

donorCentrics™ index of Direct Marketing Fundraising

2019 Third Calendar Quarter Results

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About the donorCentrics index of Direct Marketing Fundraising

This report includes results through September 2019.

The Target Analytics donorCentrics index of Direct Marketing Fundraising analyzes direct marketing giving for many of the largest non-profit organizations in the country.

For the twelve months ending Q3 2019, Target Analytics evaluated transactions from:



56 organizations



more than 26 million donors



more than 70 million gifts



totaling over \$2.6 billion

The index reports on direct marketing giving only. Direct mail is the dominant revenue source for most organizations, but web, telemarketing, canvassing, and other gifts considered to be direct marketing are also included. Individual payments greater than \$10,000, soft credits, and matching gift payments are excluded.

Quarterly results are reported on a calendar year basis.

Index findings are based on analysis of actual donor transactions, not survey responses from fundraisers. All calculated measures have been reviewed by participants for accuracy.

All index results are medians unless otherwise specified.

Q3 2019 index Participants

**Animal Welfare**

Humane Society of the United States
International Fund for Animal Welfare

**Arts & Culture**

National Law Enforcement Officers Memorial
The Smithsonian Institution

**Environment**

Defenders of Wildlife
Earthjustice
Environmental Defense Fund
Greenpeace USA
National Audubon Society
National Park Foundation
National Park Conservation Association
National Wildlife Federation
Natural Resources Defense Council
Sierra Club
The Nature Conservancy
The Ocean Conservancy
The Wilderness Society

**Health**

Alzheimer's Association
American Diabetes Association
American Heart Association
American Lung Association
Arthritis Foundation
BrightFocus Foundation
Easterseals
Juvenile Diabetes Research Foundation
Leukemia and Lymphoma Society
March of Dimes
Mayo Clinic
Muscular Dystrophy Association
St. Jude Children's Research Hospital

**Human Services**

American Indian Relief Council
Covenant House
Disabled American Veterans
Feeding America
Make-A-Wish Foundation
Paralyzed Veterans of America

**International Relief**

AmeriCares
CARE
Catholic Relief Services
ChildFund International
Doctors without Borders
Habitat for Humanity International
International Rescue Committee
Mercy Corps
Operation Smile USA
Oxfam
Project HOPE
Save the Children USA
USA for UNHCR

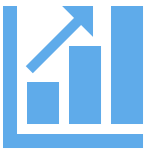
**Societal Benefit**

American Association of University Women
American Civil Liberties Union
Amnesty International USA
Human Rights Campaign
NAACP
Planned Parenthood
Public Citizen

Q3 2019 Summary

Revenue per Donor Increases Continue to Drive Overall Increases in Revenue

In the first three quarters of 2019 median donor counts declined by 1.9%, with more than a third of all organizations experiencing donor growth. However, 79% of all organizations had an increase in revenue per donor, driving a 1.5% increase in median revenue. New donors were down by more than 4%, and overall retention and reactivation rates increased.



Median revenue up 1.5% driven by a 3.8% increase in revenue per donor.



Median donor counts down 1.9%.



Median new donors down a median 4% driving donor declines.

Performance by sector

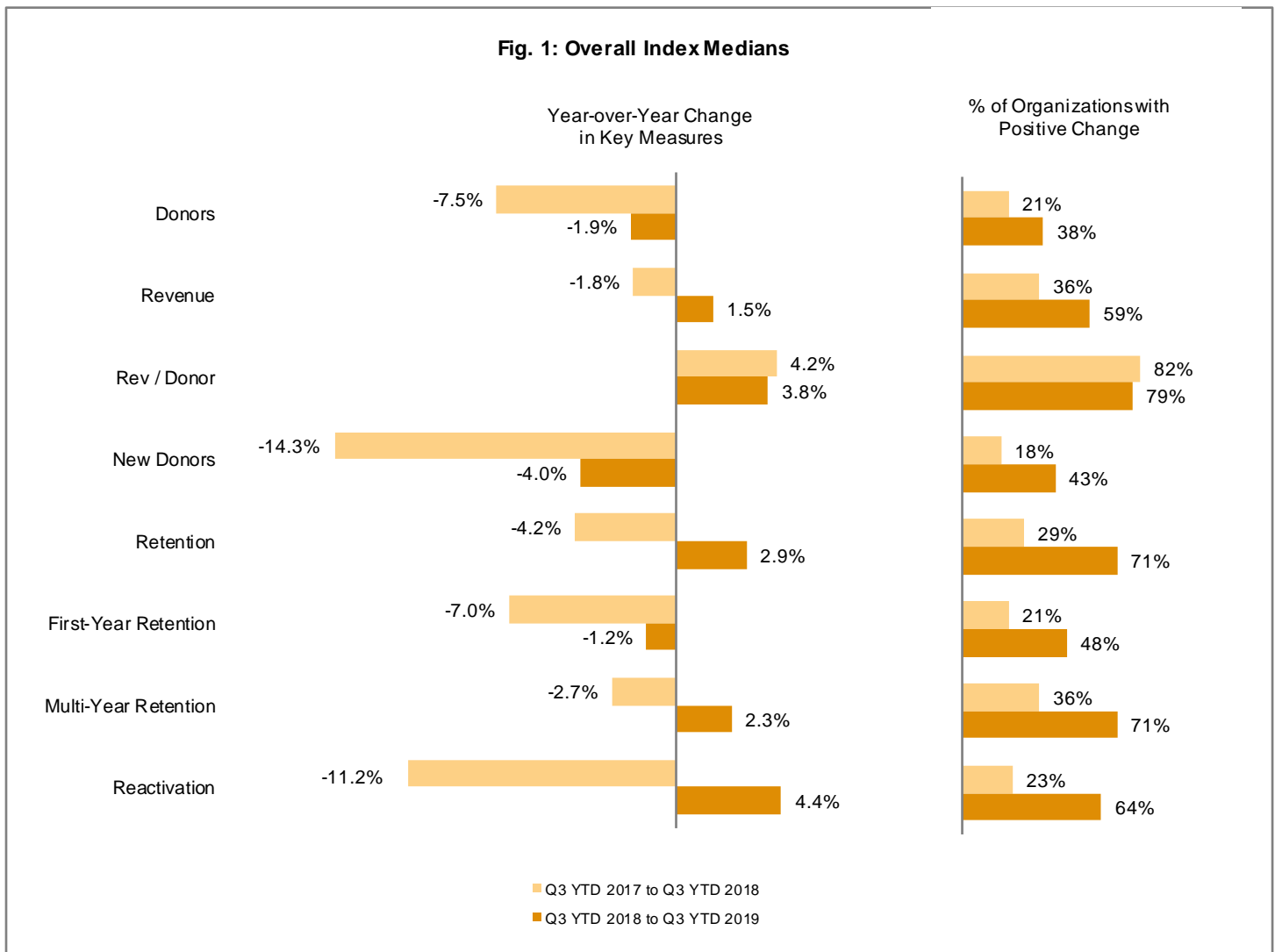
- The **environmental** sector is outperforming overall index medians, with increases in overall revenue, donors, new donors, and overall retention. Increases in revenue per donor and multi-year retention may have been impacted by a greater focus on sustainer giving.
- The **health** sector experienced continuing declines in overall donors and revenue. The decreases were largely driven by a 4.5% decrease in the number of new donors. Revenue per donor has increased steadily for this sector over the most recent three years – now \$49.06.
- The **human services** sector suffered large declines in overall donors and revenue that were primarily influenced by large declines in new donors – down 23.1%. Revenue declines in the first three quarters of 2019 were related to the donor decline and despite an increase in revenue per donor.
- Without a large-scale emergency through September 2019, the **international relief** sector returned to more traditional giving patterns with a small decrease in overall donor counts and a 4.7% increase in overall revenue.
- The **societal benefit** sector had large decreases in many key donor metrics through Q3 of 2019 including large declines in overall donors and new donors. Revenue also decreased modestly despite an increase in revenue per donor. The steep decline in new donors is driving the increase in overall donor value. The increases in revenue per donor and multi-year retention may be influenced by a larger share of sustainer giving in this sector.
- The **animal welfare** and **arts and culture** sectors had too few participants this quarter to have valid sector trends. The data for both sectors is included in the overall index.

