The Generosity Commission:
Request for Letters of Intent and Proposals to Study High-Priority Research Issues

The Generosity Commission invites letters of intent and proposals from researchers interested in studying several critical issues of importance to the work of the Generosity Commission. Solicited proposals are due November 30, 2019, and unsolicited proposals are due January 31, 2020. More details on the submission process can be found below.

Background on the Generosity Commission

America’s culture of generosity is something that is woven into the fabric of who we are as a nation. That spirit of generosity has served the needs of our society by expanding and strengthening educational offerings, providing critical social services, inspiring innovative research, supporting vital medical care and the performing arts, and so much more.

Yet, giving and volunteering in our nation are now at risk as fewer Americans are contributing to the building of our civil society. That’s why the Generosity Commission exists. Through research, public education, and public policy recommendations our vision is to reignite this spirit of generosity to better serve who America is today and will become tomorrow.

The Generosity Commission is a nonpartisan group that brings together a breadth of stakeholders, voices, and expertise to explore profound questions that will shape the future of giving, volunteering, and other forms of civic engagement in America. A small Working Group is currently developing detailed plans for this new Commission. At its heart are questions like:

- How do we encourage volunteerism by all Americans?
- How do we create a policy environment that supports more giving in more forms by more givers?
- How do we encourage civic participation, engagement, and advocacy?
- What can we learn from the charitable traditions and practices of others?

The Generosity Commission will launch a new and needed inquiry into the role of giving and volunteering in American life on a large scale and with a goal of broad public engagement. It will include esteemed individuals in the philanthropic, nonprofit, government, business, academic, and social innovation sectors who will lead the effort and be a powerful voice to encourage the change needed to strengthen the support for the charitable sector.

Ultimately, the Generosity Commission will seek to spark a new national conversation that aims to ignite awareness, desire, and action among our citizens to be generous. The goals are to
increase giving and volunteering in its many forms from more people across all backgrounds and recognize new approaches that serve the needs of society.

Research Topics

To inform the work of the Generosity Commission, the commission invites proposals for studies that will deepen understanding of important changes in giving and volunteering including declines in the number of Americans who give and volunteer; growing awareness of the diverse ways that Americans give and volunteer; and shifts in the ways that Americans engage in civic affairs. The research should also recommend possible actions for; remedy, or accelerating encouraging trends, or at a minimum describe lines of future inquiry. In particular, the Generosity Commission seeks proposals for new research studies that address the following issues:

1. Implications for Nonprofit Organizations and Communities of the Decline in the Number of Givers and Volunteers

Data indicate that important changes are occurring in patterns of giving and volunteering in the U.S. While giving by the wealthy continues to rise, giving by middle and low-income households is falling and overall fewer Americans are making charitable contributions. The number of Americans who volunteer is also declining. However, what is not yet clear is how these changes are affecting nonprofit organizations and the people and communities these organizations serve. To fill this gap in understanding, the Generosity Commission will support research that explores how nonprofits and their stakeholders are being affected by these trends in giving and volunteering.

Historical trends and projections of the possible ten-year impact on nonprofits of the changes in giving and volunteering will help inform thinking about the steps that are needed to bolster the positive aspects of the trends and reduce their negative consequences. To study the issues described above, researchers may want to draw insights from previous research studies; analyze existing data sources; and/or mount new data collection efforts, such as a new survey of nonprofit organizations. (See Appendix A for a list of existing U.S. databases on philanthropy developed by the Indiana University Lilly Family School of Philanthropy. For information about a Data Collaborative that has emerged from the GivingTuesday project, please see https://www.givingtuesday.org/data and email data@givingtuesday.org.)

In particular, research is needed that examines: how giving and volunteering trends are affecting nonprofit organizations in different fields (e.g., human services, health, arts) and of different sizes and locations; and how these trends are impacting rural vs. urban nonprofits,
direct service vs. advocacy organizations, and nonprofits headed by and serving individuals of different racial and ethnic groups.

Research should explore how changes in giving and volunteering patterns impact the flow of resources into different kinds of nonprofits and how they affect organizational decision making and operations. For example, research might explore whether increases in the dollars donated by wealthy donors and declines in the number of smaller donors affects nonprofit board governance, fundraising activities, and programs.

