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LILLY FAMILY SCHOOL OF PHILANTHROPY



Perspectives on Philanthropy

GIVING USA | 2022

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ABOUT CCS FUNDRAISING

Celebrating 75 years of transformational partnerships with nonprofits.



Leading experts in campaign and development strategy for 75 years



Experienced across nonprofit sectors and locations



Full-time professional staff plans, implements, and manages fundraising projects.

TODAY'S SPEAKERS



Dr. Una Osili | Keynote Presenter

Associate Dean for Research
and International Programs

IU Lilly Family School of
Philanthropy



Dr. Anna Pruitt | Panelist

Managing Editor of Giving USA

IU Lilly Family School of
Philanthropy



Lisa Wallack | Panelist

Vice Chair, International Board
of Directors

Juvenile Diabetes Research
Foundation (JDRF)



Kara Ramirez Mullins | Panelist

Chief Advancement Officer
National Geographic Society



Rick Happy | Welcome & Intro

Chairman

CCS Fundraising



Sarah Krasin | Moderator

Managing Director

CCS Fundraising



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Giving USA

2022

The Annual Report on Philanthropy for the year 2021

***Giving USA 2022 and
Today's Philanthropic
Landscape***

Researched and written by



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**Giving USA
2022**

The Annual Report
on Philanthropy
for the Year 2021



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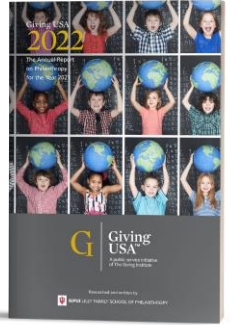
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What is *Giving USA*?



- 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



Giving USA
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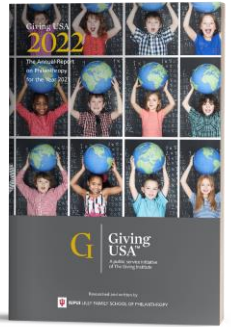
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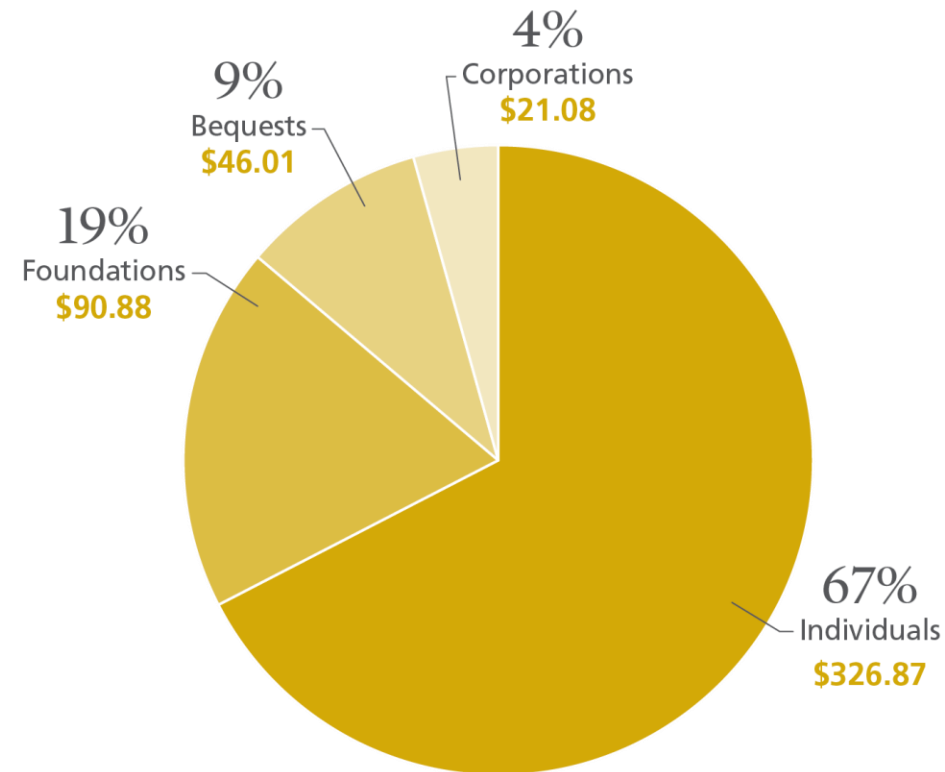
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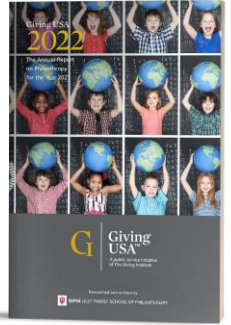
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2021 contributions: \$484.85 billion by source of contributions

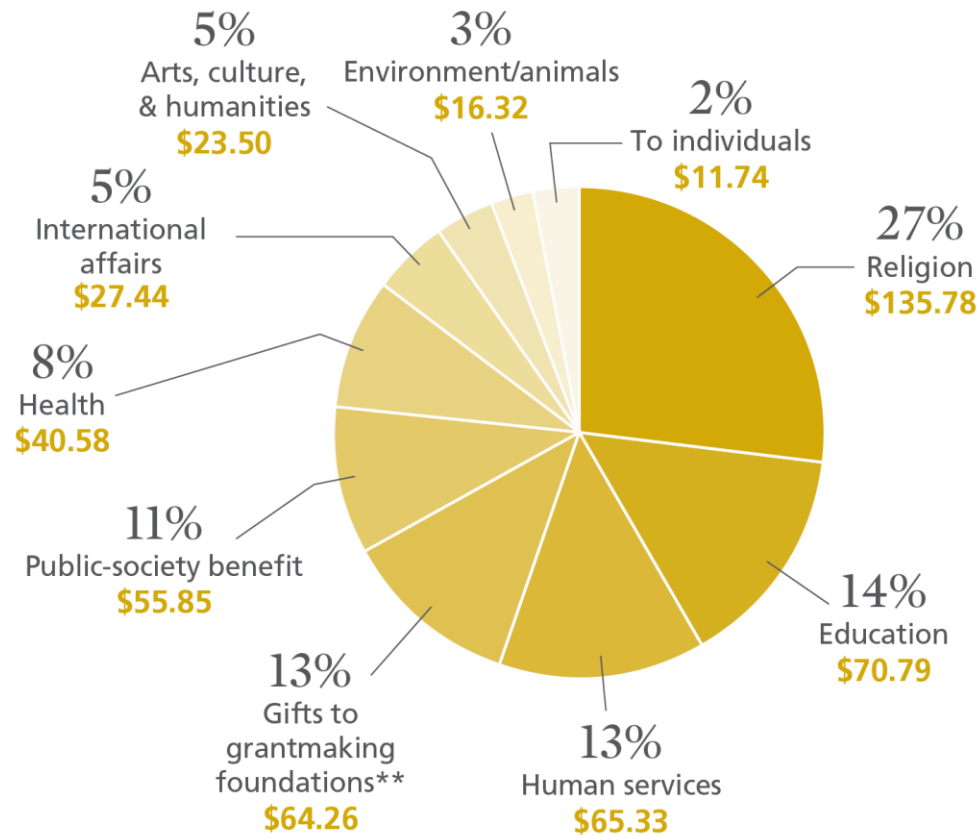
(in billions for dollars – all figures are rounded)





2021 contributions: \$484.85 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)



* Total includes unallocated giving, which totaled -\$26.75 billion in 2021.