Overall Index Performance

Year-to-Year Change

Declines in overall donor numbers were driven primarily by declines in new donor acquisition.

Overall retention and reactivation rates increased in the first three quarters of 2019. First-year retention rates declined, but at a lesser rate than one year ago.

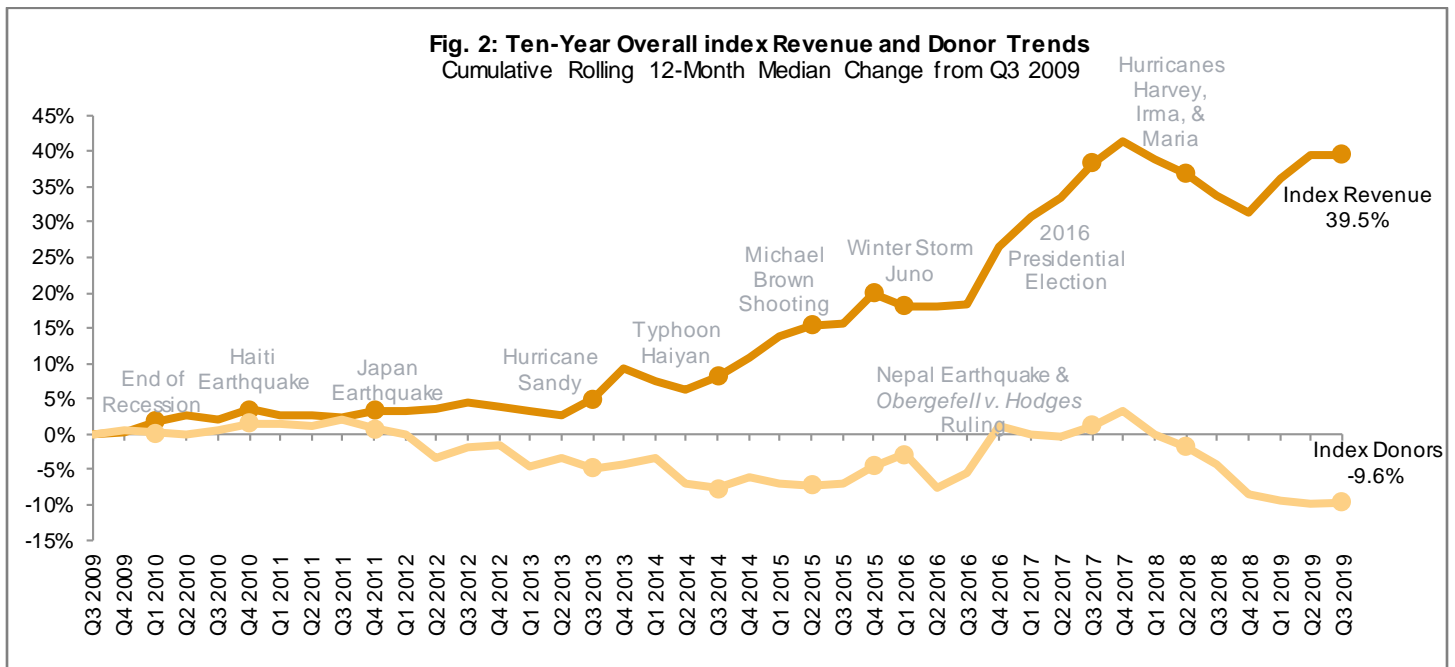


Under normal circumstances, revenue per donor amounts tend to increase due to a combination of organizational practice and inflationary adjustments by donors. Revenue per donor also tends to increase when new donor acquisition declines, since the mix of donors shifts towards more loyal, higher-dollar donors.



Revenue per donor increased by 3.8% through Q3 of 2019.

Ten-Year Revenue Trends



A rolling 12-month analysis helps to smooth out seasonal differences and allows us to see continuous movement from one quarter to the next, instead of simply comparing one full or partial year to the next full or partial year.

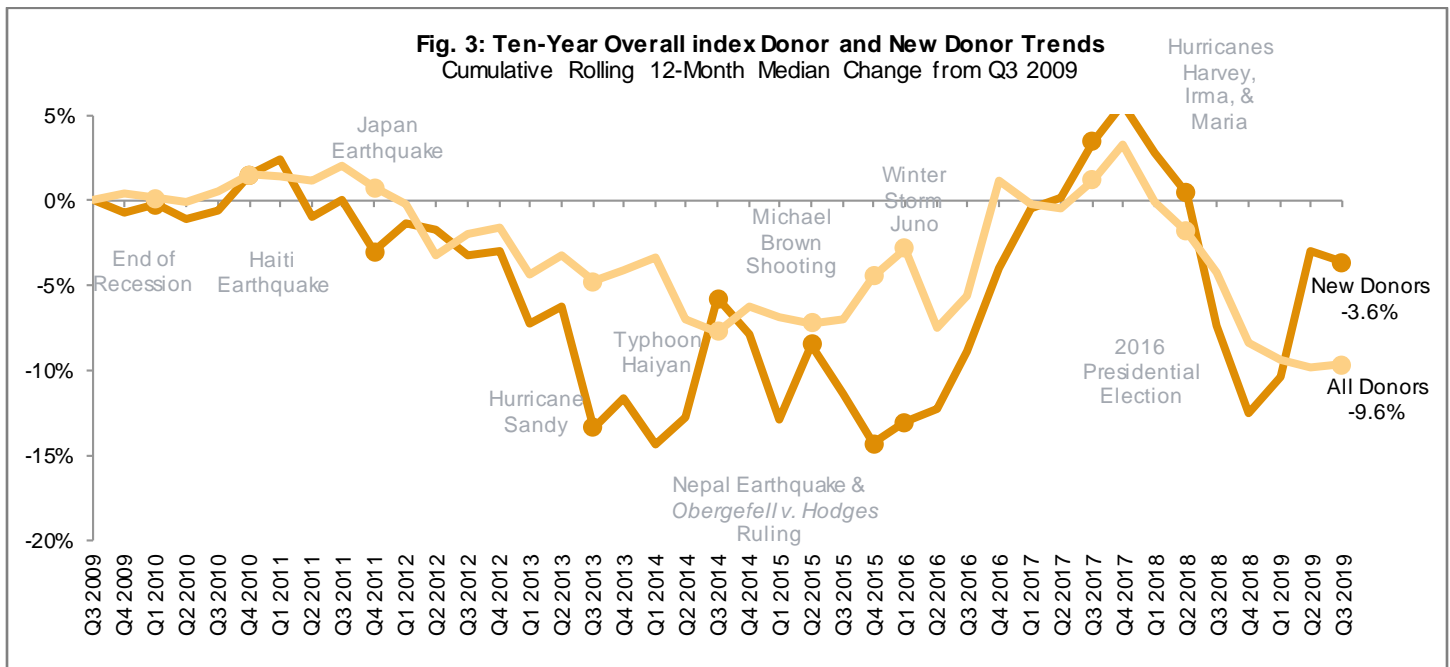
For most of the past 10 years, since the recession of 2007-2009, the index has generally seen halting, inconsistent revenue growth punctuated by periodic disaster-related revenue spikes. The increase in revenue per donor has driven a revenue increase for the first three quarters of 2019.