2. Uncovering the Causes of Recent Trends in Giving and Volunteering and Identifying Proposals to Remedy the Concerning Developments

To inform the Generosity Commission’s efforts to spur giving and volunteering in the U.S., it will be helpful for the Commission to have a better understanding of the roots of recent trends. What explains the recent declines in giving by middle and low-income households and the falloff in volunteering rates? Researchers are thus invited to explore the impact on giving and volunteering of a broad range of possible causative factors, including shifting generational patterns of giving and volunteering, changes in tax law, the increasingly unequal distribution of income and wealth in the U.S., new economic insecurities facing many households, the decline of religious participation, and many other potential influences. How are these and other factors affecting giving and volunteering? Do some of the factors seem especially important in influencing levels of giving and volunteering? What are promising policy and other ideas for reversing the concerning aspects of recent trends in giving and volunteering?

3. Understanding and Measuring Diverse Forms of Giving and Volunteering

Giving and volunteering take many different forms, including peer-to-peer giving, religious giving, on-line giving, impact investing, crowdfunding, giving to political and social causes, giving through giving circles and other intermediaries, and giving through cultural family associations. How well do current measures of giving and volunteering capture the diverse forms these activities now take, and how can we do a better job of measuring these diverse forms?

Understanding diverse forms of giving and volunteering will help determine whether new forms of these activities are replacing traditional giving to and volunteering with 501(c)(3), charitable nonprofits; whether new kinds of giving and volunteering are expanding but not yet offsetting the drop in traditional giving and volunteering; or whether these new kinds of giving and volunteering are making headlines but do not really have the potential to make up for the fall in traditional giving and volunteering.
4. Where Giving and Volunteering Fit Among Different Types of Civic Engagement

Using a broad definition of civic engagement, Americans engage in civic affairs in diverse ways, including through giving and volunteering, through political and non-political pursuits, through formal and informal approaches, and through more active and more passive activities. Are giving and volunteering becoming more or less significant forms of civic engagement compared with other types of engagement, and why? What is the impact of any changes in the importance of giving and volunteering as forms of civic engagement?

5. Relationship between Giving and Volunteering and a Healthy Democracy

Philanthropic activities, including both giving and volunteering, can make important contributions to our society by helping to solve social problems, strengthening civil society, and in many other ways as well. But these activities can also have a downside, by advancing the interests of the few over the many, or worsening inequality by favoring projects that benefit the wealthy. What is the relationship between giving and volunteering and a robust democracy? In what ways does philanthropy support democracy, and in what ways does philanthropy undermine democracy? Has philanthropy become more or less supportive of democracy in recent decades? How is the increasing inequality of income and wealth in the U.S. affecting both giving and volunteering in our nation and the impact of these activities on our democracy? What difference does it make to our democracy that the number of middle and lower-income Americans who give is declining and that volunteering rates are also falling? What can be done to strengthen the pro-democracy impact of philanthropy?

The Generosity Commission Policy on Information Sharing

The Generosity Commission is committed to information sharing and transparency. Our intent is to create a national conversation on giving and volunteering. We expect that researchers should build on the ideas and conclusions of others so we can accelerate knowledge gained from the collective work. Therefore, we believe that published research resulting from our funding and the supporting data should be available to all. We have adopted an Open Access policy that enables the unrestricted access and reuse of all research funded, in whole or in part, by The Commission, including any underlying data sets.

Our Open Access policy contains the following elements:

- Research reports and associated data sets will be published on “Open Access” Terms and be made widely available upon delivery to The Generosity Commission. We
recommend publishing under the Creative Commons Attribution 4.0 Generic License CC BY or CC BY SA. This permits all users of the publication to copy and redistribute the material in any medium or format and modify and build upon the material, including for any purpose (including commercial) without further permission or fees being required. At the same time, it requires proper citing of the original work. See more details on this form of copywrite at: https://creativecommons.org/share-your-work/licensing-types-examples/#by

- The Generosity Commission is working to accelerate learning and progress in giving and volunteering, which results in the need for this open access policy. However, for researchers looking to publish their results in an academic journal that does not abide by open access policies, we will consider options for publishing in this manner or potentially pay for the report to be public. These requests will be handled on a case by case basis.

