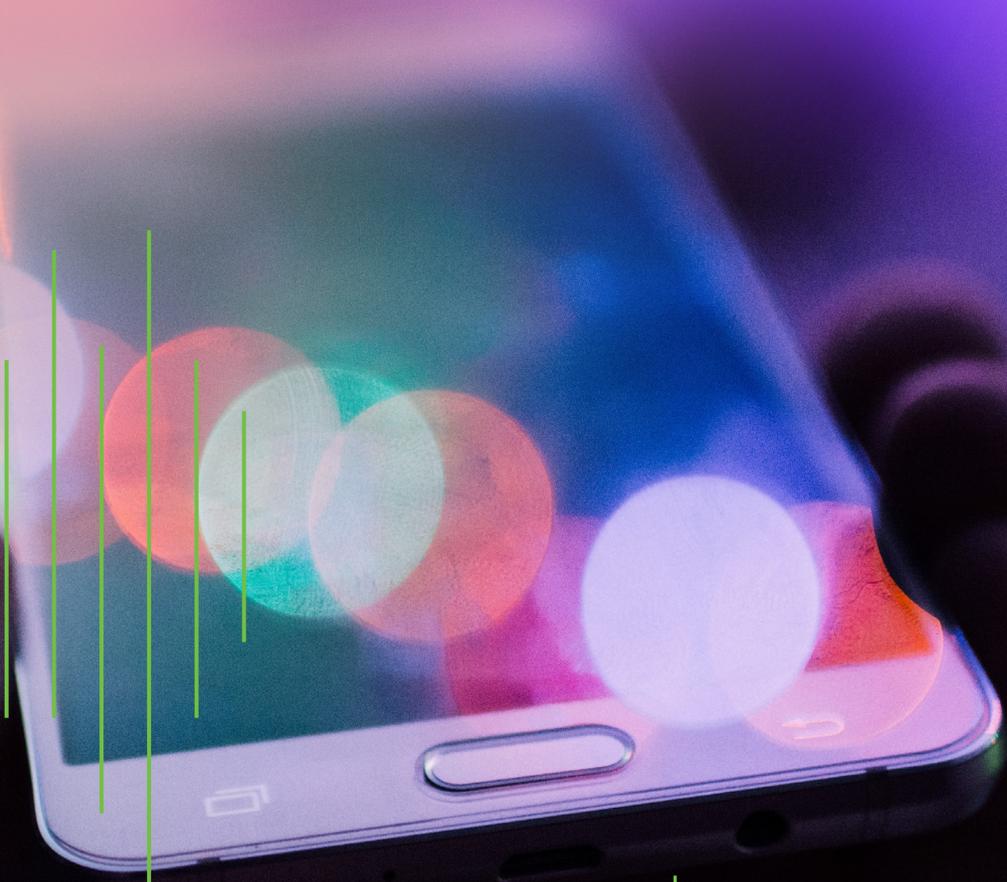




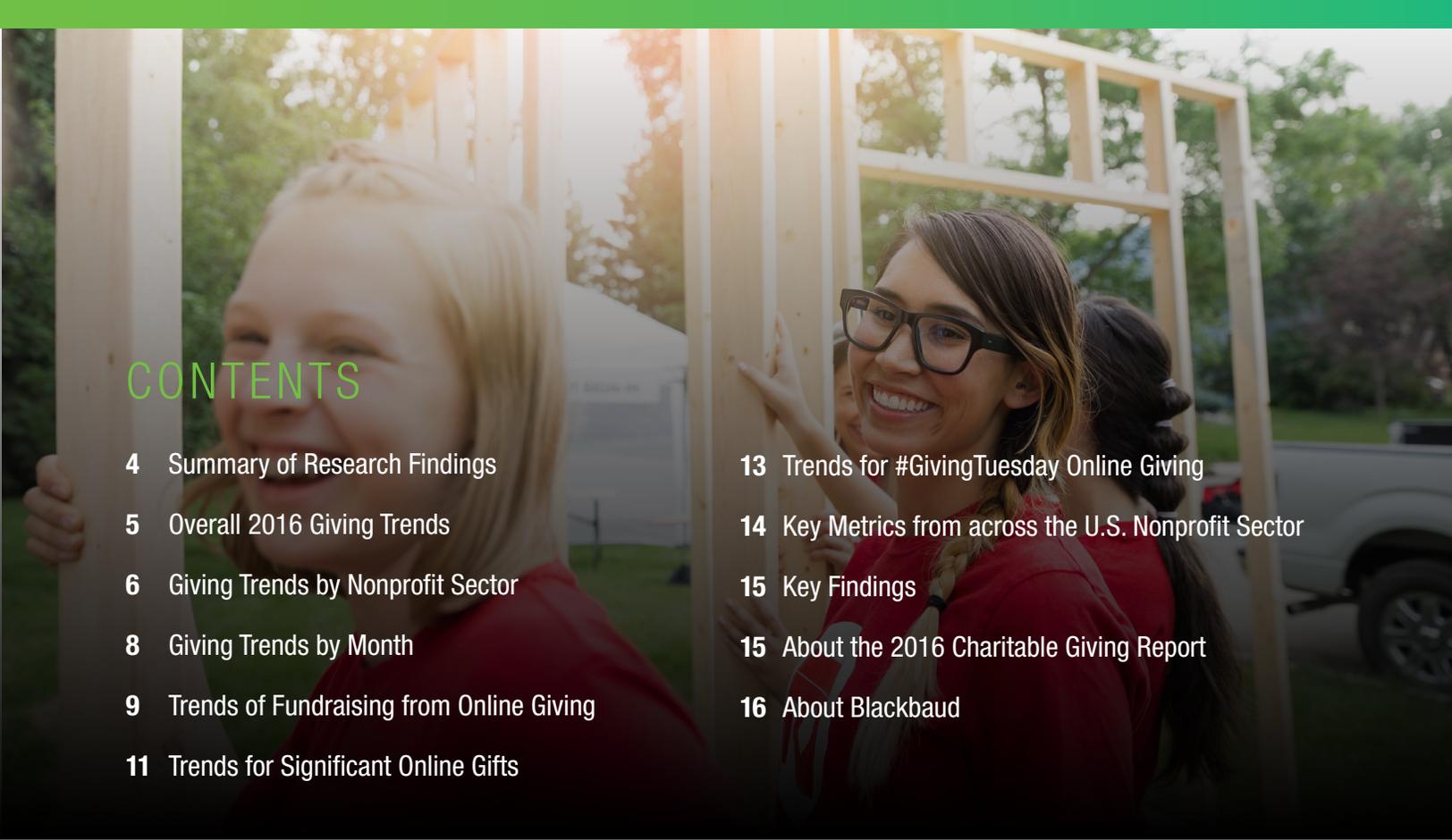
Charitable Giving Report

How Nonprofit Fundraising Performed in 2016



BLACKBAUD
INSTITUTE

FOR PHILANTHROPIC IMPACT



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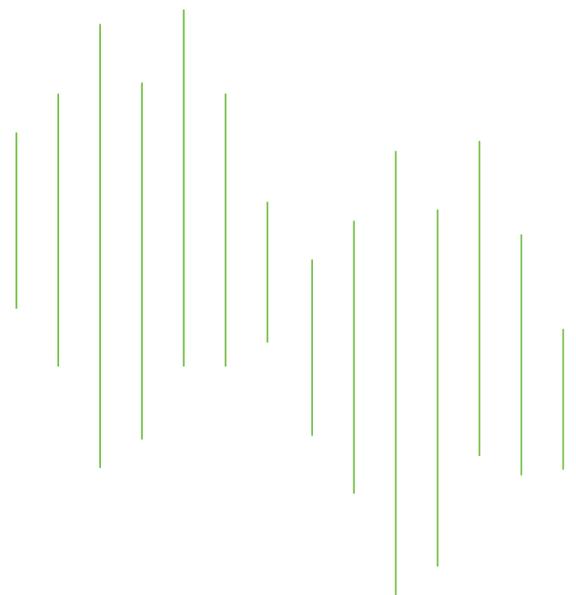
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INTRODUCTION

The *Charitable Giving Report* leverages The Blackbaud Index to provide a year-in-review based on the largest analysis of overall and online giving data anywhere in the nonprofit sector. This is the fifth consecutive year that Blackbaud has published the *Charitable Giving Report* and we believe it can help inform fundraising strategies across the nonprofit sector for years to come. To commemorate this milestone, we asked some of our friends across the social good space to share their thoughts on how these fundraising trends have shaped the sector and where things are headed in the future. You'll find their quotes throughout this report.

The 2016 *Charitable Giving Report* includes overall giving data from 6,845 nonprofit organizations representing **\$23 billion in total fundraising** from 2016. The report also includes online giving data from 5,210 nonprofits representing **\$2.6 billion in online fundraising** from 2016.

As in the past, significant work has gone into building the analysis model and making sure the data meets strict requirements. This includes collecting giving data on a monthly basis over a period of 24 months, checking and rechecking for anomalies, classifying each organization by sector using the National Taxonomy of Exempt Entities (NTEE) code, matching and retrieving reported total revenue information, and applying statistical expertise to the data.