From the fourth quarter of 2016 through the fourth quarter of 2017, roughly one-fifth of the organizations in the index, particularly those in the environmental and societal benefit sectors, had exceptional growth in almost all areas, likely related to the results of the November presidential election and donor concern over the policies of the current presidential administration. This growth was sustained for five successive quarters and leveled off in the first and second quarters of 2018. In 2019 index organizations have experienced modest growth in revenue, and flat or declining donor numbers (see Fig. 2).



Ten-year median revenue growth 39.5%

Ten-Year Donor Trends



A rolling 12-month analysis provides additional context for donor trends. It shows that donors had been declining at a relatively steady pace before the most recent presidential election. The return to more usual giving patterns in 2018-19 has meant that donor numbers are only slightly ahead of where the long-term trend would have put them without the post-election spike in giving.

The result was that despite disaster- and election-related spikes, donor numbers remained essentially flat over a nine-year period, from Q3 2009 to the 12 months ending Q2 2018 (see Fig. 3). This is a flat effective annual growth rate of 0.0% per year.

Recent donor declines are a continuation of a longer-term pattern: except for 2017, donor numbers have generally been in decline since we first began conducting the index in 2001. Before the 2016 U.S. presidential election, donors had generally been declining at a slow but consistent pace of roughly 1% each year.

As we have said in previous editions of the index, falling donor populations may be due to a mix of factors. The recession certainly had an impact, but so also may have a changing generational profile in the United States, changing attitudes of donors about giving, changing investment in new donor acquisition strategies by organizations, and a change in focus by fundraisers toward higher-dollar and sustaining donors.

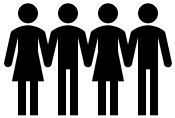


Ten-year median donor decline: 9.6%

New Donors

Long-term overall donor trends have been driven primarily by trends in new donor acquisition. Declines in overall donor numbers have been directly related to declines in acquisition for most of the past 15 years (since the Gulf Coast hurricanes of 2005.)

During the five quarters following the 2016 presidential election, surges in acquisition, likely due to concern over both actual and potential changes in federal policies, led to correspondingly dramatic increases in overall donor numbers. Donor acquisition then leveled off in 2018. In the first three quarters of 2019, new donor acquisition has declined significantly, with only two sectors (environmental and international relief) seeing an increase.



Ten-year median new donor decline: 3.6%



Effects of the Economy on Giving

Research by the Giving USA Foundation tells us that charitable giving rises during periods of strong economic growth and slows during periods of relative economic weakness¹. The donorCentrics index has consistently supported these findings: median index revenue growth has generally followed national economic performance and tends to grow more slowly or even to decline during periods of relative economic hardship.

Between the 2007-2009 recession and the most recent presidential election, the stock market performed relatively well^{2,3}. However, other indicators of US economic health, including job growth and home ownership rates, were sluggish^{4,5}, and nonprofit direct marketing revenue growth in the index was correspondingly weak during that period.

Since the presidential election in the fourth quarter of 2016, public policy concerns appear to have overshadowed the influence of the economy on giving. But if these concerns do continue to abate in the future, the economy will likely re-emerge as a primary determinant of giving trends.

As the debate continues whether the US is headed for a recession⁶, charities are looking for ways to shore up their base to withstand any coming economic storms, including diversifying channels and expanding engagement to emerging immigrant communities⁷.



Effects of Tax Policy on Giving

Giving USA Foundation researchers have also found that tax policy is another major factor influencing giving, particularly for taxpayers who itemize their deductions⁸. Nonprofits are therefore justifiably interested in the effects that the tax bill passed by Congress at the end of 2017 may have on revenue.

In December 2017, the Indiana University Lilly Family School of Philanthropy released an analysis of how tax policy changes in the Tax Cuts and Jobs Act might affect the nonprofit sector. The analysis estimates that certain specific provisions in the bill—reducing the top tax rates for individuals and corporations, increasing the standard deduction, and changing the estate tax exemption—could potentially all have negative effects on charitable giving in the United States⁹.

Organizations have seen an uptick in giving through IRA distributions as donors seek ways to keep a tax break through charitable giving.