Guidelines for Letters of Intent and Proposals

The Generosity Commission will both invite proposals from researchers and accept unsolicited proposals. The Commission currently expects to award approximately $800,000 - $850,000 to invited proposals and $150,000 - $200,000 to unsolicited proposals. Researchers interested in submitting an unsolicited proposal should first submit a letter of intent of no more than three pages that describes:

- Questions/Issues to be Addressed – Please describe in some detail the major questions/issues to be addressed in the proposed study.
- Methodology – Please describe the methodology that will be used in the research.
- Timeline – Please provide a specific timeline for the study. The current timeline for the Generosity Commission is for the Commission to be making recommendations in Q1 2021. Research results must be available to the Commission no later than December 31, 2020.
- Budget – Please indicate the overall project budget. Note that the Generosity Commission will pay overhead costs of up to ten percent of the overall budget.
- Qualifications – Please describe the qualifications of the main researcher(s) and include an abbreviated CV that does not count against the page limit.

Letters of Intent should be submitted electronically by November 15, 2019 via email to contact@thegenerositycommission.org with the subject line, “Letter of Intent.” If your project is accepted, you will be invited to submit a full proposal by January 31, 2020.

Researchers who are invited to submit full proposals will be asked to submit proposals of no longer than ten pages that include the following information:
• Questions/Issues to be Addressed – Please describe in some detail the major questions/issues to be addressed in the proposed study.
• Literature Review – Please discuss the major, relevant, existing literature and how the proposed study will build on what is already known.
• Methodology – Please describe the methodology that will be used in the research.
• Dissemination Plan – Please describe the audiences that the researcher will seek to reach with study findings and the communications vehicles that will be used. The Generosity Commission expects that researchers will disseminate research findings to both academic and non-academic audiences.
• Timeline – Please provide a specific timeline for the study. The current timeline for the Generosity Commission is for the Commission to be making recommendations in Q1 2021. Research results must be available to the Commission no later than December 31, 2020.
• Budget – Please provide a line-item budget. No more than ten percent of the overall budget may be allocated to overhead.
• Qualifications – Please describe the qualifications of the main researcher(s) and include an abbreviated CV that does not count against the page limit.

Solicited full proposals should be submitted electronically by November 30, 2019 to the research page on the www.thegenerositycommission.org website. Unsolicited full proposals should be submitted by January 31, 2020. Questions regarding this RFP may be addressed to contact@thegenerositycommission.org
## Appendix A U.S. Databases on Philanthropy

Indiana University Lilly Family School of Philanthropy

*Updated on June 10, 2019*

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American Community Survey

Basic description:

The American Community Survey (ACS) is an ongoing survey by the U.S. Census Bureau. It regularly gathers information previously contained only in the long form of the decennial census, such as ancestry, educational attainment, income, language proficiency, migration, disability, employment, and housing characteristics. These data are used by many public-sector, private-sector, and not-for-profit stakeholders to allocate funding, track shifting demographics, plan for emergencies, and learn about local communities. It is the largest household survey that the Census Bureau administers. Data files include summary data from the previous five years. The most recently available data is from 2017.

Source: U.S. Census Bureau

Years available: Ongoing, starting from 2007

Link to database description: https://www.census.gov/programs-surveys/acs

American National Election Studies (Wave 22)

Brief description:

The American National Election Study (ANES), begun in 1948, is the oldest continuous series of survey data investigating electoral behavior and attitudes in the United States. The focus of the survey includes voter perceptions of the major political parties, the candidates, national and international issues, and of the importance of the election. Also explored are voter expectations about the outcome of the election, degree of voter interest in politics, political affiliation and voting history, as well as participation in the electoral process. ANES interviews are conducted before and after presidential elections and after national congressional elections. Post-election interviews include questions on actual voting behavior and voter reflections about the election outcome.

Knowledge Networks conducted a study focusing on charitable donations, on behalf of Indiana University. The survey was conducted using the American National Election Studies (ANES) panel sample (i.e. wave 22). This sample is comprised of U.S. citizens in the general population aged 18 or older as of November 4, 2008. The survey was fielded between October 22 and November 30, 2009.

Source: A collaboration of Stanford University and the University of Michigan, with funding by the National Science Foundation
**Years available:** 2009 for Wave 22 (Full ANES data are available since 1948.)  
**Link to database description:** [https://electionstudies.org/data-center/](https://electionstudies.org/data-center/)

**American Time Use Survey**

**Brief description:**

The American Time Use Survey (ATUS) provides nationally representative estimates of how, where, and with whom Americans spend their time, and is the only federal survey providing data on the full range of nonmarket activities, from childcare to volunteering.

ATUS data files provide information collected from interviews conducted from 2003 to 2017. They can be linked to data files from the Current Population Survey (CPS).