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



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Top Ten Findings

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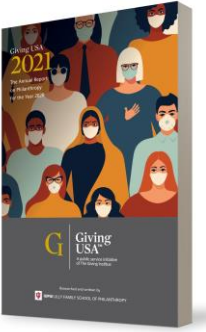
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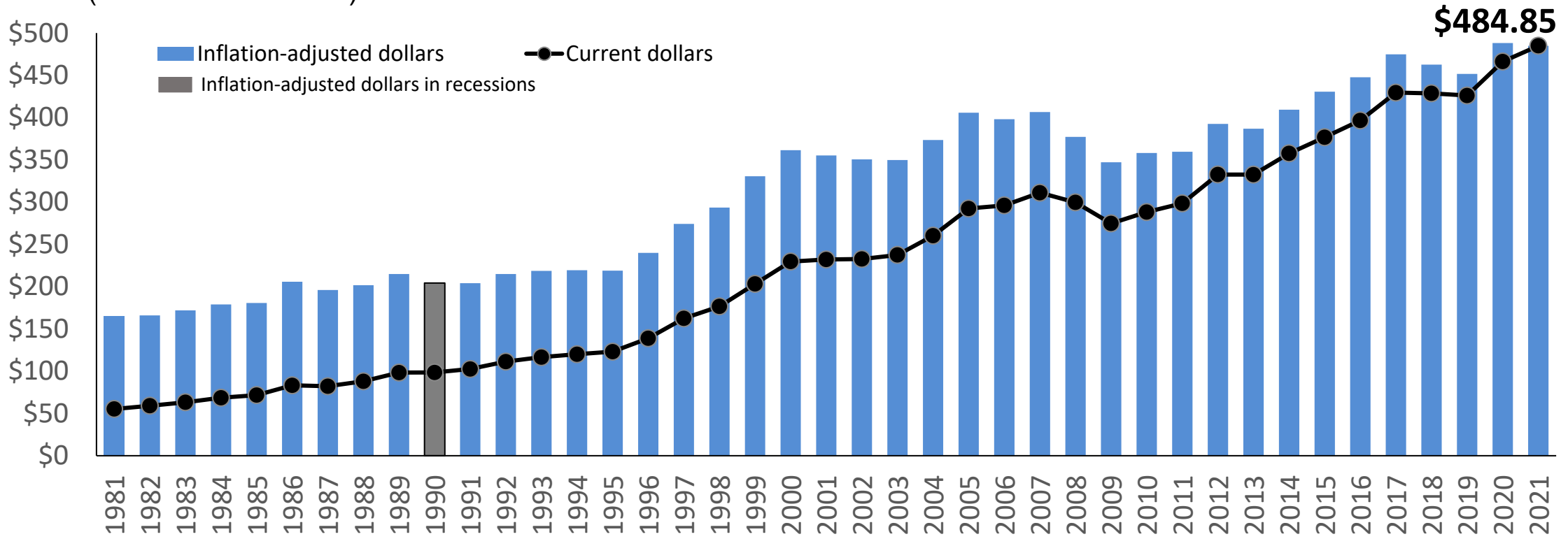
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Researched and written by  **IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY**

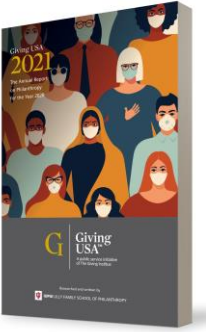
#1 Giving remained strong in 2021, reaching a total of \$484.85 billion



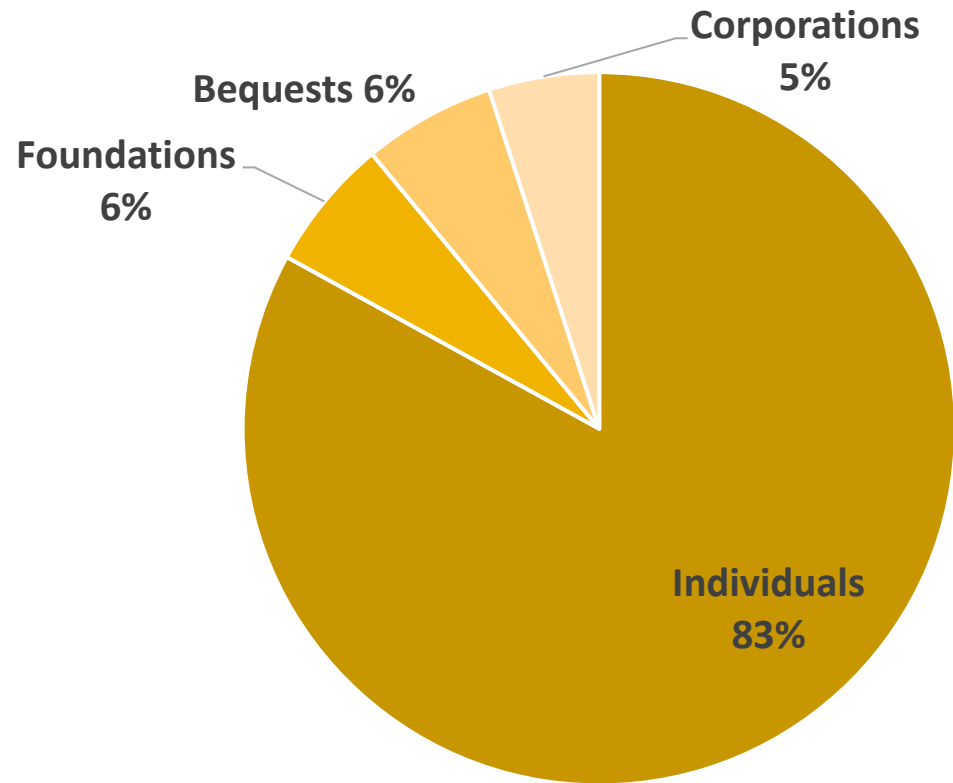
Total Giving: 2011-2021
(in billions of dollars)