Effects of Presidential Elections on Giving

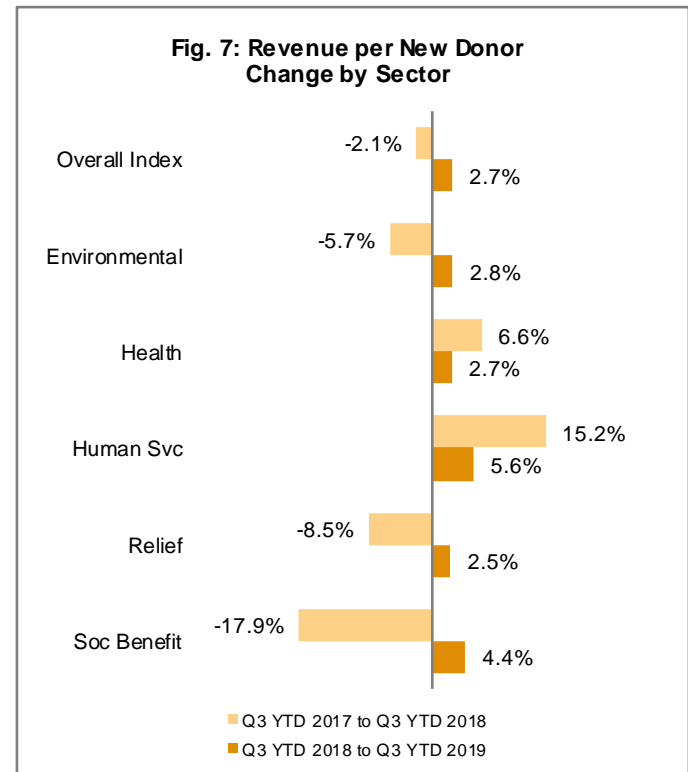
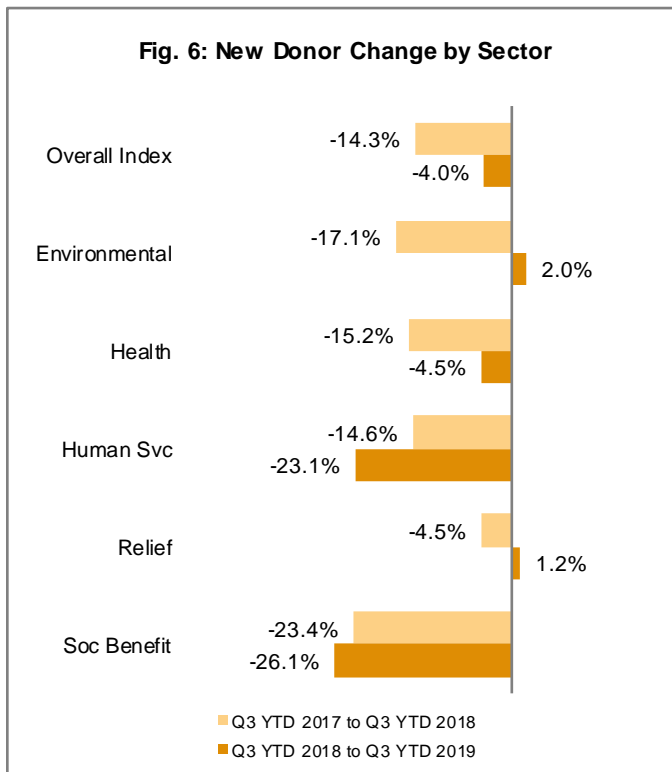
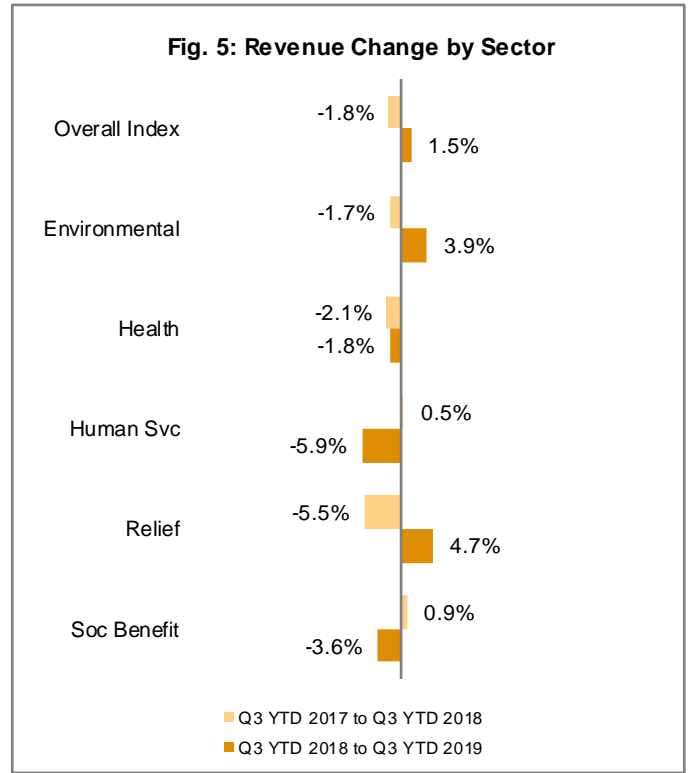
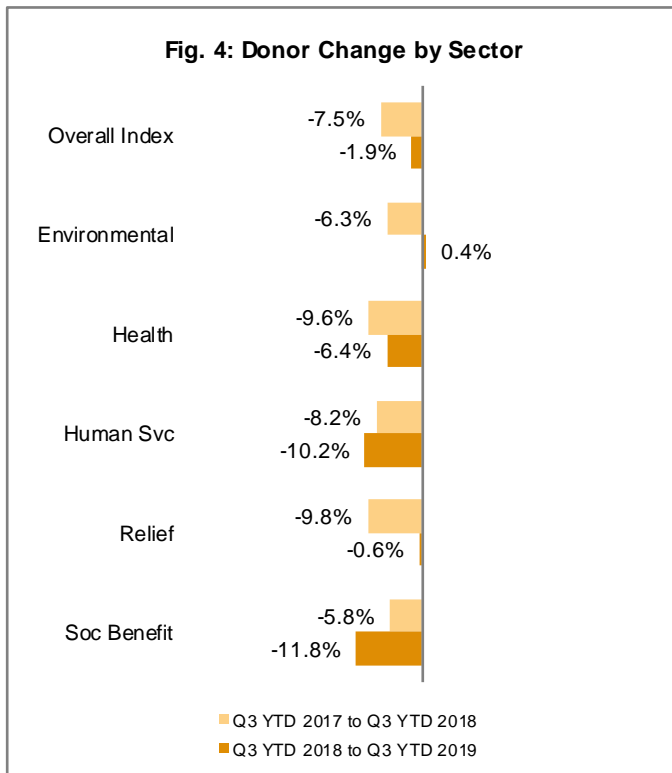
The Giving USA Foundation, which estimates national charitable giving over a 40-year span, reports that political campaigns themselves historically have had no discernible impact on overall individual giving¹⁰. And in the donorCentrics index, we, too, have seen no effect on overall revenue growth from political campaigning in presidential election years. Past index results do indicate, however, that while the nonprofit industry appears to be unaffected by political *fundraising*, election year *campaigning* may have, if anything, a positive effect on specific sectors or individual organizations that are working on issues highlighted by those campaigns.

Thanks to data on the 2012 presidential and federal office campaigns we can show that political donors tracked by the Federal Election Commission gave more to nonprofit organizations in 2012 than they did in 2011. Blackbaud did an in-depth study of the charitable giving habits of 400,000 political donors and how their giving changed in the 2012 election cycle. Political donors gave 0.9% more in 2012 than in 2011, while non-political donors (those not tracked by the FEC) gave 2.1% less. Particularly of note was the discovery that among political donors aged 25 to 34, charitable giving increased 10.8% in the 2012 election year¹¹.

More recently, the campaigns leading up to the 2016 U.S. presidential election did not have much of an impact by themselves in terms of overall donor and revenue growth. But after the election, from the fourth quarter of 2016 through all four quarters of 2017, there were significant, atypical, and sometimes unprecedented surges in giving for about a fifth of the organizations in the index, particularly for organizations in the environmental and societal benefit sectors, that was likely a reaction to heightened concern by donors about the policies of the current presidential administration.

It is too early to know how the 2020 presidential election will impact giving.