ATUS data were also provided to the United Nations' Gender Statistics Database. The database allows researchers to generate time-use estimates across different countries and demographic groups. These data help researchers better understand the roles that men and women play in society in different countries. ATUS data were also included in the Organization for Economic Co-operation and Development's Society at a Glance: OECD Social Indicators 2006.

**Source:** Bureau of Labor Statistics  
**Years available:** 2003-2017  
**Link to database description:** [http://www.bls.gov/tus/overview.htm](http://www.bls.gov/tus/overview.htm)

**The Blackbaud Institute Index**

**Basic description:**

Tracking more than $37 billion from approximately 9,000 organizations in U.S.-based charitable giving, the Blackbaud Institute Index is updated each quarter and reports year-over-year percent changes as well as giving to date for the last 12 months. Featuring overall giving trends, the Index can be viewed by organization size and sector.

**Source:** The Blackbaud Institute  
**Years available:** 2010-2019  
**Links to database description:** [https://institute.blackbaud.com/the-blackbaud-institute-index/](https://institute.blackbaud.com/the-blackbaud-institute-index/)
**Consumer Expenditure Survey**

**Brief description:**

The Consumer Expenditure Survey (CE) collects information from the Nation’s households and families on their buying habits (expenditures), income, and household characteristics. The strength of the survey is that it allows data users to relate the expenditures and income of consumers to the characteristics of those consumers. The survey consists of two components, a quarterly Interview Survey and a weekly Diary Survey, each with its own questionnaire and sample.

The Interview survey collects data on monthly expenditures for housing, apparel and services, transportation, health care, entertainment, personal care, reading, education, food, tobacco, cash contributions, and personal insurance and pensions, as well as income and characteristics data.

Data collection is carried out by the U.S. Census Bureau under contract with Bureau of Labor Statistics. Prior to 1980, the Consumer Expenditure Survey was conducted about every 10 years. Since that time, it has been an ongoing survey.

In the Interview Survey, each consumer unit is interviewed every 3 months over five calendar quarters. In the initial interview, information is collected on demographic and family characteristics and on the consumer unit’s inventory of major durable goods. Expenditure information also is collected in this interview, but is used only to prevent duplicate reporting in subsequent interviews. Expenditure information is collected in the second through the fifth interviews using uniform questionnaires. Income and employment information is collected in the second and fifth interviews. In the fifth interview, a supplemental section is administered in order to account for changes in assets and liabilities over a one-year period.

**Source:** The survey data are collected for the Bureau of Labor Statistics by the U.S. Census Bureau.

**Years available:** 1972-73, 1980-81, and every year since 1990

**Link to database description:** [http://www.bls.gov/cex/](http://www.bls.gov/cex/)
Current Population Survey Volunteer Supplement Data

Brief description:

The Current Population Survey (CPS) is the source of the official government statistics on employment and unemployment. It has been conducted monthly for over 50 years. The September Volunteer Supplement was conducted as a supplement to that month’s CPS and conducted in approximately 56,000 interviewed households across the country.

The Volunteer Supplement questions were asked of persons age 15 years old or older. Data are provided on participation in volunteer activities during a one-year period from September 1, 2008 to the date of the interview, the frequency of that activity, types of organizations volunteered for, and the types of activities for volunteer service. Data are also provided on participation in volunteer activities in a foreign country and in volunteer activities more than 120 miles from home. Since 2008, CPS Volunteer Supplement survey has also included one question on charitable giving.

CPS comprehensive data are available on the employment status, occupation, and industry of persons 15 years old and over. Also shown are personal characteristics such as age, sex, race, marital status, veteran status, household relationship, educational background, and Hispanic origin.

States, regions and divisions are identified in their entirety. Within confidentiality restrictions; indicators are provided for 278 selected core-based statistical areas (CBSA), 30 selected combined statistical areas (CSA), 217 counties, and 76 central cities in multi-central city core-based statistical areas or combined statistical areas. Also within confidentiality restrictions, indicators are provided for metropolitan/non-metropolitan, central city/balance metropolitan, and CBSA size.

Source: Conducted by the Bureau of the Census for the Bureau of Labor Statistics

Years available: Annual data since 2002, but several major changes affected the 2003 CPS (see http://www.nber.org/data/cps_extract.html for details).

Foundation Center By Candid

Basic description:

Foundation Center by Candid is an American 501(c)(3) nonprofit organization headquartered in New York City, United States. Its mission is "to strengthen the social sector by advancing knowledge about philanthropy in the U.S. and around the world." Foundation Center maintains comprehensive databases on grant-makers and their grants; issues a wide variety of print, electronic, and online information resources; conducts and publishes research on trends in foundation growth, giving, and practice; and offers education and training programs online and at its five regional hubs and more than 400 Funding Information Network locations.