In addition to this year-in-review report, The Blackbaud Index is updated on a monthly basis to showcase the latest charitable giving trends. Visit www.blackbaud.com/blackbaudindex for additional insights, to chart your organization's performance against the index, and to sign up for free monthly fundraising alerts.

Summary of Research Findings

In 2016, overall charitable giving in the United States increased 1.0% on a year-over-year basis. Large organizations grew by 1.0%; medium organizations increased 1.7%; and small nonprofits experienced flat growth compared to the same time period in 2015.

Online giving grew 7.9% in 2016 compared to 2015. Large organizations grew by 6.3%; medium-sized organizations grew 11.4%; and small nonprofits grew 8.1% on a year-over-year basis.

The percentage of total fundraising that came from online giving reached a record high in 2016. About 7.2% of overall fundraising revenue, excluding grants, was raised online. The growth in digital giving also means significant gifts are shifting to online. Of all online donations in 2016, 10% were \$1,000 or more, and 41% of nonprofits received at least one online donation of \$1,000 or more last year.

In 2016, 17% of online transactions were made using a mobile device. This was a 21% year-over-year increase and represents a continuing shift by donors to consumer-oriented engagement channels. Continued growth in #GivingTuesday also demonstrates how social good movements continue to increase their impact on charitable giving.

Giving to Arts & Culture and K–12 Education sectors grew the most in 2016. The Healthcare sector experienced the largest decrease in year-over-year fundraising with a 4.5% drop. Public & Society Benefit nonprofits had a year-over-year decrease in fundraising performance for the second consecutive year.

