



REFLECTIONS ON TODAY'S PHILANTHROPIC LANDSCAPE

Wednesday, August 14, 2019

1:00 PM EST / 10:00 AM PST

TODAY'S PRESENTERS



Travis Carley
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CCS San Francisco



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Managing Director
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ABOUT CCS: 2018 YEAR IN REVIEW

In 2018, CCS...

Celebrated 72 years of helping nonprofits achieve their missions



Worked in 11 countries, 281 cities around the world, and 43 states in the US



Partnered with over 550 organizations around the world



Raised nearly \$4.8 billion for over 270 campaigns



Executed 172 planning studies, conducting 6,300+ interviews with donors/key stakeholders



Analyzed the giving patterns of 5 million philanthropists to help our clients identify top major donor prospects



TODAY'S DISCUSSION

1 How Did the Landscape Change?

2 Current Unique Trends in Giving

3 Strategies and Takeaways

4 Q & A

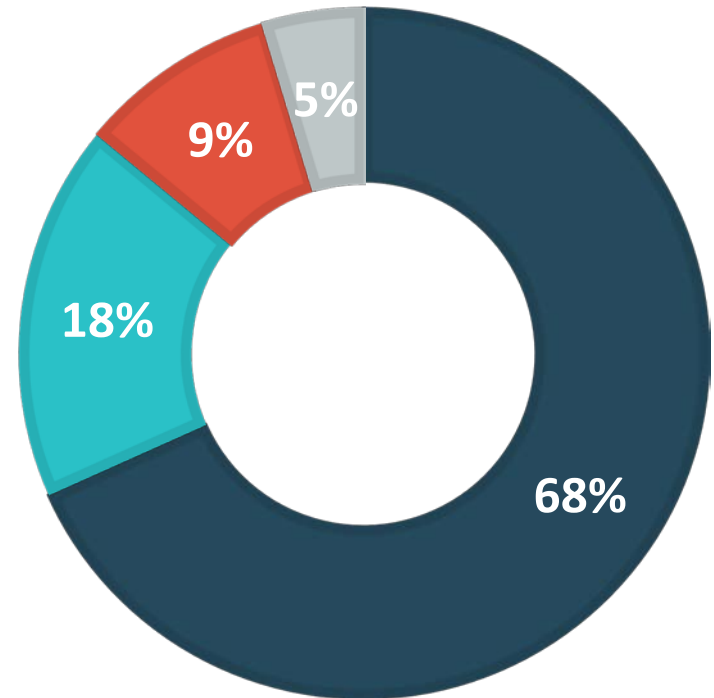
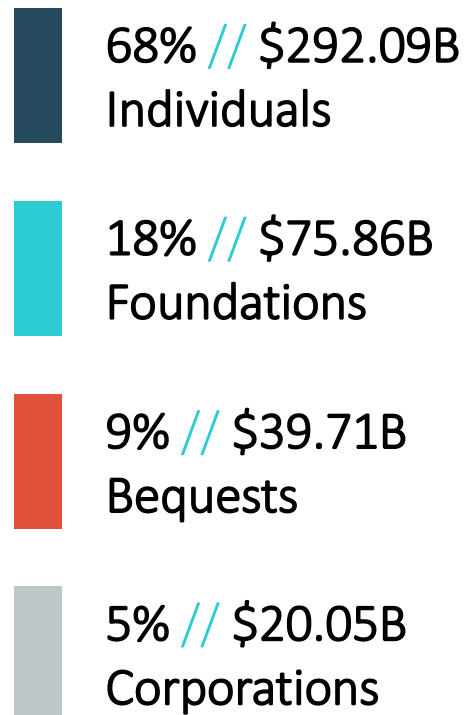
HOW DID THE LANDSCAPE CHANGE?



