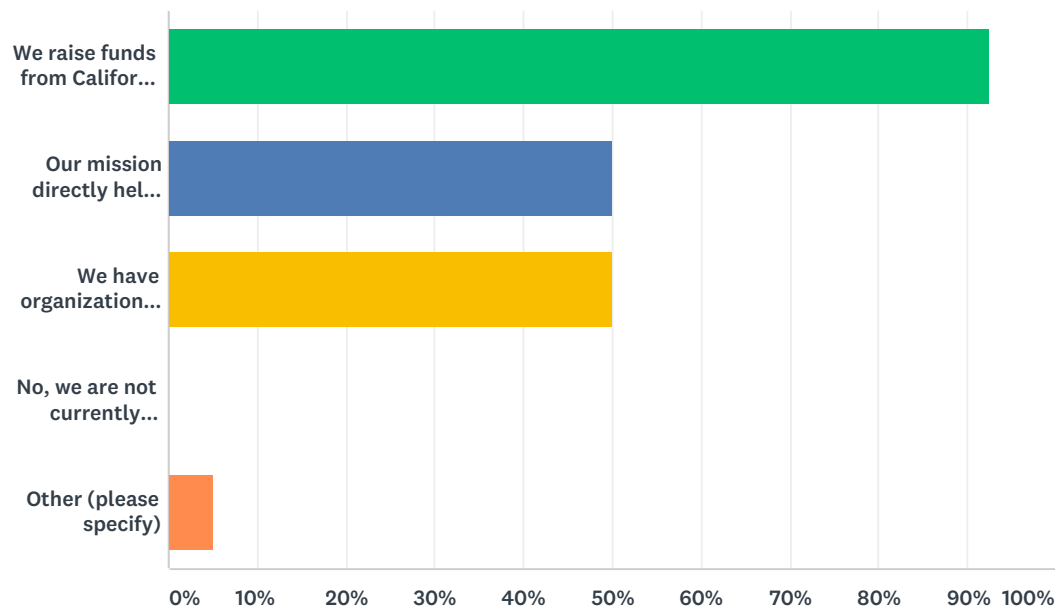


### Q1 Are you active in California? If so, how? Please check all that apply.

Answered: 40 Skipped: 2



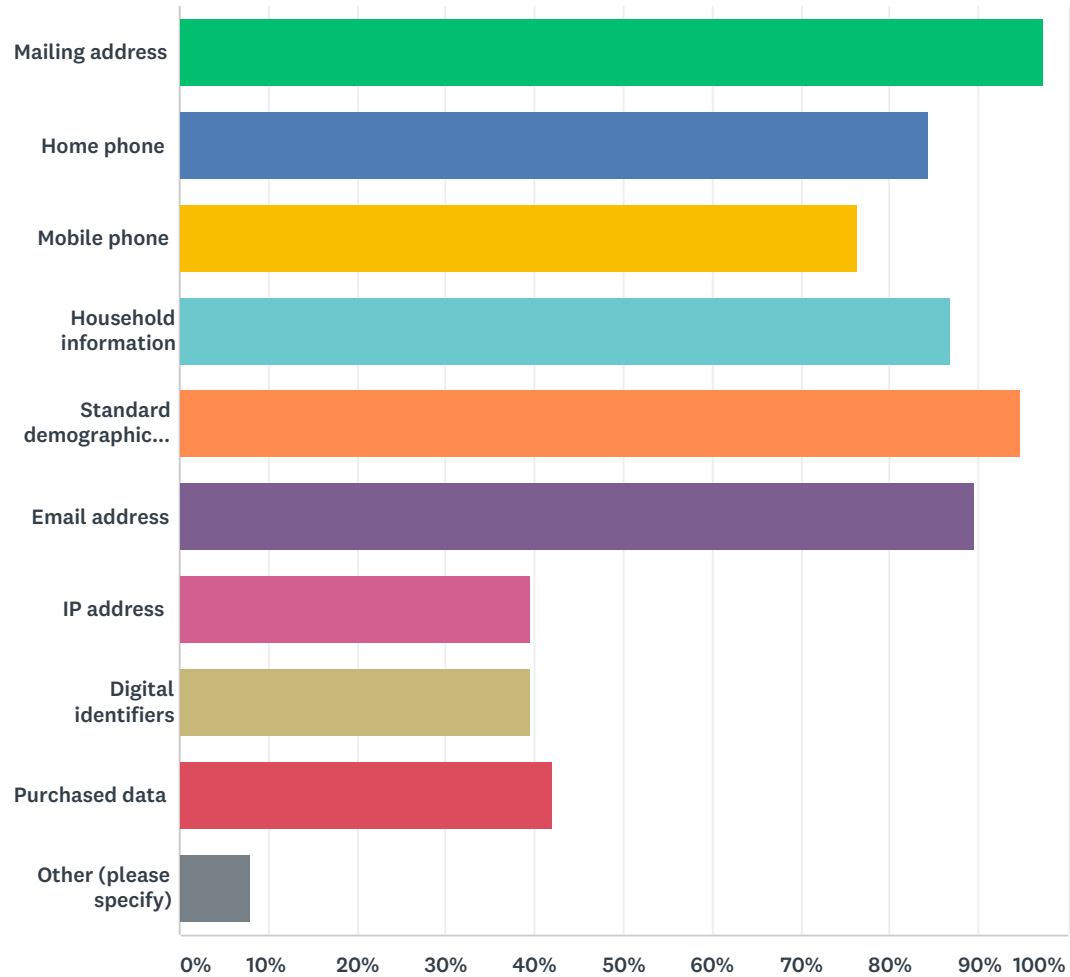
ANSWER CHOICES	RESPONSES	
We raise funds from California residents.	92.50%	37
Our mission directly helps Californians.	50.00%	20
We have organization volunteers and other key contacts in California.	50.00%	20
No, we are not currently active in California.	0.00%	0
Other (please specify)	5.00%	2
Total Respondents: 40		

#	OTHER (PLEASE SPECIFY)	DATE
1	National non-profit vendor	4/8/2019 3:01 PM
