

*STRATFORD, ST MARYS, &  
PERTH COUNTY DONOR  
DEMOGRAPHIC SURVEY 2017*

Results and Analysis

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## Executive Summary

In August 2016, the Stratford Perth Community Foundation partnered with the University of Waterloo Community, Health, Environment, Communications (CHEC) Initiative to create a donor demographic survey in order to capture a snapshot of philanthropy in our local communities. The hope was to gain a better understanding of the donor makeup within the region. Together, they sought out the help of five local charities and not-for-profit organizations: United Way Perth-Huron, Stratford Festival, Stratford General Hospital Foundation, Stratford-Perth Humane Society, and the Stratford-Perth Family YMCA.

A graduate student from the University of Waterloo created the donor demographic survey. Participating organizations provided input and feedback throughout the survey design process. The survey was open for three weeks on SurveyMonkey running from May 23<sup>rd</sup> to June 13<sup>th</sup>, 2017. The survey was distributed via email, social media, and was open to the general public through the City of Stratford, the Town of St. Marys, and the Perth County municipal website. The survey was distributed to 2,280 donors via email and was completed 251 times, providing an 11% response rate from email distribution. Because it was not possible to capture how many clicks the survey received from social media and municipal website, it is reasonable to assume the actual response rate was lower than 11%.

The survey results indicated that the majority of donors within the region are established with more mature families. Their children are older and are at the age where they are no longer reliant on their parents for financial support. Donors are well educated and earn an average income higher than the provincial average. As donors continue to age, donors' financial obligations will shift as they begin to enter retirement.

The primary concern among donors is seeing positive change within their communities. Donors are less concerned with receiving recognition or gifts than they are with seeing the charities and organizations they contribute to, make a difference. While not public recognition, donors still prefer to receive a tax receipt for their contribution. Survey respondents identified that they contributed to all participating organizations, with the United Way Perth Huron receiving the greatest response with 62% stating they have given to the organization.

In-line with donors' primary concern, donors were most interested with the impact and the goals of the organization when making their decision to donate. The impact of the charity also ranked highly for what makes donors feel the most satisfied. Donors identified that they are currently happy with the level of communication they receive from their favourite charities and not-for-profit organizations. However, donors indicated that they wish to receive less communication via mail. They would prefer to see the money put towards achieving the goals or objectives of the organization. It was found that the majority of donors frequently give to the same charity and most donors had been donating to charity for more than 11 years.

Participating organizations were able to gather valuable information on the types of donors contributing to their causes. They were able to identify common donor trends and narrow down who their main demographic is. Charities and not-for-profit organizations within the area will use this information to better serve their donors and to modify and adapt their fundraising strategies.

## **1. Introduction**

In August of 2016, the Stratford Perth Community Foundation (SPCF) partnered with the University of Waterloo Community, Health, Environment, Communications (CHEC) Initiative to create and disseminate a survey to collect pertinent donor demographic information in order to capture a snapshot of philanthropy in Stratford, St. Marys, and Perth County. The need for a donor demographic survey was recognized when the SPCF identified a lack of knowledge of donor demographics within the region. The purpose of the survey was to help charities and not-for-profit organizations better understand and serve their communities while providing them more information on donors within the region.

The following organizations participated in the donor demographic survey research: United Way Perth-Huron, Stratford Festival, Stratford General Hospital Foundation, Stratford-Perth Humane Society, and the Stratford-Perth Family YMCA. Participation from these organizations provided the basis for a well-rounded understanding of the donor base within the region.

## **2. Methods**

The survey was created by Paula LaGamba, a research associate with the CHEC Initiative. It was distributed online via SurveyMonkey and was open for three weeks running from May 23<sup>rd</sup> to June 13<sup>th</sup>, 2017. All participating organizations had access to the same SurveyMonkey link in order to distribute the survey to their respective stakeholders. The SurveyMonkey link was also made available to the general public through public relations and social media. This includes Facebook, Twitter, media outreach and a link on the City of Stratford, Town of St. Marys, and Perth County municipal websites.

Respondents' answers were kept anonymous and confidential. The CHEC Initiative monitored the data throughout the SurveyMonkey data collection process and analyzed the results to remove any data deemed confidential and revealing.

All participating organizations received a complete summary of the sanitized data. Findings from the survey have been shared with participating organizations. The comprehensive summary report of the sanitized data is available to the general public by contacting the SPCF. Participating organizations received both a comprehensive report and an individual summary report tailored to their organization. Participating organizations provided questions to help guide the analysis.

Raw data from the survey will be stored indefinitely by the SPCF in a secure location and participating organizations will have access to the sanitized data indefinitely.

## **3. Response Rate**

Five of the six participating organizations provided numbers regarding the number of people to whom the survey was distributed. The survey was emailed to 2,280 people. In total, there were 251 people who completed the survey. This gives an 11% response rate. There is a level of skepticism that should be taken with this number because this does not take into account how many people would have seen the survey on social media sites and chose not to respond, nor does it include the distribution information from the sixth organization. Therefore, it is likely that the response rate is lower than 11%.

## **4. Findings**

The survey questions were divided into six different categories. The categories were: demographic, giving habits, recognition, communication, donor satisfaction, and other. The following section discusses some of the main findings from each section.

### **4.1 Demographic Questions**

All questions within the demographic section of the survey received 251 responses. The majority of respondents were female with 66.1%, or 166 respondents, and 32.7% male, or 82 respondents.

The age range of 45 to 54 saw the largest amount of responses, with 26.7% or 67 responses. It is interesting to note that 76.9% of total respondents were at least 45 years of age with 56.2% being older than 55. This is important information for charities as the population ages and a large number of donors begin to enter retirement.

A total of 66.5% of the respondents were married, 12% were single, and 6.8% were either divorced or separated. Spouses and partners tended to share in the majority of their giving decisions with 42.2% of respondents saying decisions were made together. The survey indicated that 23.5% of respondents stated that giving decisions were made separately and 30.7% said that they made all the decisions for themselves and their spouse or partner.

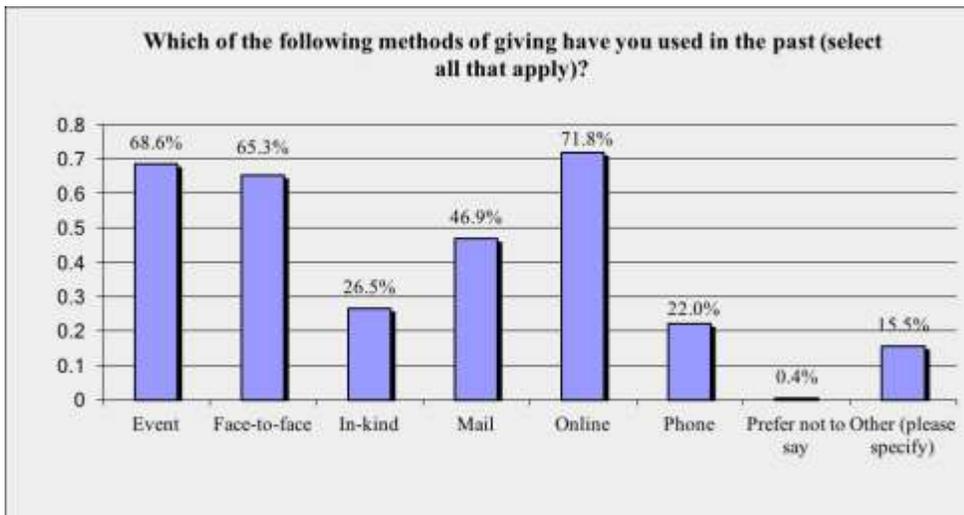
Survey responses noted that 76.5% of respondents, or 192 people, reported having children. Just over half, or 53% of respondents, reported having 2-3 children and 13.1% reported having one child. A total of 39.4% had children 26 years of age and older. This number corresponded with the age demographic responses and the majority of respondents being over the age of 55.

The donors located within the region are well educated. The survey indicated that 21.9% of respondents had completed a college diploma, 25.5% held a bachelor's degree, and 32.3% had obtained either a graduate or a professional degree.