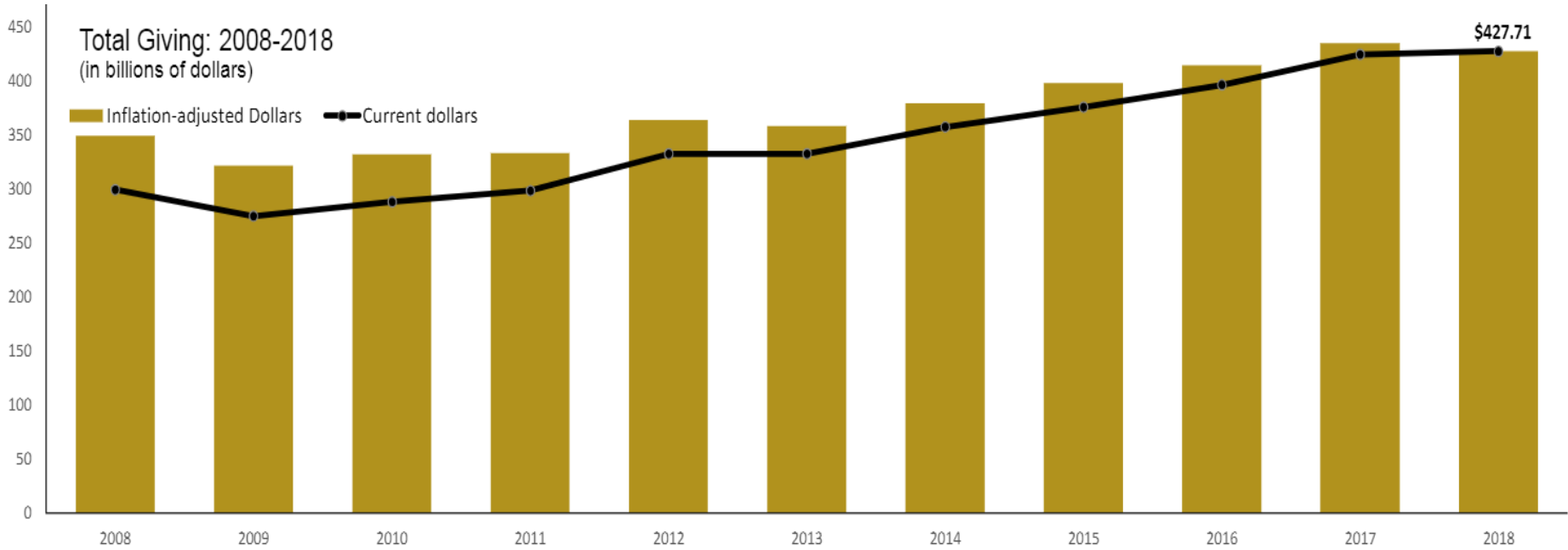
GIVING OVERVIEW

In 2018, Americans gave **\$427.71 billion**.

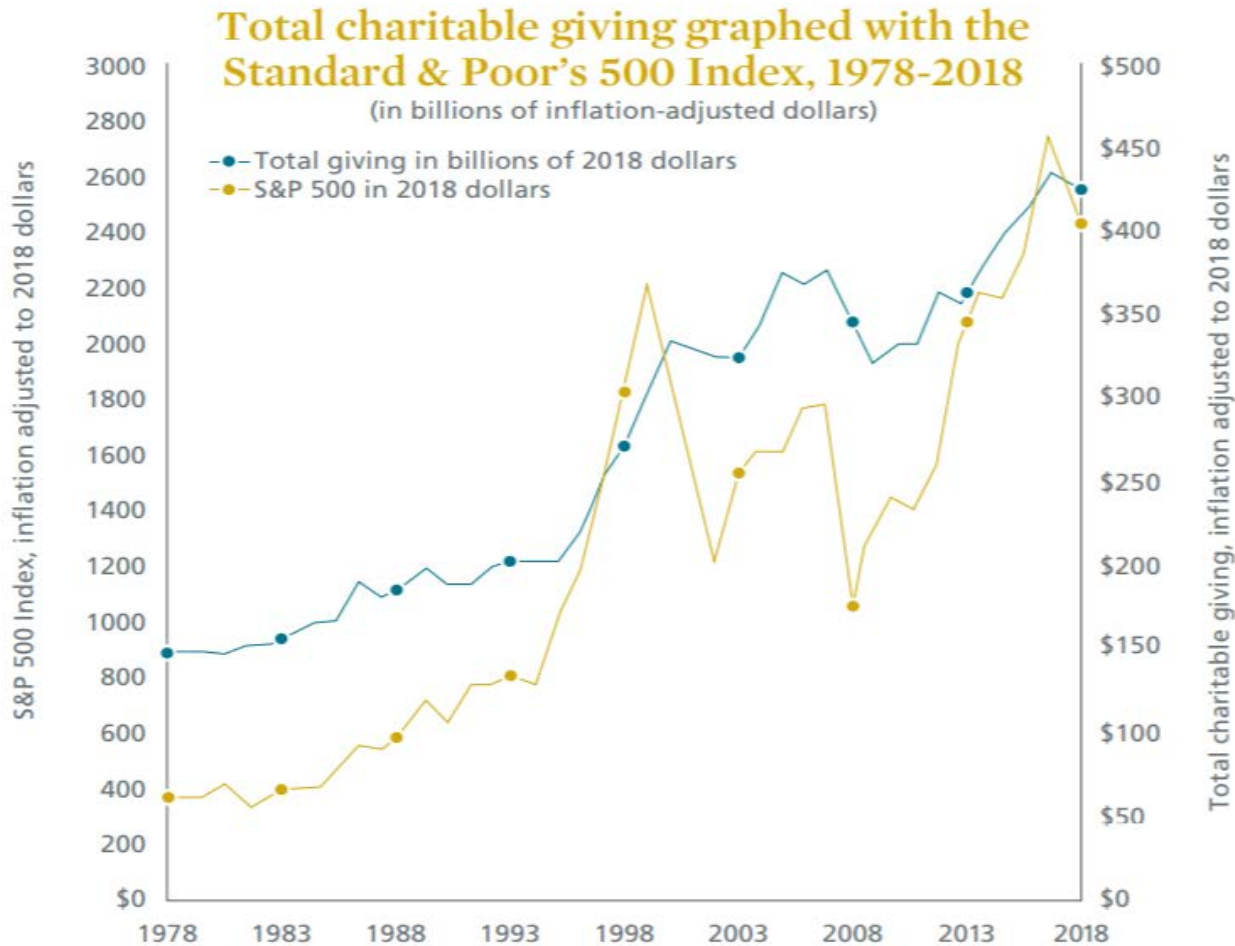
Total estimated charitable giving in the United States rose **0.7%** in current dollars but declined **1.7%** in inflation-adjusted dollars.