2	Marketing Solution Provider enabling non-profits to reach the right donor - in the right channel.	3/11/2019 10:03 AM

## Data Privacy Restrictions Impact Survey

Q2 What type of data do you use? Please check all that apply.

Answered: 38 Skipped: 4



### ANSWER CHOICES

### RESPONSES

Mailing address

97.37%

37

Home phone

84.21%

32

## Data Privacy Restrictions Impact Survey

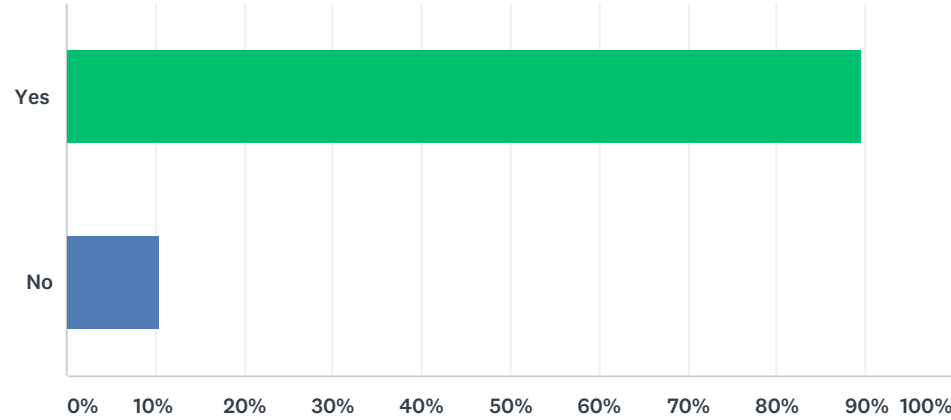
Mobile phone	76.32%	29
Household information	86.84%	33
Standard demographic info (age, ethnicity, other)	94.74%	36
Email address	89.47%	34
IP address	39.47%	15
Digital identifiers	39.47%	15
Purchased data	42.11%	16
Other (please specify)	7.89%	3
Total Respondents: 38		

