SNAPSHOT OF TODAY'S

PHILANTHROPIC LANDSCAPE

A Guide to Philanthropy in the U.S.

8th Edition, 2019

FUNDRAISING

// INTRODUCTION: *Reflections on the Latest Data*

In 2018, charitable giving in the United States reached a record-breaking **$427 billion** reported in contributions from individuals, companies, foundations, and charitable bequests.

Despite this extraordinary number, there are some underlying trends which raise concerns about the participation of American households in charitable giving. Annual surveys, such as the *Philanthropy Panel Study* by the IUPUI Lilly Family School of Philanthropy, indicate that the percentage of American households that report making charitable gifts has declined. The most significant dip was during the financial crisis in 2009 with an estimated 14 million fewer U.S. households reporting charitable gifts.

Evidence of this trend can be seen in decreasing support in the religious sector, declining alumni participation rates at many educational institutions, and lower engagement in several leading corporate matching gift programs.

In contrast, the philanthropic activity of American households with an income of $200,000 or more is growing in significance as evidenced by large publicly reported charitable gifts, institutional fundraising success stories, and an influx of personal assets into donor-advised funds. Those who do give are giving considerably more.

There are more than one million registered nonprofit organizations in the United States. How these institutions respond to these trends will affect their revenue streams well into the future. With this in mind, we have endeavored to consolidate many insightful reports on giving and volunteering into this ***Snapshot of Today's Philanthropic Landscape***.

We hope this publication provides valuable information that helps nonprofit organizations develop informed strategies to support their vital missions.

Robert Kissane
Chairman
CCS Fundraising

Contents

Report Highlights

$427 BILLION

In 2018, giving reached $427.71 billion after breaking $400 billion for the first time in history in 2017[1]

FOUNDATION GIVING

reached **$75.9 billion** and showed the highest increase of all sources at **7.3%**

56% OF THE U.S. POPULATION gave to charity[2]

90%

OF HIGH NET WORTH INDIVIDUALS gave, supporting an average of **seven organizations** annually[3]

30%

OF AMERICANS VOLUNTEERED in 2018, a **21% increase** since 2016[4]

Sources:
1 The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019
2 IUPUI Lilly Family School of Philanthropy: *Philanthropy Panel Study*, 2017
3 Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2018
4 Corporation for National & Community Service: "Volunteering in America," 2018

Nearly

2 in 3

charitable dollars come from Baby Boomers and Generation X[1]

24%

OF HIGH NET WORTH INDIVIDUALS serve on the board of a nonprofit organization[2]

CORPORATE GIVING to disaster relief increased over

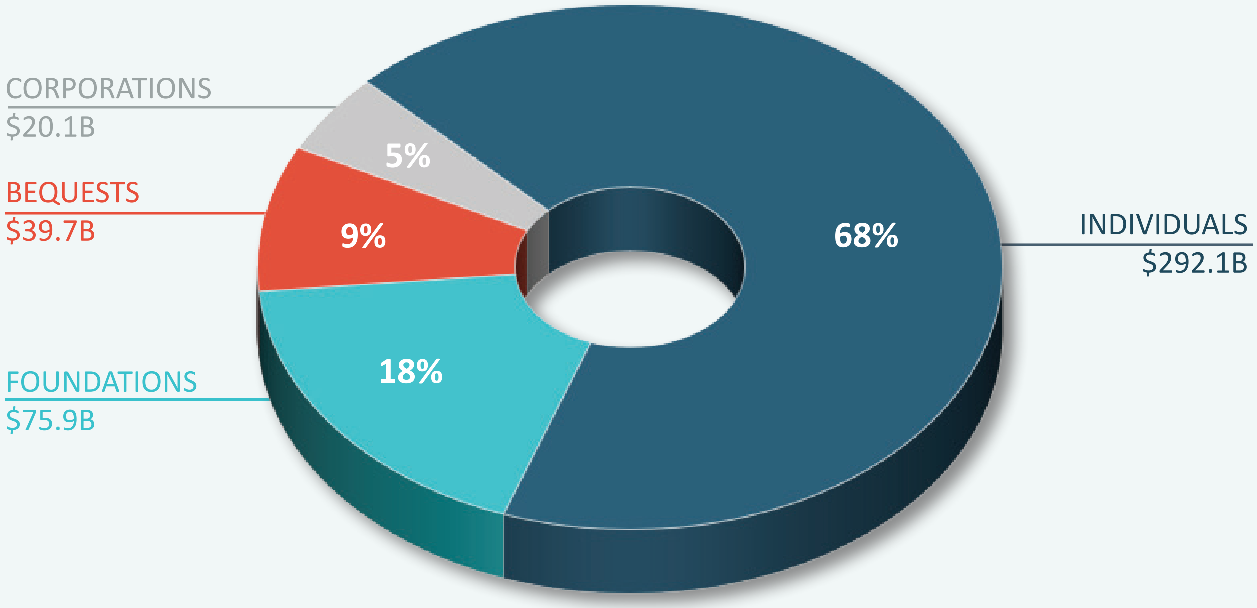
300%[3]