TOTAL GIVING: 2008-2018



TOTAL CHARITABLE GIVING VS. S&P 500



- Adjusted for inflation, the S&P 500 decreased 8.5 percent—compared with 1.7 percent decrease in total giving—between 2017 and 2018.
- Stock market volatility may have decreased giving by individuals.

INDIVIDUAL GIVING SHRINKS AS FOUNDATION GIVING GROWS

Giving by source: percentage of the total in five-year spans, 1979-2018

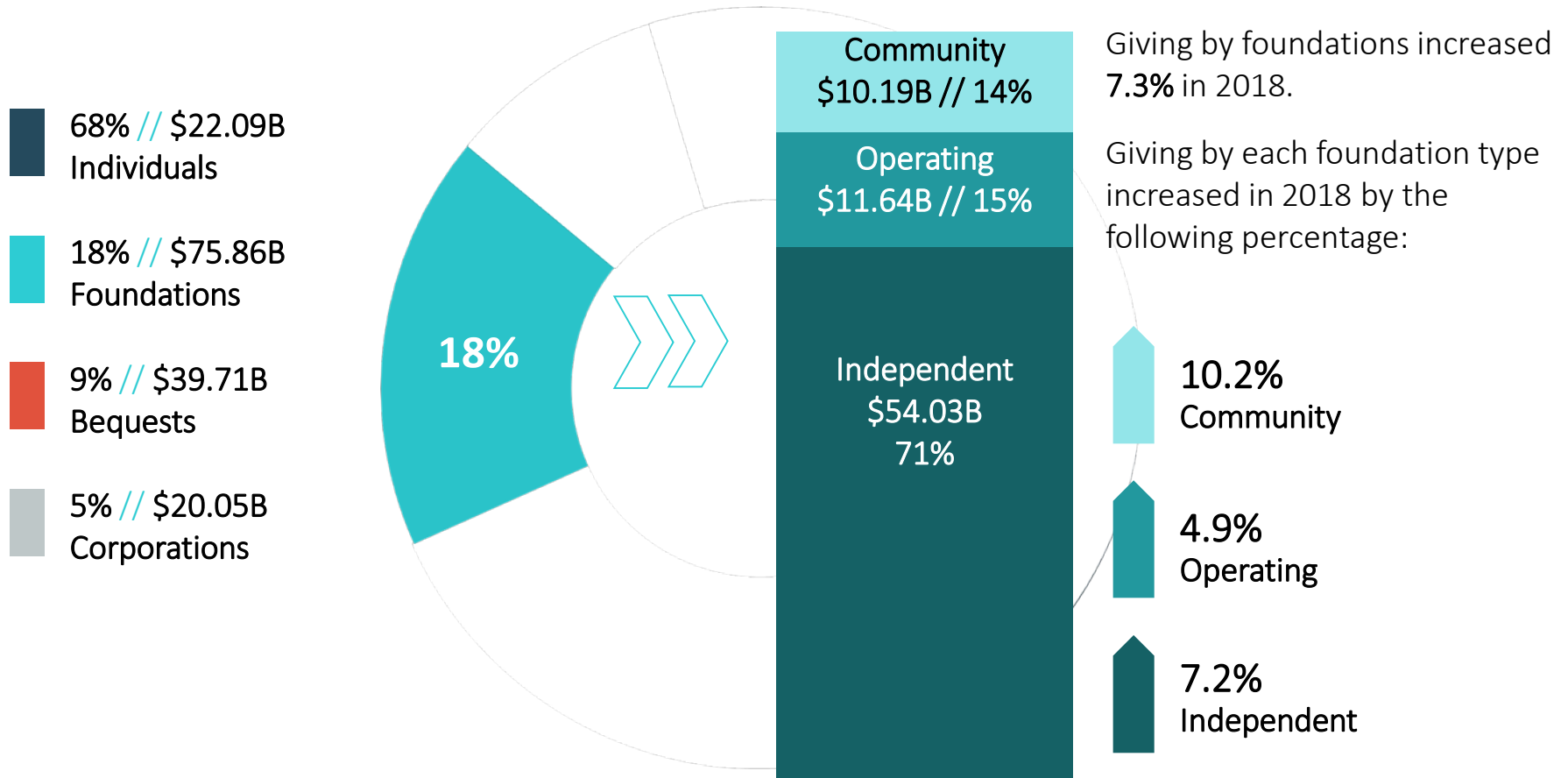
(in billions of inflation-adjusted dollars, 2018=\$100)