#	OTHER (PLEASE SPECIFY)	DATE
1	Wealth indicators/data	3/12/2019 5:46 PM
2	Many data points are used for matching or analysis to select the most likely donor. Marketing messaging is deployed at the USPS Address, email, or digital/mobile display.	3/11/2019 10:04 AM
3	co-op database modeling and selections; merge optimization	3/11/2019 8:16 AM

## Data Privacy Restrictions Impact Survey

### Q3 Do you work with cooperative database companies?

Answered: 38 Skipped: 4

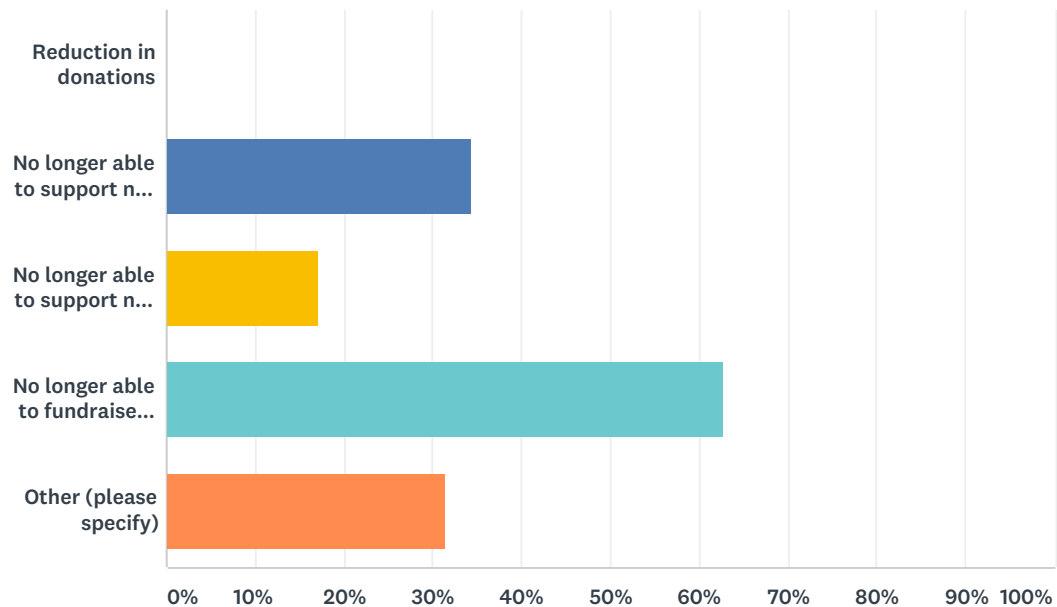


ANSWER CHOICES	RESPONSES	
Yes	89.47%	34
No	10.53%	4
TOTAL		38

## Data Privacy Restrictions Impact Survey

Q4 Due to the new law, if you cannot utilize California data starting in 2020, what is the estimated impact on your ability to deliver your mission? Please check all that apply.

Answered: 35   Skipped: 7



ANSWER CHOICES	RESPONSES	
Reduction in donations	0.00%	0
No longer able to support new initiatives in California	34.29%	12
No longer able to support new initiatives elsewhere	17.14%	6
No longer able to fundraise; will need to review other, more costly ways to communicate	62.86%	22
Other (please specify)	31.43%	11
Total Respondents: 35		

#	OTHER (PLEASE SPECIFY)	DATE
1	may reduce direct marketing targeted to CA	4/16/2019 10:58 AM

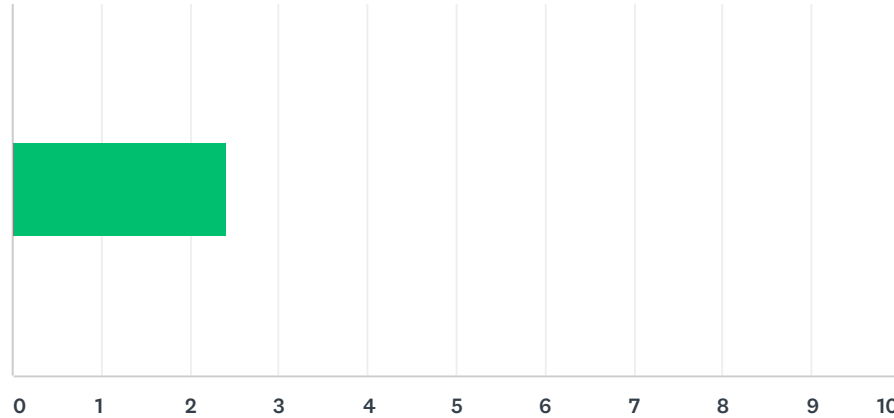
## Data Privacy Restrictions Impact Survey