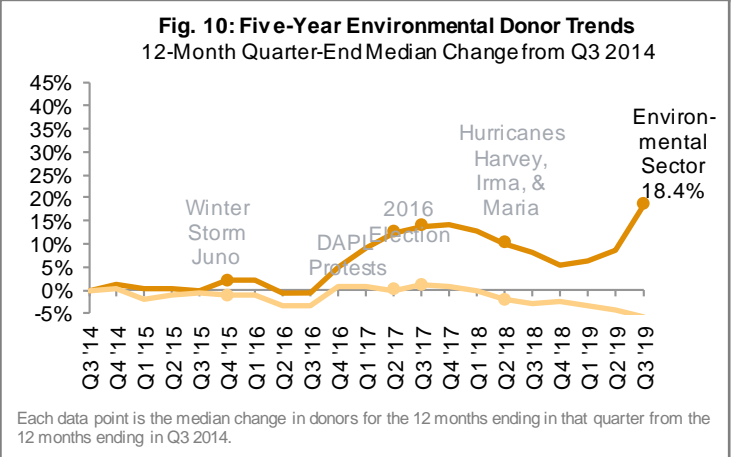
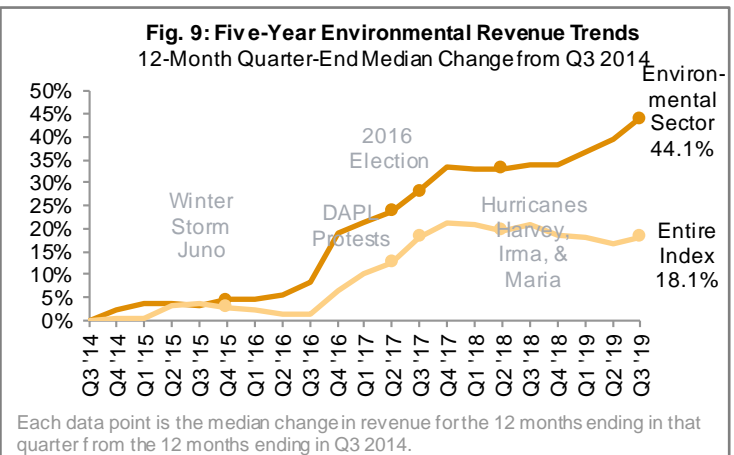
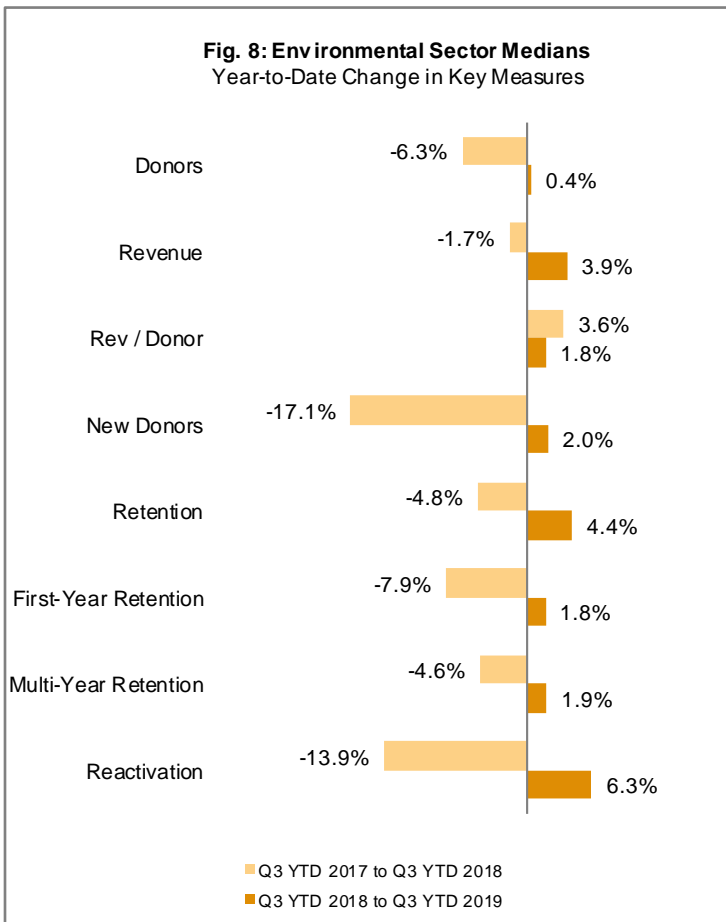
Comparisons by Key Performance Indicators



Environment
13 organizations

For most of the past 15 years, the environmental sector had not typically had a great deal of fluctuation in giving from quarter to quarter or from year to year and had closely paralleled the overall index in most key metrics.

More recently, increased attention on environmental issues—particularly catastrophic weather events related to climate change—may be boosting fundraising for this sector. The environmental sector was also one of two in the index to have dramatic increases in giving starting in the fourth quarter of 2016 and continuing throughout all of 2017. In the first three quarters of 2019, donor and revenue growth are once again outperforming overall index medians. As climate issues have higher newsworthiness, revenue and donor trends for this sector experienced growth well above the index.



Through September 2019, the environmental sector had increases in overall donor numbers, overall revenue, and new donor acquisition that were among the largest increases in the index (see Figs. 4-6). These increases all come after declines in the same period in the previous year and were likely a return to normal giving patterns.

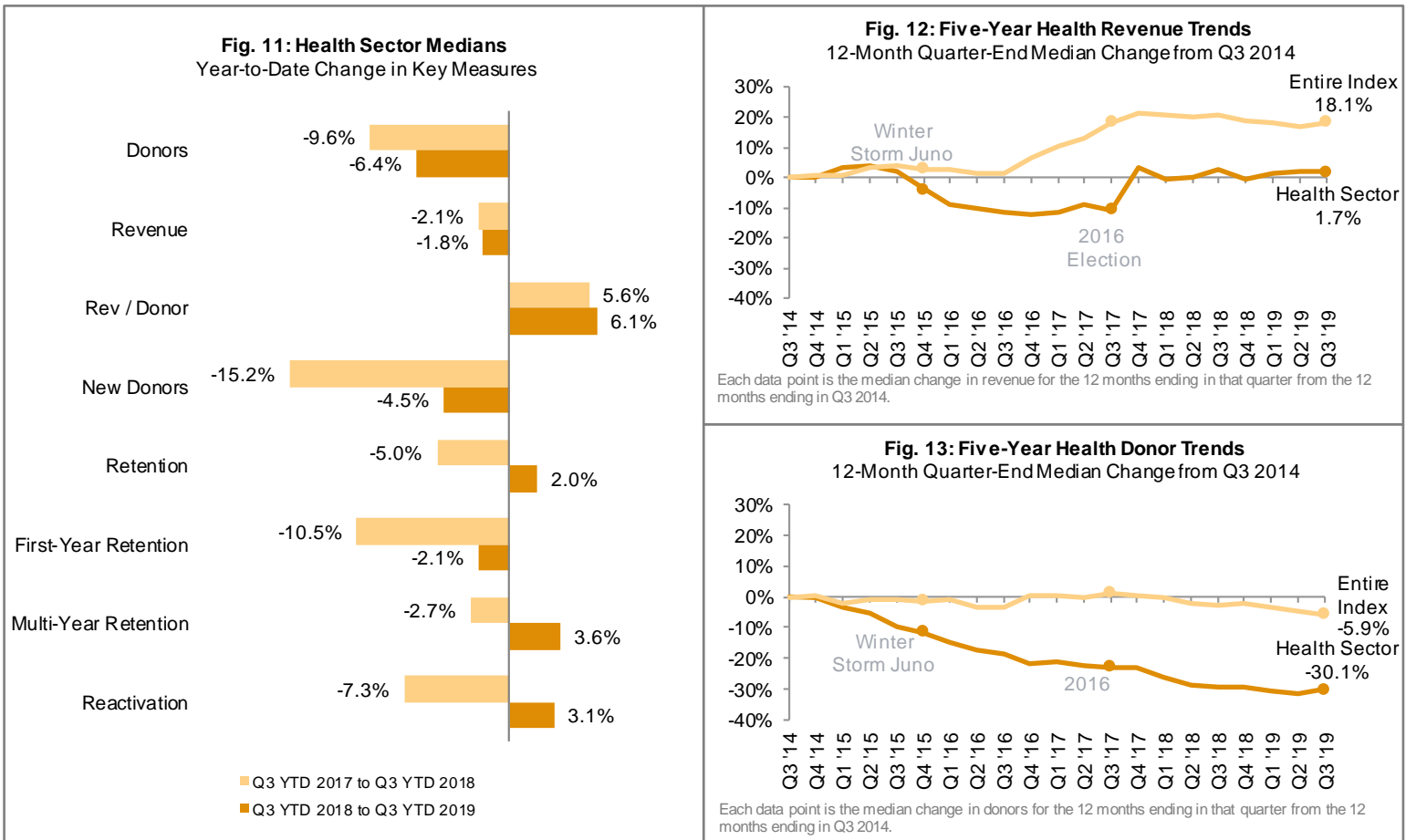
The sector’s first-year donor retention rate increased in the first three quarters of 2019, while the index median declined 1.2%. Driving an increase in overall retention are the increase in multi-year donor retention rates and the change in the file composition from 2018 – the pool of donors available to renew had fewer new and more multi-year donors.