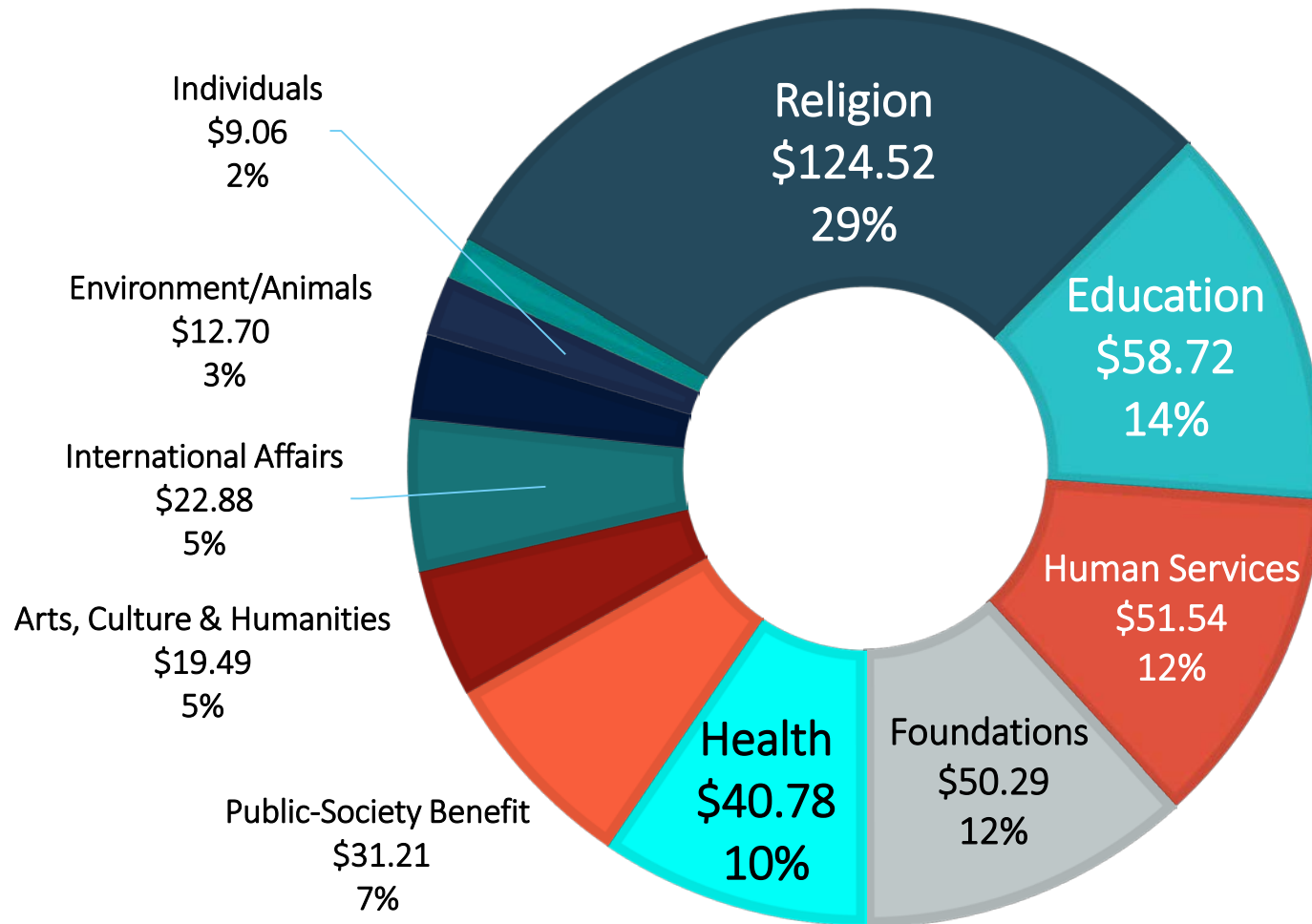
POLL:

Has your organization
experienced a change
in individual giving over
the past year?

FOUNDATION GIVING INCREASED ACROSS ALL TYPES



WHERE DID THE MONEY GO?



HOW DID CONTRIBUTIONS CHANGE?