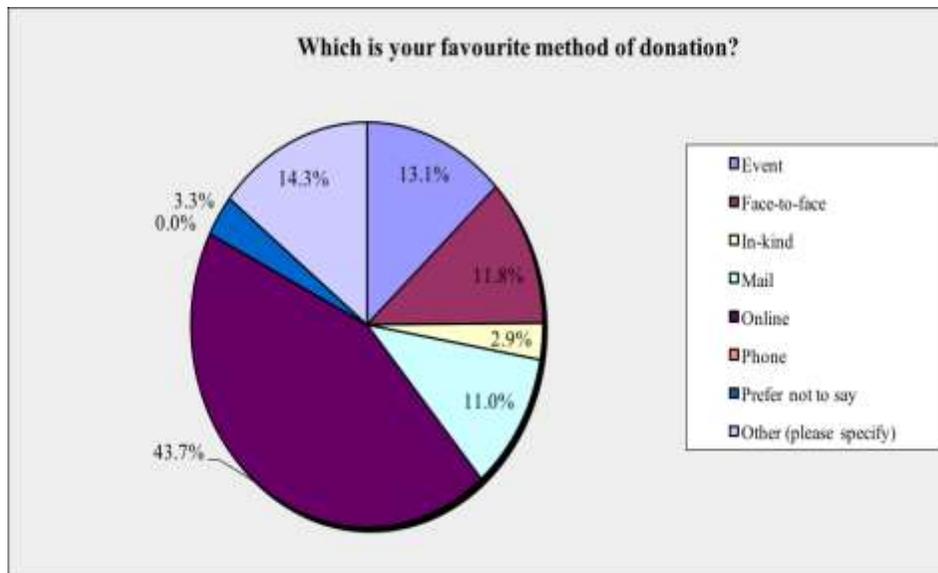
In line with the high number of responses from individuals aged 65 and older, 34.3% of respondents were retired. A total of 43.4% of respondents were employed full-time and 12.4% were self-employed. This high level of education corresponded with the high level of household income within the region. Close to one third, or 32.3% of respondents, earned a household income between \$50,000-\$99,999, while 39.5% had a household income of over \$100,000. Less than a quarter, or 22.7% of respondents, reported that their financial situation was better this year compared to last year, while 64.5% said it remained the same and 10.8% said they were worse off this year (2017) than the previous year.

## 4.2 Giving Habits

### 4.2.1 Methods of Giving

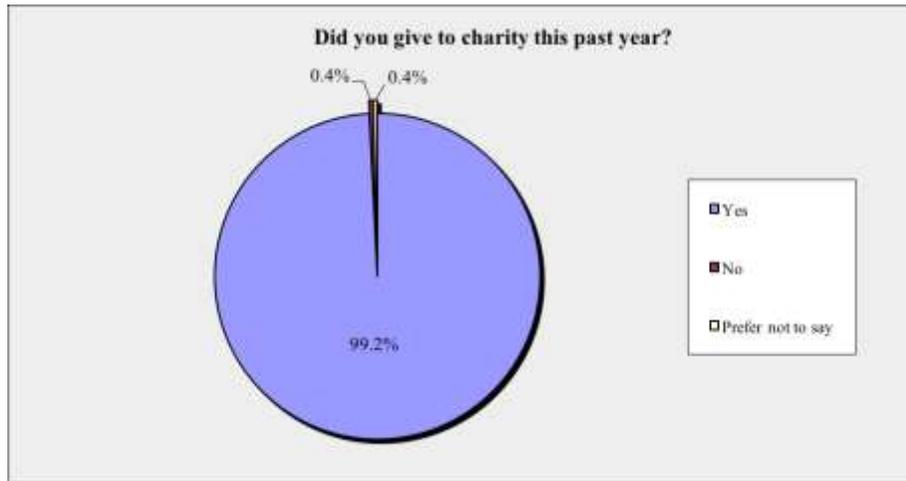


Donors used a number of different giving methods. Online, event, and face-to-face donations were the top three methods. A total of 176, or 71.8% of respondents, made donations online while 68.6% or 168 and 65.3% or 160 respondents made donations at an event or face-to-face respectively.

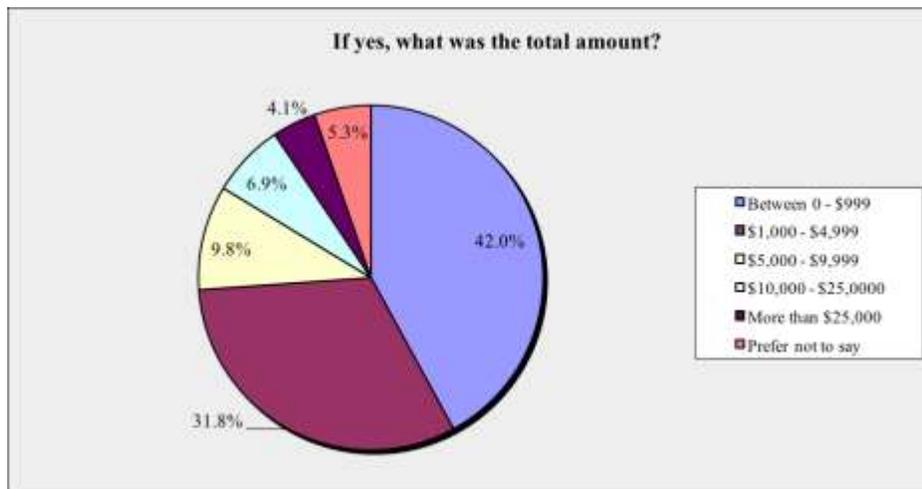


Online donations were the preferred method of giving within the region with 43.7% or 107 respondents, identifying online as their favourite method of donation. Event, face-to-face, and mail were the next three favourites with 13.1%, 11.8%, and 11% respectively. It is interesting to note that phone donations were not a favourite method of donation within the region as 0% of respondents selected phone as their favourite method of donation.

#### 4.2.2 Giving Habits



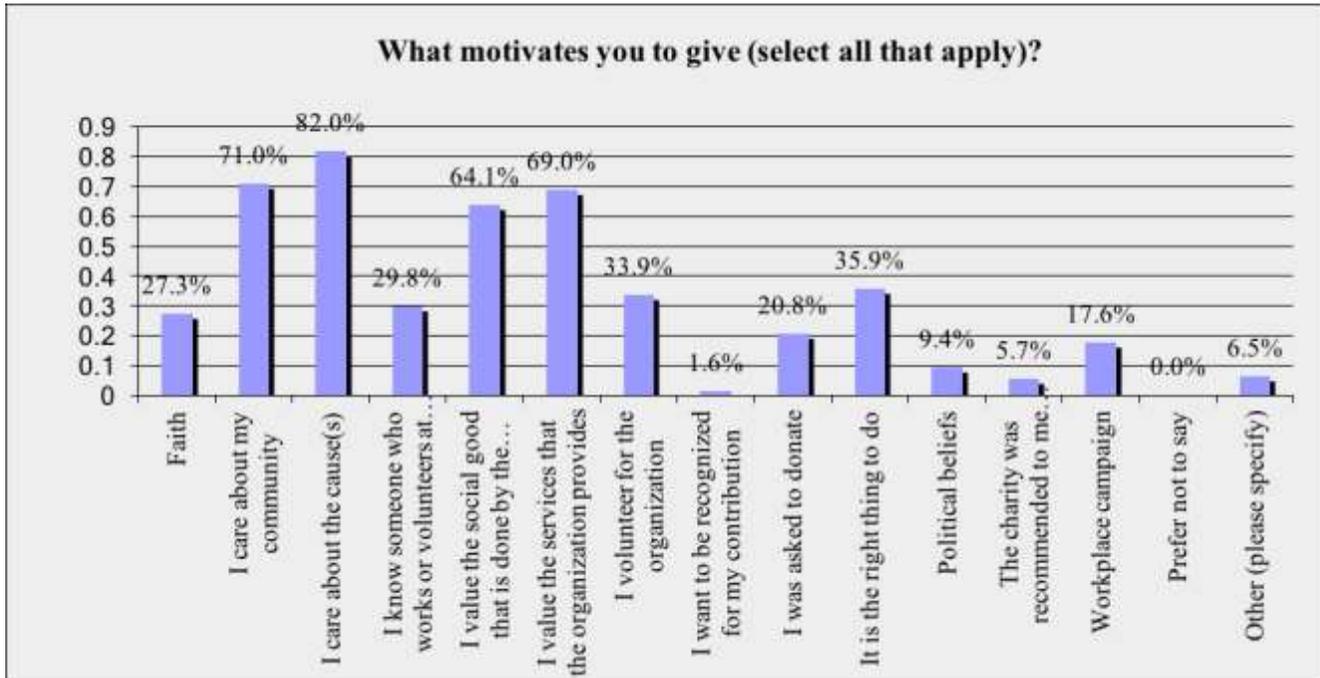
A total of 99.2% or 243 respondents, gave to charity last year. It is important to note that since the survey was sent out to current and previous donors within participating organization's databases, this statistic paints an accurate picture of the giving habits of the donors from only the participating organizations and not the entire region.



