Giving in Florida: **Frequently Asked Questions**

April 1, 2022

Occasionally, reporters may ask you questions that either need to be answered delicately, are out of your scope of expertise, or simply too difficult to remember off the top of your head. We want you to feel confident in any event. Think of this as a document that you can use to prepare for interviews and the question-and-answer portion of the news conference. As such, this document is ***not*** to be shared with reporters.

Any methodology questions or in-depth questions about the results should be directed to Indiana University Lilly Family School of Philanthropy.

Finally, it is appropriate to answer questions based on your personal experience. However, it is important to clarify to reporters when you are speaking to the results from the *Giving in Florida* study and when you are speaking to your personal experience.

FREQUENTLY ASKED QUESTIONS:
1. **What can this report tell me?**
   Giving in Florida provides an in-depth examination of the charitable giving, volunteering, and informal giving patterns of Florida households in 2021, as well as their priorities and motivations for giving. Data were collected in January 2022 from a survey of 1,444 Florida residents aged 18 or older, including an oversample of high net worth households[1]. The final sample was weighted to represent the general adult population of Florida.

2. **How does giving in Florida compare to the rest of the United States?**
   Giving rates for Floridians in 2021 look similar to other recent national studies: 69 percent of Floridians gave, very close to the 71 percent of households that reported giving in a different study conducted in autumn of 2020.[2]

   The incidence rates hold for high-net-worth households as well: according to the *2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households* about giving in 2020, 88 percent of high net worth households gave to charity, compared to 91 percent in the *Giving in Florida* study.[3]

   There are some key differences: for instance, Floridians prioritize giving to environment and animal causes more than donors at the national level. In addition, Floridians gave a larger dollar amount to combined purposes organizations such as United Ways and community foundations compared to the most recent findings at the national level from 2018.

   Note: any questions seeking a more detailed response about methodology and differences with other studies should be sent to the Indiana University Lilly Family School of Philanthropy

3. **How does volunteering in Florida compare to the rest of the United States?**

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[1] High net worth households are defined as households with an annual income of at least $200,000 and/or net assets of $1 million, excluding their primary residence.
[2] Charitable Crowdfunding: Who Gives, to What, and Why?, Indiana University Lilly Family School of Philanthropy, 2021, https://scholarworks.iupui.edu/bitstream/handle/1805/25515/crowdfunding210331-1.pdf
[3] *The 2021 Bank of America Study of Philanthropy: Charitable Giving by Affluent Households*, Indiana University Lilly Family School of Philanthropy, 2021, https://hdl.handle.net/1805/26654

The volunteer rates in the *Giving in Florida* study are higher than the rates found in The Philanthropy Panel Study data in 2018 or the Corporation for National and Community Service data from 2017.[4]

Volunteering rates can be difficult to compare between studies for a number of reasons. To begin, the year of study can make a big difference, and most national studies do not have data from 2021.Volunteering underwent some major changes during the pandemic, when some studies found that volunteering dropped,[5] and volunteering may have picked up steam after the pandemic, where research shows that volunteer rates increase in response to disasters.[6]

In addition, there may be differences in how the questions about volunteering are asked, how different organizations define volunteer activities, or in the overall goals of the study. For activities like volunteering, where there can sometimes be a fine line between informal activities and formal volunteering work through an organization, these differences can have a large impact in terms of rates of participation. For instance, if responses for giving to food-related and "other" opportunities are excluded, the volunteering rate for high-net-worth Floridian households declines to 72 percent (down from 81 percent) and 40 percent (down from 56 percent) for general households.

Note: any questions seeking a more detailed response about methodology and differences with other studies should be sent to the Indiana University Lilly Family School of Philanthropy

4. **Conventionally, Florida has been talked about as one of the least generous states[7] and a state with low rates in volunteering.[8] Why do the findings from this report look different?**

Different studies use different methods and try to assess specific snapshots or aspects of giving and volunteering at different points in time. The results from *Giving in Florida* provide a benchmark for giving and volunteering in Florida in 2021, in the wake of the social, economic, and political disruptions introduced by the COVID-19 pandemic.

The data is based on a survey of Florida residents aged 18 or above conducted in January 2022 by the Public Opinion Research Lab at the University of North Florida. The study incorporated both telephone and online responses, and the results were weighted to reflect Florida's population. The findings from the *Giving in Florida* study underscore the need to have additional, timely research on these trends to better understand how they may be changing over time.