▲ 9.6%
International Affairs



▲ 3.6%
Environmental/Animals



= 0.1%
Health



= 0.3%
Arts, Culture & Humanities



= 0.3%
Human Services



▼ 1.3%
Education



▼ 1.5%
Religion



▼ 2.6%
Individuals



▼ 3.7%
Public-Society Benefit

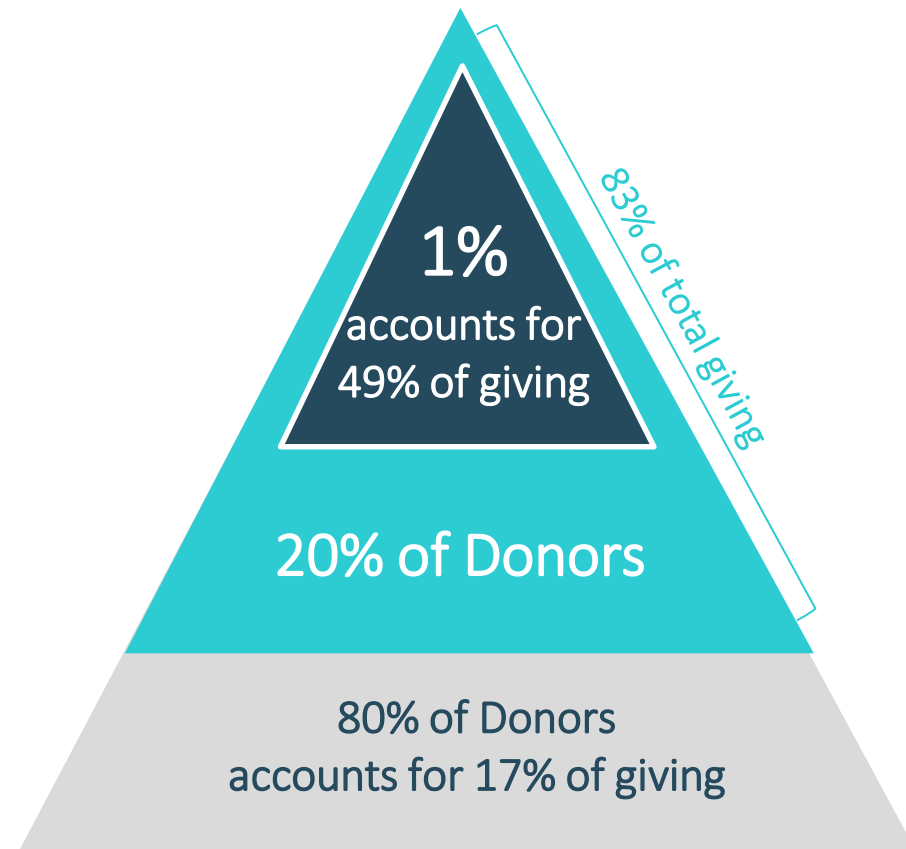
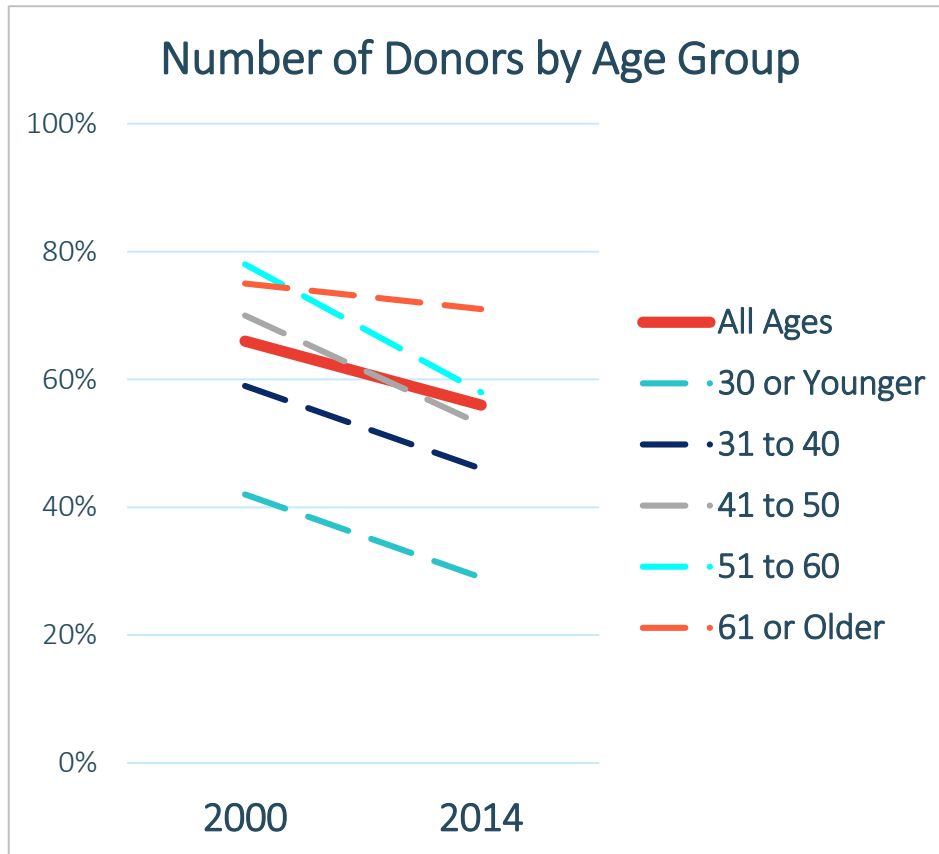