The survey responses indicated that 42% or 103 respondents, donated between 0 - \$999 to charity last year. A total of 48.5% or 119 respondents, donated more than \$1,000 last year with 31.8% or 78 respondents, donating between \$1,000 and \$4,999, 9.8% or 24 respondents, donating between \$10,000 and \$25,000, and 6.9% or 17 respondents, donating more than \$25,000 to charity last year.

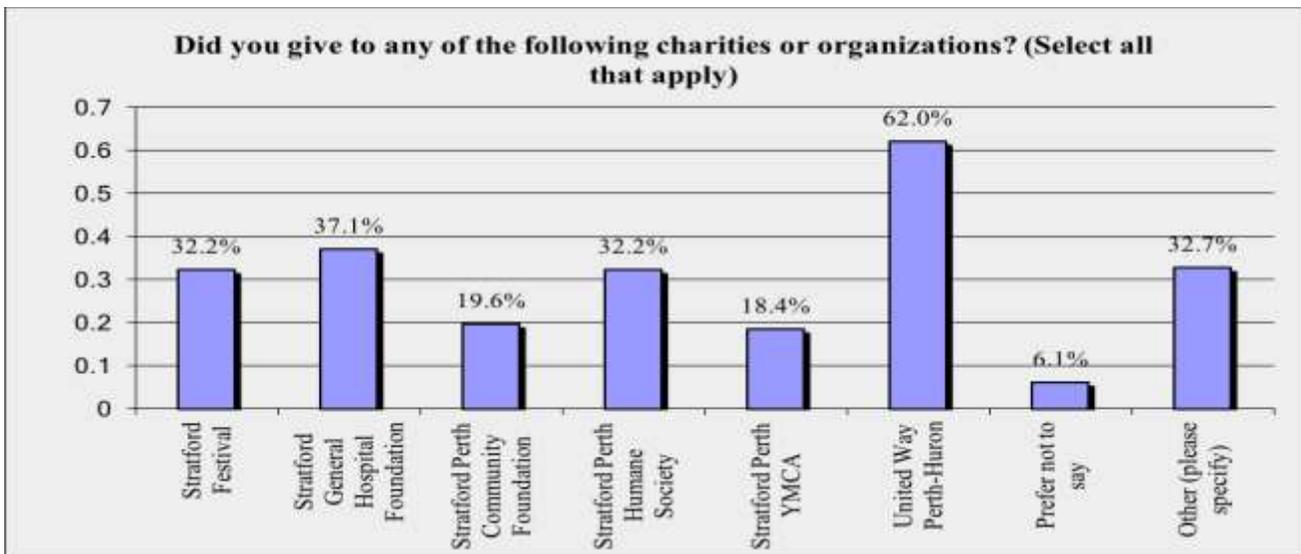
Only three respondents provided an answer as to why they did not give to charity last year. One respondent explained he/she did not know where to donate, one was unable to afford to donate, and one simply stated that he/she had donated to charity the previous year.

### 4.2.3 Motivation for Giving



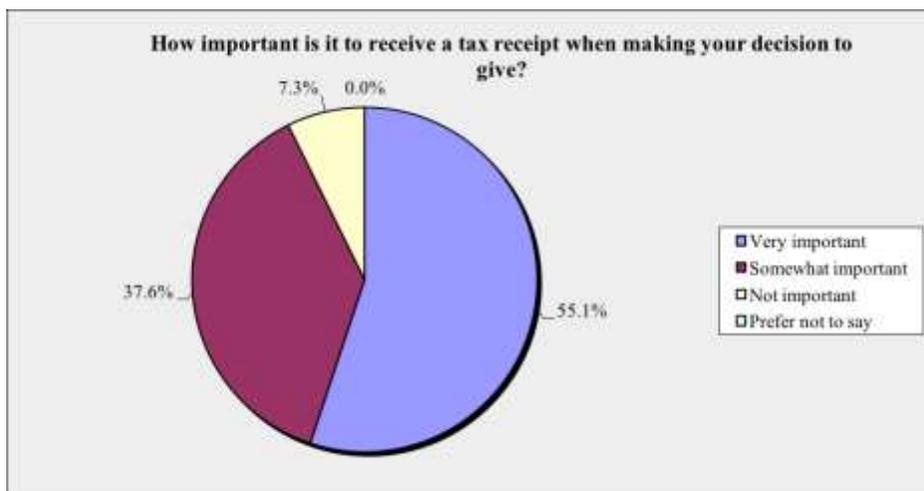
Donors within the region were motivated to give because they wanted to make a positive impact in their community. The top four reasons people were motivated to give were: because they care about the causes (82%), they care about the community (71%), they value the services that the organization provides (69%), and they value the social good that was done by the charity/organization (64.1%). These four answers received a substantially higher number of responses than the remaining options. The fifth most popular response was selected by 35.9% of the respondents, 28.2% less than the fourth most popular option. These results make it clear that donors priorities are to give to reputable charities and organizations that truly make a difference within the community.

### 4.2.4 Charities & Organizations Receiving Donations



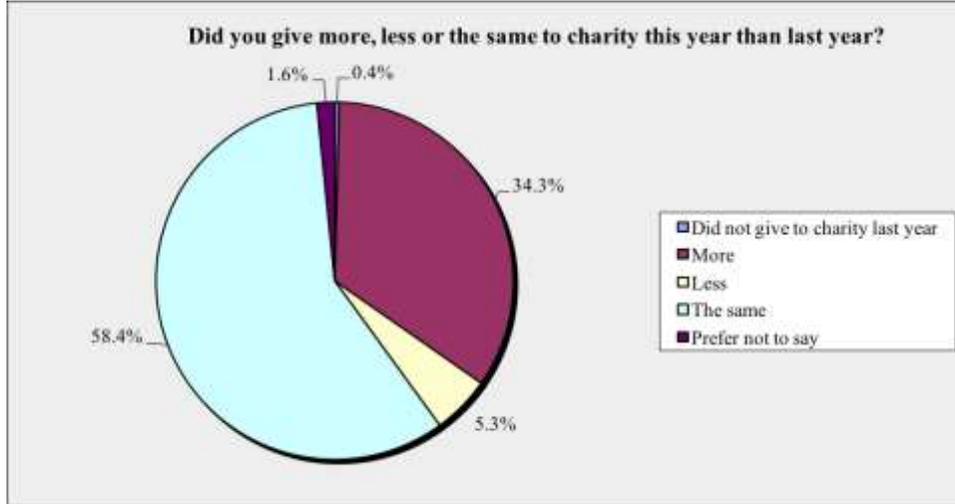
Donations throughout the region were distributed to different organizations. Out of the six participating organizations, the majority of respondents had donated to the United Way Perth-Huron with 62% or 152 responses. The Stratford General Hospital Foundation, Stratford Perth Humane Society, and the Stratford Festival received a similar number of responses with the Stratford General Hospital Foundation receiving donations from 37.1% of the respondents and the Stratford Perth Humane Society and Stratford Festival both receiving donations from 32.2% of the respondents. A total of 32.7% of respondents donate to other organizations not participating in the survey.