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[4] Thom Patterson, "The most generous state in America," CNN, June 4, 2019, http://cnn.com/cnn/2019/06/04/us/volunteering-statistics-united-states-america-cfc/index.html
[5] *The Role of Volunteering in Philanthropy*, Fidelity Charitable, 2020, https://www.fidelitycharitable.org/content/dam/fc-public/docs/resources/the-role-of-volunteering-in-philanthropy.pdf
[6] Alexander P. Kalish, "The Effect of Natural Disasters on Volunteerism," Claremont McKenna College, PhD dissertation, 2014, https://scholarship.claremont.edu/cgi/viewcontent.cgi?referer=&httpsredir=1&article=1947&context=cmc_theses
[7] https://www.bizjournals.com/tampabay/news/2019/12/05/florida-ranks-among-least-charitable-states.html
[8] https://www.cnn.com/2019/06/04/us/volunteering-statistics-united-states-america-cfc/index.html

Differences to other studies may be explained by the year of the study—very little information about 2021 is currently available outside of the *Giving in Florida* study. Additionally, there may be differences in methodology, definitions of what counts as giving, or sampling approaches.

<mark>*Note: any questions seeking a more detailed response about methodology and differences with other studies should be sent to the Indiana University Lilly Family School of Philanthropy*</mark>

5. **How did giving in Florida change due to the pandemic?**

    The *Giving in Florida* study provides a new benchmark for giving and volunteering in 2021. Unfortunately, the study is unable to quantify how giving changed during the pandemic.

    Anecdotally, it seems that Floridians reacted in much the same way as elsewhere in the U.S., by giving to COVID-19 relief (such as Florida's First Coast Relief Fund, which raised $5.5 million[9]) and to organizations committed to racial justice, such as HBCUs (for instance, Bank of America committed $1 million to Florida A&M University as part of an initiative to support workforce readiness for students of color[10]). Final IRS data and national survey data from the Philanthropy Panel Study that show how giving changed during the pandemic will not be available for several more years.

    For all of these reasons, it is vital to encourage additional research in these areas in the future.

6. **Do people who don't live full-time in Florida later send the majority of their charitable dollars out of the state?**

    Households that do not remain in Florida year-round send a larger percentage of their giving to organizations based outside of Florida compared to year-long residents. However, these households give more overall, so by dollar amount, these non-year-long residents do not give less to Florida-based organizations overall.

7. **The report notes that individuals who live in Florida year-round are more likely to give a larger share of their charitable dollars to organizations based in Florida than individuals who do not live in Florida year-round. How common is it for Floridians to spend several months of the year outside of the state?**

    A majority (89%) of respondents in the survey live in Florida year-round. Among those who do not live in Florida year-round, most stay in Florida for 6 months or longer each year.

8. **Do you have city-level data?**

    The report does not include city-level data, because a much larger sample that contains a sufficient number of respondents in each city is required in order to offer city-level results.

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[9] https://unitedwaynefl.org/disaster-relief/reporting/
[10] http://www.famunews.com/2020/11/bank-of-america-gives-florida-am-university-1-million-for-jobs-initiative/

Instead, the report shares findings on regional differences within Florida. The study compares giving and volunteering across 8 regions in Florida, reflecting regional-level similarities and differences in philanthropic behaviors and preferences.

However, we do have data about individual counties such as Miami-Dade and Hillsborough, which line up with Miami and Tampa respectively.

9. Do you have data about corporate or foundation giving?

This study focuses on giving and volunteering by households, so the report does not cover corporate or foundation giving. For data on grantmaking by foundations (including corporate foundations), see the dashboard offered by the Florida Philanthropic Network and Candid at https://florida.foundationcenter.org/.

10. Does the report include non-itemizers in estimates of charitable giving?

Yes, the report measures charitable giving by Florida residents, no matter whether they deduct cash contributions on their tax returns. The survey also asked whether respondents plan to itemize their federal tax return for 2021.

11. People participated in various forms of philanthropy especially during the COVID-19 pandemic. Does the report measure informal philanthropy?

Yes, the survey asked about engagement in various forms of informal philanthropy, including donating goods, contributing to crowdfunding projects supporting individuals directly, giving money to people in need, and helping people in need in ways other than giving money.