2016 showed a continuation of lower year-over-year growth rates in overall charitable giving and strong growth in online donations. A strong U.S. economy, increased consumer confidence, and other positive trends had minimal impact on giving growth.

While there were numerous reports of increased giving to a number of nonprofits after the U.S. presidential election, there is no evidence that this resulted in a significant rise in overall giving.

The U.S. nonprofit sector is entering a period where sustainable growth depends on embracing best practices in donor engagement, retention, and stewardship. This includes using data and analytics to drive informed decision making.

“As our world faces mounting challenges, fragmented interests, and resource scarcity, many foundations are taking a more systemic and holistic ‘philanthropic ecosystem’ approach to problem solving. Making big bets that focus on the root causes of problems, as well as the symptoms, is making the role of philanthropy even more critical in driving change.”

—Vikki Spruill, President and CEO,
Council on Foundations



Overall 2016 Giving Trends

Overall giving in 2016 grew 1.0% on a year-over-year basis for the 6,845 nonprofit organizations in the analysis. This is the fifth consecutive year where the Charitable Giving Report has found an increase in giving.

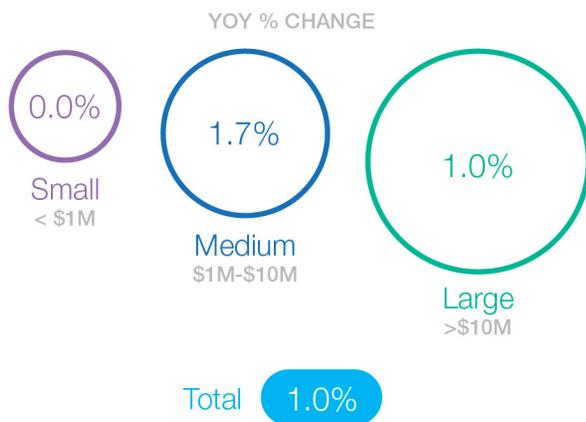
Fundraising by large organizations, with annual total fundraising more than \$10 million, was up by 1.0%. Medium-sized organizations, with annual total fundraising between \$1 million and \$10 million, had an increase of 1.7% on a year-over-year basis. Small nonprofits, with annual total fundraising less than \$1 million, experienced flat year-over-year fundraising results compared to 2015.

Online giving in 2016 grew 7.9% year over year for the 5,210 nonprofit organizations in the analysis. Double-digit growth

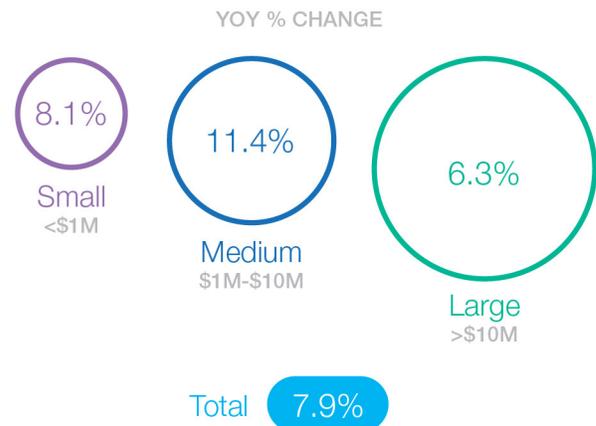
by medium-sized nonprofits along with growth from large and small nonprofits helped fuel this growth rate.

Nonprofit organizations of all sizes grew their online giving in 2016 compared to 2015. Large organizations, with annual total fundraising more than \$10 million, grew their online fundraising by 6.3% in 2016 compared to 2015. Medium-sized nonprofits, with annual total fundraising between \$1 million and \$10 million, had a year-over-year increase of 11.4% in their online fundraising. Small nonprofits, with annual total fundraising less than \$1 million, grew their online fundraising 8.1% compared to 2015.

OVERALL GIVING TRENDS BY ORGANIZATION SIZE



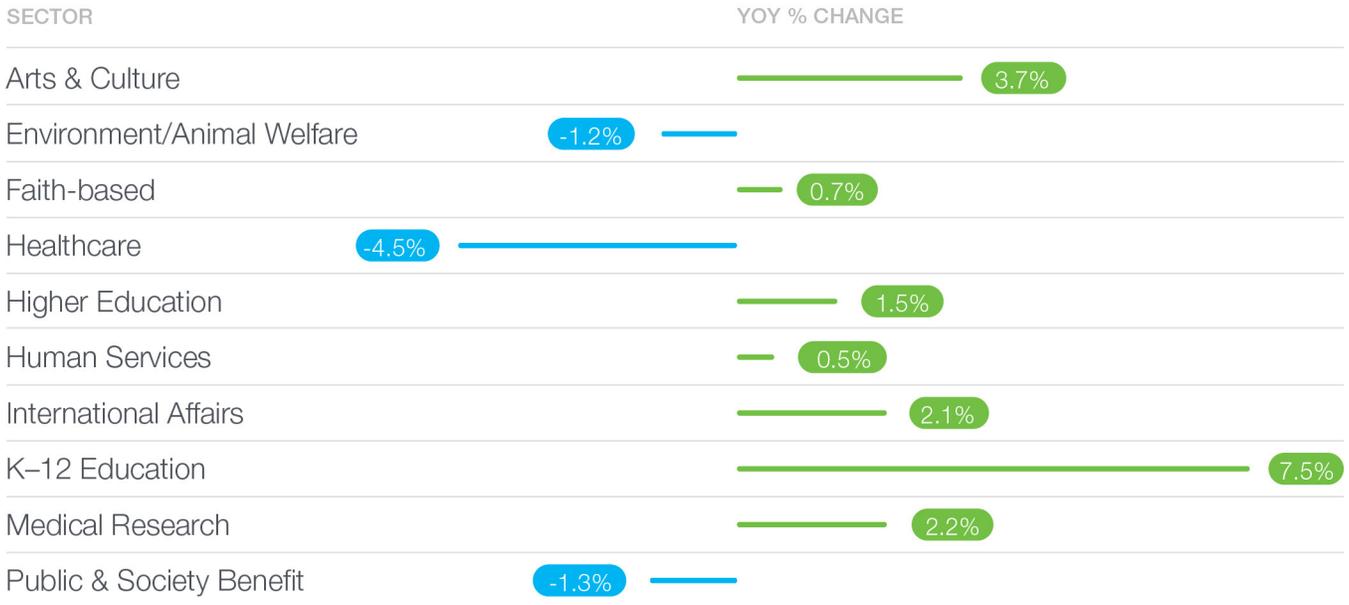
ONLINE GIVING TRENDS BY ORGANIZATION SIZE