#### 4.2.4 Tax Receipts

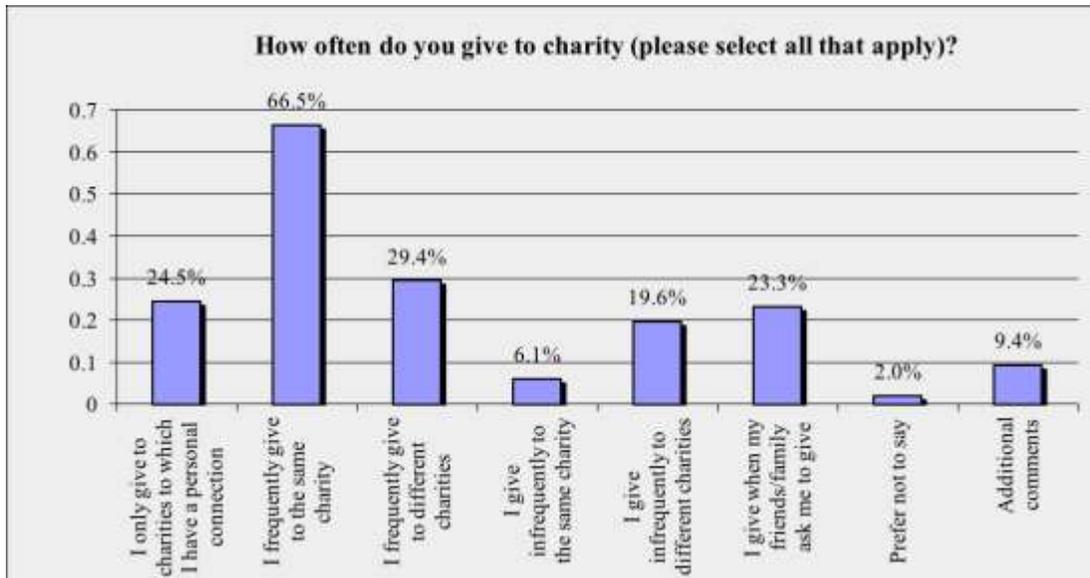


With 92.7% or 227 respondents, a large number of donors considered it important to receive a tax receipt when making their decision to give with 55.1% considering a tax receipt to be very important and 37.6% considering a tax receipt to be somewhat important. Only 7.3% of respondents said a tax receipt was not important when making their decision to donate.

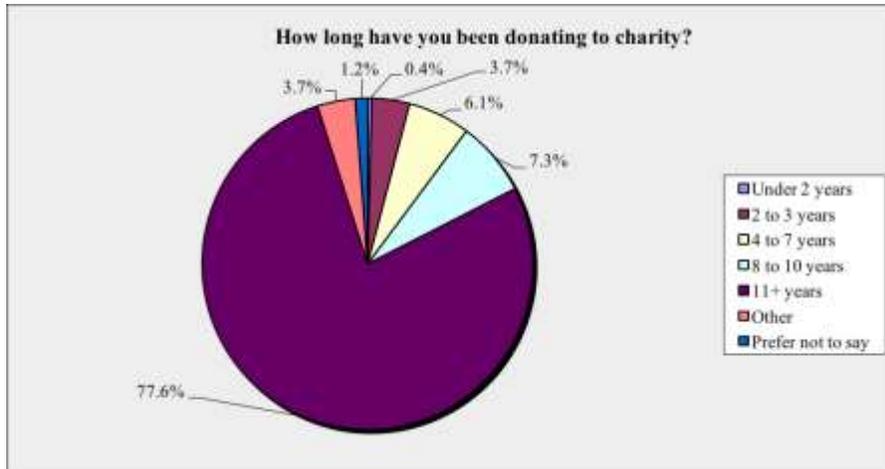
#### 4.2.6 Donation Frequency



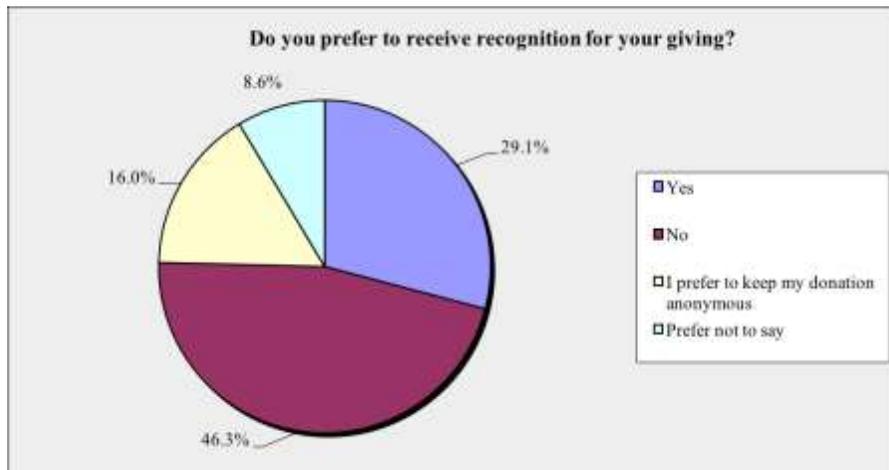
Survey results suggested that donors within the region have been donating consistently over the past two years. A total of 92.7% or 227 respondents, gave at least the same amount to charity as the previous year with 34.4% or 84 respondents, giving more this year than they had the previous year. Only 5.3% or 13 respondents, reported they had given less to charity this year than last year.



Donors within the region donate regularly with 66.5%, or 163 respondents, frequently giving to the same charity and 29.4% or 72 respondents, frequently giving to different charities. Based on the graph in section 4.2.4 and the high frequency of donation local charities receive, this could be perceived as positive news for charities and not-for-profit organizations within the region.

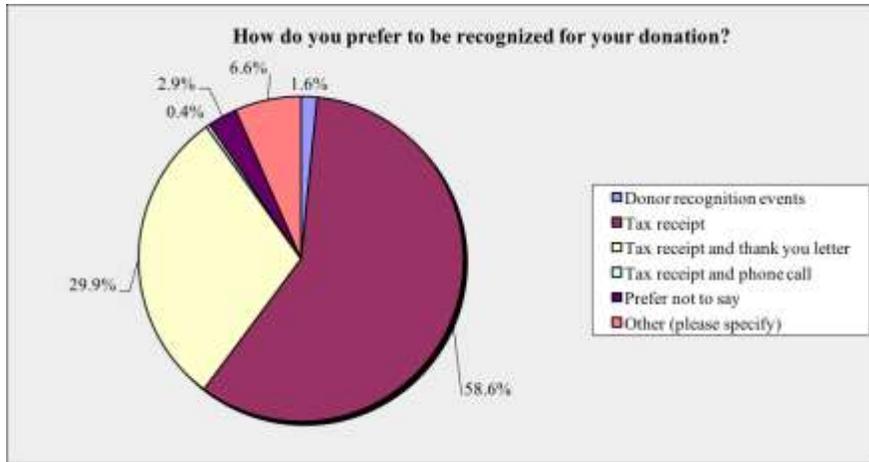


The region is home to many loyal donors with 84.9% or 208 respondents, donating to charity for the past eight years or more and 77.6% of respondents donating for more than 11 years.