Twelve-month rolling trends (see Figs. 15-16) show that revenue and donor growth both performed at the index median from 2013 through 2016, and then began to outpace the index dramatically starting in the fourth quarter of 2016.



Health
13 organizations

Health organizations have had some of the greatest fundraising challenges in the index for most of the 15 years that we have been conducting this analysis. The health sector has had significant growth in revenue per donor in recent years, as well as sporadic increases in new donor acquisition in some quarters, but overall revenue and donor growth continue to lag the index over the long term. This sector does not appear to have been affected in a significant way by post-election giving. In the first three quarters of 2019, the health sector had steep declines in several key metrics.



The health sector had among the largest declines in both overall donor numbers and overall revenue in the index comparing performance in Q3 YTD 2018 to Q3 YTD 2019 (see Figs. 4-5). The sector had comparatively large declines in new donor acquisition as well. These same metrics were down significantly in the same quarter last year.

The health sector did have relatively strong growth in revenue per donor through Q3 2019. Donor retention and lapsed donor reactivation both increased in Q3 YTD 2019, at rates that were close to overall index medians (see Figs. 1, 11).

A 12-month rolling trend analysis shows that sector revenue and donor growth have both lagged overall index median trends significantly over the long term (see Figs. 12-13).

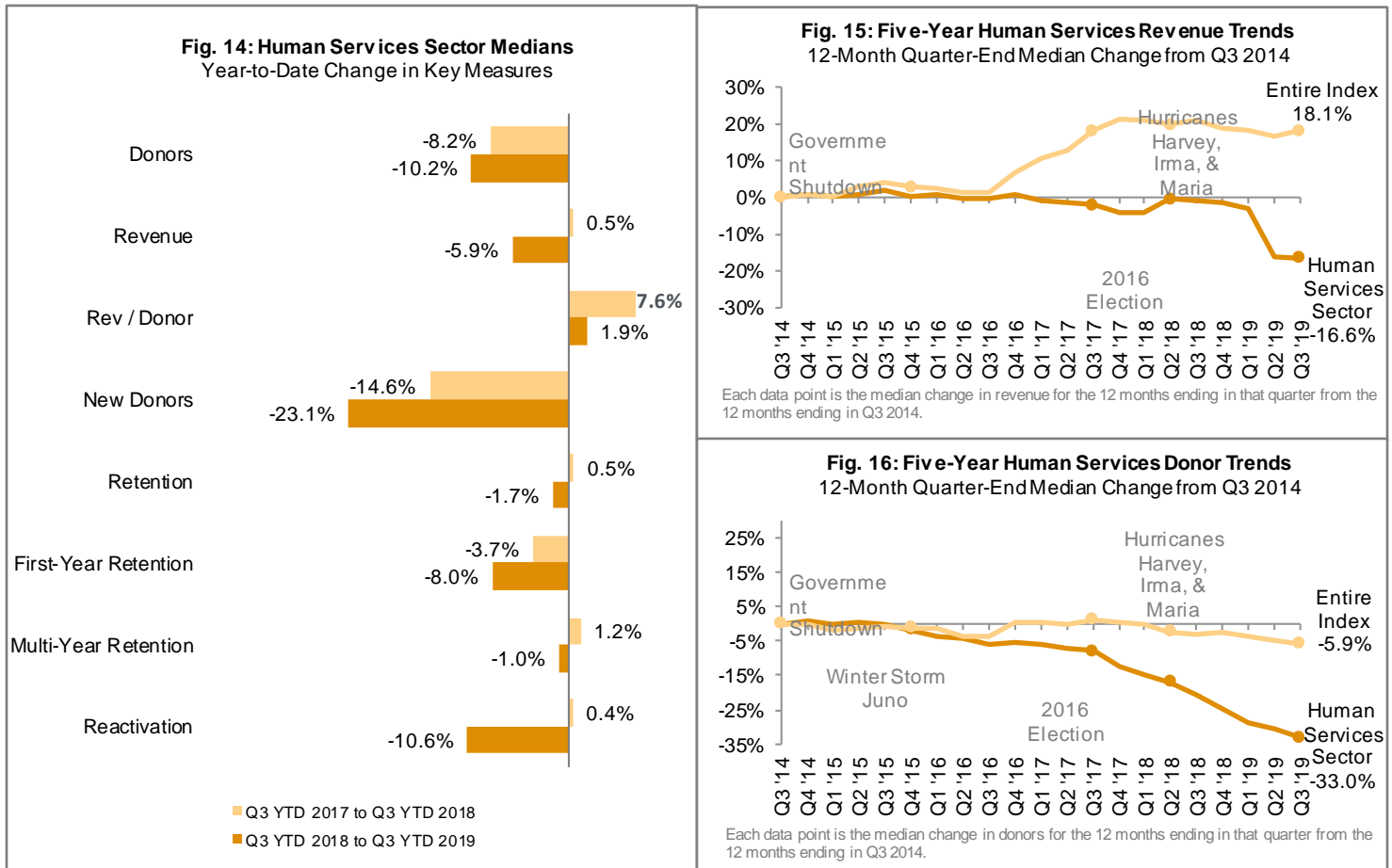
This study considers direct marketing revenue, not event revenue. Over the last decade some health charities have shifted their fundraising strategy to large-scale events that are not included in this analysis.



Human Services

6 organizations

The human services sector was one of the highest-performing sectors in the index during the recession of 2007-2009, as donors stepped up their contributions to meet a perceived immediate need. Since the end of the recession, however, the sector has performed below overall index medians, with moderate increases in revenue per donor only partially offsetting donor declines and resulting in gradually declining revenue. While other sectors experienced disaster- and post-election-related giving surges in 2016 and 2017, human services organizations continued to struggle.



Through Q3 2019, the sector had significant declines in most metrics, performing below index medians.

The human services sector had declines in donors, revenue, acquisition, and retention compared with the first three quarters of 2018 (see Fig. 14). The sector did have a large increase in revenue per donor in through Q3 2018 which saw additional gains in 2019.

Rolling 12-month trends give a longer-term context to these recent trends. They show that the human services sector generally paralleled overall index performance through 2015 but fell behind the index in 2016 and throughout the first three quarters of 2019 as other sectors received boosts from either post-election or disaster-related giving (Figs. 15-16).

Human services organizations do not tend to fundraise around political content, and do not use surveys and petitions to advocate for their causes. This may be part of the reason that the human services sector struggled at a time when advocacy-based organizations experienced enormous growth.





International Relief

13 organizations

The international relief sector is typically subject to dramatic volatility due to event-based emergency-related giving. In years with significant emergency fundraising, the sector experiences large spikes in giving; in years without large-scale emergencies, sector revenue and donor growth roughly parallels index medians. This combined pattern has resulted in the sector well outperforming the index, over the long term.

