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#CCSGivingUSA

Perspectives on Philanthropy
Giving USA 2021
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

Stacy Palmer
Editor
The Chronicle of Philanthropy

PANELIST

Eileen R. Heisman
President & CEO
National Philanthropic Trust (NPT)

MODERATOR

Eric Javier
Principal & Managing Director
CCS Fundraising
Giving USA 2021
The Annual Report on Philanthropy for the Year 2020

Giving USA 2021 and Today’s Philanthropic Landscape
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
2020 contributions: $471.44 billion by type of recipient organization*
(in billions of dollars - all figures are rounded)

- 28% Religion $131.08
- 15% Education $71.34
- 14% Human services $65.14
- 12% Gifts to grantmaking foundations** $58.17
- 10% Public-society benefit $48.00
- 9% Health $42.12
- 5% International affairs $25.89
- 3% Environment/animals $16.14
- 4% Arts, culture, & humanities $19.47
- 3% To individuals $16.22

* 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)

- **Bequests**: 9% ($41.91 billion)
- **Corporations**: 4% ($16.88 billion)
- **Foundations**: 19% ($88.55 billion)
- **Individuals**: 69% ($324.10 billion)
#1 Giving reached a record $471.44 billion

**Total Giving: 1980-2020**

(in billions of dollars)

- Inflation-adjusted dollars
- Current dollars
- Inflation-adjusted dollars in recessions

$471.44
#1 Giving reached a record $471.44 billion

1980:
- Individuals: 84%
- Corporations: 5%
- Bequests: 6%
- Foundations: 6%

2020:
- Individuals: 69%
- Corporations: 4%
- Bequests: 9%
- Foundations: 19%
#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)

- Total: 0%
- Individuals: -5%
- Foundations: 15%
- Bequests: 10%
- Corporations: -10%

<table>
<thead>
<tr>
<th>Change in current dollars</th>
<th>Change in inflation-adjusted dollars</th>
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<tbody>
<tr>
<td><strong>Total</strong></td>
<td><strong>Total</strong></td>
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<tr>
<td>Yellow: 5.1%</td>
<td>Blue: 3.8%</td>
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<td>4.7%</td>
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<td>Total: 10.0%</td>
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<td>Total: 6.7%</td>
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<tr>
<td><strong>Individuals</strong></td>
<td><strong>Individuals</strong></td>
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<td>Yellow: 2.2%</td>
<td>Blue: 1.0%</td>
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<td>6.7%</td>
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<td><strong>Foundations</strong></td>
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<td>Yellow: 17.0%</td>
<td>Blue: 15.6%</td>
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<td>0.6%</td>
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<td>Total: 19.9%</td>
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<td>Total: 16.3%</td>
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<td><strong>Bequests</strong></td>
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<tr>
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<td>9.0%</td>
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<tr>
<td></td>
<td>Total: 4.9%</td>
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<td></td>
<td>Total: 1.7%</td>
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<tr>
<td><strong>Corporations</strong></td>
<td><strong>Corporations</strong></td>
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<tr>
<td>Yellow: -6.1%</td>
<td>Blue: -7.3%</td>
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<tr>
<td>3.1%</td>
<td>1.3%</td>
</tr>
<tr>
<td></td>
<td>Total: -3.2%</td>
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<tr>
<td></td>
<td>Total: -6.1%</td>
</tr>
</tbody>
</table>

2019-2020

2018-2019
Total giving, 1980-2020
(in billions of dollars)
Economic factors in 2020

- 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)

1980: 1.7%
1985: 1.7%
1990: 1.7%
1995: 1.6%
2000: 2.2%
2005: 2.2%
2010: 1.9%
2015: 2.1%
2020: 2.3%

Researched and written by IUPUI Lilly Family School of Philanthropy
#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

1980: 128.02
1985: 137.96
1990: 156.44
1995: 160.92
2000: 261.79
2005: 292.48
2010: 246.73
2015: 288.97
2020: 324.10
Individual giving as a share of disposable income, 1980-2020
(in current dollars)
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

*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 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.
#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.
Online giving accounts for a growing share of giving

Online giving as a percentage of total fundraising in 2020

- Online, 13%
- All other forms, 87%

Source: Blackbaud Institute, 2021
#10 Online giving accounts for a growing share of giving

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

<table>
<thead>
<tr>
<th>Year</th>
<th>Online Giving</th>
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<tbody>
<tr>
<td>2012</td>
<td>7.0%</td>
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<tr>
<td>2013</td>
<td>6.4%</td>
</tr>
<tr>
<td>2014</td>
<td>6.7%</td>
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<tr>
<td>2015</td>
<td>7.1%</td>
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<td>2016</td>
<td>7.2%</td>
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<tr>
<td>2017</td>
<td>7.6%</td>
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<tr>
<td>2018</td>
<td>8.5%</td>
</tr>
<tr>
<td>2019</td>
<td>8.7%</td>
</tr>
<tr>
<td>2020</td>
<td>12.9%</td>
</tr>
</tbody>
</table>

Charitable Giving Report: Using 2020 Data to Transform Your Strategy, Blackbaud Institute, 2021
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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Researched and written by IUPUI Lilly Family School of Philanthropy
Thank you for joining us today!

A VERY SPECIAL THANKS TO OUR GUESTS FROM:

IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

The Chronicle of Philanthropy

National Philanthropic Trust