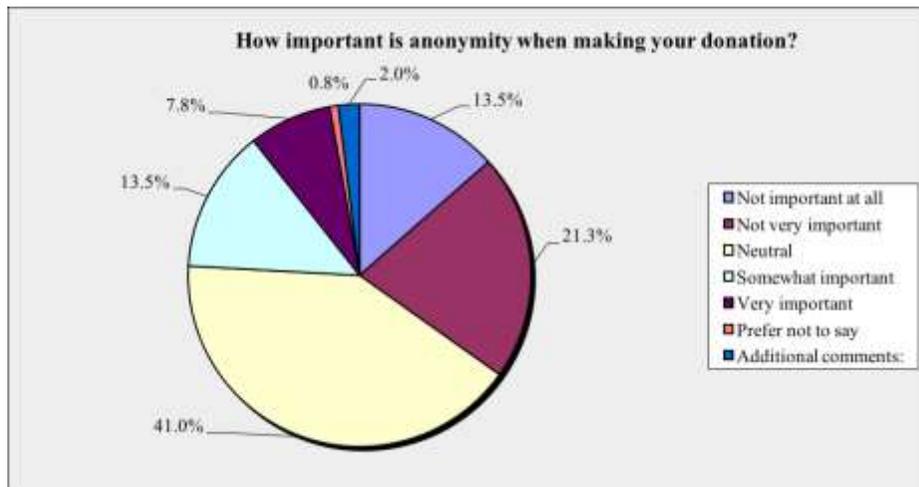


#### 4.3 Recognition

The majority of respondents did not like to receive recognition for their giving as noted by 46.3%, or 113 respondents. Additionally, 16% or 39 respondents, preferred to keep their donation(s) anonymous. A total of 29.1% did like to receive recognition for their giving.



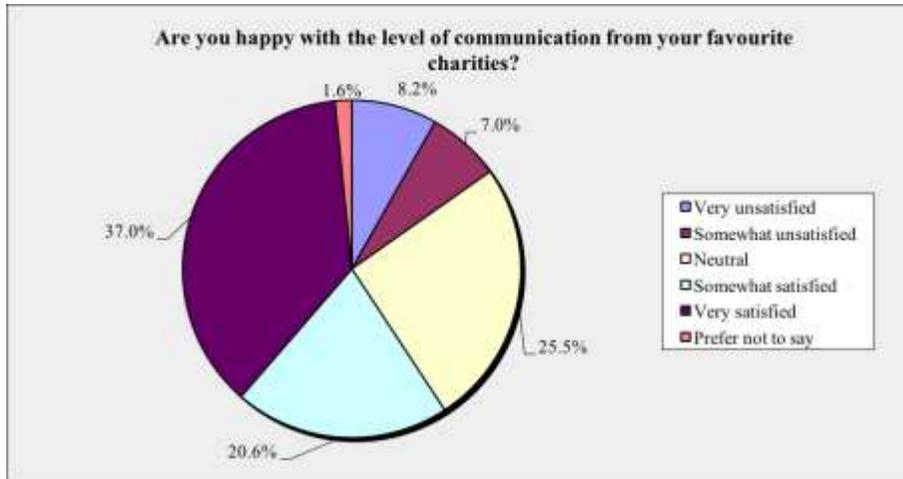
Survey results indicated that 58.6%, or 143 respondents, preferred to be recognized for their donation with a tax receipt and 29.9%, or 73 respondents, preferred to be recognized for their donation with a tax receipt as well as a thank you letter. Interestingly, only 0.4% or 1 respondent, preferred to be recognized with a tax receipt and a phone call. This parallels with the written responses provided by respondents stating they do not like to be contacted by phone.



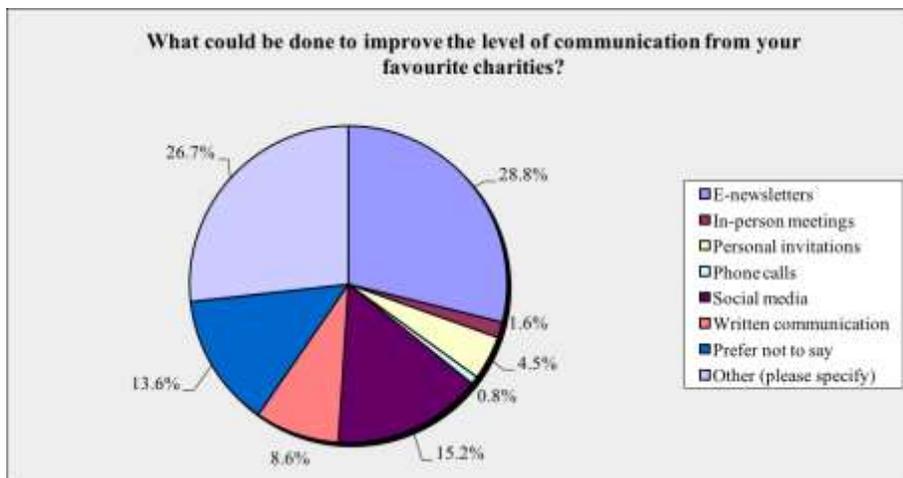
A total of 34.8% or 85 respondents, did not consider anonymity important when making their donation. Survey results indicated that 41% or 100 respondents, found anonymity neither important nor unimportant when making their donation. Alternatively, 21.3%, or 52 respondents, considered anonymity important when making their donation.

## 4.4 Communication

### 4.4.1 Charity Communication



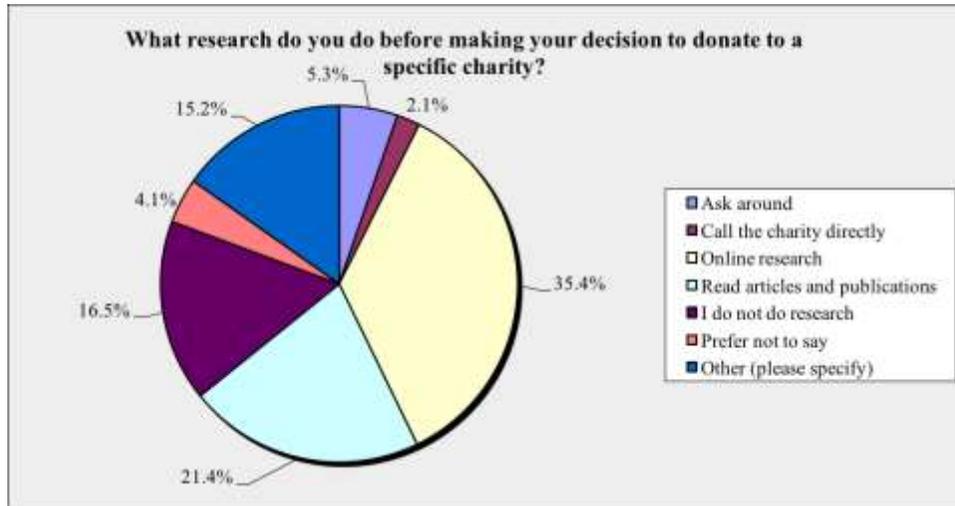
Overall, donors in the region were pleased with the level of communication they received from their chosen charity partners. The survey indicated that 57.6% or 140 respondents, were satisfied with the current level of communication from their favourite charity. A quarter, or 25.5% or 62 respondents, were neither satisfied nor unsatisfied with the level of communication. A total of 15.2% or 37 respondents, were unsatisfied, with 8.2% or 20 respondents, reporting that they are very unsatisfied with the level of communication from their favourite charity. Numerous respondents voiced that they dislike receiving communications via mail and would rather see their dollars being used to impact projects and causes.