2	we are an edu with a large percentage of alum in CA; we would still be able to fundraise, but not with these individuals	4/5/2019 6:46 PM
3	No longer able to acquire new donors in California or exchange CA donors to other nonprofits or rent CA names to commercial entities (impacts revenue)	3/18/2019 8:14 PM
4	No longer able to acquire new donors in California or exchange CA donors to other nonprofits or rent CA names to commercial entities (impacts revenue)	3/12/2019 5:49 PM
5	We will have to temporarily stop fundraising in CA while we achieve compliance with the new law.	3/12/2019 11:17 AM
6	Potentially impact other revenue opportunities including affinity programs where we share data with for profit companies	3/12/2019 10:58 AM
7	With the current respriction in the law, marketing solutions providers will be greatly challenged to support responsible non profit fundraising - while providing the donor notice, choice and transparency.	3/11/2019 10:06 AM
8	Would have to rely on fundraising in the other 49 states.	3/11/2019 9:15 AM
9	CA represents 10-15% of Acquisition sources and just a little less of current/lapsed donor sources	3/11/2019 8:22 AM
10	All of those things will be more costly, more difficult and less effective, but they won't be gone.	3/8/2019 6:39 PM
11	Will see a reduction in donations that could impact many service we provide.	3/8/2019 6:38 PM

# Data Privacy Restrictions Impact Survey

## Q5 Reduction in Arts, Culture, and Humanities Services

Answered: 5 Skipped: 37



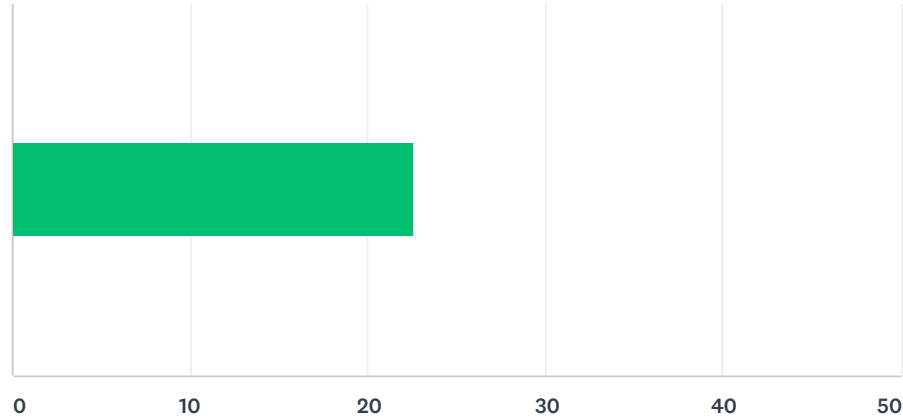
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	2	12	5
Total Respondents: 5			

#		DATE
1	12	4/8/2019 3:04 PM
2	0	3/11/2019 5:01 PM
3	0	3/11/2019 9:14 AM
4	0	3/8/2019 6:39 PM
5	0	3/8/2019 5:36 PM

# Data Privacy Restrictions Impact Survey

## Q6 Reduction in Education and Research Services

Answered: 8 Skipped: 34



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	23	181	8
Total Respondents: 8			