12. How does this study measure giving to racial justice causes?

The study examines household giving to racial justice causes/organizations in terms of three primary categories:
1. Direct support for individuals and families affected by or addressing racial injustice and harassment (including through crowdfunding sites like GoFundMe and mutual aid groups)
2. Grassroots organizations addressing specific issues related to racial equity (including social movements like Black Lives Matter, bail funds, and organizations focused on criminal justice reform)
3. Large, established organizations addressing broader issues related to racial equity (NAACP, Urban League, United Negro College Fund, historically black colleges and universities)

13. What counts as a high-net-worth household?
High-net-worth households are defined in this study as households with an annual income of $200,000 or more and/or household net worth of $1,000,000 or more

14. How are charitable giving, informal giving, volunteering, and racial justice giving defined?

- **Charitable giving** is defined as donating money, assets, property, or goods to a religious or charitable organization.

- **Informal giving** is defined as aid that is given outside of the household to family members, friends and community with the purpose of improving the individual or the community's status or quality of life, without expectation of repayment at any time in the future. Informal giving does not include charitable donations made to a nonprofit organization.

- **Volunteering** is defined as spending time doing unpaid work, not just belonging to an organization.

- **Racial justice giving** we would like you to think of racial justice causes/organizations in terms of three primary categories:
  - Direct support for individuals and families affected by or addressing racial injustice and harassment (including through crowdfunding sites like GoFundMe and mutual aid groups)
  - Grassroots organizations addressing specific issues related to racial equity (including social movements like Black Lives Matter, bail funds, and organizations focused on criminal justice reform)
  - Large, established organizations addressing broader issues related to racial equity (NAACP, Urban League, United Negro College Fund, historically black colleges and universities)

15. **What is included in each of the categories of nonprofits?**
- **Arts and culture** refers to organizations that support or promote the arts, culture, or ethnic awareness, such as museums, theatres, orchestras, public broadcasting, or organizations that promote ethnic cultural awareness.
- **Basic needs** refers to organizations that help people in need of food, shelter, or other basic necessities.
- **Combined purposes** refers to organizations that serve a combination of purposes, such as United Way, United Jewish Federation, Catholic Charities, or local community foundations.
- **Education (other)** refers to educational organizations pre-K through 12, after-school programs, public libraries, adult education, and organizations offering educational services.
- **Environment and animals** refers to organizations that preserve the environment, such as for conservation efforts, animal protection, or parks.
- **Health** refers to health care or medical research organizations, including those affiliated with universities, such as hospitals, nursing homes, mental health facilities, cancer, heart, and lung associations, or telethons for health purposes.
- **Higher education** refers to higher educational institutions or activities, such as colleges, universities, university libraries, or scholarship funds.
- **Neighborhood and community development** refers to organizations that improve neighborhoods and communities, such as community centers, Habitat for Humanity, or similar organizations.

- **International aid** refers to organizations that provide international aid or promote world peace, such as international children's funds, international disaster relief, or international human rights.
- **Religious purposes** refers to organizations specifically serving religious purposes or promoting spiritual development, such as churches, synagogues, mosques, TV or radio ministries. Charities run by religious organizations, such as schools, hospitals, or food pantries in a church basement, are not included in this category.
- **Youth and family services** refers to organizations that cater to the needs of youth and families, such as Boys' and Girls' clubs, sports leagues, Big Brothers or Sisters, adoption services or foster care, family counseling, and family violence shelters.

16. What counties are in the different regions in Florida?
Northwest:
Bay
Calhoun
Escambia
Franklin
Gulf
Holmes
Jackson
Liberty
Okaloosa
Santa Rosa
Walton
Washington

North Central
Alachua
Bradford
Columbia
Dixie
Gadsden
Gilchrist
Hamilton
Jefferson
Lafayette
Leon
Levy
Madison
Suwannee
Taylor
Union
Wakulla

Northeast
Baker
Clay
Duval
Flagler
Nassau

Putnam
St. Johns

Central West
Citrus
DeSoto
Hernando
Hillsborough
Manatee
Pasco
Pinellas
Sarasota

Central
Hardee
Highlands
Lake
Marion
Orange
Osceola
Polk
Seminole
Sumter

Central East
Brevard
Indian River
Okeechobee
St. Lucie
Volusia

Southwest
Charlotte
Collier
Glades
Hendry
Lee

Southeast
Broward;
Martin
Miami-Dade
Monroe
Palm Beach