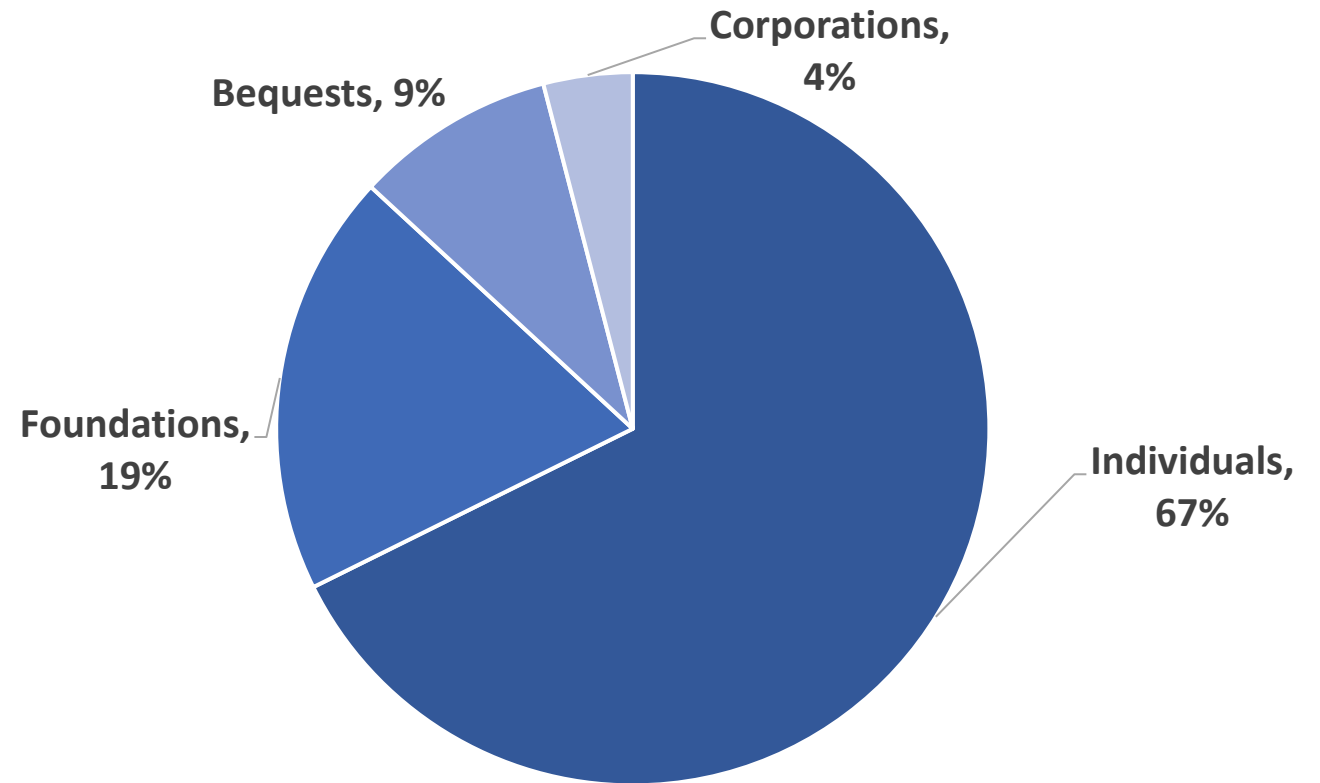
#1 Giving reached a record \$484.85 billion



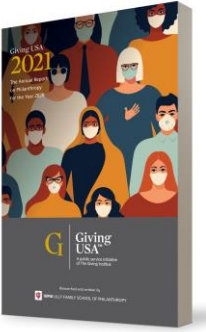
1981



2021



#2 Economic, social, political events from 2020 had an impact on giving in 2021



The challenges of 2020 continued and new factors emerged:



- COVID-19 pandemic



- Racial justice and social justice movements



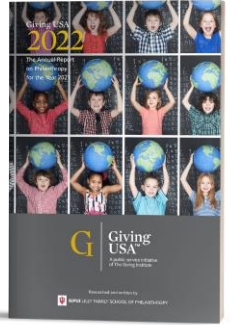
- One of the highest inflation rates in 40 years

Despite these challenges, the economy performed well:



- Strong growth in the S&P 500 and GDP
- Moderate growth for personal disposable income

Economic Factors in 2021



STANDARD & POOR'S



- **S&P 500** grew 26.9% in current dollars, and 21.2% in inflation-adjusted dollars

- **GDP** grew 10.1% in current dollars, and 5.1% in inflation-adjusted dollars

- **Personal disposable income** grew 6.1% in current dollars, 1.3% in inflation-adjusted dollars

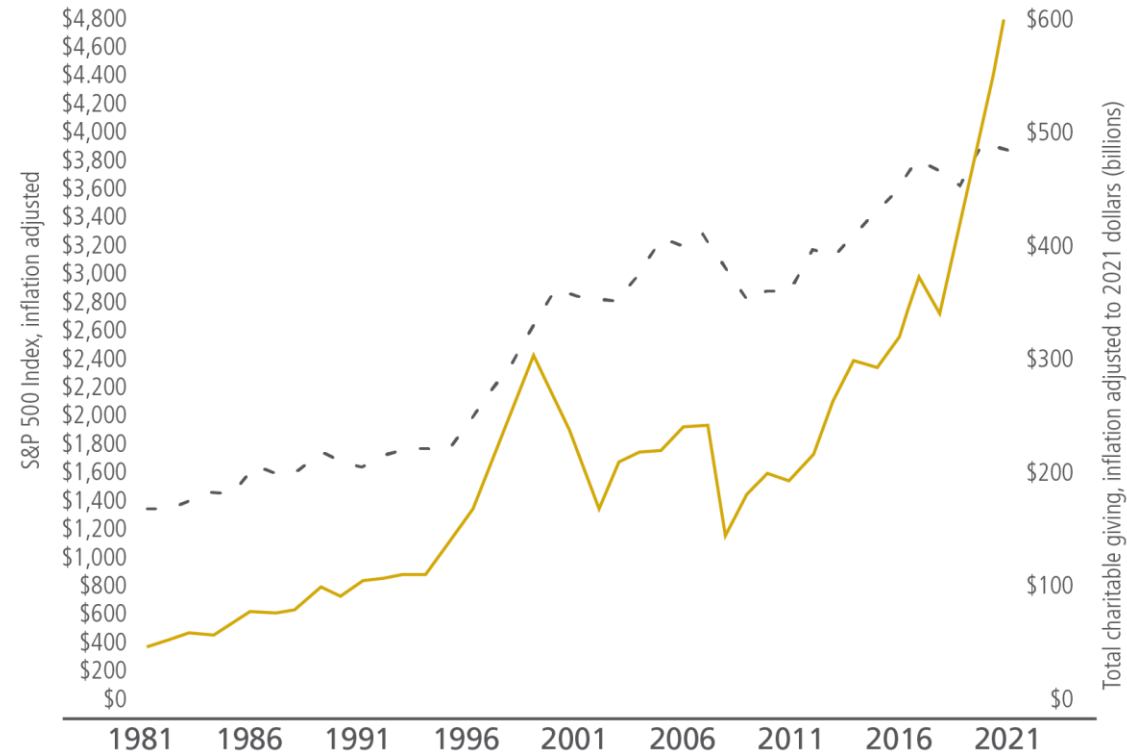
- **Inflation** grew 4.7% according to the Consumer Price Index (CPI)