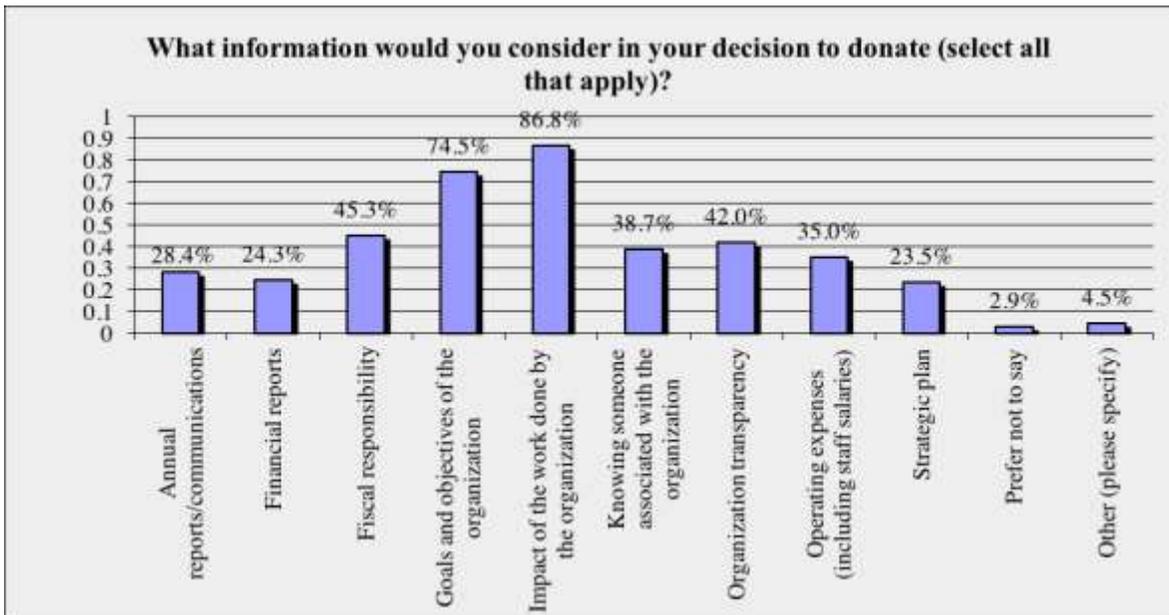
E-newsletters appear to be the best way charities can improve their level of communication with their donors with 28.8% or 70 respondents, selecting the option. Respondents were very vocal with suggestions with 26.7% or 65 respondents, choosing to select the 'other' option and specify what could be done to improve communication. Social media got the third highest number of responses with 15.2% or 37

respondents.

#### 4.4.2 Charity Research



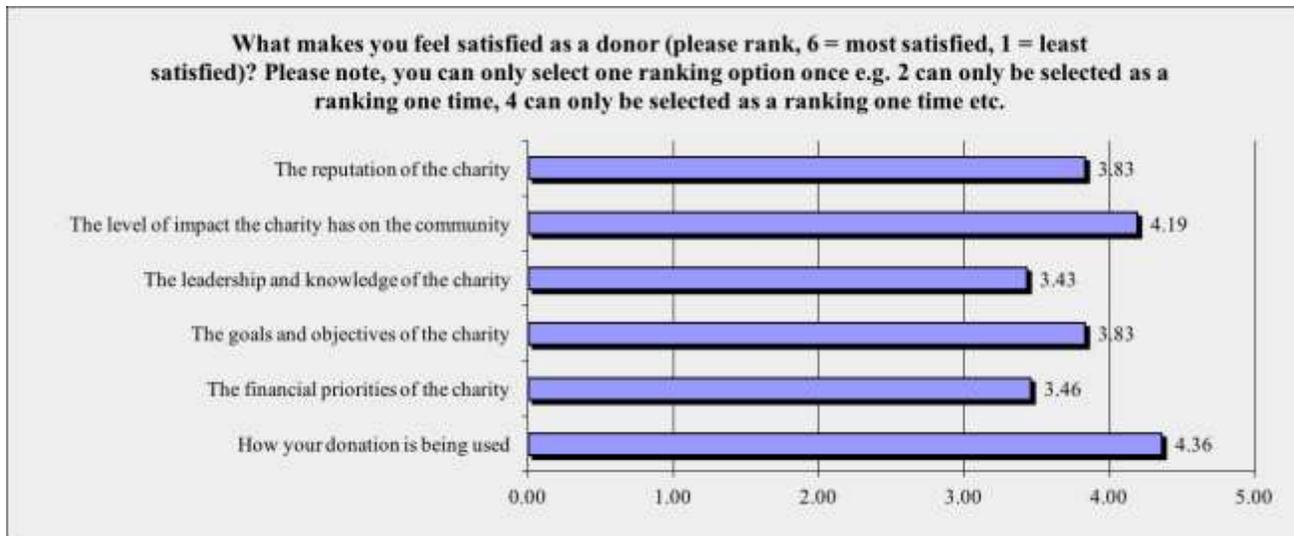
Survey results indicated that 35.4% or 86 respondents, research charities online prior to making a decision to donate to a specific charity. A total of 21.4% or 52 respondents, said that they read articles and publications before making their decision to donate. Interestingly, only 16.5% or 40 respondents, did not do any research prior to making a decision to donate.



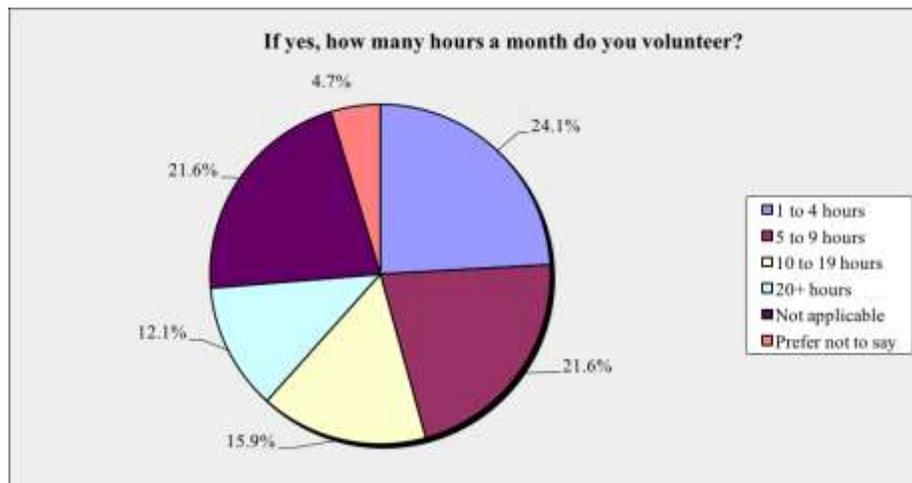
Donors within the region care about the causes to which they are donating. A total of 86.6%, or 211 respondents, said that they considered the impact of the work done by the charity in their decision to donate and 74.5%, or 181 respondents, said that they cared about the goals and objectives of the

organization. A combined 80.3% of respondents said that they considered either the financial responsibility of the organization or the operating expenses before making their decision to donate.

#### 4.5 Donation Satisfaction

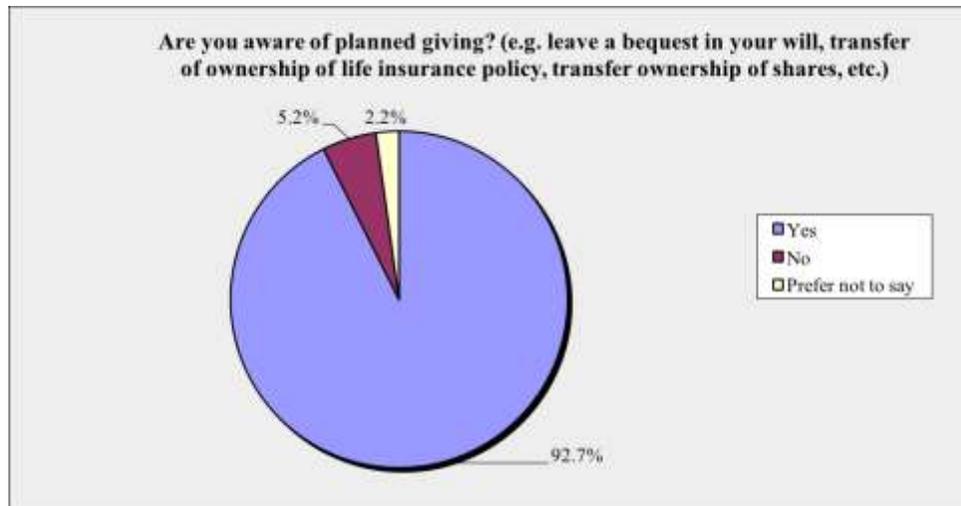


At 4.36 out of six, the topic that made the most impact on donor satisfaction was how donor donations are being used. The second highest ranked topic was the level of impact the charity had on the community, at 4.19 out of six. Leadership and knowledge of the charity and the financial priorities of the charity were ranked the least satisfying to donors with 3.43 and 3.46 respectively.