Source: Foundation Center

Years available: 2002-2015

Link to database description: http://foundationcenter.org/gain-knowledge/foundation-data

Fundraising Effectiveness Survey/Growth in Giving Reports

Basic description:

The Fundraising Effectiveness Project (FEP) distributes the Fundraising Effectiveness Survey (FES) to donor software firms in order to collect data about fundraising organizations. The donor software firms facilitate data collection from nonprofits, but nonprofits prepare their own Fundraising Performance Reports. Therefore, data comes directly from the nonprofit organizations. For the 2018 report, data was acquired through partnerships with five donor software firms: Bloomerang, DonorPerfect, Neon, Blackbaud, and ClearView. The project was established by the Association of Fundraising Professionals (AFP) and the Center on Nonprofits and Philanthropy at the Urban Institute in 2006. The first survey, launched in 2006, collected data for giving years 2004 and 2005. Beginning in 2009, the FEP releases yearly reports. In addition, they occasionally release supplemental reports on donor retention. More recently, they have begun releasing quarterly updated reports. The most recent report was released in month (October 2018) for the second quarter (Q2) of 2018 covering fundraising data through June 2018.

The Fundraising Effectiveness Project focuses on organization level data. Data in the FEP dataset includes funds raised, gains and losses in giving compared to the previous fiscal year, number of donors and donor retention, gift retention, and information about fundraising goals. The dataset also includes basic organizational data (size, revenue, etc.). The dataset
differs over time, but the project provides adjustments and analyses to allow for year to year comparison. Furthermore, because many organizations participate each year, the dataset includes a panel or organizations, which provides the best year to year analysis. The panel data includes organizations who have raised at least $5,000 and have had at least 25 donors every year between 2013 and 2018.

**Source:** Partnership between the Association of Fundraising Professionals (AFP) and the Center on Nonprofits and Philanthropy at the Urban Institute

**Years available:** 2009-2018

**Link to database description:** [http://afpfep.org/](http://afpfep.org/)

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**Gallup’s WorldView World Poll**

**Brief description:**

Gallup’s WorldView World Poll is an ongoing research project carried out in 153 countries that together represent about 95% of the world’s population. The survey asks questions on many different aspects of life today including charitable and volunteering behavior.

In most countries surveyed, 1,000 questionnaires are completed by a representative sample of individuals living in urban centers. In some large countries, such as China and Russia, samples of at least 2,000 are collected, while in a small number of countries, where polling is difficult, the poll covers 500 – 1,000 people but still features a representative sample.

Respondents are over 15 years old and samples are probability-based. A standard set of core questions is used around the world. In some regions, supplemental questions are asked in addition to core questions. The questionnaire is translated into the major languages of each country. Surveys are carried out by telephone or face-to-face depending on the country’s telephone coverage.


**Source:** Gallup

**Years available:** Annual starting in 2006

**Link to database description:** [http://www.gallup.com/se/126848/WorldView.aspx](http://www.gallup.com/se/126848/WorldView.aspx)
General Social Survey

Brief description:

The General Social Survey (GSS) is one of NORC’s flagship surveys and our longest running project. The GSS started in 1972 and completed its 26th round in 2006. The GSS contains a standard ‘core’ of demographic and attitudinal questions, plus topics of special interest. Many of the core questions have remain unchanged since 1972 to facilitate time trend studies as well as replication of earlier findings. The GSS takes the pulse of America and is a unique and valuable resource. It is the only survey that has tracked the opinions of Americans over an extended period of time.

Source: National Opinion Research Center (NORC) at the University of Chicago

Years available: 1972-2018 (before 1994, data available for almost every year, and after 1994, data available for every two years)

Link to database description: http://gss.norc.org/About-The-GSS

Giving USA

Giving USA, the longest-running and most comprehensive report on charitable giving in the U.S., provides estimates for total giving in the U.S. Giving USA uses data from a number of sources including publicly available reports, news stories, and websites to estimate giving by individuals. In addition, Giving USA provides separate estimates for giving by itemizers and non-itemizers. Giving USA includes estimates for giving by individuals, corporations, foundations, and bequests.