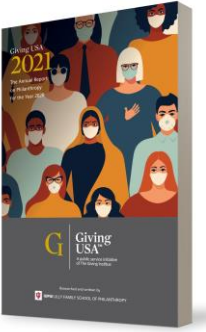
Total charitable giving graphed with the Standard & Poor's 500 Index, 1981-2021

(in billions of inflation-adjusted dollars, 2021 = \$100)

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

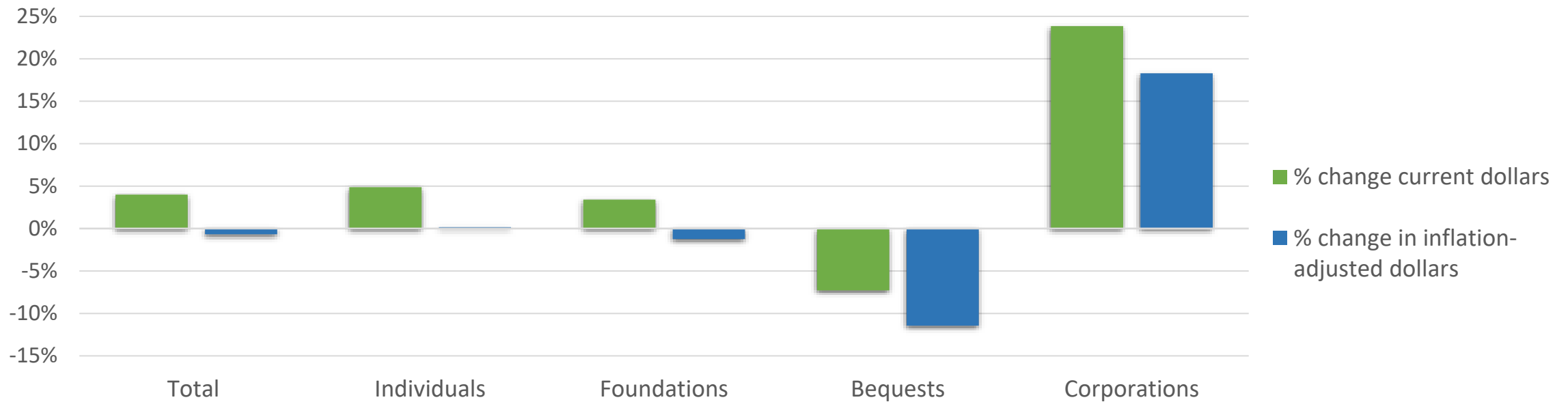


#3 Sources of giving had mixed results in 2021



- Corporations showed strong growth, bequests declined, and individuals and foundations were in between
- Inflation is higher than it has been in recent years, so adjusting for inflation may paint a different picture
- All four sources experienced positive two-year growth, even when adjusting for inflation

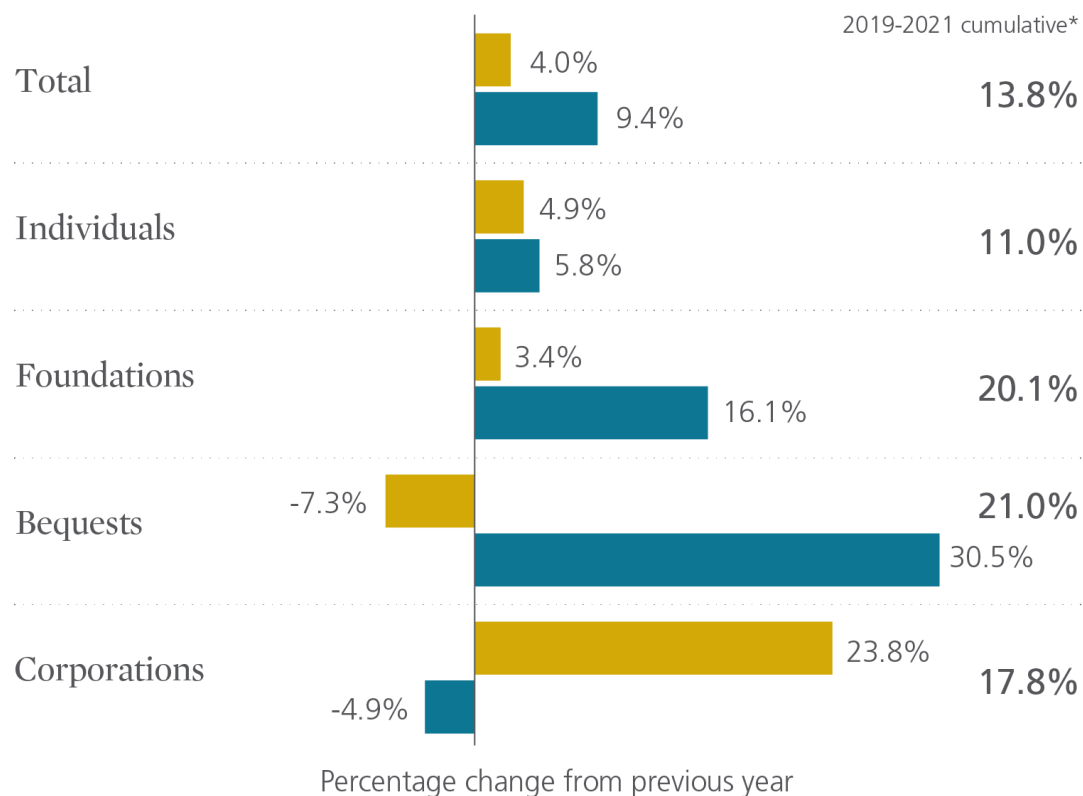
Percent change for sources in 2021



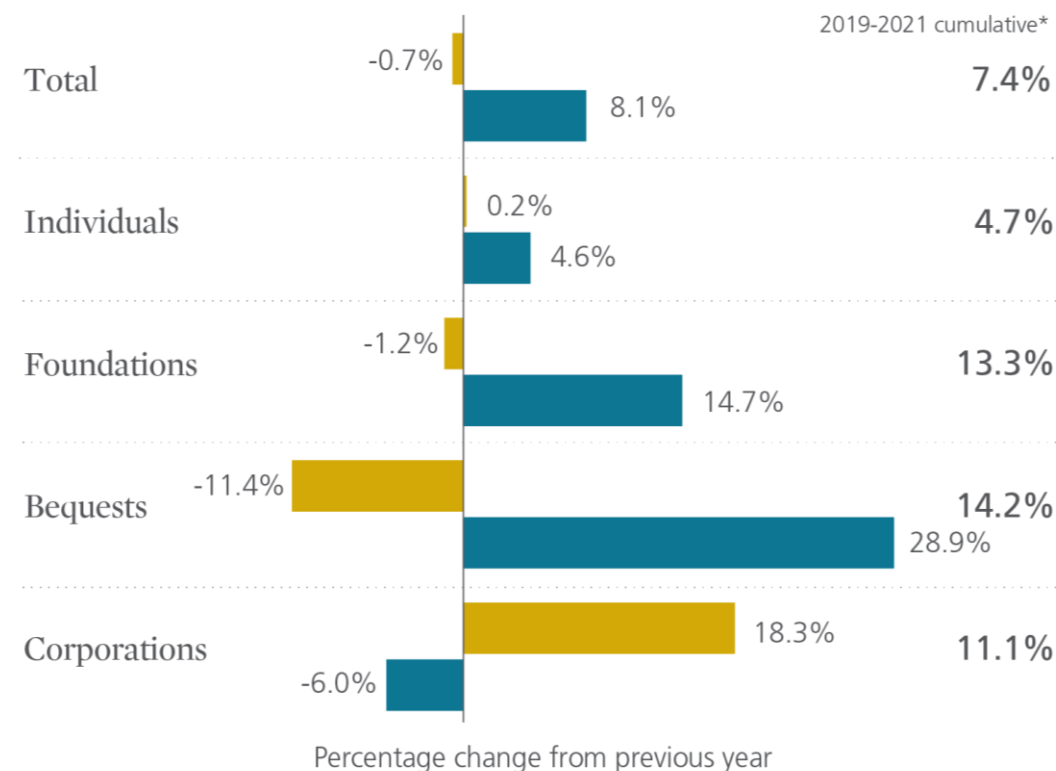
Changes in giving by source: 2019-2020 and 2020-2021, 2019-2021 cumulative



Change in current dollars



Change in inflation-adjusted dollars



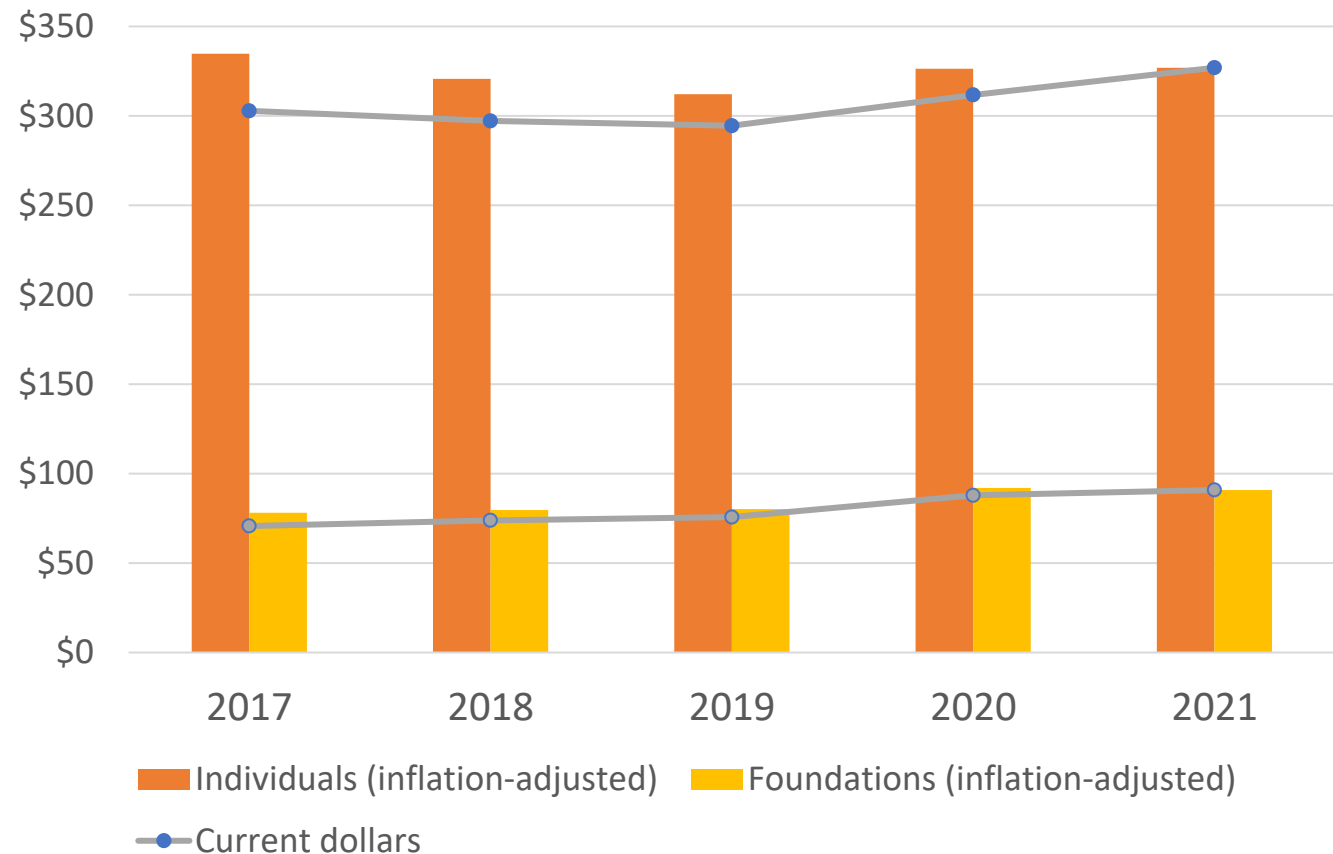
■ 2020-2021
■ 2019-2020

#4 Individuals and foundations performed well and came close to exceeding record highs

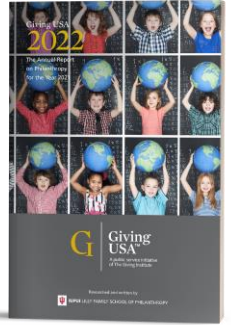


- Giving by individuals and foundations both grew in current dollars
- These sectors both reached the second-highest level of giving on record when adjusting for inflation
- Mega-gifts by individuals totaled \$15 billion in 2021 and represented about 5% of all giving by individuals
- Many foundations adopted unrestricted funding models and streamlined the application and reporting process

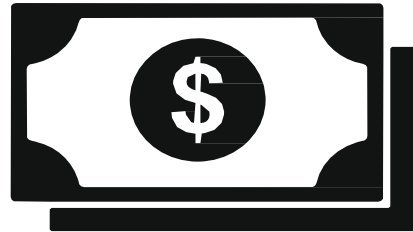
Giving by Individuals and foundations, 2017-2021
(in billions of dollars)



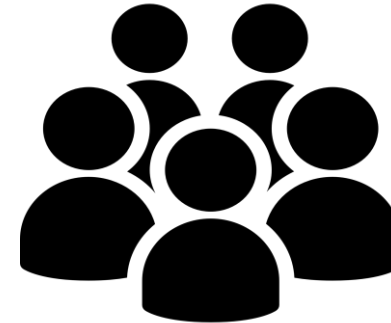
The Power of Individuals in Philanthropy



Overall Rate of Giving
50%



Average Giving Amount
\$2,581

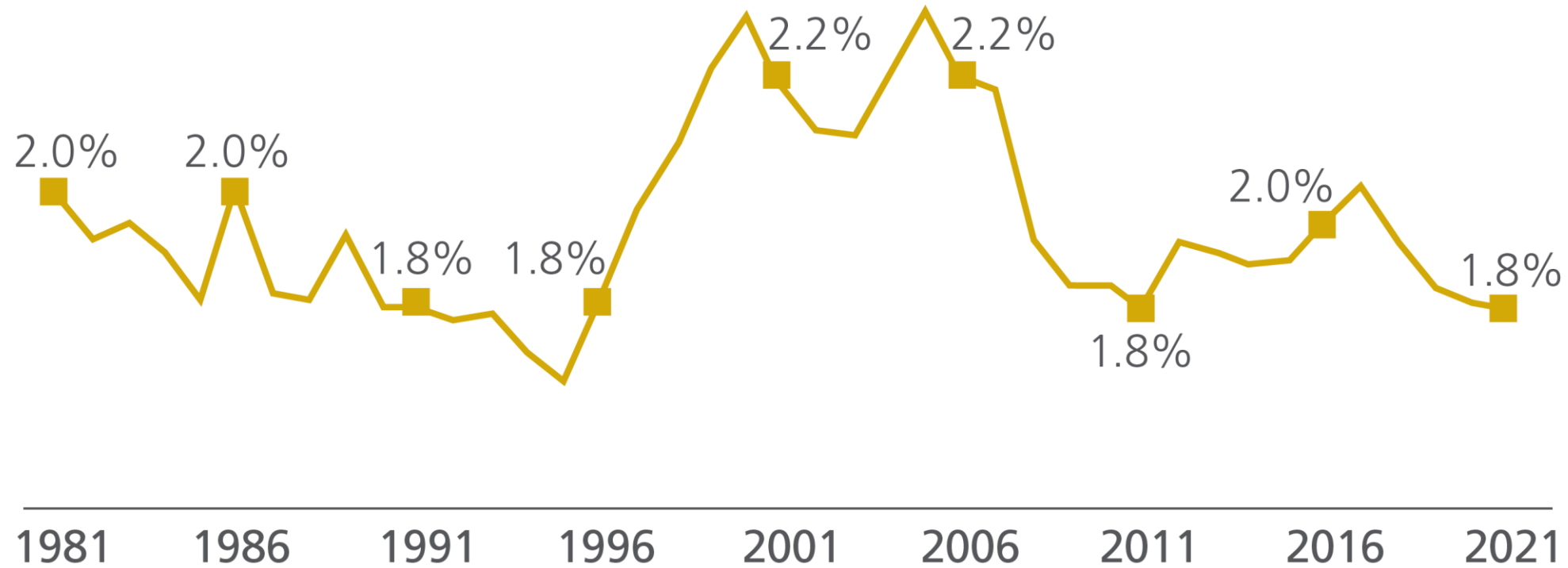


Total Population
329.5 million

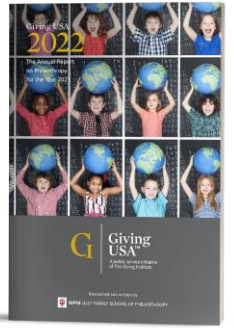


Individual giving as a percentage of disposable personal income, 1981-2021

(in current dollars)



#5 Corporate giving grew in 2021



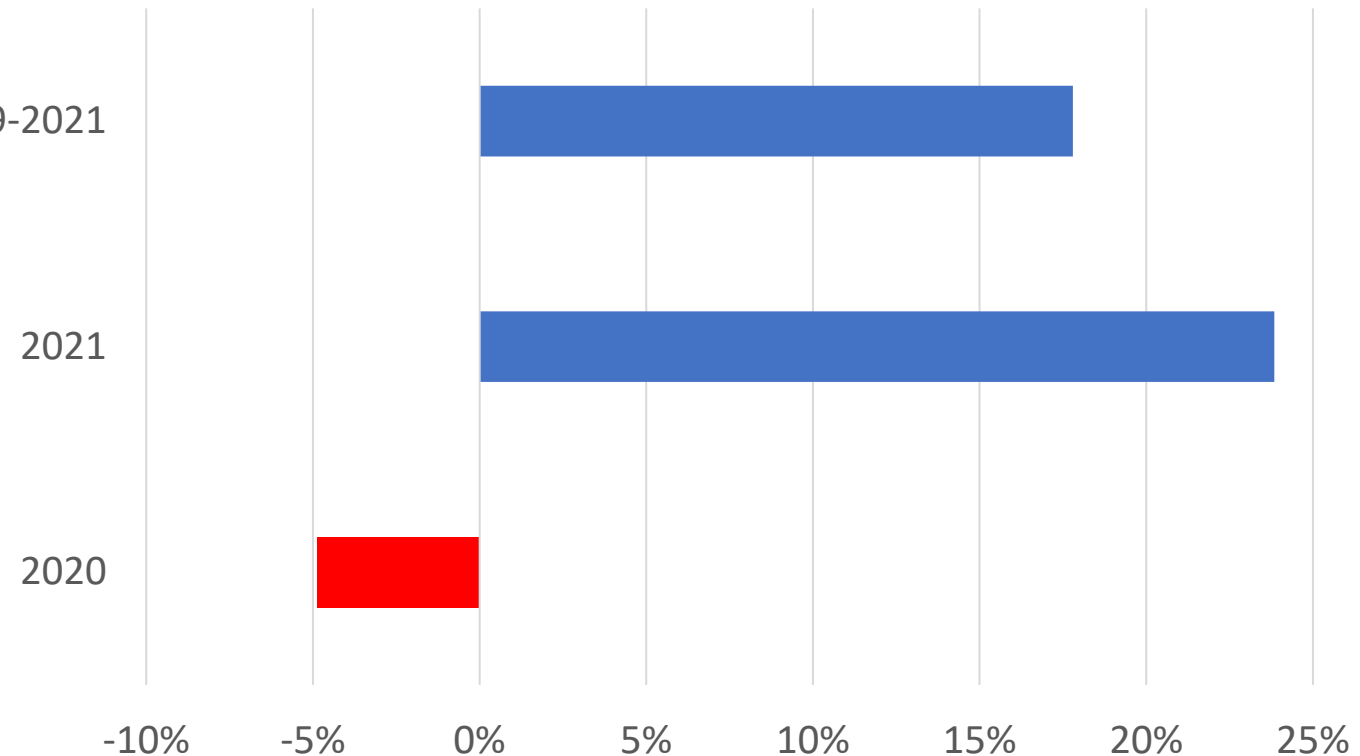
- Factors that impacted corporate giving in 2021



- **GDP** increased 10.1%
- **Corporate pre-tax profits** increased 37.4%

- 2021 represented a rebound from 2020's recession

Growth in giving by corporations in 2020, 2021, and 2019-2021*



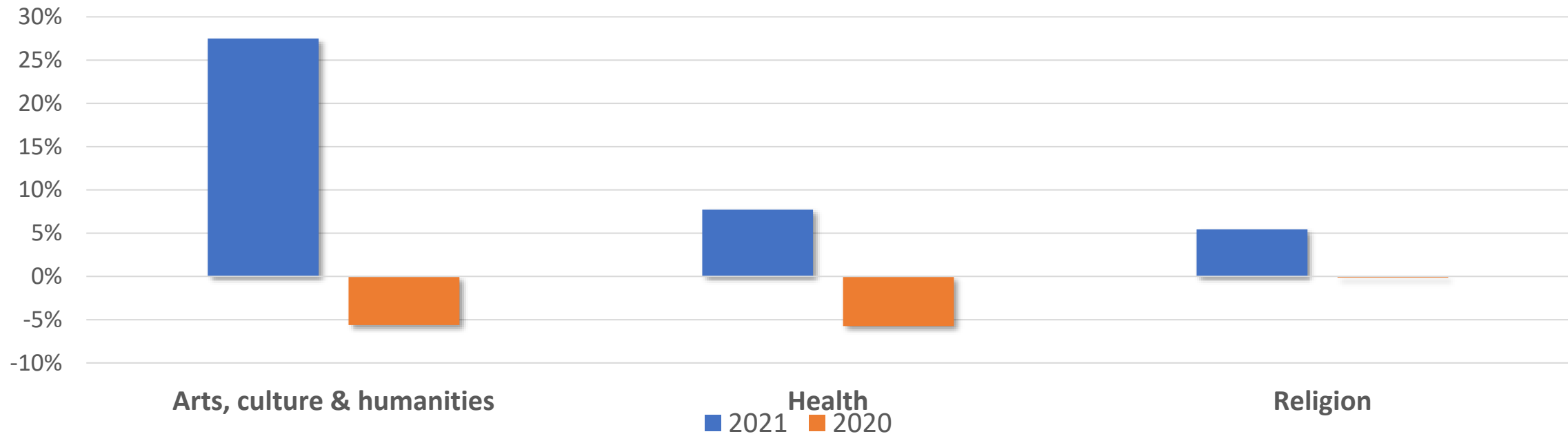
* Chart in current dollars

#6 Giving to health and arts rebounded after a difficult 2020



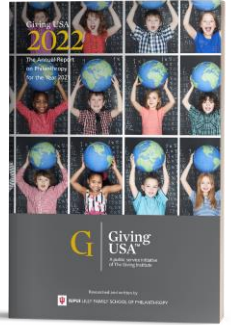
- Giving to arts, culture, and humanities grew 27.5% and giving to health grew 7.7% in 2021, bolstered by a strong stock market and a return to in-person activities
- After a slight decline in 2020, giving to religion resumed moderate growth
- When adjusted for inflation, gains for health were more moderate and religion remained relatively flat in 2021

Percent change in giving arts, health, and religion*



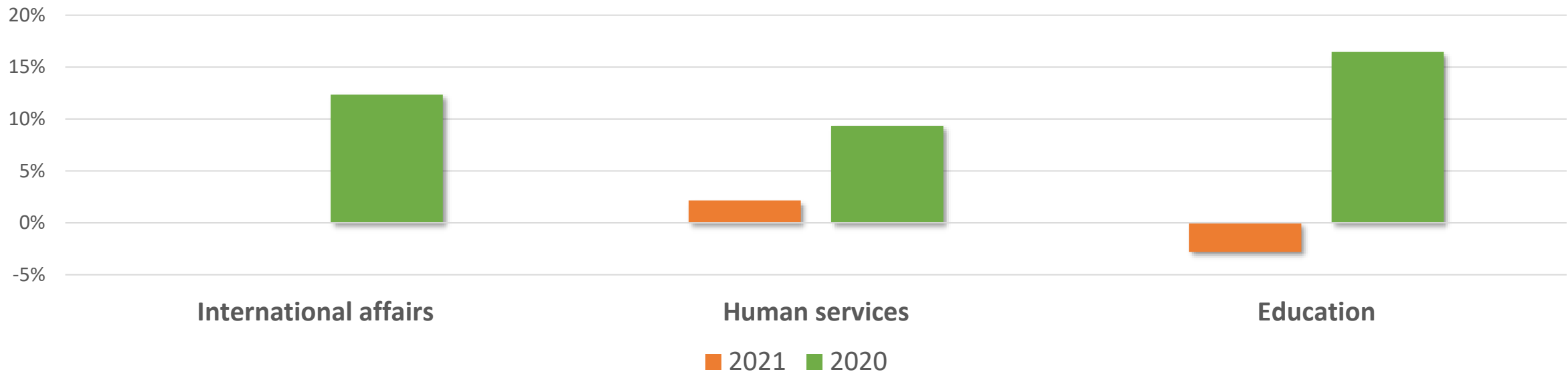
*All numbers reported in current dollars unless otherwise noted

#7 Some subsectors did not reach the same heights in 2021 as they did in 2020



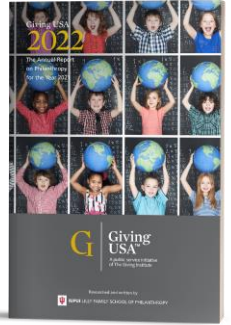
- After reaching record-highs in 2020, giving to international affairs, human services, and education experienced low growth or declines in 2021
- Two-year growth was strong: 11% or higher for each subsector in current dollars (5% or more when adjusted for inflation)

Percent change in giving to international affairs, human services, and education*



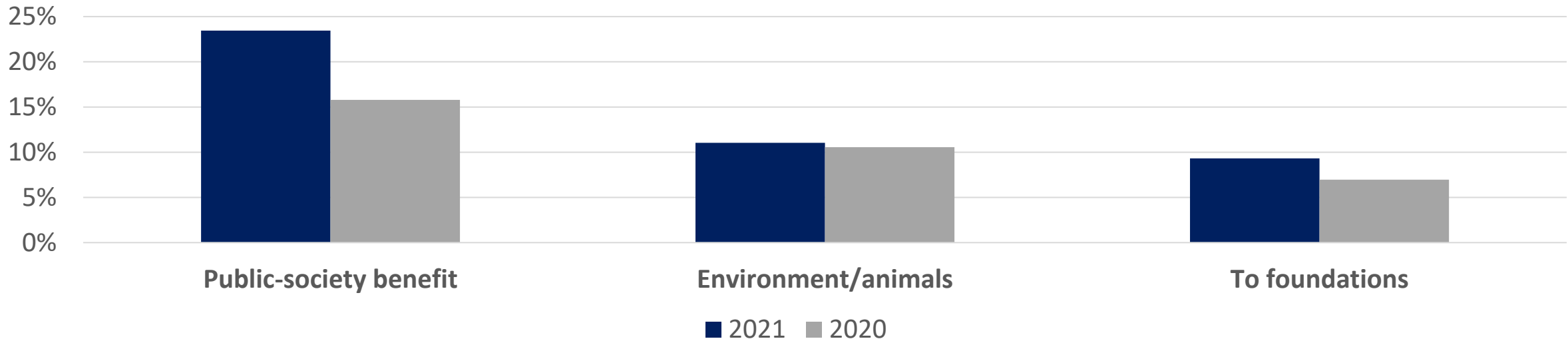
*All numbers reported in current dollars unless otherwise noted

#8 Giving to environment, public-society benefit organizations, and foundations grew for two consecutive years



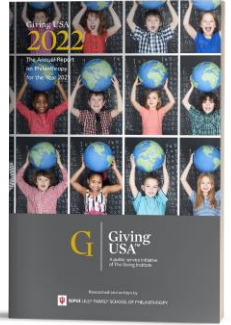
- Giving to public-society benefit, environment and animals, and foundations all grew by 10% or more in 2021
- Over two years, these subsectors grew by 15% or more
- Giving to PSB and foundations is linked to growth in the stock market
- Environment is the smallest category of giving, but has shown impressive growth over time

Percent change in giving to public-society benefit, environment/animals, and foundations*



*All numbers reported in current dollars unless otherwise noted

#9 Nonprofits need flexibility and innovation to navigate new and ongoing challenges

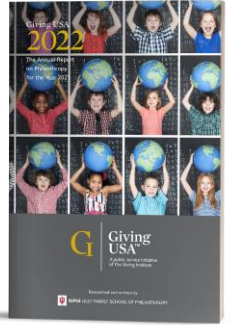


NEW NORMAL

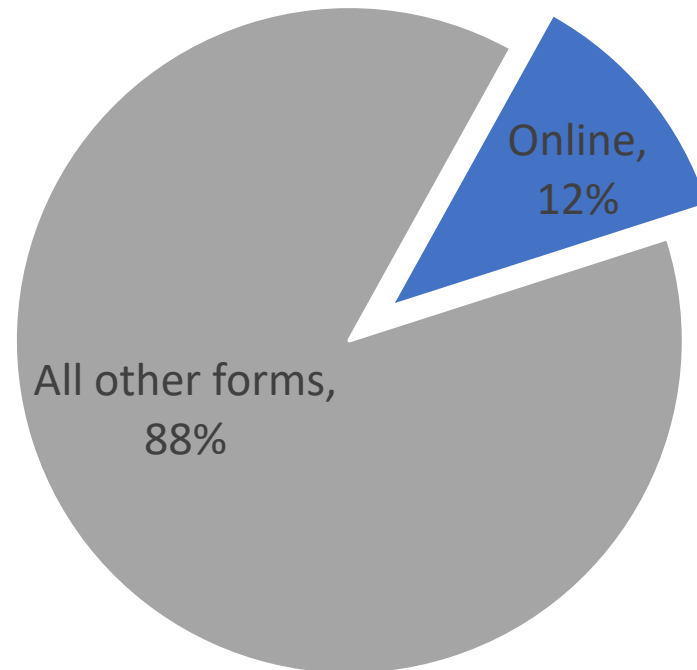


- **Technology plays a key role.** Hybrid events are here to stay, even with the return of in-person events. In addition, online giving represented 12% of total giving in 2021, an increase over pre-pandemic levels.
- **Nonprofits will need to remain flexible as they navigate an ever-changing terrain.** Between staffing challenges, supply chain issues, and elevated levels of demand, there were challenges in 2021 that are likely to remain in 2022.
- **New ways of giving are increasingly popular.** Increase opportunities for success by understanding the ways that donors want to give, including DAFs, cryptocurrency, and planned giving tools.

#10 Online giving accounts for a growing share of giving

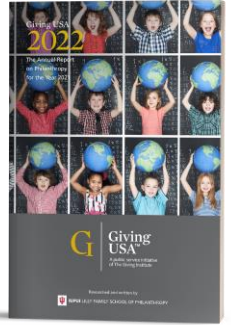


Online giving as a percentage of total fundraising in 2021

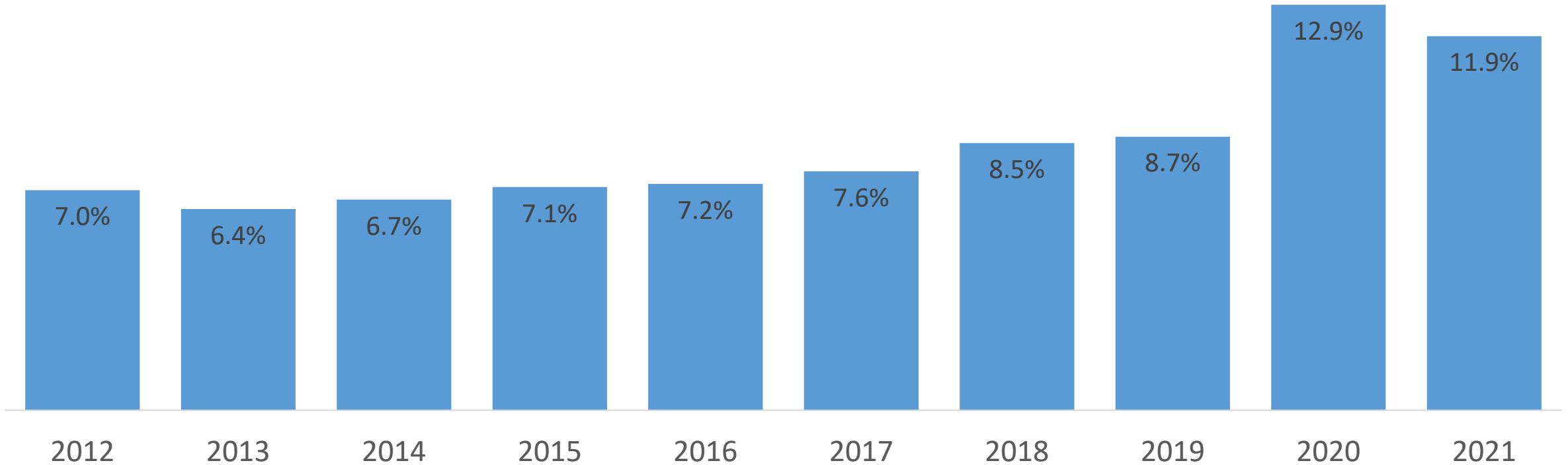


Source: Blackbaud Institute, 2022

#10 Online giving accounts for a growing share of giving



Online Giving as a Percentage of Total Fundraising, 2012-2021



Charitable Giving Report: Using 2021 Data to Transform Your Strategy, Blackbaud Institute, 2022



Researched and written by



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PANEL DISCUSSION



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