Fig. 17: International Relief Sector Medians
Year-to-Date Change in Key Measures

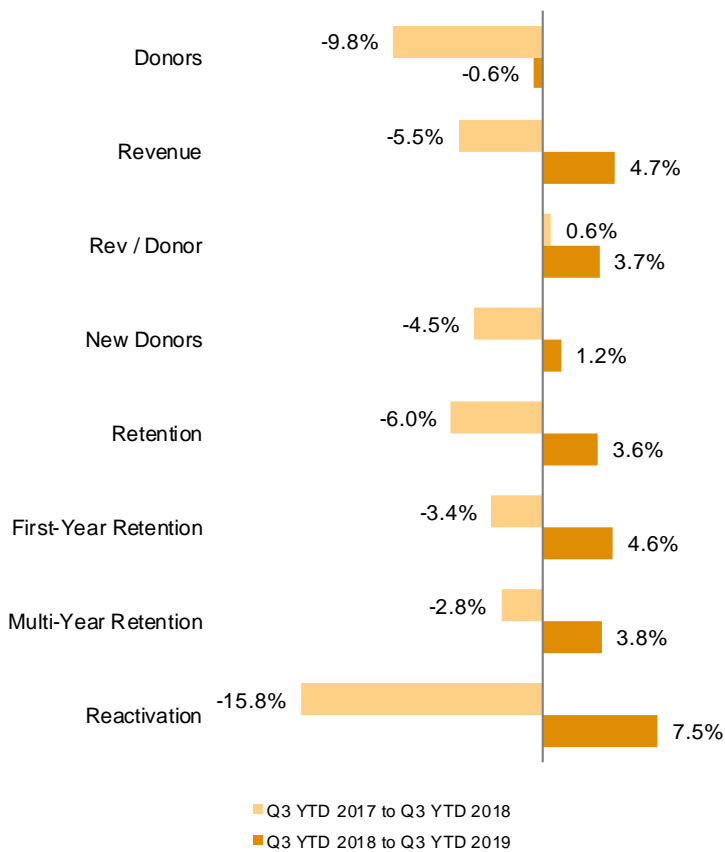
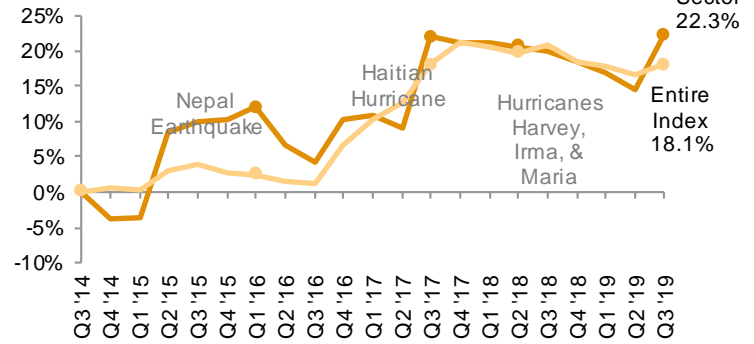
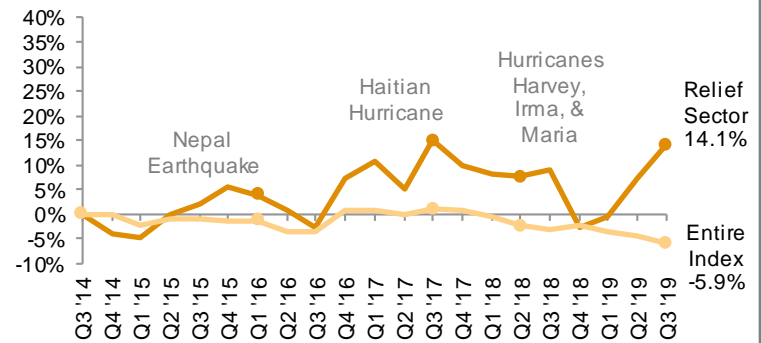


Fig. 18: Five-Year Relief Revenue Trends
12-Month Quarter-End Median Change from Q3 2014



Each data point is the median change in revenue for the 12 months ending in that quarter from the 12 months ending in Q3 2014.

Fig. 19: Five-Year Relief Donor Trends
12-Month Quarter-End Median Change from Q3 2014



Each data point is the median change in donors for the 12 months ending in that quarter from the 12 months ending in Q3 2014.

2019 was relatively free of significant large-scale disaster giving through Q3, resulting in declines in key metrics. Giving in the fourth quarter, however, may increase following earthquakes in Puerto Rico and fires in Australia.

The relief sector had a small decline in donors from Q3 YTD 2018 to Q3 YTD 2019 (see Fig. 17). Revenue increases were above the index median. New donors had a modest increase in the first three quarters of 2019.

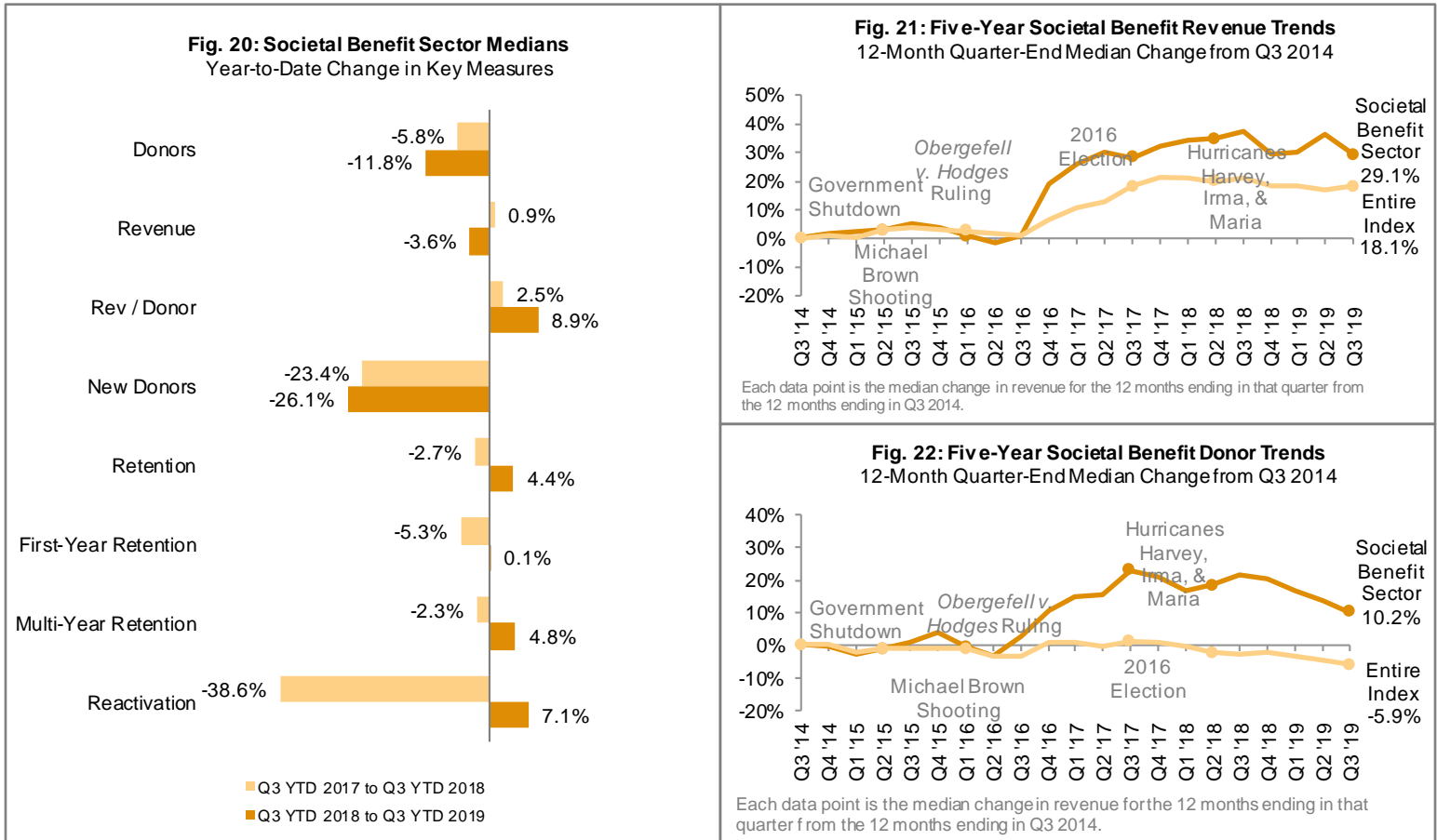
Rolling revenue and donor trends can give a longer-term context for recent relief sector performance (see Figs. 18-19). Over the long term, due to good retention of donors acquired during disaster spikes, the sector has performed significantly better than the index in both donors and revenue.