51%

of donors use mobile devices to visit a nonprofit's website[4]

Sources:
1 Blackbaud: *The Next Generation of American Giving*, 2018
2 Bank of America: *U.S. Trust Insights on Wealth and Worth*, 2018
3 CECP: *Giving in Numbers Report*, 2018
4 Nonprofits Source: "Online Giving Statistics," 2018

In 2018, Americans Gave $427.71 Billion



GIVING SOURCE	AMOUNT	CHANGE IN GIVING SINCE 2017
Individuals	$292.1B	1.1% Decrease
Bequests	$39.7B	0.0% Increase
Corporations	$20.1B	5.4% Increase
Foundations	$75.9B	7.3% Increase

Noteworthy Trends

- **Individual Giving** fell below 70 percent of total giving for the first time since 1954
- **Foundation Giving** increased the most of all sources
- **Corporate Giving** was the only other source to report an increase
- **Giving by Bequest** showed no growth in 2018 after increasing 14.6 percent from 2016 to 2017

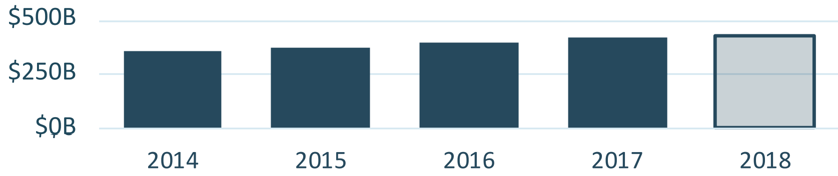
*According to *Giving USA*, updated estimates for total giving in 2017 was $424.7 billion

Source: The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019

All Charitable Giving Sources Have Grown Over the Last Five Years*

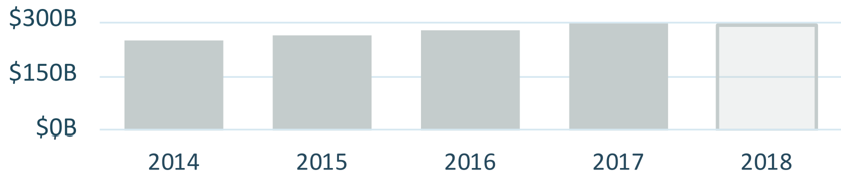
A look at source growth between 2014 and 2018:

TOTAL GIVING OVER 5 YEARS
↑3.6% CAGR**



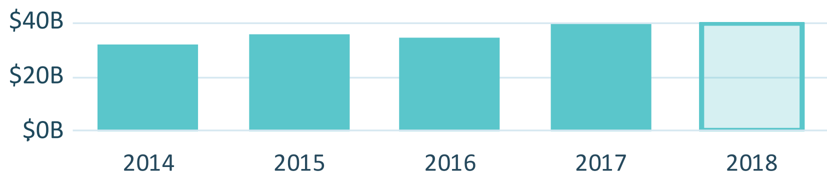
Total giving grew by **3.6%** over five years

INDIVIDUAL GIVING OVER 5 YEARS
↑2.9% CAGR



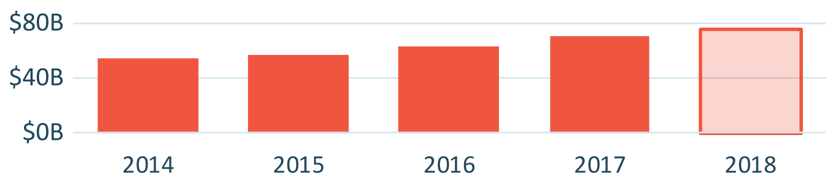
Individual giving grew by **2.9%** over five years