#### 4.6 Other

A total of 76.7% or 178 respondents, noted that they volunteered. Approximately one fifth of the respondents did not volunteer with 20.3% or 47 respondents. Of the respondents who did volunteer, 45.7%, or 106 respondents, volunteered between one to nine hours a month, with 24.1% volunteering between one to four hours a month. The survey indicated that 28%, or 65 respondents, volunteered between ten and 20 hours a month with 12.1% or 28 respondents, volunteering more than 20 hours a month.



With 92.7% or 215 respondents, most respondents were aware of planned giving.

## 5. Analysis and Discussion

### 5.1 Demographic Analysis

The survey results presented a high correlation between respondents' age, whether or not they had children, and their relationship status. Donors in Stratford, St. Marys, and Perth County have settled down and have mature families at home. A total of 56.2% of the respondents were 55 years of age or older and 76.5% of respondents had at least one child. Of this, 39.4% reported having at least one child over the age of 25, suggesting they are living on their own and no longer dependent on their parents. This suggests that donors within the region may have fewer financial responsibilities regarding their families

The survey implies that there is likely a relationship between income, age, and education levels. Donors were more mature in age and well educated, resulting in an average income higher than the provincial average, which was \$81,480 in 2015<sup>1</sup>. A total of 80.1% of respondents reported having either a college diploma, bachelor's degree, professional degree, or PhD with another 11.2% having attended university or college.

As families continue to mature, and as more donors with children become empty nesters, families will have more disposable income for goods and services. This means donors may have more income available to give to their favourite charities and not-for-profit organizations. It is important for charitable organizations to understand that as their donors continue to age and begin to enter retirement their financial habits may change. As an example, donors may find they are on a tighter, more fixed income, upon retirement. As such, charities and not-for-profit organizations may need to adjust their financial strategies as their donor bases continue to age.

### 5.2 Donor Analysis

There was a clear and common theme among donors as to why they gave to charity with the main reasons being that donors cared about the cause or causes and the direct impact the charity or organization had on

<sup>1</sup> Statistics Canada. No date. Table 11-0009. Median total income, by family type, by province and territory (All census families). Last updated July 12, 2017. <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/famil108a-eng.htm>

the community. Survey results indicated that donors within the region wished to help guide positive change within their communities.

Donors were more concerned about their donations making positive change than they were about receiving recognition for their donation. In turn, multiple donors voiced that they only wanted to receive recognition if it helped to raise awareness about the cause, charity, or the organization. While a small percentage of respondents reported that they preferred to receive recognition for their donation, the general sense within the region is that donors were more interested in seeing their favourite charities and not-for-profit organizations reach their goals and objectives above all.

Although not a direct form of recognition, the majority of donors preferred to receive a tax receipt for their donation. It was evident that, for the most part, donors did not want to be publically recognized for their charitable donations but they still wanted to receive a tax receipt for their financial contributions.

The survey results identified that donors within the region donated to a number of the participating charities and not-for-profit organizations (Table 1). The United Way Perth Huron received the greatest number of responses of participating organizations, with 62% of respondents identifying they gave to the organization. The Stratford Perth YMCA received the lowest amount of responses of participating organization with 18.4% of respondents giving to the organization. The wide range of donations to local charities helps contribute to the assumption that donors give because they truly want to better the community.

**TABLE 1:**

<b>Did you give to any of the following charities or organizations? (Select all that apply)</b>		
<b>Answer Options</b>	<b>Response Percent</b>	<b>Response Count</b>
Stratford Festival	32.2%	79
Stratford General Hospital Foundation	37.1%	91
Stratford Perth Community Foundation	19.6%	48
Stratford Perth Humane Society	32.2%	79
Stratford Perth YMCA	18.4%	45
United Way Perth-Huron	62.0%	152
Prefer not to say	6.1%	15
Other (please specify)	32.7%	80
<b><i>answered question</i></b>		<b>245</b>
<b><i>skipped question</i></b>		<b>6</b>

The primary reasons donors give, the combination of local charities donors donate to, and the lack of desired recognition identifies that donors within Stratford, St. Marys, and Perth County truly care about their communities and they value the services that their favourite charities and not-for-profit organizations provide for the region.

### **5.3 Charity Hopes & Communications**

Donors identified that the impact and goals of the organization or charity were the top two pieces of information to consider when making a donation. The third most important piece of information donors consider when making their decision to donate is the fiscal responsibility of the organization followed by the level of transparency. Interestingly, the fiscal priorities of the organization were less important to donors when they considered what makes them feel satisfied as a donor. The impact of the charity ranked within

the top two answers for both the information donors consider when making a charitable giving decision and what makes donors feel satisfied. Furthermore, 28.4% of donors review annual reports and communications when making their donation to give, furthering the idea that donors care about the financial priorities of the charities they support.

Due to the fact that donors considered the impact, financial priorities, transparency, and operating expenses of charities, it is important that charities and organizations provide donors with the appropriate amount of information to enable them to make informed giving decisions. At 57.6%, over half of donors reported that they were either somewhat satisfied or very satisfied with the level of communication from their favourite charity, identifying that charities are doing a good job communicating with their donors. Interestingly, there was a trend toward e-newsletters and social media as the preferred method of communication. Donors voiced that they did not want charities to send mailings or gifts. Instead, they would rather be communicated with electronically, thus reducing expenses and freeing up more money to go directly to the goals and objectives of the charity.

Overall, charities within the region tend to be doing a good job. A total of 66.5% of respondents identified that they frequently give to the same charities, suggesting that donors are loyal to their favourite charities. Based on the giving habits of survey respondents the local charities and organizations have been making a positive impact in the community as indicated by 77.6% of respondents who have been donating for more than 11 years.

## **6. Conclusion**

The Stratford, St. Marys, and Perth County Donor Demographic Survey revealed some interesting information about the makeup of the donor base within the region. It was identified that donors were more mature, well-educated, and tended to support charities that have a positive impact within the community. Donors wanted to see their donation being used effectively and did not want to see waste within their favourite charities and not-for-profit organizations. As for communication, the two most popular methods of communication were e-newsletters and social media. Donors did not want to receive expensive mailings, instead opting for communications via the web so that money could be saved and put towards achieving organization goals and objectives.

The project was undertaken after the SPCF identified a lack of donor knowledge within the area. They partnered with the University of Waterloo CHEC Initiative to create and distribute a donor demographic survey, targeting donors within Stratford, St. Marys, and Perth County. The following charities and not-for-profit organizations participated in the project: United Way Perth-Huron, Stratford Festival, Stratford General Hospital Foundation, Stratford-Perth Humane Society, and the Stratford-Perth Family YMCA. The diverse participation from various organizations within the area helped to provide a broad-based understanding of the donor base within the region.

Participating organizations plan to use the data gathered from the donor demographic survey to help guide their donor retention and loyalty strategies, cater more appropriately to the needs and wants of their donors, and improve their strategic goals. It is the hope of the participating organizations that this survey can be further developed and used as a tool to keep in touch with donor trends.