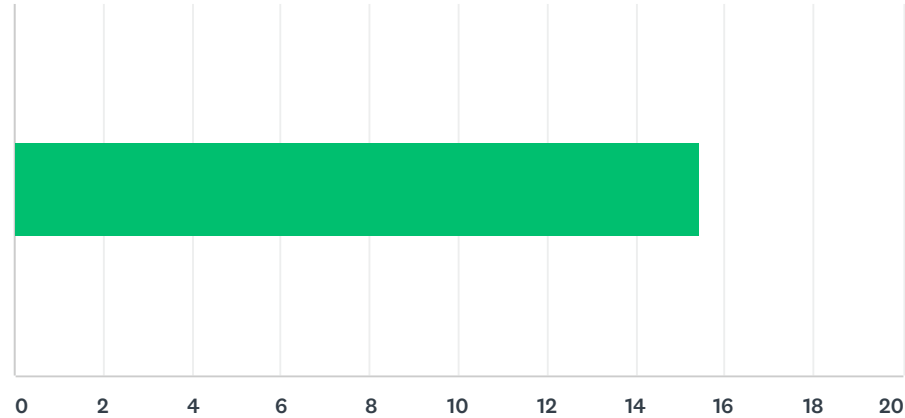
#		DATE
1	0	4/8/2019 3:04 PM
2	100	4/5/2019 6:47 PM
3	0	3/22/2019 10:53 AM
4	16	3/11/2019 9:52 AM
5	20	3/11/2019 9:16 AM
6	12	3/9/2019 9:13 AM
7	15	3/8/2019 6:47 PM
8	18	3/8/2019 6:39 PM



## Data Privacy Restrictions Impact Survey

### Q7 Reduction in Environmental and Animal Services

Answered: 7 Skipped: 35



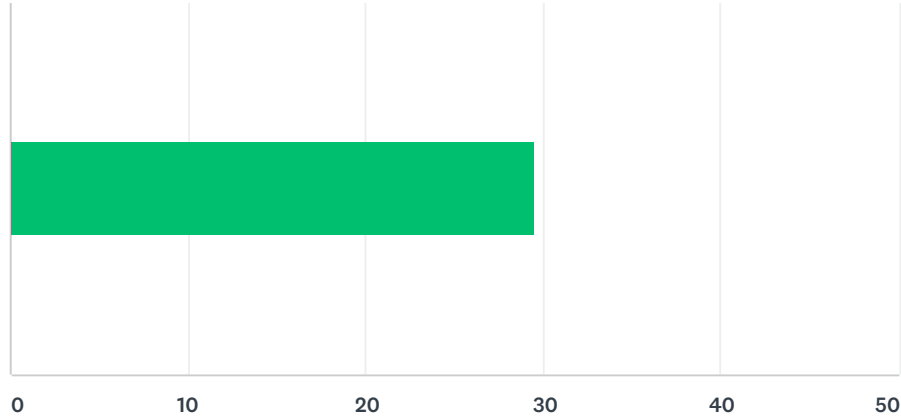
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	15	108	7
Total Respondents: 7			

#		DATE
1	12	4/8/2019 3:04 PM
2	16	3/11/2019 9:52 AM
3	15	3/11/2019 8:22 AM
4	48	3/10/2019 5:46 PM
5	12	3/9/2019 9:13 AM
6	0	3/8/2019 7:41 PM
7	5	3/8/2019 6:39 PM

# Data Privacy Restrictions Impact Survey

## Q8 Reduction in Human Services

Answered: 17 Skipped: 25



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	30	502	17
Total Respondents: 17			

#		DATE
1	25	4/11/2019 10:15 AM
2	12	4/8/2019 3:04 PM
3	18	3/14/2019 8:53 AM
4	0	3/13/2019 3:11 PM
5	13	3/12/2019 10:59 AM
6	10	3/11/2019 5:01 PM
7	100	3/11/2019 4:43 PM
8	100	3/11/2019 11:11 AM
9	0	3/11/2019 10:34 AM
10	16	3/11/2019 9:52 AM
11	21	3/11/2019 9:16 AM

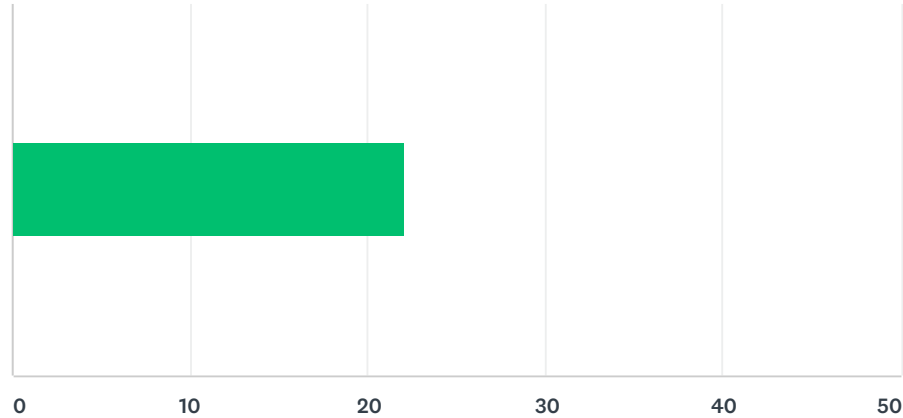
## Data Privacy Restrictions Impact Survey

12	51	3/11/2019 9:14 AM
13	28	3/9/2019 12:29 PM
14	40	3/8/2019 7:41 PM
15	23	3/8/2019 6:39 PM
16	5	3/8/2019 6:39 PM
17	40	3/8/2019 6:34 PM

# Data Privacy Restrictions Impact Survey

## Q9 Reduction in International Programs and Services

Answered: 9 Skipped: 33



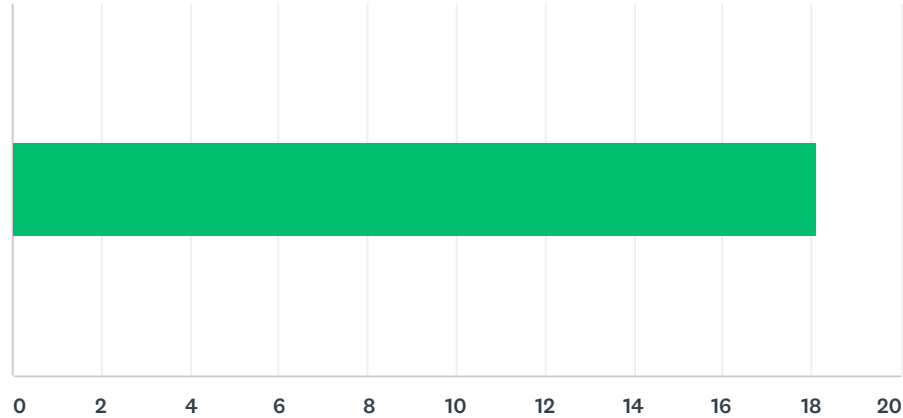
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	22	199	9
Total Respondents: 9			

#		DATE
1	0	3/29/2019 12:07 PM
2	17	3/14/2019 8:53 AM
3	69	3/13/2019 3:11 PM
4	50	3/13/2019 12:27 PM
5	1	3/12/2019 11:17 AM
6	24	3/9/2019 12:29 PM
7	12	3/9/2019 9:13 AM
8	10	3/8/2019 11:28 PM
9	16	3/8/2019 6:47 PM

## Data Privacy Restrictions Impact Survey

### Q10 Reduction in Public and/or Societal Benefit Services (e.g., Civil Rights, Civil Liberties)

Answered: 8 Skipped: 34



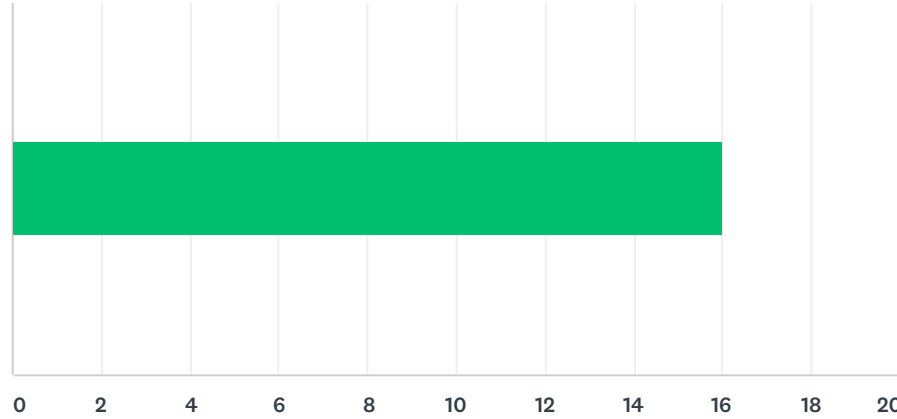
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	18	145	8
Total Respondents: 8			

#		DATE
1	14	3/12/2019 10:59 AM
2	24	3/11/2019 9:16 AM
3	19	3/9/2019 12:29 PM
4	12	3/9/2019 9:13 AM
5	9	3/8/2019 6:47 PM
6	22	3/8/2019 6:39 PM
7	5	3/8/2019 6:39 PM
8	40	3/8/2019 6:34 PM

# Data Privacy Restrictions Impact Survey

## Q11 Reduction in Religious Programs and Services

Answered: 4 Skipped: 38



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	16	64	4
Total Respondents: 4			

#		DATE
1	19	3/9/2019 12:29 PM
2	9	3/8/2019 11:28 PM
3	10	3/8/2019 6:47 PM
4	26	3/8/2019 6:39 PM

## Data Privacy Restrictions Impact Survey

### Q12 Other: (please specify the benefit provided, and the percentage of service reduction)

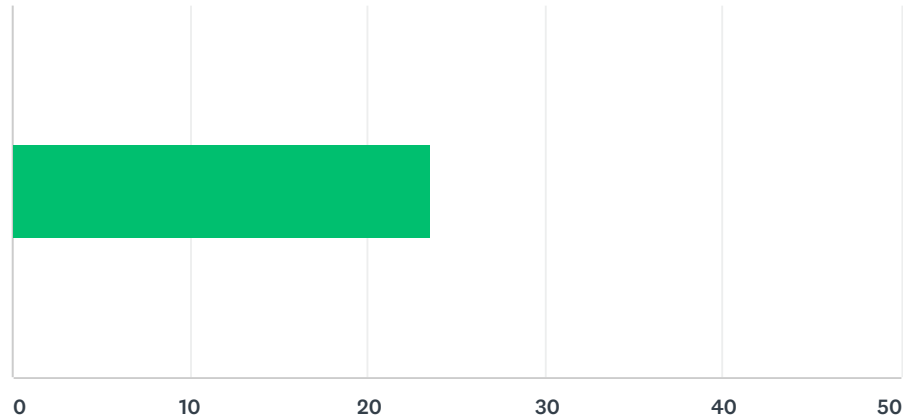
Answered: 3 Skipped: 39

#	RESPONSES	DATE
1	We do not provide services in CA - only CA donors provide financial support to our mission in MT	3/18/2019 8:14 PM
2	We do not provide services in CA - only CA donors provide financial support to our mission in MT	3/12/2019 5:51 PM
3	As a service provider it is more than likely ALL of these categories will be significantly impacted.	3/11/2019 10:07 AM

## Data Privacy Restrictions Impact Survey

Q13 We expect cutbacks/the following reduction in services due to loss of prospective donors over five years:Please indicate using the slider below what percentage of reduction you estimate you will experience.

Answered: 24 Skipped: 18



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	24	566	24
Total Respondents: 24			

#		DATE
1	20	4/11/2019 10:15 AM
2	12	4/8/2019 3:05 PM
3	60	4/5/2019 6:47 PM
4	10	3/29/2019 12:08 PM
5	10	3/22/2019 11:01 AM
6	17	3/14/2019 8:53 AM
7	70	3/13/2019 3:11 PM
8	5	3/13/2019 12:28 PM



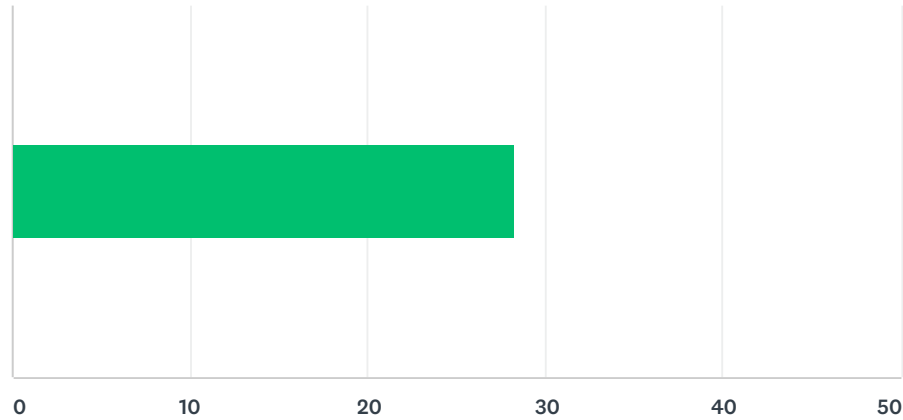
## Data Privacy Restrictions Impact Survey

9	45	3/12/2019 4:45 PM
10	15	3/12/2019 11:18 AM
11	20	3/12/2019 11:00 AM
12	15	3/11/2019 5:02 PM
13	25	3/11/2019 4:43 PM
14	65	3/11/2019 11:12 AM
15	40	3/11/2019 10:34 AM
16	0	3/11/2019 10:08 AM
17	17	3/11/2019 9:52 AM
18	14	3/11/2019 9:17 AM
19	10	3/11/2019 9:15 AM
20	36	3/9/2019 12:30 PM
21	15	3/9/2019 9:14 AM
22	30	3/8/2019 7:42 PM
23	8	3/8/2019 6:48 PM
24	7	3/8/2019 6:40 PM

## Data Privacy Restrictions Impact Survey

Q14 We expect the following loss in total donations due to reduced numbers of new donors in California over five years: Please indicate using the slider below what percentage of donations you estimate you will lose.

Answered: 26   Skipped: 16



ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
	28	735	26
Total Respondents: 26			

#		DATE
1	10	4/16/2019 11:07 AM
2	20	4/11/2019 10:15 AM
3	12	4/8/2019 3:05 PM
4	61	4/5/2019 6:47 PM
5	10	3/29/2019 12:08 PM
6	10	3/22/2019 11:01 AM
7	95	3/18/2019 8:17 PM
8	16	3/14/2019 8:53 AM

## Data Privacy Restrictions Impact Survey

9	25	3/13/2019 3:11 PM
10	10	3/13/2019 12:28 PM
11	50	3/12/2019 4:45 PM
12	20	3/12/2019 11:18 AM
13	25	3/12/2019 11:00 AM
14	15	3/11/2019 5:02 PM
15	76	3/11/2019 4:43 PM
16	75	3/11/2019 11:12 AM
17	40	3/11/2019 10:34 AM
18	17	3/11/2019 9:52 AM
19	20	3/11/2019 9:17 AM
20	5	3/11/2019 9:15 AM
21	10	3/11/2019 8:24 AM
22	31	3/9/2019 12:30 PM
23	15	3/9/2019 9:14 AM
24	49	3/8/2019 7:42 PM
25	11	3/8/2019 6:48 PM
26	7	3/8/2019 6:40 PM

## Data Privacy Restrictions Impact Survey

### Q15 Please share any additional concerns you may have with privacy restrictions on data overall.

Answered: 4 Skipped: 38

#	RESPONSES	DATE
1	Concerned that this is just the beginning, and at some point the other states will implement similar restraints and it will become nearly impossible for nonprofits to rent/exchange or acquire new donors for national direct response programs	3/18/2019 8:20 PM
2	That other states will follow suit. That cost of fundraising will rise and productivity will decline. That these will impact our ratings with CharityNavigator and other watchdogs, further impacting our fundraising productivity.	3/12/2019 11:24 AM
3	The patchwork of laws and restrictions will absolutely kill nonprofits as they have to redirect donor funds away from services and towards admin costs ... which will create other issues with charity ratings and false donor impressions that nonprofits are ineffective at delivering mission.	3/12/2019 11:02 AM
4	domino effect to other states!	3/11/2019 8:25 AM