“ I’m pleased to see that giving grew in 2016 and appreciate Blackbaud’s great analysis of the year. That said, over the course of the past five years, we are seeing more giving, but fewer donors. That speaks to the work that charities must do to improve their retention and cultivation of donors by creating a culture of philanthropy and telling their stories of impact and change. It also requires an understanding that the newer generations of donors view themselves as change agents who do not simply want to passively give charitable contributions; it requires building new types of relationships with donors to help them enact change in the context of charitable mission.”

— Jason Lee, Interim President & CEO, Association of Fundraising Professionals

2016 OVERALL GIVING TRENDS BY SECTOR



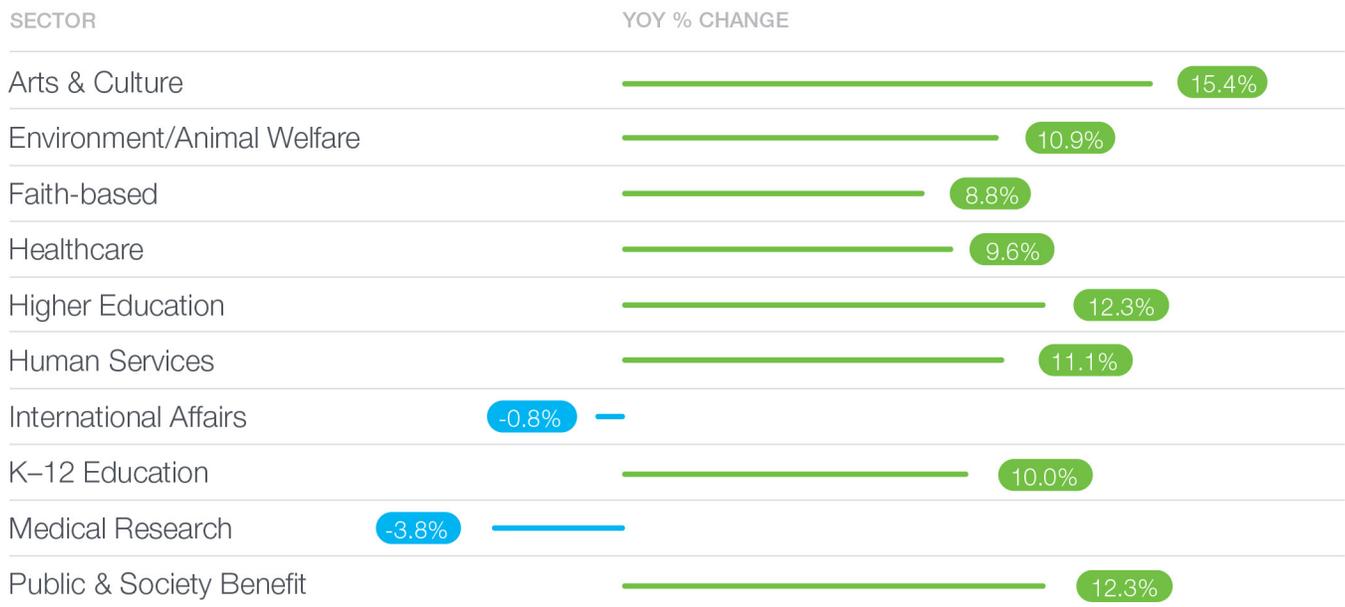
Each organization in The Blackbaud Index is categorized by one of 10 sectors using its National Taxonomy of Exempt Entities—or NTEE code—as reported on its 990 tax return. These sectors are Arts & Culture, Environment/Animal Welfare, Faith-based, Healthcare, Higher Education, Human Services, International Affairs, K-12 Education, Medical Research, and Public & Society Benefit. Each sector is weighted based on Giving USA data to ensure that no individual organization or sector is overrepresented in the analysis.

K-12 Education had the largest increase in year-over-year fundraising with 7.5% growth. This was followed by Arts & Culture nonprofits with a growth rate of 3.7%. Medical Research organizations grew 2.2% and both Higher Education and International Affairs nonprofits grew compared to 2015.

There was small growth in giving to Faith-based and Human Services nonprofits in 2016. The Environment/Animal Welfare, Healthcare, and Public & Society Benefit sectors all had a decline in overall fundraising.