Source: Partnership between the Indiana University Lilly Family School of Philanthropy and Giving USA Foundation

Years available: 1978-2018

Link to database description: https://givingusa.org/

Global Philanthropy Indices

Basic description:

The Global Philanthropy Environment Index (GPEI, formerly Index of Philanthropic Freedom), first published in 2015 by the Center for Global Prosperity at the Hudson Institute, examines how favorable countries’ policies are to philanthropy, both domestically and internationally. Indiana University Lilly Family School of Philanthropy released the new GPEI report in 2018, which included experts from 79 countries and economies sharing their
knowledge about the enabling conditions for philanthropy in their economies with the rest of the world. In the study, country experts assess the philanthropic environment using several criteria: 1) conditions for NGO formation/registration, operations, and dissolution; 2) regulations and tax incentives for domestic donations; 3) regulations and incentives for cross-border philanthropic flows; 4) political environment; and 5) socio-cultural environment. With the addition of two new sets of indicators (political and socio-cultural) in the scoring system, the 2018 GPEI provides a comprehensive vision of the facilitating and inhibiting forces that shape philanthropy around the world. This new edition also includes the publication of regional reports, highlighting the importance of the surrounding social and political environmental forces in shaping the country’s philanthropic landscape.

The Global Philanthropy Resource Flows Index (GPRFI, formerly Index of Global Philanthropy and Remittances), first published in 2006 by the Center for Global Prosperity at the Hudson Institute, provides comprehensive information on official, private investment, philanthropic and remittances flows from developed and emerging economies to the developing world. It is widely used by policymakers and practitioners in philanthropy and government aid in both bilateral and multilateral government institutions, universities, foundations, charities, and religious organizations. It was cited in Foreign Affairs as a “one stop compendium of the best available data on global philanthropy.” The GPRFI documents the magnitude of contributions from governments, foundations, corporations, private and voluntary organizations, religious organizations, universities, and remittances from individuals, while also reporting on new and innovative private giving trends. The most recent report was released in March 2017. This edition collects data from 28 OECD donor countries, and eleven emerging countries (Brazil, China, Colombia, India, Indonesia, Kenya, Mexico, South Africa, Tanzania, Turkey, and Uganda). The last report shows that 84 percent of all donors’ total economic engagement with the developing world is through private financial flows, with only 16 percent from government aid.

Source: Indiana University Lilly Family School of Philanthropy

Years available: 2006-2016

Link to database description: https://globalindices.iupui.edu/

Health and Retirement Study

Basic description:

The Health and Retirement Study (HRS) is a longitudinal survey of a representative sample of Americans over age 50 conducted by the Survey Research Center (SCR) at the Institute for Social Research (ISR) at the University of Michigan in Ann Arbor and supported by the National Institute on Aging (NIA). The study interviews approximately 20,000 respondents every two years on subjects like health care, housing, assets, pensions,
employment and disability. The study is managed through a cooperative agreement between
the NIA, which provides primary funding, and the ISR, which administers and conducts the
survey. Beginning in 2012, HRS began adding genetic information from consenting
participants to its database. The economic measures captured by the data in the HRS are
regarded as being of very high quality.

**Source:** The Survey Research Center (SCR) at the Institute for Social Research (ISR)
at the University of Michigan in Ann Arbor and the National Institute on Aging
(NIA)

**Years available:** 1992-2016

**Link to database description:** [http://hrsonline.isr.umich.edu/](http://hrsonline.isr.umich.edu/)

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**Human Needs index**

**Basic description:**

The HNI was developed in a unique collaboration between the Indiana University Lilly
Family School of Philanthropy and The Salvation Army. It provides an analysis of The
Salvation Army’s rich, enduring, and consistent collection of service data to expand the
pathways through which individuals and communities in poverty may be identified. When
combined with an assessment of governmental data, the HNI provides a new lens through
which to understand human need across the U.S. Unlike other traditional measures of poverty,
the HNI comprises indicators that represent need substantiated on consumption rather than
income. Thus, the HNI’s greatest strength is that it illustrates a more intimate portrayal of
need than any other index.

Another important contribution of the HNI is that it provides a reliable instrument for
measuring human need in near real time, and for tracking trends over time. The advantage of
this approach is that it provides critical observations informing the work of nonprofit
organizations and public policymakers in reducing poverty.

**Source:** Partnership between the Indiana University Lilly Family School of Philanthropy
and The Salvation Army

**Years available:** 2004-2018
IRS Individual Tax Statistics

Brief description:

IRS Individual Tax Statistics (Zip Code Data) are based on individual income tax returns filed with the IRS. Within each ZIP code, data are classified by size of adjusted gross income. There are no data about where the giving goes, demographic characteristics of the tax filer, or attitudes and values.

