased 11% from 2006 and 2007, to $8.7 million; however, gifts increased 57% from 2003 to 2007. Since 1992, individual gifts have grown 89%. Business gifts also decreased from 2006 to 2007, down 22% to $5.5 million, yet growing 62% between 2003 and 2007. Foundation gifts, in contrast, doubled from 2006 to 2007 from $4.4 million to $8.9 million. Foundations gifts in 2003 totaled $4.5 million.
Government grants received by health bellwethers decreased slightly from 2006 to 2007, totaling $137.9 million in 2007. From 2003 to 2007, government grants increased 48%. In 1992, government grants received by health organizations totaled only $6.2 million. Program revenue received by health bellwethers totaled $529.6 million in 2007, the highest ever and an increase of 10% from 2006. From 2003 to 2007, program revenue increased 36%. Since 1992, program revenue has increased 146%.

Contributions equaled 5% of the total revenue received by the health bellwethers in 2007, the same as in 2005 and 2006. In 2003, contributions equaled 3% of the total revenue received by health bellwethers. In 2007, 24% of the total contributions received came from individuals, four percentage points less than in 2006. In 2003, individual gifts accounted for 34% of the total contributions, while in 1992 individual gifts equaled 45% of the total contributions. Fundraising expenditures equated to 12% of the total contributions in 2007, the same as in 2006. In 2003, fundraising expenditures equated to 19% of the total contributions.
HUMAN SERVICES

Total contributions to the human service bellwethers totaled $36.5 million in 2007, a 3% decrease from 2006, and the first decrease in six years. The 2007 total contributions is the second highest total ever behind the 2006 total of $37.5 million. Between 2003 and 2007, human service contributions increased 14%, slightly above the rate of inflation. Since 1992, these contributions have increased $22.7 million, or 164%.

Capital campaign contributions totaled $5.4 million in 2007, the lowest since 1999. Capital campaign contributions decreased 31% from 2006 to 2007 and 73% since 2003. Since 1992, however, capital contributions have increased almost 400%.

Individual, business, and foundation gifts to the human service bellwethers all decreased from 2006 to 2007. Business gifts accounted for the largest one-year decrease, falling 24% to $6.9 million. Between 2003 and 2007, business gifts increased 26%. Individual gifts decreased 7% from 2006 to 2007, to $12.6 million, and 15% between 2003 and 2007. Foundation gifts decreased slightly (1%) from 2006 to 2007 to $10.3 million, while increasing 25% since 2003.
Government grants received by the human service bellwethers decreased 16% from 2006 to 2007, or $49.8 million. While fluctuating in individual years, between 2003 and 2007, government grants decreased 24%. Since 1992, government grants have increased 96%. Program revenue increased 10% from 2006 to 2007, an increase for the fourth straight year. Between 2003 and 2007, program revenue increased 80%, and since 1992 it is up 167%.

Contributions accounted for 14% of the total revenue received by human service bellwethers in 2007, one percentage point less than in 2006. In 1992, contributions accounted for 16% of the total revenue. The percentage of total gifts that comes from individuals has decreased every year since 2003. In 2007, individual gifts made up 35% of the total gifts, one percentage point less than in 2006, but 9% less than in 2003. Fundraising costs as a percent of total contributions has remained fairly level between 2000 and 2007. In 2007, fundraising costs equated to 16% of the total contributions, the same as in 2006.
GIVING TRENDS BY SIZE

The last analysis of giving trends looked at all bellwether organizations (except funding organizations) by total giving. Small organizations received less than $500,000 in gifts; medium-sized organizations between $500,000 and $2 million; and large organizations more than $2 million. In 2007, 19 organizations were categorized as large, 26 as medium, and 5 as small.

The following chart shows the total gifts indexed to 100 beginning in 2001. In 2007, gifts to large organizations totaled $124.8 million, a decrease of 10% from 2006. Since 2001, gifts to large organizations increased 24%. Gifts to medium-sized organizations decreased 16% from 2006 to 2007, and gifts to small organizations decreased slightly.

![Chart 9.1: Total gifts by size of organization, indexed to 100 in 2001](image-url)
PERCEPTIONS OF THE FUTURE
ALL BELLWETHER AGENCIES

The executives of our bellwether agencies have a somewhat more pessimistic view of the state of philanthropy in the Milwaukee region this year, with only 33% reporting they view conditions as improving, compared to 50% last year. In addition, for every giving category, fewer groups anticipate giving will increase this year. More groups do report increased program revenues, however.

Chart 10.1: Views on the state of philanthropy in Metro Milwaukee

Chart 10.2: Percent expecting increased support from each source in current year
PERCEPTIONS OF THE FUTURE
HUMAN SERVICES AGENCIES

This year, for the first time, we broadened our survey to include all human services agencies in the Greater Milwaukee Foundation’s database. We emailed invitations to respond to the survey to 157 human services agencies, of which 57 completed the on-line survey instrument. Because 16 of our bellwether groups are human service agencies, we present the data for both in the charts, for comparison purposes.

The human services sample had a somewhat more favorable opinion about the state of the philanthropy in Milwaukee when compared to the bellwethers, with half feeling there had been no change in condition and 20% feeling these had been some improvement.

Interestingly, given their feelings about the state of philanthropy, just 30% reported an increase in giving from individuals over the past 12 months. Most of the human services respondents report they will increase their fundraising efforts over the next 12 months.

The human services agencies report an increase in the demand for services this year as compared to last, with about a third reporting “a great deal” of increased demand. This increase in demand leads about half of them to state they are only “somewhat confident” about their ability to meet the demand for their services this year, most likely because most report they have not changed their staff size in response to changing demands. (However, 39% have increased their staff sizes.)

Perhaps the most striking finding is that human services professionals are not entirely optimistic about the long-term sustainability of their organizations. One-third of the human service agencies report being only moderately confident about their agency’s long-term sustainability.
Finally, we asked the human services agencies, “Do you expect that the support your organization receives from each of the following sources will increase or decrease in 2008?” The answers were scored on a scale of 1 to 5, with 1 representing “increase a lot” and 5 being “decrease a lot.” A score of 3 indicates the support level is expected to stay the same. Nearly every category of giving scored between 2 and 3, indicating that giving levels are expected to increase slightly, if at all, for human service agencies in metro Milwaukee.

<table>
<thead>
<tr>
<th>Do you expect that the support your organization receives from each of the following sources will increase or decrease in 2008?</th>
<th>Surveyed Human Service Agencies</th>
<th>Bellwether Human Service Agencies</th>
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</thead>
<tbody>
<tr>
<td>Government grants</td>
<td>3.18</td>
<td>2.85</td>
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<tr>
<td>Government contracts</td>
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</tr>
<tr>
<td>Gifts from multi-purpose appeals</td>
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<td>Corporate gifts</td>
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<td>Gifts from individuals</td>
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<td>Program revenues</td>
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<td>Membership dues</td>
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<td>Time given by volunteers</td>
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