2016 ONLINE GIVING TRENDS BY SECTOR



Arts & Culture organizations experienced the highest growth in online giving with a 15.4% year-over-year increase. For the third consecutive year, online giving to Higher Education institutions grew significantly with a 12.3% year-over-year increase. Public & Society Benefit, Environment/Animal Welfare, Human Services, and K-12 Education organizations also all had double-digit online giving growth in 2016 compared to 2015.

Faith-based nonprofits and Healthcare organizations had single digit growth in online giving during 2016. Online giving to International Affairs organizations had a decrease of 0.8% and Medical Research nonprofits dropped 3.8% on a year-over-year basis.



Giving Trends by Month

The analysis looked at the distribution of giving across all of 2016. December remains the largest giving month of the year followed by June. This has remained consistent for several years now, but there are signs of giving shifting during the calendar year.

Online giving in December increased for the second consecutive year and represented 21.8% of all online giving. November accounted for 9.7% of all online giving in 2016, and this is likely due to continued growth in #GivingTuesday online donations.

There is no evidence in the data that giving prior to or immediately after the 2016 presidential election had a significant impact on overall charitable giving. There are certainly widely reported examples of certain organizations

seeing a dramatic increase in giving related to the election. But we should keep in mind that even a large increase in giving to a small number of nonprofits does not move the needle on overall charitable giving.

Online giving in December increased for the second consecutive year and represented 21.8% of all online giving. November accounted for 9.7% of all online giving in 2016, and this is likely due to continued growth in #GivingTuesday online donations.

2016 OVERALL GIVING DISTRIBUTION PERCENTAGE BY MONTH BY SECTOR

SECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Arts & Culture	6.7	8.2	9.7	7.2	8.4	9.6	6.0	6.7	6.0	7.7	6.8	17.0
Environment/Animal Welfare	5.3	6.4	7.1	6.7	7.2	14	6.5	7.3	7.2	6.4	7.6	18.3
Faith-based	5.7	7.1	8.3	7.9	8.6	8.1	7.5	6.5	7.8	7.1	7.5	17.9
Healthcare	6.5	6.8	7.0	6.0	7.5	10.6	6.0	7.1	8.0	7.4	8.1	18.9
Higher Education	6.7	6.8	7.3	7.0	7.0	10.5	6.4	7.3	7.7	7.7	7.9	17.7
Human Services	7.0	6.4	7.0	6.7	7.4	9.5	6.6	8.3	6.9	7.9	8.5	17.9
International Affairs	6.8	6.1	6.0	6.6	7.1	15.9	4.7	8.1	6.5	7.4	8.8	16.1
K-12 Education	6.3	6.0	7.2	7.8	7.9	12.9	5.8	5.7	6.0	6.8	7.7	19.7
Medical Research	12.5	5.9	6.9	6.6	10.7	8.3	6.2	6.2	6.7	6.6	8.7	14.7
Public & Society Benefit	7.2	6.7	7.7	6.5	7.7	7.9	7.1	8.8	8.0	6.4	9.5	16.7
OVERALL	7.0	6.6	7.2	6.9	7.8	10.6	6.3	7.3	7.2	7.3	8.2	17.7

2016 ONLINE GIVING DISTRIBUTION PERCENTAGE BY MONTH BY SECTOR

SECTOR	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Arts & Culture	5.9	6.9	8.9	7.8	6.2	7.3	5.4	6.5	8.1	7.3	8.9	20.7
Environment/Animal Welfare	5.3	5.8	6.9	7.2	7.3	6.1	5.1	5.4	5.7	5.4	11.0	28.7
Faith-based	6.1	6.5	7.5	6.7	6.2	7.2	6.9	6.3	6.0	8.5	8.3	23.9
Healthcare	5.0	6.8	6.6	5.7	5.6	5.3	4.6	5.4	7.3	7.3	12.5	27.7
Higher Education	4.6	6.1	8.0	8.5	6.9	9.2	3.8	5.5	7.0	6.7	9.7	24.2
Human Services	4.5	4.9	5.9	6.3	5.9	5.7	4.6	5.3	6.3	7.1	12.7	30.8
International Affairs	5.1	5.1	5.9	6.2	5.4	7.9	7.1	6.0	6.7	8.3	9.9	26.4
K-12 Education	8.1	12.0	9.9	8.1	7.4	9.0	3.8	5.0	5.7	6.7	7.8	16.6
Medical Research	3.1	5.7	9.5	13.4	9.7	7.5	4.7	8.2	15.2	11.1	4.8	7.3
Public & Society Benefit	5.0	6.0	7.4	6.7	6.2	5.7	5.0	5.5	6.2	6.1	15.8	24.2
OVERALL	4.8	6.3	7.6	8.2	7.0	7.0	5.0	6.1	8.4	7.9	9.7	21.8

Trends by Percentage of Total Fundraising from Online Giving

Blackbaud has been measuring the shift toward digital giving for many years now. The key metric for this transition is the percentage of total fundraising that comes from online giving. This metric can be used by nonprofit organizations to benchmark their online giving performance against peer organizations within each sector or of a similar size.

Blackbaud used data over the past year to examine percentage of total fundraising that came from online giving. In 2016, 7.2% of total fundraising came from online giving. This was a slight increase from 7.1% in 2015. This is based on an analysis of data from 3,908 organizations with \$24.1 billion in total fundraising in 2016.