Source: IRS

Years available: Tax years 1998 and 2001 (for free); 2002-2018

Link to database description:
SOI Tax Stats - Individual Public-Use Microdata Files:

IRS Tax-Exempt Organizations Statistics

Brief description:

Machine-readable data from certain electronic 990 forms filed with the IRS from 2013 to present are available for anyone to use via Amazon S3.

Form 990 is the form used by the United States Internal Revenue Service to gather financial information about nonprofit organizations. Data for each 990 filing are provided in an XML file that contains structured information that represents the main 990 form, any filed forms and schedules, and other control information describing how the document was filed. Some non-disclosable information is not included in the files.

This data set includes Forms 990, 990-EZ and 990-PF which have been electronically filed with the IRS and is updated regularly in an XML format. The data can be used to perform research and analysis of organizations that have electronically filed Forms 990, 990-EZ and 990-PF. Forms 990-N (e-Postcard) are not available with this data set. Forms 990-N can be viewed and downloaded from the IRS website.

Source: IRS

Years available: 2013 – Present

Link to database description:
Registry of Open Data on AWS: https://registry.opendata.aws/irs990/
Million Dollar List

Basic description:

The Million Dollar List is a record of publicly announced charitable gifts of $1 million or more since 2000 given by U.S. residents, corporations, private foundations, and other grantmaking nonprofits to domestic or international entities across a range of charitable subsectors. The list is updated on an ongoing basis.

The goal of the Million Dollar List is to create an accurate picture of large gifts and how they fit into the landscape of giving in general. Data for the list come from donors and organizations that self-report, and from media reports and other publicly available sources researched by the Indiana University Lilly Family School of Philanthropy.

Source: Indiana University Lilly Family School of Philanthropy

Years available: 2000-2016

Link to database description: https://milliondollarlist.org/

Nonprofit Research Collaborative Nonprofit Fundraising Study

Basic description:

The Nonprofit Research Collaborative (NRC) surveys nonprofit organizations in the United States and Canada two times per year. The NRC is a collaboration between various surveys that were previously fielded independently. To reduce participant burden and increase data quality, these surveys were combined to one planned series of surveys. The NRC focuses on organization level data. Data in the NFS dataset includes changes in fundraising, fundraising methods, fundraising goals, and organization characteristics. In addition, the 2018 survey (covering fundraising year 2017) asked about expectations resulting from the passage of TCJA. The dataset includes information about fundraising organizations in the United States and Canada.

Source: Partnership of several organizations in the U.S. and Canada

Years available: 2010-2018

Link to database description: https://npresearch.org/
Philanthropy Panel Study

**Brief description:**

Philanthropy Panel Study (PPS) is the Indiana University Lilly Family School of Philanthropy’s signature research project that aims to follow the same families’ philanthropic behaviors throughout their lives. The PPS is conducted in conjunction with the University of Michigan Institute for Social Research’s Panel Study of Income Dynamics, which has followed the same households since 1968. The philanthropy component was added in 2001. The most recent wave contains data on over 9,000 families.

The PPS is the only study that surveys giving and volunteering by the same households over time as families mature, face differing economic circumstances and encounter changes in their family size, health and other factors. It also is the only data available that asks families extensively about their wealth and philanthropy as well as income and other relevant factors. Because the PSID employs genealogical sampling (those who are born or marry into sample families are included thereafter), the panel will allow researchers to study the transmission of philanthropic behaviors across generations and to study the relationship between helping family members and helping anonymous others. Finally, the panel data will help us distinguish types of donors who respond differently to economic, demographic, and environmental factors.

**Source:** Indiana University Lilly Family School of Philanthropy

**Years available:** Every two years (starting from 2001)

**Link to database description:**
https://philanthropy.iupui.edu/research/current-research/philanthropy-panel-study.html

Social Capital Community Benchmark Study

**Brief description:**

The 2000 Social Capital Community Benchmark Survey is the largest-ever on the civic engagement of Americans. It measures everything from levels of giving blood, to hanging out with friends, to participating in various groups and associations, to levels of trust, to participation in group arts and group sports, to the diversity of our friendship patterns. The survey was designed and conducted by the Saguaro Seminar at the John F. Kennedy School of Government, Harvard University. It builds upon two comprehensive efforts: the work of Professor Robert Putnam, Harvard University (author of Bowling Alone: Collapse and Revival of the American Community) and strategies for civic revitalization outlined in Better Together, a recent Saguaro Seminar report.
The overall sample size is 29,703. The Survey comprises both a national sample of 3,003 respondents and community respondents in 42 communities nationwide (across 29 states) covering an additional 26,700 respondents. The national sample of the continental U.S. contains an over-sampling of black and Hispanic respondents; 501 non-Hispanic blacks and 502 Hispanics were surveyed.