The relief sector performance has been dominated by spikes in fundraising related to typhoons, hurricanes, earthquakes and other natural disasters. Climate related disasters may continue to affect the sector going forward.



Societal Benefit
7 organizations

Societal benefit organizations are arguably the most likely to be affected by increased attention to their missions during presidential campaign cycles. The 2016 race did not appear to have much of an impact on donor and revenue growth in and of itself. However, the societal benefit sector was one of two in the index to have dramatic growth in giving immediately *after* the 2016 election, and that surge continued throughout all of 2017. This election cycle has not had a measurable effect on the sector thus far.



The post 2016 election growth, which is almost certainly related to concern over the policies of the current presidential administration, has been significantly greater than anything these already strong organizations have experienced in the past 15 years of index participation. This unprecedented growth leveled off in 2018.

The societal benefit sector had continuing declines in donors in 2019 following more modest declines in 2018 (see Fig. 20). Revenue also decreased despite a strong increase in revenue per donor. The steep decline in new (lower value) donors and increase in multi-year retention rates are driving the increase in overall donor value.

A rolling 12-month revenue and donor analysis give a longer-term context for recent trends (see Figs. 21-22). Aside from relatively minor fluctuations due to current events, revenue and donor growth for the societal benefit sector roughly paralleled index medians from 2014 through early 2016. Giving then surged markedly for this sector starting in the fourth quarter of 2016 and continuing throughout 2017. This post-election growth leveled off in 2018 and shows decline in both donors and revenue in 2019. If this sector can retain a good percentage of these post-election-surge donors in subsequent years (especially those acquired as sustainers) societal benefit organizations will maintain a significantly increased base of support on which to build for the future.

References

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Industry Sectors Used in the Index

Animal Welfare Organizations

Organizations that focus on the care, protection, or understanding of pets or specialty animals, other than livestock. Includes humane societies, veterinary services, aquariums, and zoos.

Arts & Culture Organizations

Organizations that promote enjoyment or understanding of the visual, performing, folk, or media arts or the humanities; communications organizations; and organizations that promote the appreciation or understanding of historical events, including historical societies and genealogical or heredity-based organizations.

Environmental Organizations

Programs that focus on the preservation and protection of the environment, including pollution control and abatement programs; conservation and development of natural resources (land, plant, water, energy); control or elimination of hazardous and toxic substances (including pesticides); solid waste management programs; botanical gardens and societies; urban beautification and open spaces programs; and environmental education. Also includes programs that focus primarily on the protection and preservation of wildlife or fisheries.

Health Organizations

Programs which help people achieve and maintain physical well-being through prevention, screening, evaluation and treatment; programs that promote mental health and treatment of mental illness; voluntary health organizations that are organized on a national, state or local basis and supported primarily by voluntary contributions from the public at large, which are engaged in a program of service, education and some research that is related to a particular disease, condition or disability, or group of diseases, conditions or disabilities; research institutes and other organizations whose primary purpose is to promote the advancement of knowledge about specific diseases, disorders, or medical disciplines.

Human Services Organizations

Organizations that promote or provide a broad range of social or human services to individuals or families; organizations that focus on protecting the public from antisocial elements; organizations that help individuals to find and sustain gainful employment; organizations that focus on the development and improvement of food resources; organizations that focus on promoting adequate housing for individuals, families and communities; organizations which aim to prevent, predict or control the effects of domestic disasters (e.g., floods, earthquakes, fires, tornadoes); organizations that work to build character and develop leadership and social skills among children and youth.

International Relief Organizations

Organizations that provide development and relief services to foreign countries and/or organizations that raise and distribute funds for the benefit of overseas institutions.

Societal Benefit Organizations

Programs that focus on protecting and promoting the broad civil rights and civil liberties of individuals, improving relations between racial, ethnic, and cultural groups, and promoting voter education and registration; advocacy and citizen action groups that work to change public policy and opinion in a variety of areas; organizations that work to strengthen, unify, and build community spirit and increase the capacity of various community organizations to improve the quality of life for all.

Sector definitions are based on a modification of the Foundation Center's National Taxonomy of Exempt Entities.

<http://fdncenter.org/nTEE/index.html>

Looking Ahead

The next installment of the index, to be released in April 2020, will examine activity through the fourth quarter of 2019.

Index Methodology

Target Analytics applied the following rules to standardize data from each of the organizations participating in the index of Direct Marketing Fundraising:

Individual payments greater than \$10,000, soft credits, and matching gift payments are excluded. Direct mail is the dominant or only revenue source for most organizations; however, web, telemarketing, event, and other sources are included. Indicators are calculated on a cash payment basis, as opposed to a pledge basis. Gifts or donors are defined as new, retained, or reactivated according to relative gift dates rather than organization-specific business rules or source codes. Retention rates for quarterly analysis are calculated by dividing the number of donors giving in the current year-to-date quarter(s) who also gave during the previous calendar year by the total number of donors who gave in the previous calendar year. Revenue per donor refers to the cumulative giving per donor per current period.

About Medians

Unless otherwise noted, index trends are measured by using the median percent change among a group of organizations. The median is the middle value in a ranked order of numbers. Using this statistic to describe historical trending minimizes distortion caused by the wide range of organizations' file sizes or extreme changes at a few organizations.

Participation

Participation in the index is limited to organizations that meet size and geographic requirements as well as other terms and conditions. For information about index eligibility contact Melissa Stepno at melissa.stepno@blackbaud.com. Please direct questions or requests to reproduce these findings to Denise Santoro at denise.santoro@blackbaud.com

Online Resources

Participating organizations are granted access to an online, interactive graphical system where they can chart their own performance results against overall and sector-specific medians. Please contact your account representative for your password and for more information.

About Target Analytics

Blackbaud Target Analytics delivers data-driven, collaborative solutions designed to help non-profit organizations maximize their fundraising potential. Target Analytics was the first company to bring forward-thinking non-profit organizations together to establish industry-standard benchmarking and openly discuss successful strategies and practices.