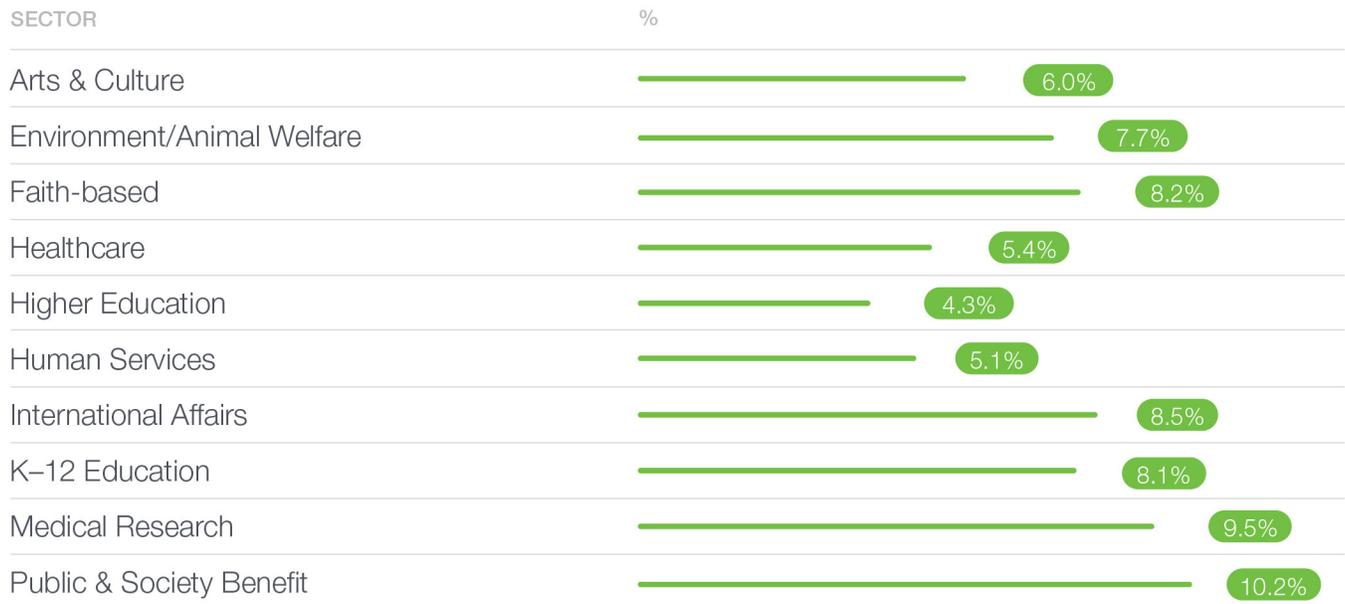
PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING



PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY ORGANIZATION SIZE



2016 PERCENTAGE OF TOTAL FUNDRAISING FROM ONLINE GIVING BY SECTOR



Large nonprofits have re-established their presence in driving online giving across their fundraising programs. For large organizations, 7.7% of fundraising revenue came from online donations in 2016. This was followed by small nonprofits at 6.2% and medium-sized organizations at 5.1%.

Public Society & Benefit organizations have replaced Medical Research as the sector raising the highest percentage of their total fundraising revenue from online gifts. Year-over-year increases with Arts & Culture and Healthcare nonprofits saw digital giving increase its share over overall fundraising.

Online giving remains less than 10% of total fundraising as we approach 20 years since the first online donation. As a point of comparison, the U.S. Department of Commerce estimates that ecommerce sales in the third quarter of 2016 accounted for 8.2% of total sales. The nonprofit sector is now lagging behind consumer trends for online activity.

“ Our dependence on digital data and infrastructure is now complete. Even if you don’t do everything online or on mobile, nonprofits, foundations, and donors are digitally dependent. The most important thing about this is everything—because digital doesn’t work the way analog does. It presents us with new opportunities and new responsibilities. The safe, ethical, and effective use of digital data is what matters most now to an independent civil society.”

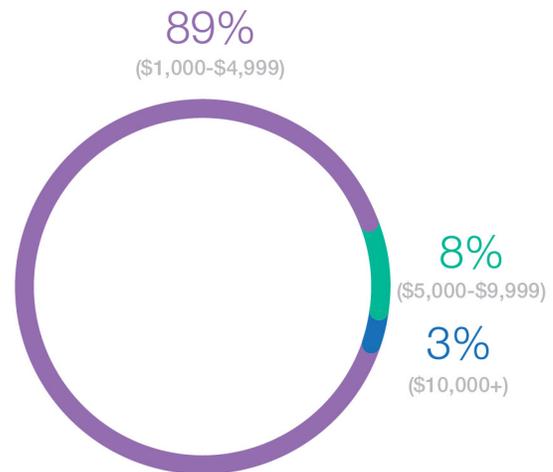
—Lucy Bernholz, Director, Digital Civil Society Lab, Stanford Center on Philanthropy and Civil Society

Trends for Significant Online Gifts

Blackbaud examined how significant online gifts of \$1,000 or more were trending in 2016. Specifically, Blackbaud analyzed significant online donations and found that 10% of online gifts were \$1,000 or more. In fact, 41% of nonprofits received at least one online donation of \$1,000 or more in 2016.