The survey, averaging 26 minutes, was conducted by telephone using random-digit-dialing during July - November 2000. Interviewing in the national survey and in most of the community surveys was concluded in October.

The 2006 Social Capital Community Benchmark Survey is comprised of a national adult sample of 2,741 respondents and 22 communities sample (11 of which were from the 2000 SCCBS) totaling 9,359 community respondents. The overall sample size is 12,100. Interviews averaged 32 minutes in length and were conducted by telephone using random-digit-dialing by experienced interviewers.

Additionally, based on the 2000 survey and other surveys in 2001/2002, the Saguaro Seminar has distilled down the 25-minute Social Capital Community Benchmark Survey into a Short Form that has 5-10 minutes of questions. For documentations on the short-form survey, visit http://www.hks.harvard.edu/saguaro/measurement/measurement.htm#shortform.

Source: Survey designed and conducted by the Saguaro Seminar at the John F. Kennedy School of Government, Harvard University. Data released by the Roper Center, University of Connecticut.

Years available: 2000 and 2006

Link to database description:


Study of High Net Worth Philanthropy

Brief description:

The Bank of America Study of High Net Worth Philanthropy (HNW Study) is the most in-depth quantitative study of high net worth households aimed at understanding not only their charitable practices, but also the motivations behind them. Bank of America, one of the leading providers to both philanthropic individuals and institutions, partnered with the Indiana University Lilly Family School of Philanthropy, one of the nation’s leading academic centers for the study and practice of philanthropy.

The purpose of the HNW Study was to assess charitable giving and philanthropic activities of high-income and high net worth households. To qualify for the study, households had an annual household income over $200,000 and/or net worth over $1,000,000 (excluding primary residence). While the study has been published every other year since 2006, the methodology changed between the 2014 wave and the 2016 wave (giving years 2013 and 2015, respectively). From 2016, this series of biennial studies is based on a nationally representative sample of wealthy donors, including deeper analysis based on age, gender, race and sexual orientation. This landmark study has major implications for the philanthropic sector: those who donate, the nonprofits that benefit from those donations, and the financial institutions that support them.

As the longest running study on HNW philanthropy, this study offers some of the best available data on giving and volunteering behavior by HNW households. Each wave of the survey asked detailed questions about how much respondents donated overall and to a variety of subsectors or causes (e.g., basic needs, religious/spiritual, health care or medical research, youth and family services, etc.). In addition, given the large number of disasters and associated giving in 2017 [1], the 2018 survey also asked how much respondents donated to disaster relief efforts. Each wave also includes questions that focus on a wide range of topics related to philanthropic attitudes and behaviors (motivations for giving, satisfaction with giving decisions, giving vehicles, intergenerational giving, board service, etc.). Furthermore, the recent waves of the study included questions related to changes in tax policy.

Source: Indiana University Lilly Family School of Philanthropy

Years available: Every two years (starting from 2006)

Link to database description:
https://philanthropy.iupui.edu/research/current-research/index.html
Survey of Consumer Finances

Brief description:

The Survey of Consumer Finances (SCF) is a triennial survey of the balance sheet, pension, income, and other demographic characteristics of U.S. families. The survey also gathers information on the use of financial institutions. The SCF is the only fully representative source of information on the broad financial circumstances of U.S. households. No other survey collects data on the household finances of a probability sample of Americans.

In prior rounds of the survey NORC conducted 4,500 interviews; for 2010 the survey collected information from approximately 6,500 respondents. The latest available results are those of the 2016 survey. Two general types of data set are provided – first, the full public data set is given in DAP/SAS, Stata and ASCII computer formats; second, an extract file of summary variables is provided in Microsoft Excel spreadsheet format.

Source: Sponsored by the Federal Reserve Board in cooperation with the Department of the Treasury. Since 1992, data have been collected by the National Organization for Research at the University of Chicago (NORC).

Years available: Every three years from 1983, the most recent data available is 2016 wave

Link to database description: