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LILLY FAMILY SCHOOL OF PHILANTHROPY



# Perspectives on Philanthropy

# Giving USA 2021

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# ABOUT CCS FUNDRAISING

CCS is a fundraising consulting firm that partners with nonprofits for transformational change.

Our areas of expertise include strategic counsel, capital and endowment campaigns, leadership giving, development assessments, and data analytics.



Innovator in the field of fundraising for **7 decades**



Partners with **500+ nonprofits** annually worldwide



Largest professional staff with **300+ full-time employees**

# TODAY'S SPEAKERS



## KEYNOTE PRESENTER

**Dr. Una Osili**

*Associate Dean for Research and International Programs*  
IU Lilly Family School of Philanthropy



## PANELIST

**Dr. Anna Pruitt**

*Managing Editor of Giving USA*  
IU Lilly Family School of Philanthropy



## PANELIST

**Eileen R. Heisman**

*President & CEO*  
National Philanthropic Trust (NPT)



## PANELIST

**Stacy Palmer**

*Editor*  
The Chronicle of Philanthropy



## MODERATOR

**Eric Javier**

*Principal & Managing Director*  
CCS Fundraising



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**Giving USA**

**2021**

The Annual Report on Philanthropy for the year 2020

*Giving USA 2021 and  
Today's Philanthropic  
Landscape*

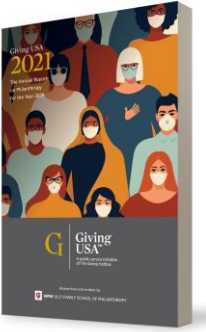
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# What is *Giving USA*?



- The longest running, annual report on U.S. charitable giving
- Estimates for:
  - Sources of giving
  - Amounts received by type of organization
- Published by Giving USA Foundation™
- Begun in 1956 by the American Association of Fundraising Counsel, now The Giving Institute
- Made possible by contributions from The Giving Institute member firms, foundations, and other donors
- Researched and written by the Indiana University Lilly Family School of Philanthropy





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**The Big Picture**



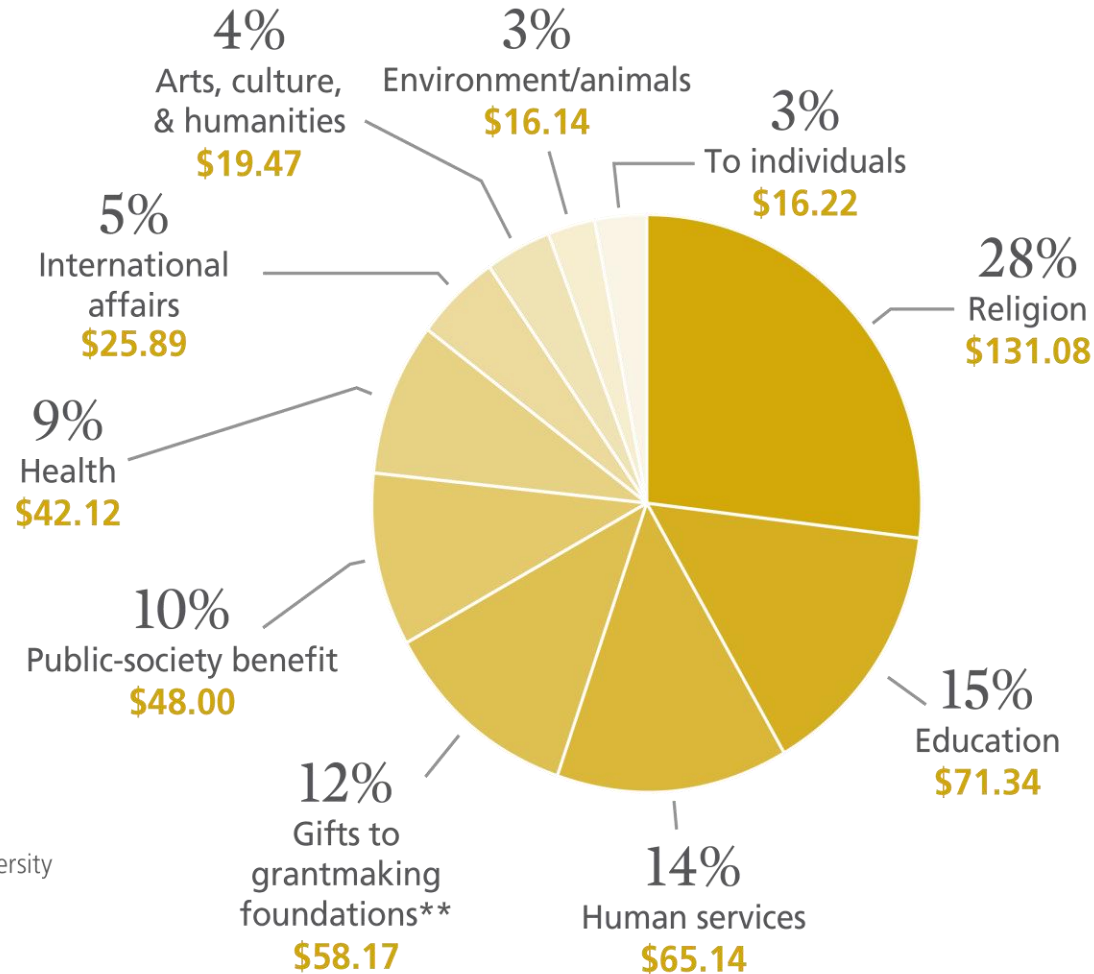
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# 2020 contributions: \$471.44 billion by type of recipient organization\*

(in billions of dollars - all figures are rounded)



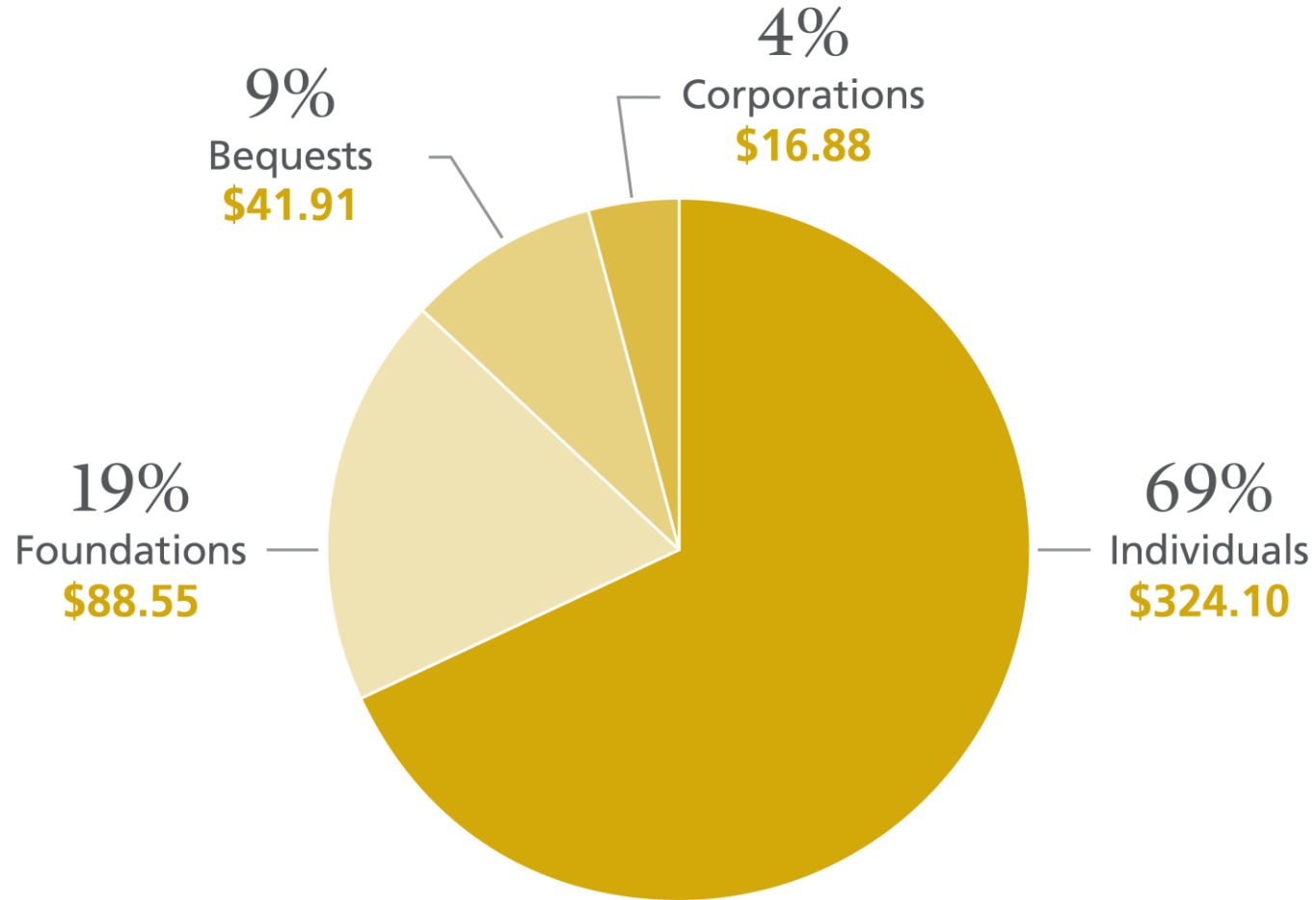
\* Total includes unallocated giving, which totaled -\$22.13 billion in 2020.

\*\* Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.



# 2020 contributions: \$471.44 billion by source of contributions

(in billions of dollars - all figures are rounded)







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**Top Ten Findings**

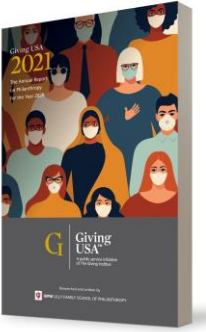


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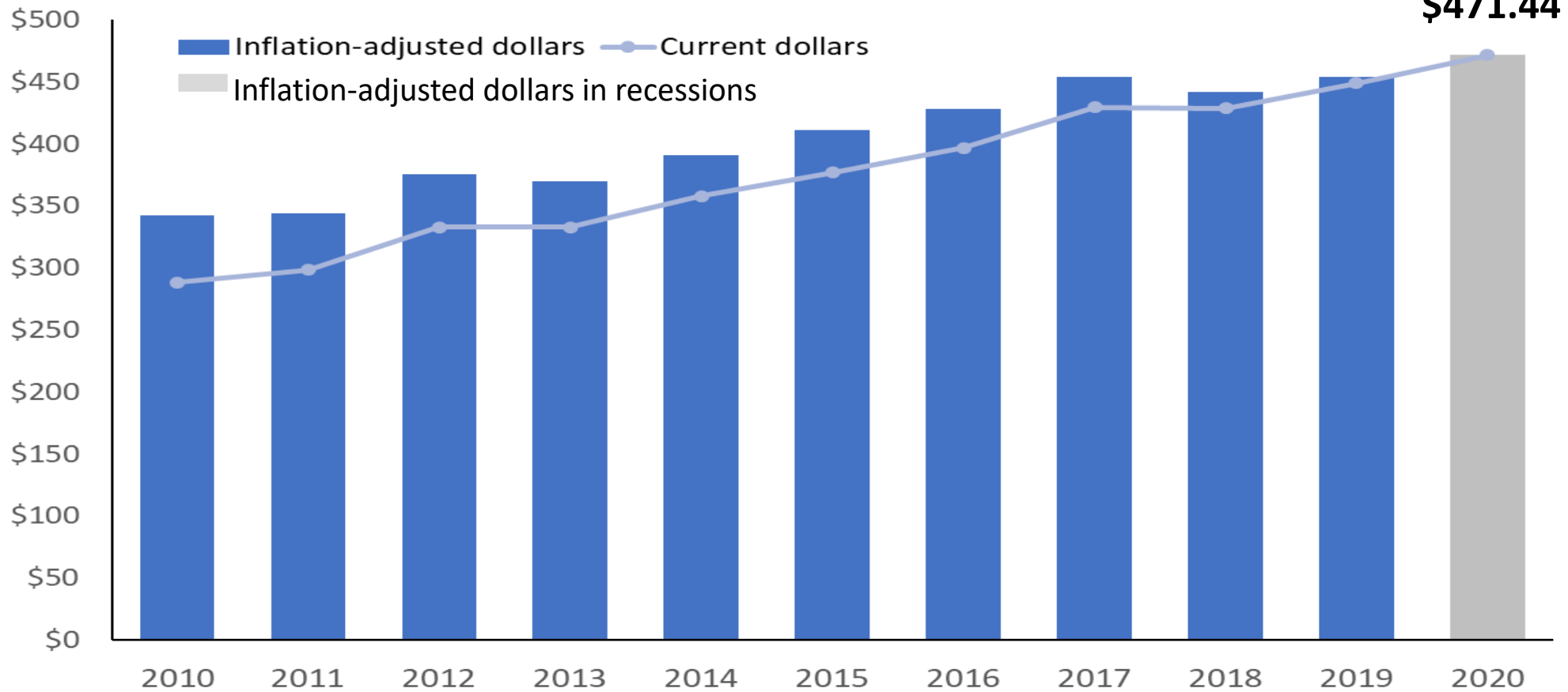


**IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY**

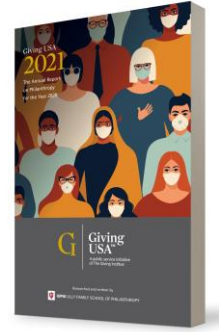
# #1 Giving reached a record \$471.44 billion



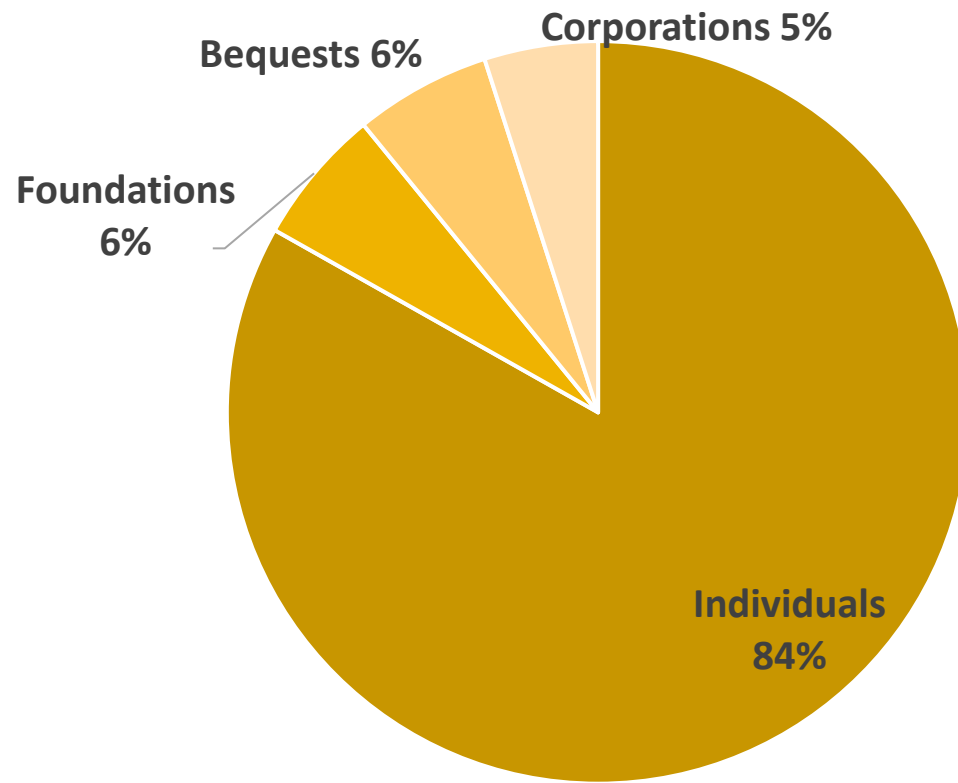
Total Giving: 1980-2020  
(in billions of dollars)



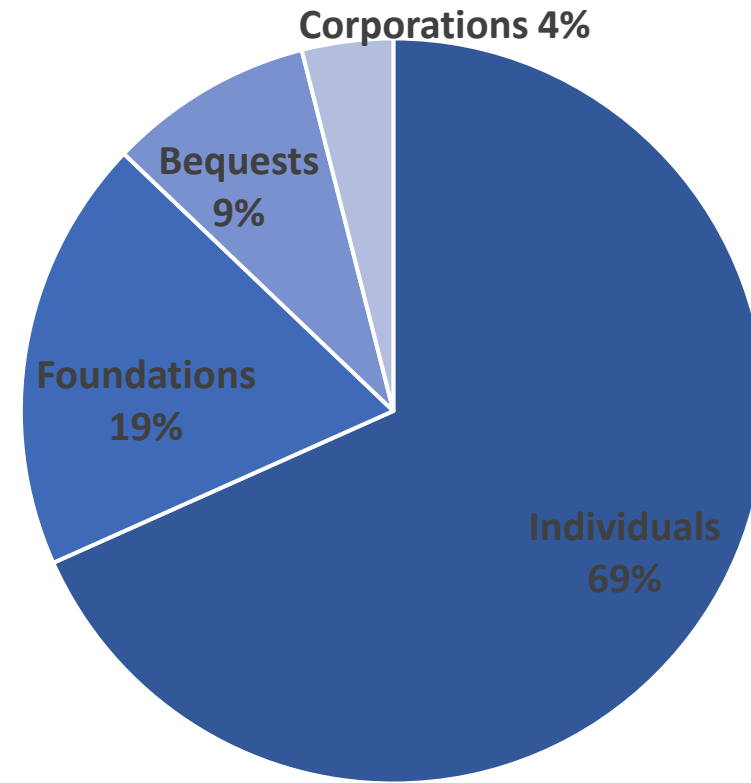
# #1 Giving reached a record \$471.44 billion



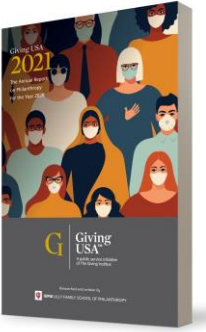
## 1980



## 2020



# #2 Economic, social, political environment had an impact on giving



The giving environment in 2020 was complex, especially in mid-year 2020:



- COVID-19 pandemic



- Racial justice and social justice movements



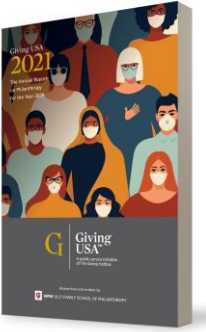
- Economic need

By year end, strong but uneven recovery:



- Impact of CARES Act
- S&P 500 grew 16.3% (current dollars)

# #3 Three of four sources grew in 2020

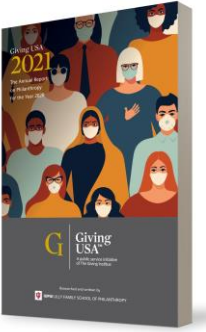


Percent change for sources in 2020  
(in current dollars)

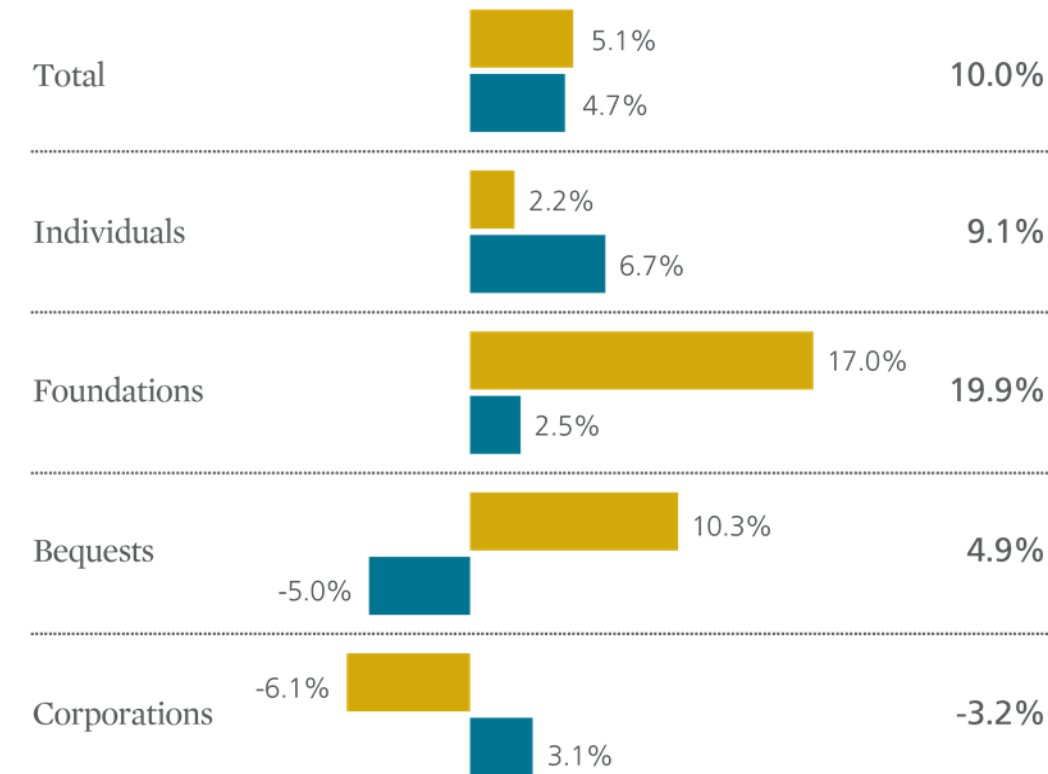




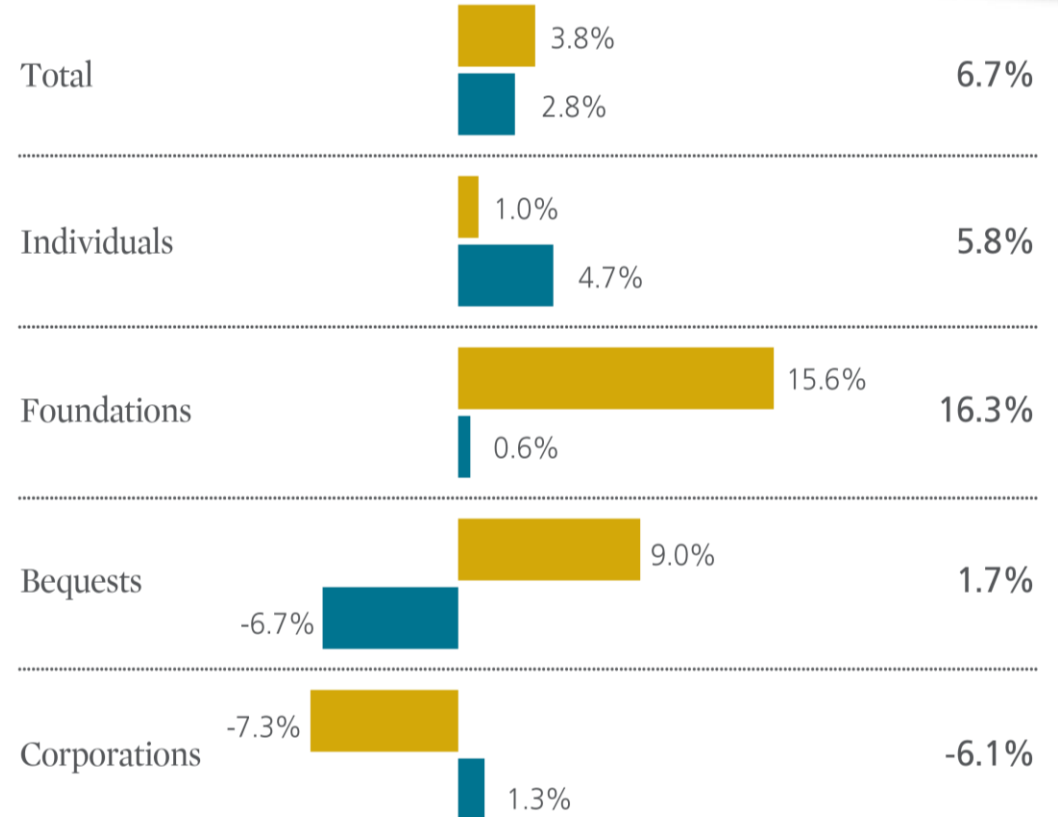
# Changes in giving by source: 2018-2019 and 2019-2020, 2018-2020 cumulative



## Change in current dollars



## Change in inflation-adjusted dollars

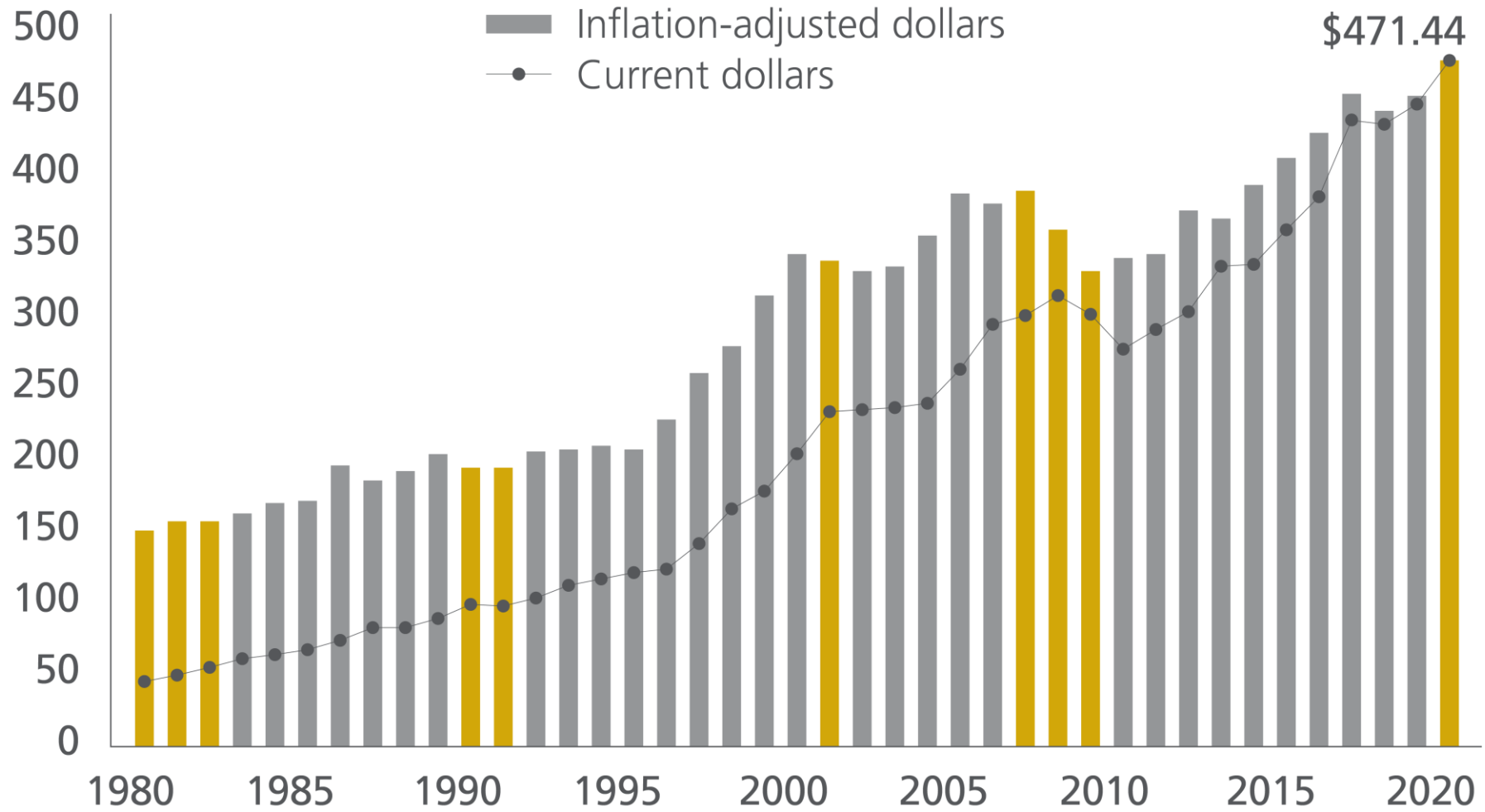


■ 2019-2020  
■ 2018-2019

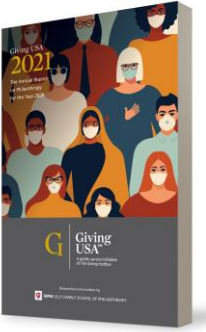


# Total giving, 1980-2020

(in billions of dollars)



# Economic factors in 2020



## STANDARD &POOR'S



GROSS DOMESTIC  
PRODUCT

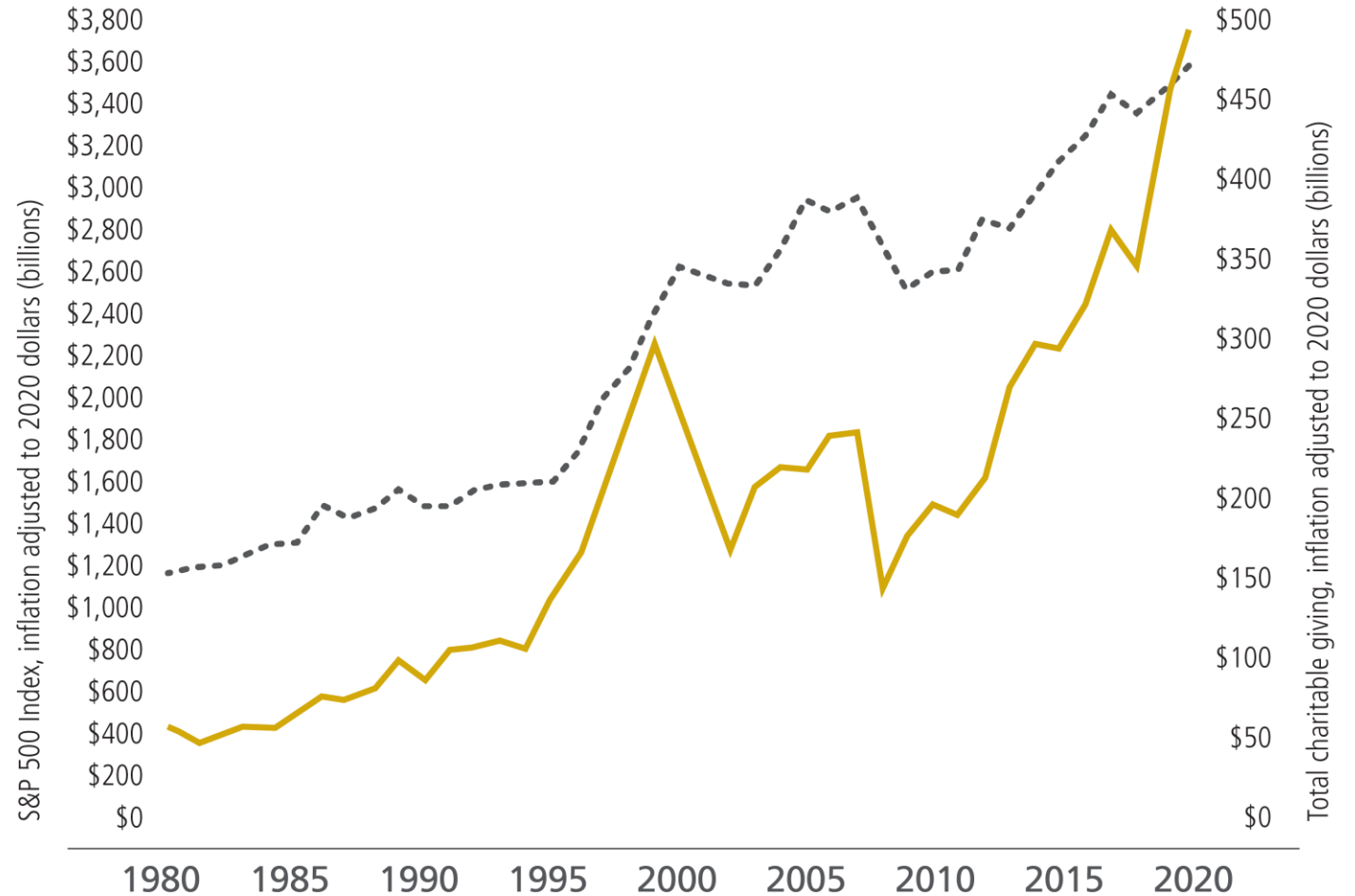


- **S&P 500** grew 16.3% (current dollars)
- **GDP** declined 2.3% (current dollars)
- **Personal disposable income** grew 6.1% (current dollars)



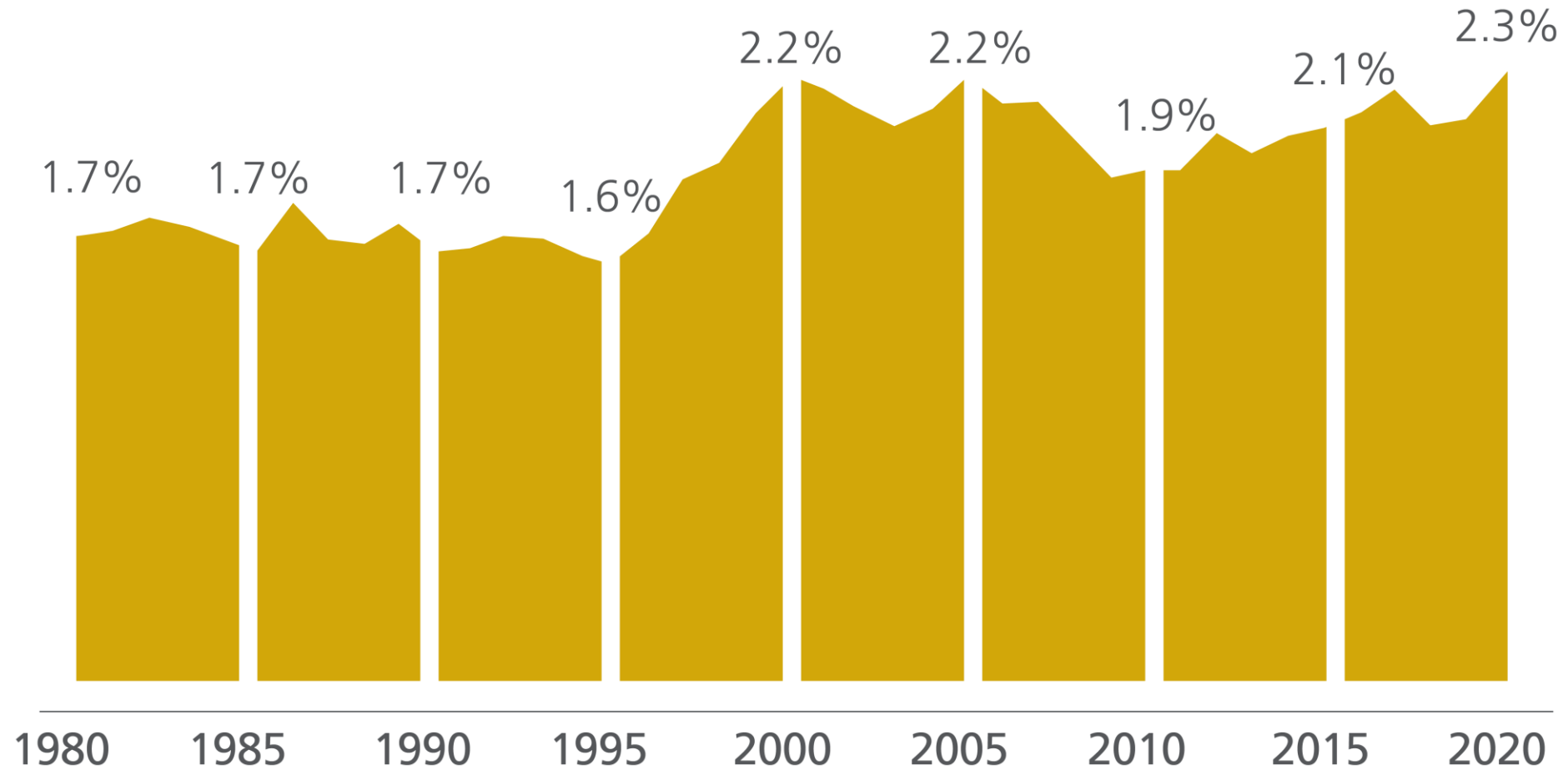
# Total charitable giving graphed with the Standard & Poor's 500 Index, 1980-2020 (in billions of inflation-adjusted dollars, 2020 = \$100)

- S&P 500, inflation-adjusted dollars
- - - Total giving, inflation-adjusted dollars



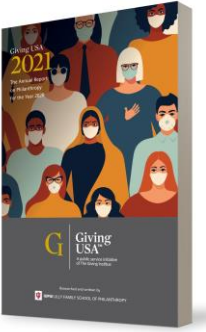


# Total giving as a percentage of gross domestic product (GDP), 1980-2020 (in current dollars)





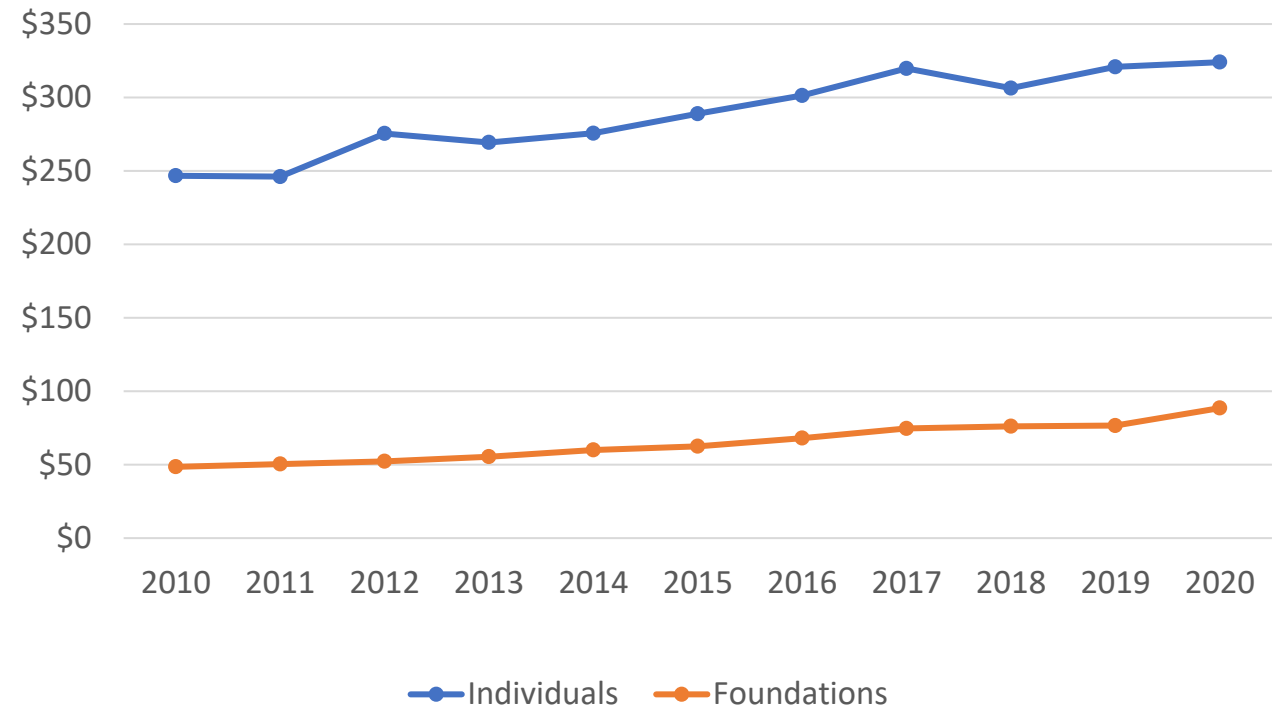
# #4 Giving types linked to the stock market performed well in 2020



- Growth in giving by foundations & individuals has been linked to the stock market performance.
- The stock market recovery by year end 2020 influenced overall giving trends.
- Giving by foundations reached a record 19% of total giving in 2020, but giving by individuals is still the largest share of total giving.

Giving by Individuals and Foundations, 2010-2020

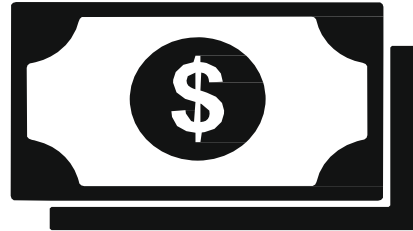
(in billions of inflation-adjusted dollars, 2020=\$100)



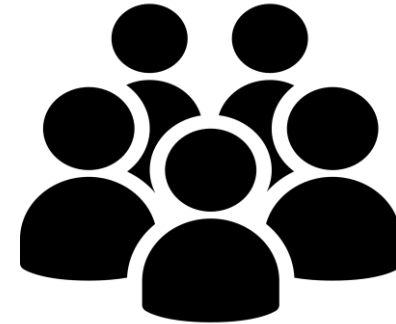
# The Power of Individuals in Philanthropy



*Overall Rate of Giving*  
**53%**



*Average Giving Amount*  
**\$2,766**



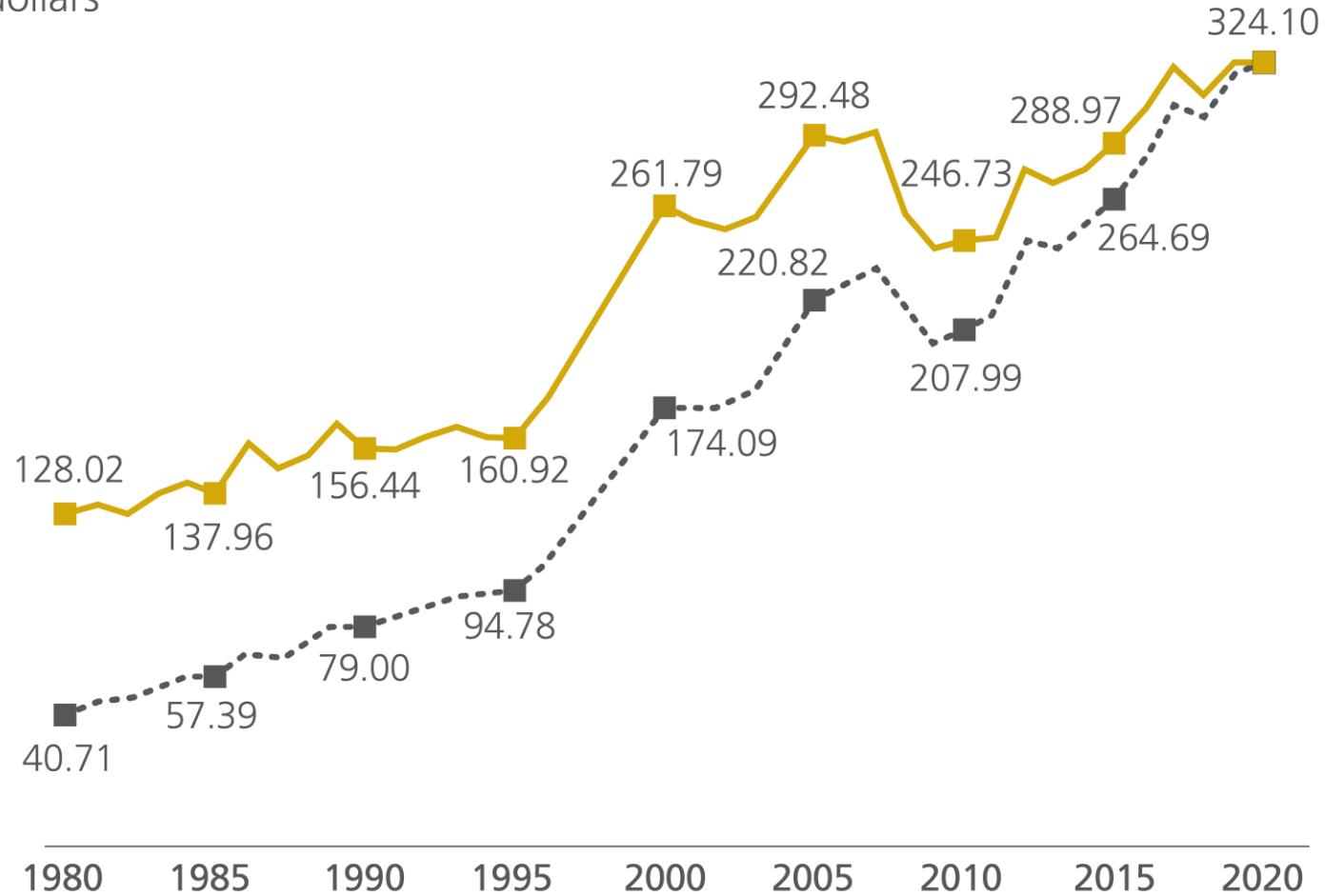
*Total Population*  
**323.4 million**



# Giving by individuals, 1980-2020

(in billions of dollars)

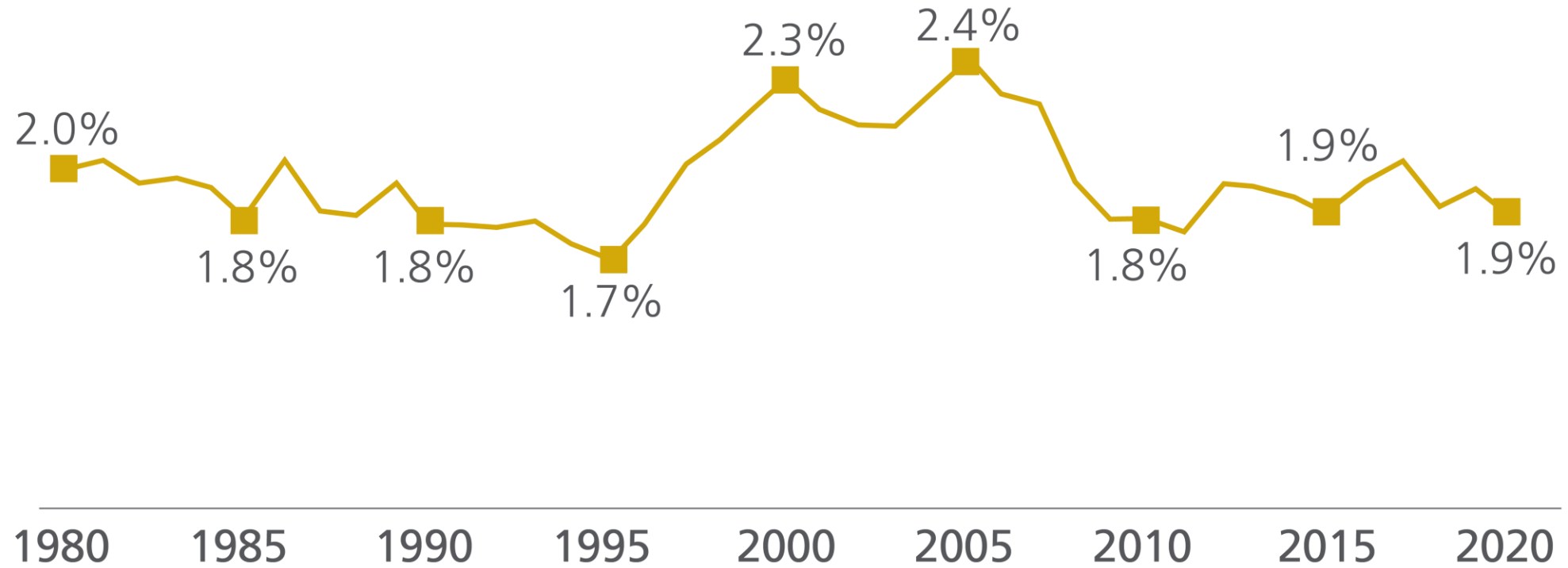
- Inflation-adjusted dollars
- - - Current dollars



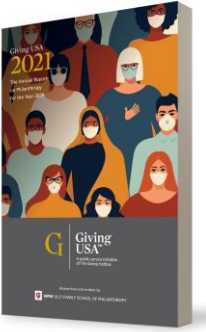


# Individual giving as a share of disposable income, 1980-2020

(in current dollars)



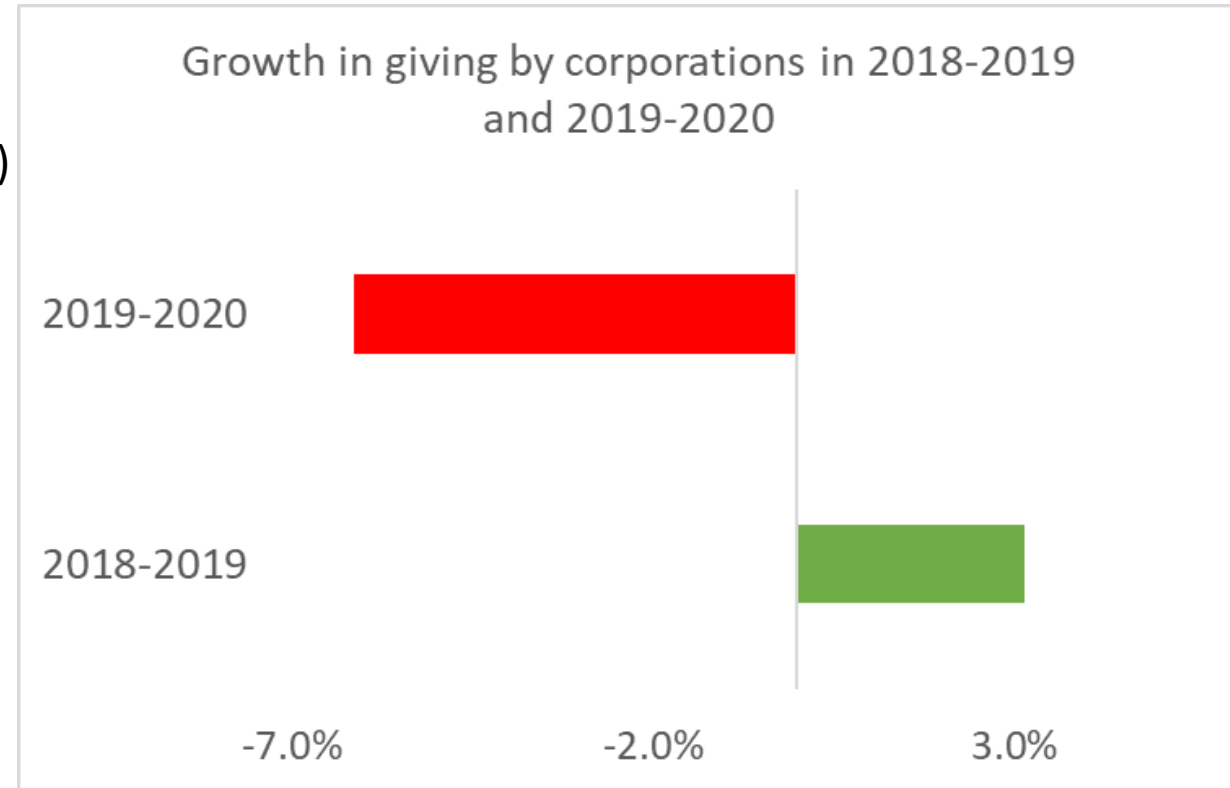
# #5 Factors that impacted corporate giving in 2020



Factors that impacted corporate giving in 2020

- **GDP** declined 2.3% (current dollars)
- **Corporate pre-tax profits** declined 3.5% (current dollars)

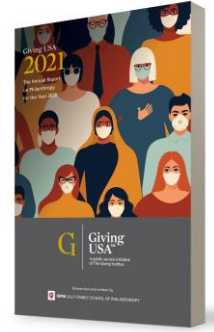
Economic impact of the pandemic across industries was uneven



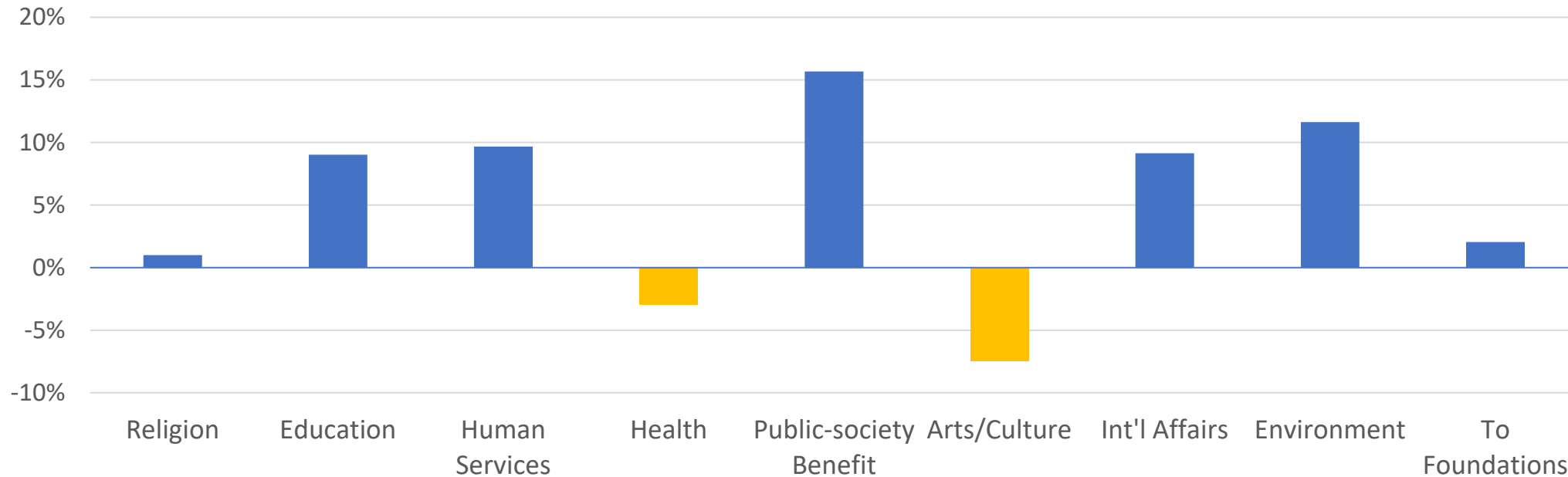


# #6 Seven of nine subsectors grew

- Giving to seven of nine subsectors grew, and giving grew by more than 8% for five subsectors\*
- Two-year growth was positive for all nine subsectors

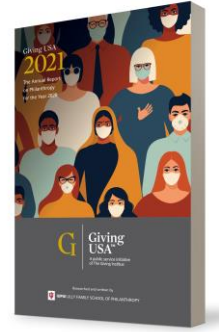


Percent change in giving to recipient categories, 2019-2020  
(in current dollars)



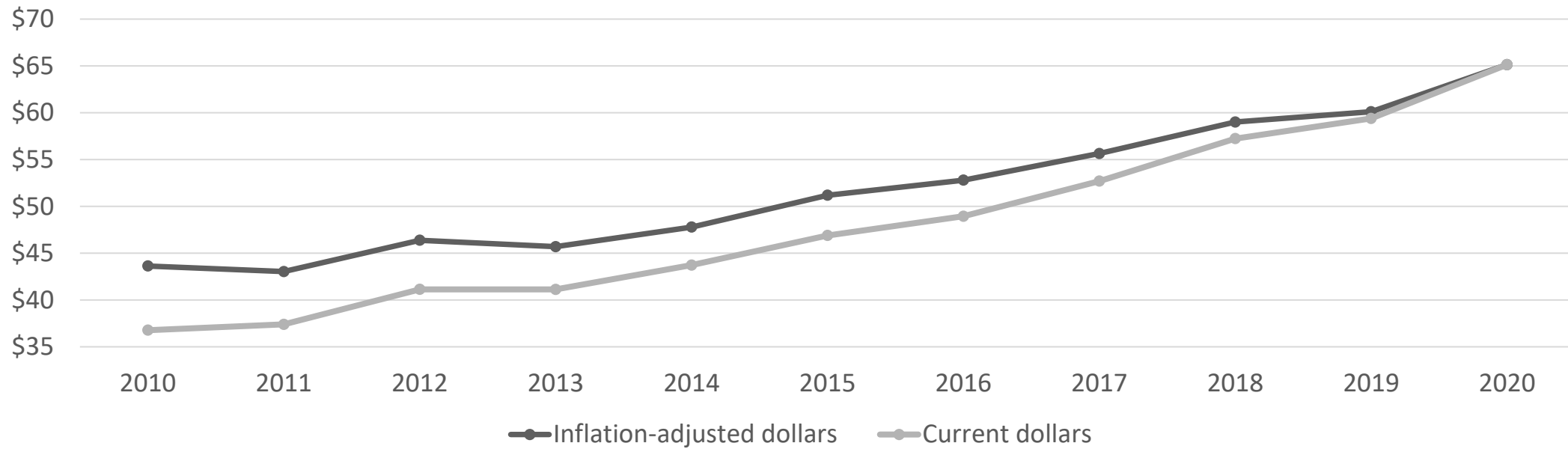
\*all information is in current dollars

# #7 Human services experienced rapid growth in 2020

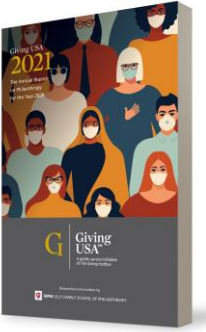


- Giving to human services grew 9.7% over 2019 in current dollars.
- This growth continues a pattern seen in previous recessionary years, as well as years where the U.S. has experienced a crisis.

Giving to Human Services  
(in billions of dollars)

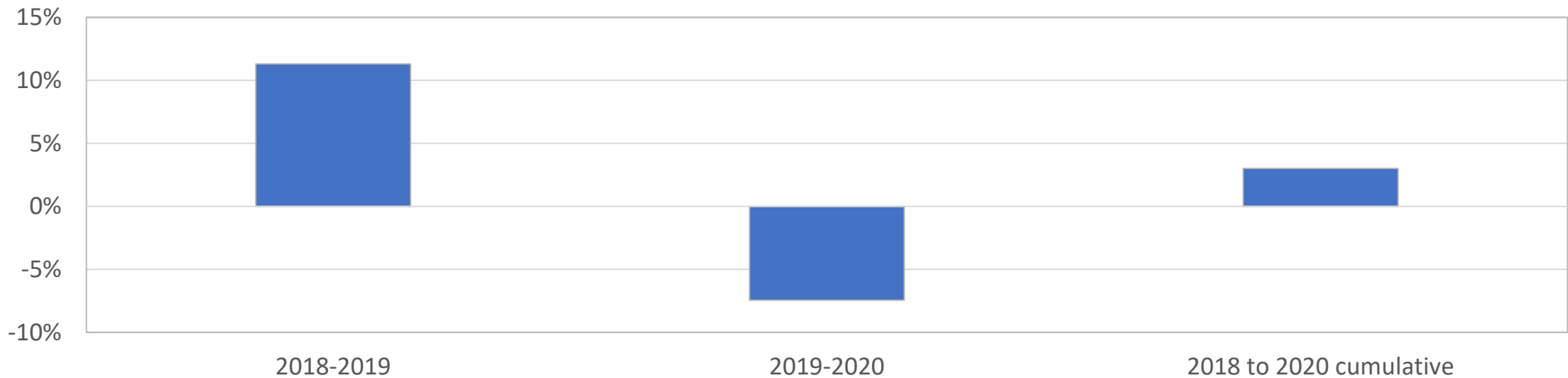


# #8 Giving to arts experienced declines

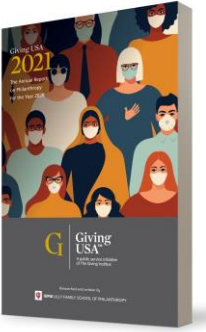


- Giving to arts, culture, and humanities declined by 7.5% in 2020.
- The shutdowns in the pandemic impacted in-person events for many arts organizations, culture, and humanities organizations.
- Two-year change percentages was positive in current dollars.

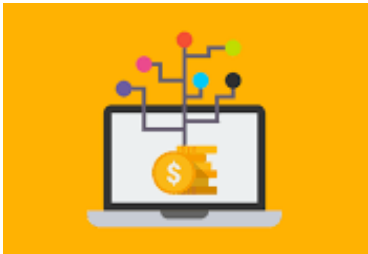
**Giving to Arts, Culture, and Humanities Organizations: 2018-2019, 2019-2020, and 2018-2020**



# #9 2020 saw unprecedented events and innovation in fundraising models



- Charities were well-served by being able to pivot to providing online services and fundraising programs.

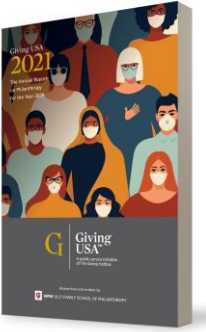


- Crowdfunding, mutual aid, and other forms of nontraditional philanthropy served an important role in responding to COVID-19 and calls for racial justice.

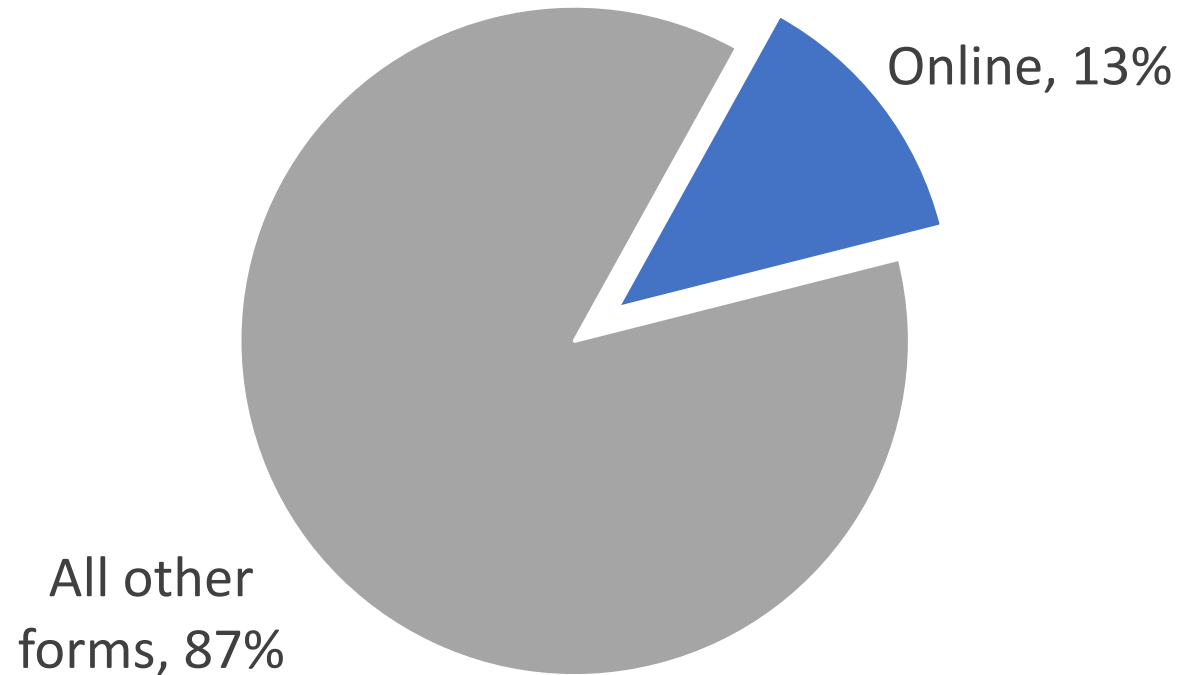


- Several reports from around the field indicate that some nonprofits experienced an influx of new donors. Nonprofits will need to communicate their impact in order to build relationships with these new donors.

# #10 Online giving accounts for a growing share of giving



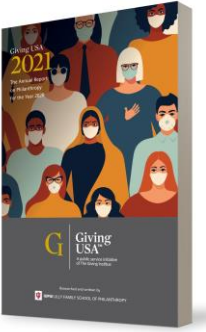
Online giving as a percentage of total fundraising in 2020



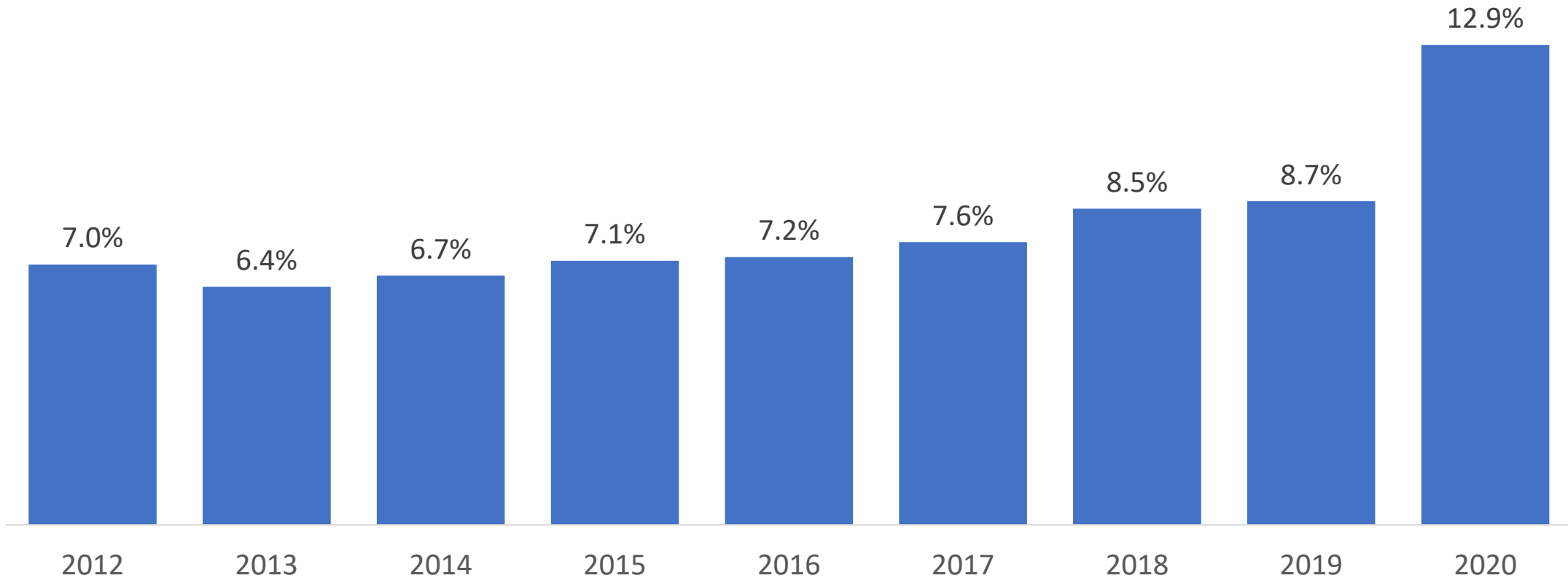
Source: Blackbaud Institute, 2021



# #10 Online giving accounts for a growing share of giving



## Online Giving as a Percentage of Total Fundraising, 2012-2020



*Charitable Giving Report: Using 2020 Data to Transform Your Strategy*, Blackbaud Institute, 2021

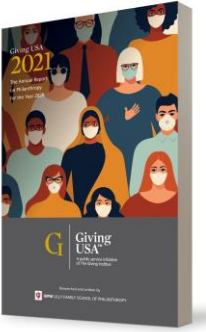


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# Questions?



Please **comment** on the surprises and top trends you see.



## Question & Answer

- You may now ask a question via the Q&A widget found at the bottom of your console.



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# PANEL DISCUSSION



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