The analysis also showed that 89% of significant online donations were between \$1,000 and \$4,999. Interestingly, 61% of those donations were exactly \$1,000. Another 8% of significant online donations were between \$5,000 and \$9,999 with 81% of those donations exactly \$5,000. Finally, 3% of significant online donations were \$10,000 or more. The largest online donation in this group was \$100,000.

DISTRIBUTION OF SIGNIFICANT ONLINE GIFTS



A LOOK AROUND THE WORLD

Canadian Giving Spotlight

The Blackbaud Index was expanded in 2014 to begin tracking overall and online giving for Canadian nonprofits. The Canadian Index includes giving data from 494 nonprofits with over \$1.2 billion in charitable giving.

- Overall **charitable giving was down 1.8%** among Canadian nonprofits in 2016
- **Online giving increased 10%** for nonprofits in Canada compared to 2016

U.K. Giving Spotlight

The Blackbaud Index added tracking of online and overall giving in the United Kingdom during 2016. The U.K. Index includes giving data from 342 organizations with over \$675 million in charitable giving.

- Overall **charitable giving was up 2.8%** among U.K. not-for-profits in 2016
- **Online giving increased 2.2%** among U.K. not-for-profits in 2016

“ It is more important than ever for individuals and charitable organizations, grounded in their commitment to rigorous continual learning, to translate that learning into effective advocacy with and on behalf of the communities in which we live and serve. Ultimately, we need to be fierce advocates for the issues and causes that best serve the community and nation. It’s only when we give voice to these issues that government, business, and the charitable sectors can work together to solve problems, encourage giving, and build a better future for us all.”

—Daniel Cardinali, President and CEO, Independent Sector

Mobile Giving Spotlight

For many years now, Blackbaud has examined the growth in online donations made on a mobile device. In 2016, approximately 17% of online transactions were made using a mobile device based on data from 2,162 nonprofit organizations. This was up from 14% in 2015 and just 9% in 2014.

The peak for mobile transactions was in August 2016 at 20.1% of all online donations. The low for the year was in March with 15% of online transactions occurring on mobile devices. In 2015, online transactions made on a mobile device peaked at 17.1% in May with a low of 10.7% in January. We should expect to see continued volatility in monthly mobile use trends for the next few years.

PERCENTAGE OF ONLINE DONATIONS MADE ON A MOBILE DEVICE



Being mobile friendly is no longer optional for nonprofits. The sharp increase in mobile transactions shows how consumer behavior and donor behavior are one in the same. Blackbaud recommends a multi-step approach that includes mobile-friendly email messages, websites, and donation forms. All of these should be used in combination to maximize the giving experience for supporters.



#GivingTuesday Spotlight

The fifth annual #GivingTuesday was held on November 29, 2016, and the growth in the movement continues.

- Blackbaud processed more than \$47.7 million in U.S. online donations on #GivingTuesday 2016
- Online giving on #GivingTuesday 2016 increased 20% compared to 2015
- 22% of digital donations were made on mobile devices on #GivingTuesday 2016

Blackbaud is a founding partner of #GivingTuesday and has analyzed more than \$143 million in online donations made on #GivingTuesday since 2012. This represents the largest amount of #GivingTuesday data ever analyzed and represents transaction data from across more than 6,700 nonprofit organizations.

Blackbaud’s analysis found that #GivingTuesday donations continue to shift to medium and smaller sized organizations. Large organizations now only represent 66% of the #GivingTuesday revenue compared to 80% in 2012. Medium-

sized nonprofits are receiving 26% of #GivingTuesday revenue followed by 8% for smaller organizations.

Blackbaud continues to see #GivingTuesday reflect general sector giving trends. Education, Healthcare, and Human Services organizations represent a large percentage of charitable giving in the United States, and we see that trend reflected on #GivingTuesday as well. It is worth noting that Environment/Animal Welfare organizations and Medical Research nonprofits outperform other sectors on #GivingTuesday.

DISTRIBUTION OF #GIVINGTUESDAY REVENUE BY SIZE

SIZE	2016	2015	2014	2013	2012
Small (Less than \$1M)	8%	7%	5%	3%	5%
Medium (\$1M–\$10M)	26%	22%	21%	13%	15%
Large (\$10M+)	66%	71%	74%	84%	80%

2016 DISTRIBUTION OF #GIVINGTUESDAY REVENUE BY SECTOR

SECTOR	2016	2015	2014	2013	2012
Arts & Culture	5%	3%	1%	1%	2%
Environment/Animal Welfare	19%	10%	4%	3%	4%
Faith-based	6%	16%	21%	40%	2%
Healthcare	18%	7%	13%	8%	9%
Higher Education	17%	13%	17%	8%	9%
Human Services	21%	15%	10%	13%	23%
International Affairs	10%	8%	9%	8%	13%
K–12 Education	8%	8%	10%	6%	3%
Medical Research	12%	13%	13%	11%	33%
Public & Society Benefit	8%	6%	3%	2%	2%

Key Metrics from Across the U.S. Nonprofit Sector

Through its data science and data assets, Target Analytics®, a division of Blackbaud, is in the unique position to provide several key insights in the U.S. nonprofit sector. Beginning with this year's *Charitable Giving Report*, we are going to provide answers to some of the most common questions asked by fundraising and nonprofit professionals.