▼ 6.9%
Foundations

CURRENT UNIQUE TRENDS IN GIVING



CHANGING DONOR DEMOGRAPHICS

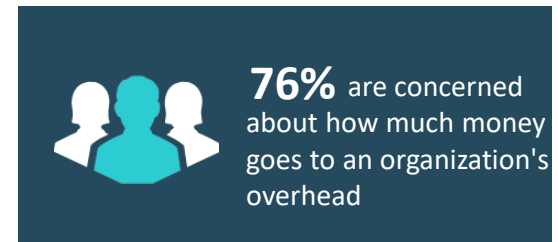


*Full triangle represents total giving

SOPHISTICATED DONORS

Most donors research nonprofits before giving. Prior to making contributions, donors consider the following factors:

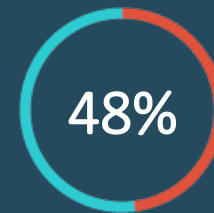
TOPIC	% of DONORS WHO RESEARCH BEFORE GIVING
Overall Efficiency	70%
Philanthropic Impact	59%
General Reputation	54%
Operating Costs	53%
Mission and Services	53%
Executive Salaries	43%
Funding Sources	31%



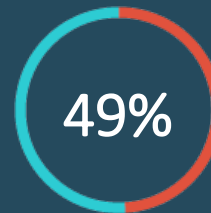
A SPOTLIGHT ON HIGH NET WORTH INDIVIDUALS

The more knowledgeable donors become about philanthropy, the more likely they are to create a strategy and a budget.

Nearly **half** of all HNWI's have a giving strategy.