## Appendices

### APPENDIX A

#### Copy of the survey

##### 1. Demographic Questions

1.1 What is your gender?

- Female
- Male
- Other
- Prefer not to say

1.2 What is your age?

- Under 18
- 19 to 24
- 25 to 34
- 35 to 44
- 45 to 54
- 55 to 64
- 65 to 74
- 75 and older
- Prefer not to say

1.3 What is your current relationship status?

- Common law
- Divorced
- Married
- Separated
- Single
- Widowed
- Prefer not to say

1.4 How do you and/or you and your spouse/partner make giving decisions?

- I make all the giving decisions
- My partner/spouse makes all the giving decisions
- We make decisions together
- We make our own giving decisions separately
- Prefer not to say

1.5 Do you have children?

- Yes
- No
- Prefer not to say

1.6 If yes, how many children do you have?

- 1
- 2-3
- 4-5
- 5+
- Not Applicable
- Prefer not to say

1.7 How old are your children?

- 18 and younger
- 19 to 25
- 26 and older
- Not Applicable
- Prefer not to say

1.8 What best describes your level of education?

- Completed some high school
- High school or GED
- Completed some college or university credits
- College diploma
- Bachelor's degree
- Ph.D.
- Graduate or professional degree
- Prefer not to say

1.9 What is your employment status?

- Employed full-time
- Employed part-time
- Retired
- Self-employed
- Student
- Unable to work
- Unemployed
- Prefer not to say

1.10 What is your household income?

- Between 0 – \$24,999
- \$25,000 – \$49,999
- \$50,000 – \$99,999
- \$100,000 – \$249,999
- \$250,000 – \$499,999
- More than \$500,000
- Prefer not to say

1.11 How does your financial situation compare to last year?

- Better
- Worse

- The same
- Prefer not to say

**2. Giving Habits**

2.1 Which of the following methods of giving have you used in the past (select all that apply)?

- Event
- Face-to-face
- In-kind
- Mail
- Online
- Phone
- Prefer not to say
- Other (please specify)

2.2 Which is your favourite method of donation?

- Event
- Face-to-face
- In-kind
- Mail
- Online
- Phone
- Prefer not to say
- Other (please specify)

2.3 Did you give to charity in the past year?

- Yes
- No
- Prefer not to say

2.4 If yes, what was the total amount?

- Between 0 – \$999
- \$1,000 – \$4,999
- \$5,000 – \$9,999
- \$10,000 – \$ 25,000
- More than \$25,000
- Prefer not to say

2.5 If you did not give, please explain (max. 500 characters)

2.6 What motivates you to give (select all that apply)?

- Faith
- I care about my community
- I care about the cause(s)
- I know someone who works or volunteers at the charity/organization

- I value the social good that is done by the charity/organization
- I value the services that the organization provides
- I volunteer for the organization
- I want to be recognized for my contribution
- I was asked to donate
- It is the right thing to do
- Political beliefs
- The charity was recommended to me by a family member or friend
- Workplace campaign
- Prefer not to say
- Other (please specify)

2.7 Did you give to any of the following charities or organizations? (Select all that apply)

- Stratford Festival
- Stratford General Hospital Foundation
- Stratford Perth Community Foundation
- Stratford Perth Humane Society
- Stratford Perth YMCA
- United Way Perth-Huron
- Prefer not to say
- Other

Please specify

2.8 How important is it to receive a tax receipt when making your decision to give?

- Very important
- Somewhat important
- Not important
- Prefer not to say

2.9 Did you give more or less to charity this year than last year?

- Did not give to charity last year
- More
- Less
- Prefer not to say

2.10 How often do you give to charity (please select all that apply)?

- I only give to charities to which I have a personal connection
- I frequently give to the same charity
- I frequently give to different charities
- I give infrequently to the same charity
- I give infrequently to different charities
- I give when my friends/family ask me to give
- Prefer not to say

Additional comments:

2.11 How long have you been donating to charity?

- Under 2 years
- 2 to 3 years
- 4 to 7 years
- 8 to 10 years
- 11 years+
- Other
- Prefer not to say

**3. Recognition**

3.1 Do you prefer to receive recognition for your giving?

- Yes
- No
- I prefer to keep my donation anonymous
- Prefer not to say

3.2 How do you prefer to be recognized for your donation?

- Donor recognition events
- Tax receipt
- Tax receipt and thank you letter
- Tax receipt and phone call
- Prefer not to say
- Other (please specify)

3.3 How important is anonymity when making your donation?

Not important at all	Not very important	Neutral	Somewhat important	Very important	Prefer not to say
<input type="checkbox"/>					

Additional Comments:

**4. Communication**

4.1 Are you happy with the level of communication from your favourite charities?

Very unsatisfied	Somewhat unsatisfied	Neutral	Somewhat satisfied	Very satisfied	Prefer not to say
<input type="checkbox"/>					

Additional Comments:

4.2 What could be done to improve the level of communication from your favourite charities?

- E-newsletters
- In-person meetings
- Personal invitations

- Phone calls
- Social media
- Written communication
- Prefer not to say
- Other (please specify)

4.3 What research do you do before making your decision to donate to a specific charity?

- Ask around
- Call the charity directly
- Online research
- Read articles and publications
- I do not do research
- Prefer not to say
- Other (please specify)

4.4 What information would you consider in your decision to donate? (Check all that apply)

- Annual reports/communications
- Financial reports
- Fiscal responsibility
- Goals and objectives of the organization
- Impact of the work done by the organization
- Knowing someone associated with the organization
- Organization transparency
- Operating expenses (including staff salaries)
- Strategic plan
- Prefer not to say
- Other (please specify)

## 5. Donor Satisfaction

5.1 What makes you feel satisfied as a donor, please rate (5 = most satisfied, 1 least satisfied):

- How your donation is being used
- The financial priorities of the charity
- The goals and objectives of the charity
- The leadership and knowledge of the charity
- The level of impact the charity has on the community
- The reputation of the charity
- Prefer not to say

Additional Comments:

## 6. Other

6.1 Do you volunteer?

- Yes
- No
- Prefer not to say

6.2 If yes, how many hours a month do you volunteer?

- 1 to 4 hours
- 5 to 9 hours
- 10 to 19 hours
- 20+ hours
- Not Applicable
- Prefer not to say

6.3 Are you aware of planned giving? (e.g. leave a bequest in your will, transfer of ownership of life insurance policy, transfer ownership of shares, etc.)

- Yes
- No
- Prefer not to say

6.4 Please enter the first three characters of your postal code

- Prefer not to say

6.5 Please provide any additional comments

## **APPENDIX B**

### **Copy of data sharing agreement**

The Stratford Perth Community Foundation (SPCF) has partnered with the University of Waterloo Community, Health, Environment, Communications (CHEC) initiative to create and disseminate a survey that collects donor demographic information in order to capture a snapshot of philanthropy in Stratford, St. Marys, and Perth County.

The following organizations are also participating in the donor demographic survey research: United Way Perth-Huron, Stratford Festival, Stratford General Hospital Foundation, Stratford-Perth Humane Society, and Stratford-Perth Family YMCA.

### **Shared Data Agreement between Participating Organizations**

Names of participating organizations (in alphabetical order):

1. Stratford Festival
2. Stratford General Hospital Foundation
3. Stratford Perth Community Foundation
4. Stratford-Perth Family YMCA
5. Stratford-Perth Humane Society
6. United Way Perth-Huron

WE HEREBY ACKNOWLEDGE:

1. That the survey will be distributed online via SurveyMonkey.
2. That all participating organizations will have access to the same SurveyMonkey link in order to distribute the survey to potential respondents within their respective donor bases.
3. That the SurveyMonkey link will be made available to the general public through public relations and social media.
4. That the data will be kept anonymous and confidential.
5. That CHEC Initiative will monitor the SurveyMonkey data collection process.
6. That CHEC Initiative will analyze the data.
7. That CHEC Initiative will sanitize data deemed confidential.
8. That all participating organizations will – through a review of a hard copy of the survey results – share responsibility in the process of sanitizing confidential data.
9. That CHEC will provide to all participating organizations a complete summary of the sanitized data.
10. That CHEC will provide each participating organization with a tailored report, including pertinent (anonymous or sanitized) data from open-ended questions.
11. That the tailored reports will be considered the private property of the associated participating organizations.
12. That the participating organizations will not distribute to external parties their respective copies of the summary report without consent from all participating organizations.

13. That the SurveyMonkey link and account will be deleted once the data has been collected.
14. That all participating organizations will have access to the sanitized data indefinitely.
15. That any summary reports produced will attribute credit to the participating organizations.
16. That all sanitized data will be stored indefinitely by the Stratford Perth Community Foundation on the myPerthHuron site as per their data sharing agreement with the Social Research and Planning Council (Appendix 1).