2016 GENERATIONAL GIVING TRENDS

GENERATION	YEARS	% OF TOTAL GIVING	% OF DONOR POPULATION	% OF U.S. POPULATION
Greatest Generation	1900–1927	6.7%	4.2%	1.5%
Silent Generation	1928–1945	30.5%	28.1%	11.3%
Baby Boomers	1946–1964	41.6%	41.6%	30.2%
Gen X	1965–1980	15.7%	19.0%	26.6%
Gen Y	1981–1997	5.4%	7.1%	30.4%



DONOR GIVING

62

Average age of donor in the U.S.

1.4

Average number of charitable gifts per U.S. donor



DONATION AMOUNTS

\$20

Median donation amount for gifts below \$1,000 in the U.S.

\$1200

Median donation amount for gifts above \$1,000 in the U.S.

\$128

Average online donation amount



RETENTION

29%

First-year offline-only donor retention rate for nonprofits in the U.S.

60%

Multi-year offline-only donor retention rate for nonprofits in the U.S.

21%

First-year online-only donor retention rate for nonprofits in the U.S.

58%

Multi-year online-only donor retention rate for nonprofits in the U.S.



MOBILE GIVING

17%

Percentage of online donations made on mobile devices

KEY FINDINGS

The *Charitable Giving Report* analyzes trends from over \$23 billion in fundraising revenue from 2016.

Here are some key findings:

1. Overall giving grew approximately 1.0% in 2016
2. Online giving grew 7.9% in 2016 compared to 2015
3. Online donations were 7.2% of all fundraising in 2016
4. #GivingTuesday online donations were up 20% in 2016
5. 17% of online donations were made on a mobile device in 2016

About the 2016 Charitable Giving Report

The findings in this report are based on giving data from 6,845 nonprofit organizations and more than \$23 billion in fundraising revenue. The online fundraising findings are based on data from 5,210 nonprofit organizations and more than \$2.6 billion in online fundraising revenue.

To be included in the analysis, these organizations needed to have 24 months of complete giving data with no gaps or missing information. Each organization was then classified by sector using their NTEE code as reported on its 990 tax return. If you are not sure which sector your organization is classified as, you may refer to your 990 to find your NTEE code. Visit <http://nccs.urban.org/classification/NTEE.cfm> for a complete listing of sectors.

Organizations were then grouped into three size categories: total annual fundraising less than \$1 million (small), total annual fundraising between \$1 million and \$10 million (medium), and total annual fundraising exceeding \$10 million (large). This is based on recorded giving in each organization's fundraising system, reported fundraising in IRS Form 990 data, and matching done through the National Center for Charitable Statistics.

Organizations without all the research criteria were not included in this analysis. Organizations based outside the United States were excluded from this analysis with the exception of the Canadian and U.K. Index results. We do not include the unfulfilled portion of pledge gifts or recurring gifts that are processed offline. Giving USA data is used to weight the data to ensure that no individual organization or sector is overrepresented in the analysis.

The percentage of total fundraising trends research is based on 3,908 nonprofits in The Blackbaud Index. These organizations represent \$24.1 billion in total fundraising in 2016. The mobile giving research is based on data from 2,162 nonprofit organizations and their mobile transactions made in 2016.

This report would not be possible without the contributions of Chuck Longfield, Jim O'Shaughnessy, Ashley Thompson, Erin Duff, Nicole Gear, Genna Shelnett, and Sam Stone.

About the Blackbaud Index

Economic conditions, natural disasters, and market fluctuations have made it extremely difficult for nonprofits to make fundraising decisions informed by the latest donor behavior. That is why we created The Blackbaud Index of Charitable Giving in 2010—to provide insight into what happened in the prior few weeks and valuable analysis by leaders in the sector into what fundraisers can learn from it.

The Blackbaud Index brings you the most up-to-date information on charitable giving today. Tracking approximately \$23 billion in U.S.-based charitable giving, the index is updated on the first of each month and is based on year-over-year percent changes. Featuring overall and online giving, the index can be viewed by size and sub-sectors of the nonprofit industry.

What's new in The Blackbaud Index?

Visit www.blackbaud.com/blackbaudindex to experience the enhanced interactive index charts where you can easily compare by size or sector.

About the Blackbaud Institute for Philanthropic Impact

The Blackbaud Institute drives research and insight to accelerate the impact of the social good community. It convenes expert partners from across the philanthropic sector to foster diverse perspectives, collective thinking, and collaborative solutions to the world's greatest challenges. Using the most comprehensive dataset in the social good community, the Blackbaud Institute and its partners conduct research, uncover strategic insight, and share results broadly, all in order to drive effective philanthropy at every stage, from fundraising to outcomes. Knowledge is powering the future of social good, and the Blackbaud Institute is an engine of that progress. Learn more, sign up for updates, and check out our latest resources at www.blackbaudinstitute.com.

About Blackbaud

Blackbaud (NASDAQ: [BLKB](#)) is the world's leading cloud software company powering social good. Serving the entire social good community—nonprofits, foundations, corporations, education institutions, and individual change agents—Blackbaud connects and empowers organizations to increase their impact through software, services, expertise, and data intelligence. The Blackbaud portfolio is tailored to the unique needs of vertical markets, with solutions for [fundraising and relationship management](#), [digital marketing](#), [advocacy](#), [accounting](#), [payments](#), [analytics](#), [school management](#), [grant management](#), [corporate social responsibility](#), and [volunteerism](#). Serving the industry for more than three decades, Blackbaud is headquartered in Charleston, South Carolina and has operations in the United States, Australia, Canada, Ireland, and the United Kingdom. For more information, visit www.blackbaud.com.