Have a
Giving
Budget



Have a
Giving
Strategy

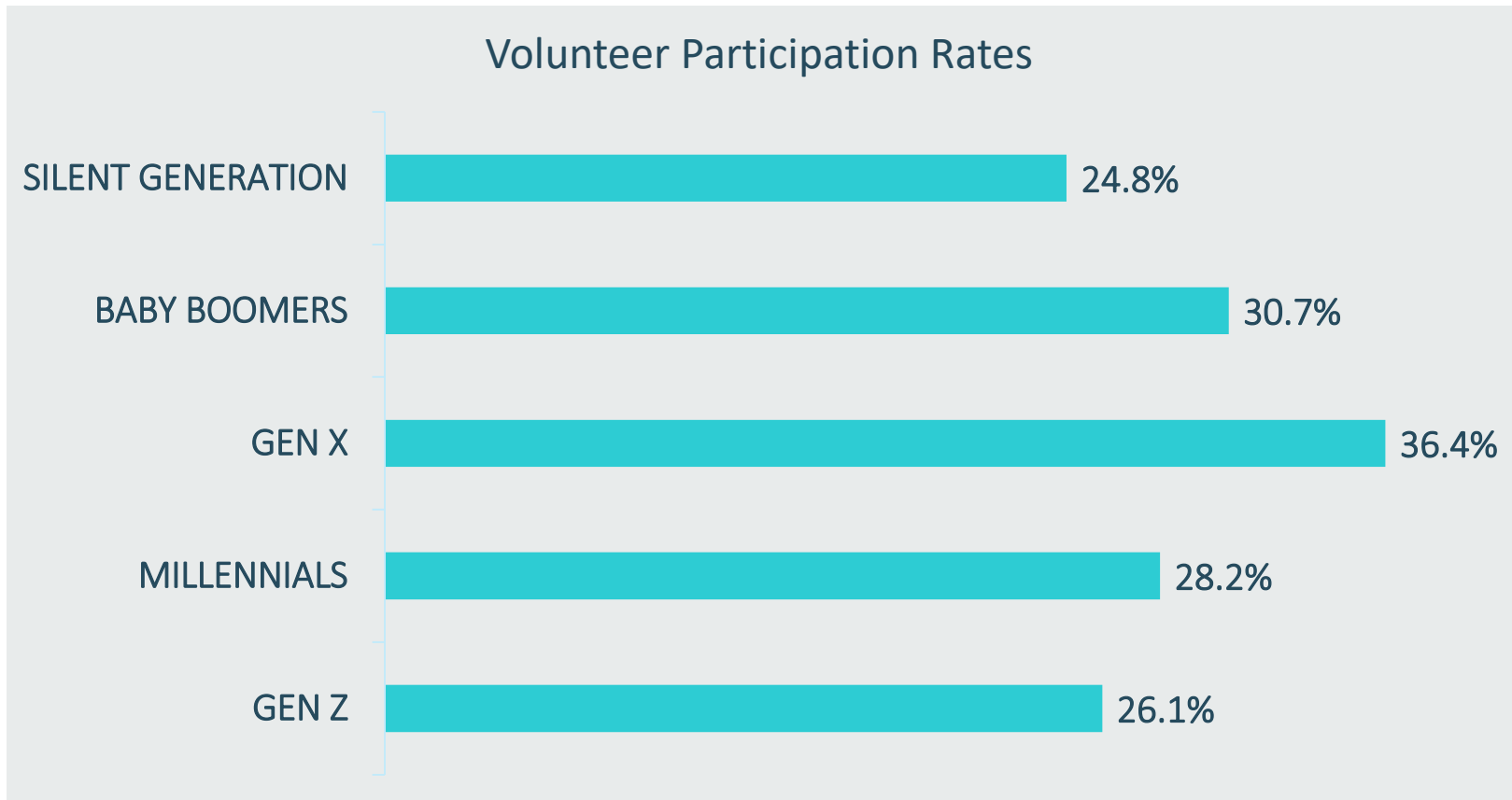
MORE AMERICANS ARE VOLUNTEERING

77.3 Million
people volunteered in 2018

23.5% 
increase from 2016

**80% of
volunteers also
donated**

GENERATIONAL VOLUNTEERING

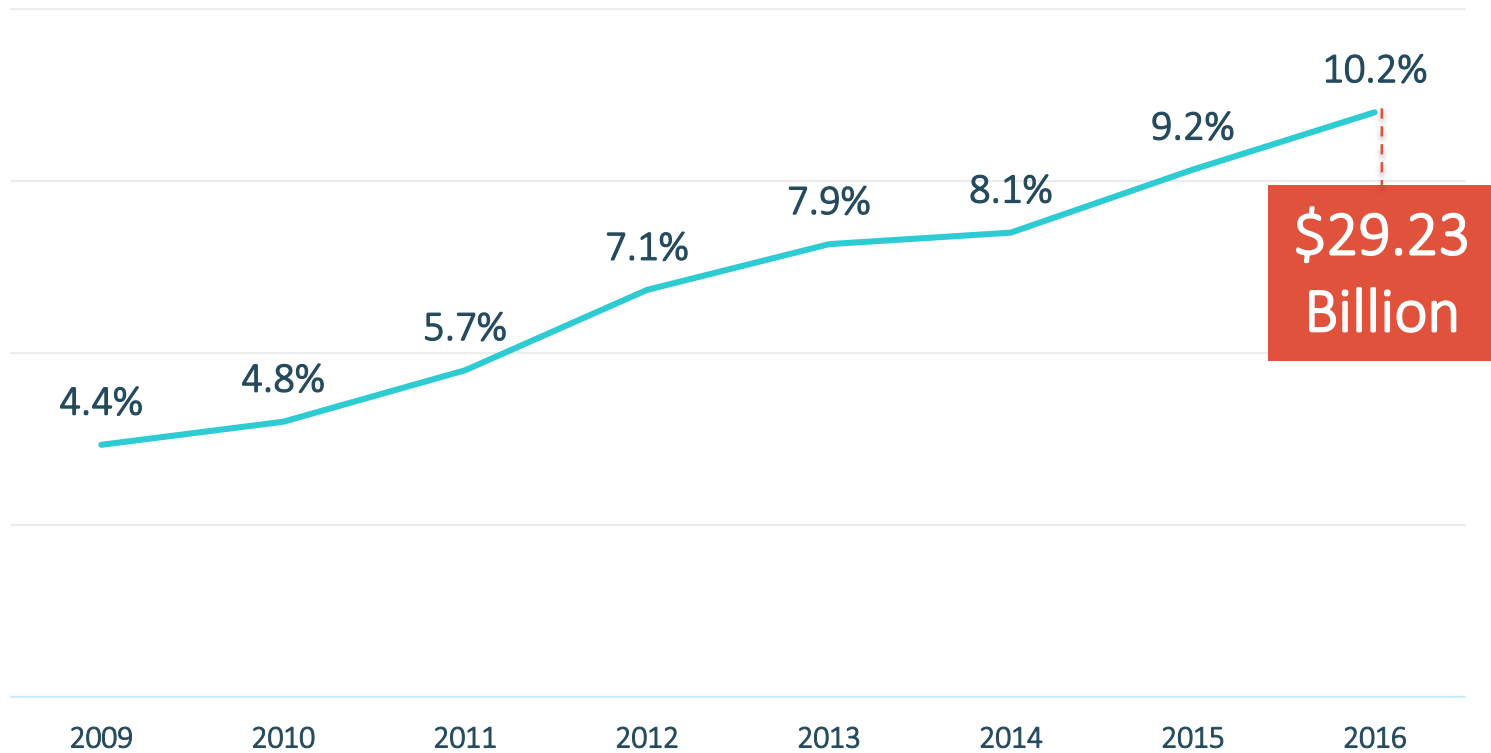


DONOR-ADVISED FUNDS AND PRIVATE FOUNDATIONS ARE ON THE RISE

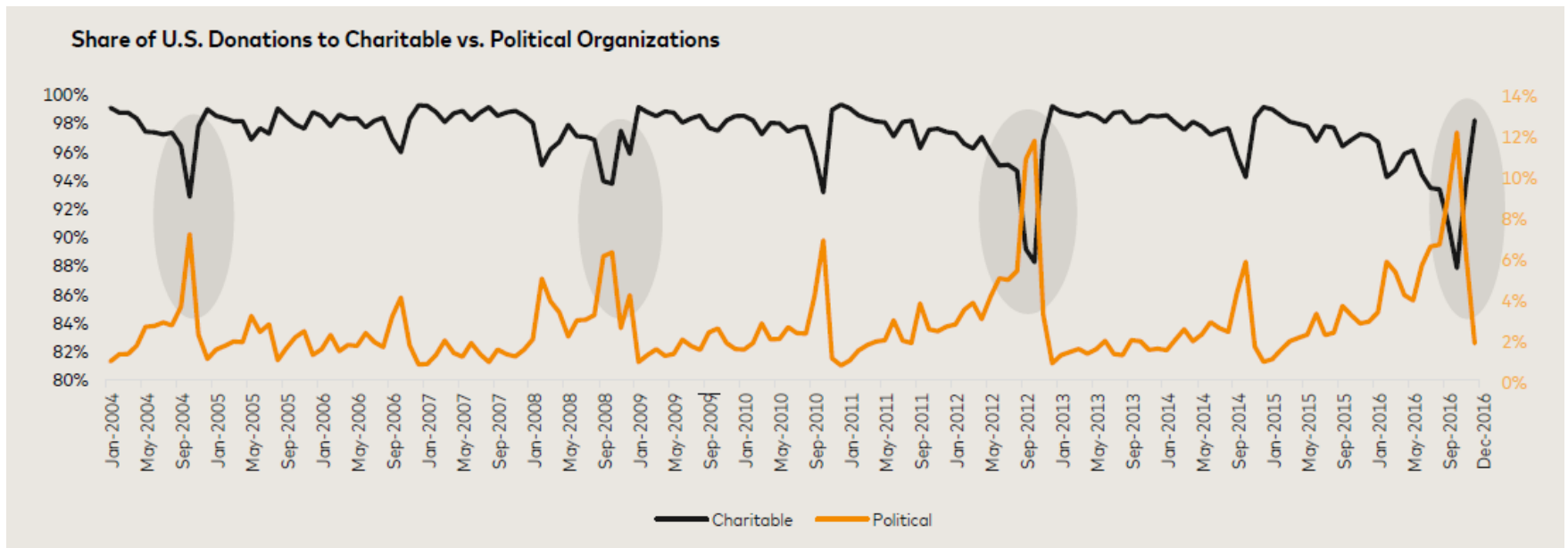
DONOR ADVISED FUNDS (DAFs)	2014	2015	2016
# of DAFs	272,845	289,478	463,622
Assets	\$77.2 Billion	\$86.5 Billion	\$110 Billion
Grantmaking	\$14.2 Billion	\$15.9 Billion	\$19 Billion
PRIVATE FOUNDATIONS			
# of Foundations	79,489	80,988	82,516
Assets	\$734.1 Billion	\$792.6 Billion	\$855.8 Billion
Grantmaking	\$44.1 Billion	\$45.2 Billion	\$49.5 Billion

CONTRIBUTIONS TO DAFs AS A PERCENTAGE OF INDIVIDUAL GIVING CONTINUES TO RISE

Giving to DAFs as a % of Total Individual Giving



POLITICAL AND ECONOMIC EVENTS MAY IMPACT GIVING



As political giving increases around elections, charitable giving decreases.

However, there is also an **uptick in charitable giving following elections.**

TAKEAWAYS

- 1 Relationships are more important than ever before.
- 2 Donors demand **transparency** and want to know about the **impact** of their gifts.
- 3 Find **meaningful ways** for donors to **experience the mission**.
- 4 Donor advised funds are a **reality and here to stay**.
- 5 Now is the time to make your case and ensure that your organization is at the **top of the list of your donors' philanthropic priorities**.

Questions and Discussion



Thank You!



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