GIVING BY BEQUEST OVER 5 YEARS
↑3.3% CAGR



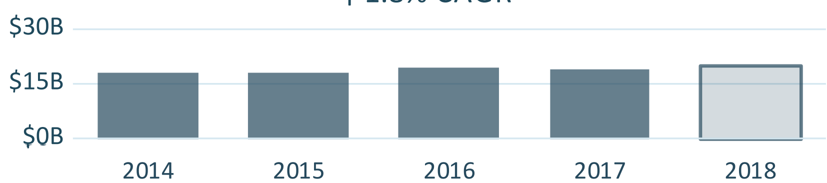
Giving by bequest grew by **3.3%** over five years

FOUNDATION GIVING OVER 5 YEARS
↑6.6% CAGR



Foundation giving grew by **6.6%** over five years

CORPORATE GIVING OVER 5 YEARS
↑1.8% CAGR

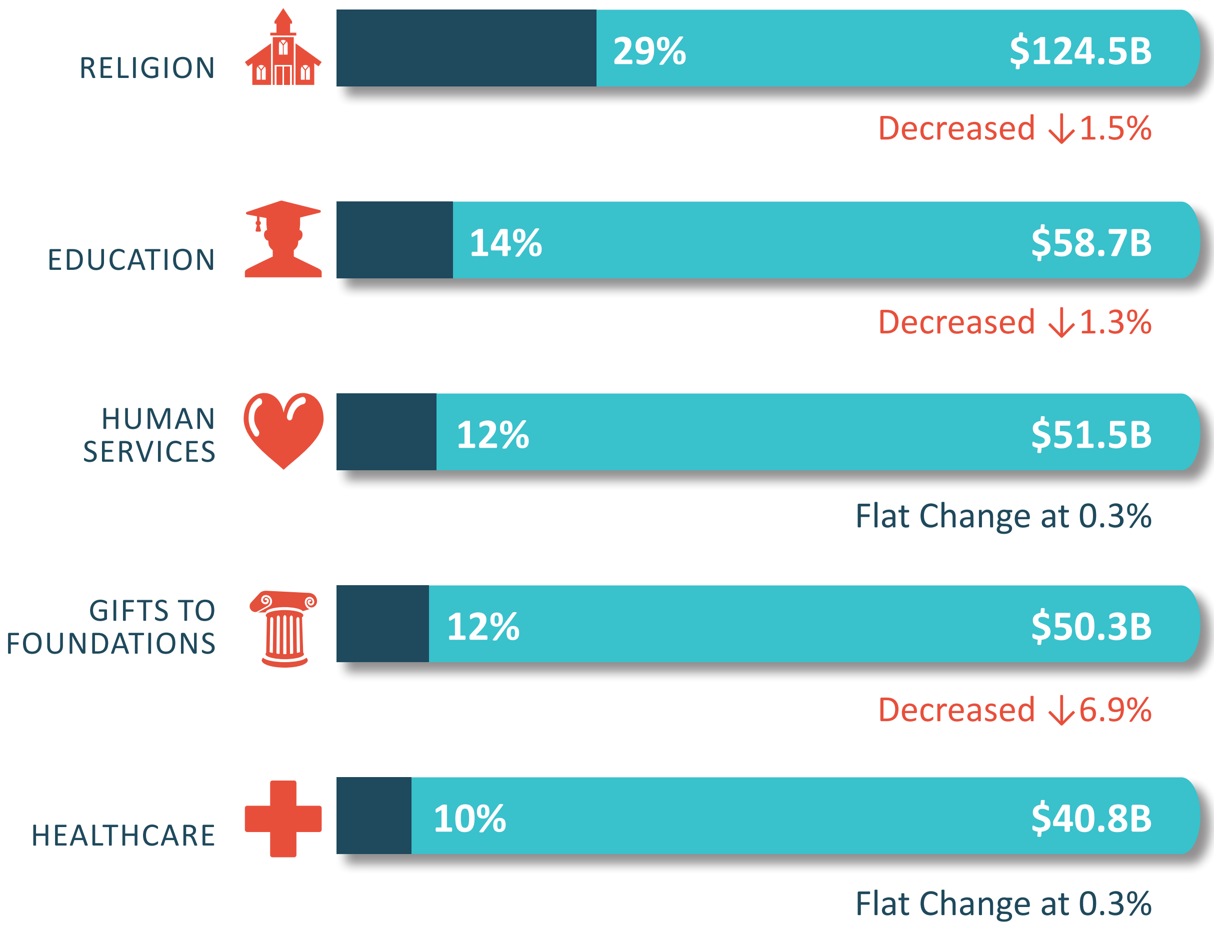


Corporate giving grew by **1.8%** over five years

*In current dollars
**Compound annual growth rate (CAGR)

Source: The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019

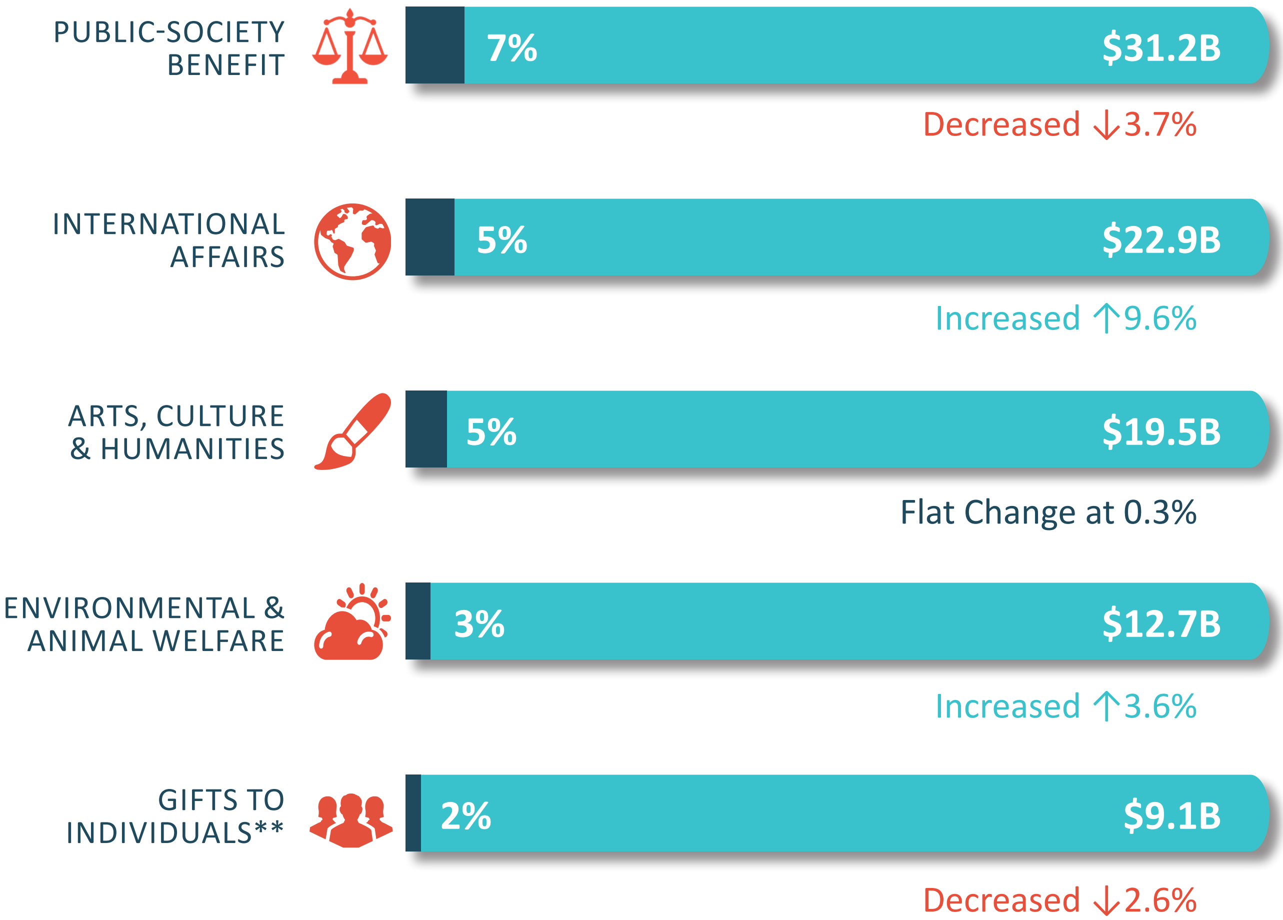
Sectors that Experienced Large Growth in 2017 Declined in 2018



For the first time, giving to **Religion** fell below 30 percent of the total. While giving in this sector declined, it is still the largest sector by a wide margin.

*Numbers are rounded.

Source: The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019



↑ **International Affairs and Environmental & Animal Welfare** organizations may have seen an increase because these are popular causes among younger generations.

*Numbers are rounded.
**Gifts to Individuals: In-kind gifts to individuals in need, made by foundations or assistance programs.

Source: The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019

Individual Giving Fell Slightly in 2018 to $292.1 Billion, Yet Remains the Largest Source

68% Individual giving accounted for **68%** of all giving in the U.S.[1]

-1.1% Individual giving decreased by **1.1%** since 2017, which is the only source that declined last year

56% of the Population Gave to Charity[2]

- **47%** of the amount given supported secular causes
- **34%** of the amount given supported religious causes

Average American Donors Spend[3]...

- **55 cents** on charity for every $1 on healthcare
- **35 cents** on charity for every $1 on food

$2,514 is the average amount given.[2]

Sources:
1 The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019
2 IUPUI Lilly Family School of Philanthropy: *Philanthropy Panel Study*, 2017
3 Bureau of Labor Statistics: *Consumer Expenditures in 2017*, 2018

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%

INSTITUTIONAL SPENDING REMAINS A PRIORITY

76% are concerned about how much money goes to an organization's overhead

56% research how an organization spends its funds

Source: Blackbaud: *The Next Generation of American Giving*, 2018

The Share of American Households Who Report Giving to Charity Has Declined

FEWER MIDDLE CLASS DONORS

Increased Itemization

52%

52% of itemized donations came from households with income of $200,000 or higher in 2015, while 10 years earlier that percentage was regularly around 30%

Shrinking Donor Base

83%

83% of donations came from 20% of households

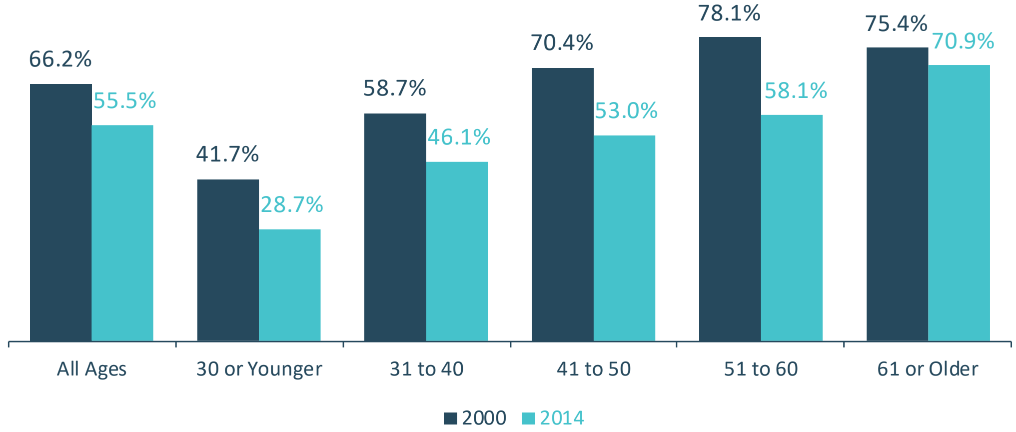
49%

49% of donations came from only 1% of households

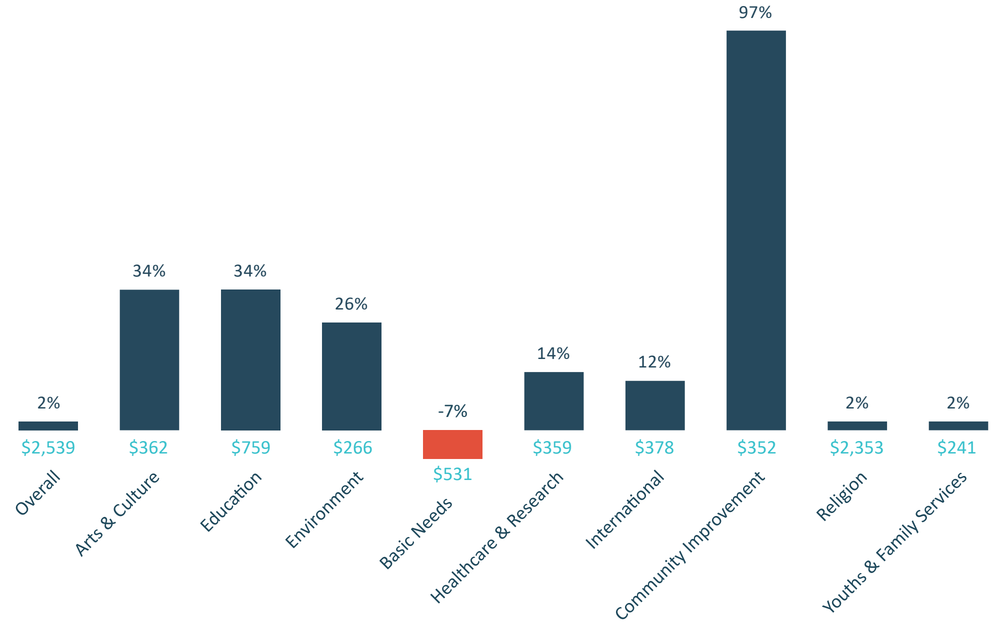
Source: Chronicle of Philanthropy, "The Disappearing Donor," June 2018

Since 2000, the number of U.S. households indicating that they give to charity has declined from 66 percent to 55 percent. This reflects either fewer U.S. households are giving to charity or households are practicing non-traditional charitable behavior.

WHILE THE NUMBER OF HOUSEHOLDS DONATING HAS DECREASED IN EACH AGE GROUP...



...THOSE DONATING ARE GIVING MORE, AS AVERAGE DONATION SIZE HAS INCREASED SINCE 2002



Source: Chronicle of Philanthropy, “The Disappearing Donor,” June 2018

More Americans are Volunteering

↑21.7% INCREASE

The volunteer rate in 2018 was **30.3%** and in 2016 it was 24.9%, an increase of 21.7%

↑23.5% INCREASE

The number of volunteers in 2018 was **77.3 million** and in 2016 it was 62.6 million, an increase of 23.5%

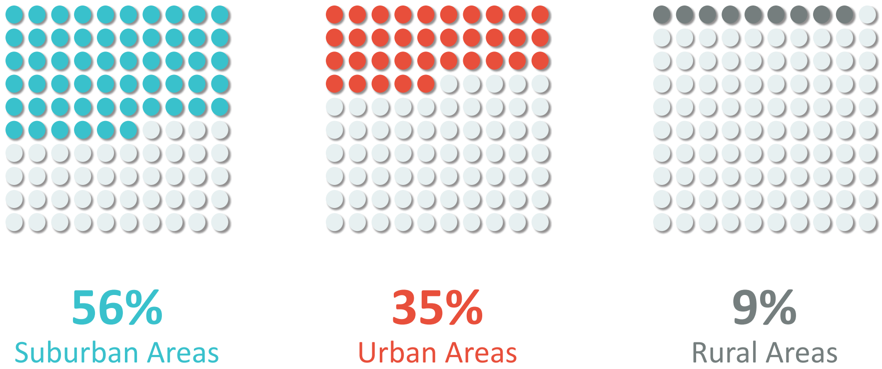
Of those who volunteered, **80 percent** also donated.

GENERATIONAL VOLUNTEERING PARTICIPATION

Generation X is taking a larger role in volunteering and charitable giving.

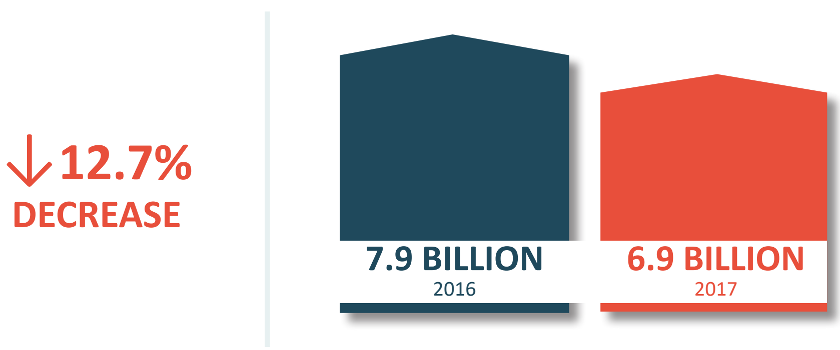
Source: Corporation for National & Community Service: "Volunteering in America," 2018

DEMOGRAPHICS OF A SURVEY OF 7,215 VOLUNTEERS[1]



79 percent are female volunteers.

ESTIMATED VOLUNTEER HOURS[2]



Estimated value of each volunteer hour: **$25.43**

Despite an increased number of volunteers, the estimated total value was $167 billion, a $17 billion decrease from 2016. This 10 percent drop may be attributed to a decrease in hours volunteered.

Sources:
1 Verified Volunteers: “Volunteer Perspective – Industry Insights 2019”
2 Corporation for National & Community Service: “Volunteering in America,” 2018

America's Most Philanthropic States

TOP 10 STATES BY TOTAL GIVING

1 **CALIFORNIA**
$29.6B TOTAL GIVING | 38.4M POPULATION
$770.83 PER PERSON

2 **NEW YORK**
$18.1B TOTAL GIVING | 19.6M POPULATION
$923.47 PER PERSON

3 **TEXAS**
$15.9B TOTAL GIVING | 26.5M POPULATION
$600.00 PER PERSON

4 **FLORIDA**
$11.7B TOTAL GIVING | 19.6M POPULATION
$596.94 PER PERSON

5 **GEORGIA**
$8.2B TOTAL GIVING | 10.0M POPULATION
$820.00 PER PERSON

6 **ILLINOIS**
$7.9B TOTAL GIVING | 12.8M POPULATION
$617.19 PER PERSON

7 **PENNSYLVANIA**
$6.3B TOTAL GIVING | 12.7M POPULATION
$496.06 PER PERSON

8 **NORTH CAROLINA**
$5.7B TOTAL GIVING | 9.8M POPULATION
$581.63 PER PERSON

9 **VIRGINIA**
$5.7B TOTAL GIVING | 8.2M POPULATION
$695.12 PER PERSON

10 **NEW JERSEY**
$5.5B TOTAL GIVING | 8.9M POPULATION
$617.98 PER PERSON

Although New York and Florida share the same population size (19.6 million), **New Yorkers** gave $6.4 billion more.

Source: Chronicle of Philanthropy: "How America Gives Data: Leaders and Laggards, Giving Opportunities, and More," 2017

Top Metro Areas for Giving

	METRO AREAS	POPULATION	TOTAL ITEMIZED CONTRIBUTIONS
1.	New York	8.5M	$22.1B
2.	Los Angeles	3.9M	$11.2B
3.	San Jose	1.0M	$8.6B
4.	Chicago	2.7M	$7.9B
5.	Washington, DC	681.1K	$7.1B
6.	Atlanta	472.9K	$6.9B
7.	San Francisco	870.8K	$6.9B
8.	Dallas-Fort Worth	1.3M	$6.1B
9.	Boston	678.4K	$5.3B
10.	Philadelphia	1.6M	$4.7B

Source: Chronicle of Philanthropy: “Reader’s Choice: Tulsa,” 2018

The Influence of High Net Worth Individuals* is on the Rise

The Millionaire Population has Increased[1]

- The U.S. added 878,000 new millionaires, which accounts for approximately 40 percent of the global increase.
- There are currently 17,350,000 millionaires in the U.S.
- 47 percent of the world's ultra high net worth individuals** are in the U.S.[2]

More private foundations and donor-advised funds are being created by wealthy philanthropists.

↑21%

Between 2005-2015, foundations **increased 21%**, and the amount of assets increased 62% over the same time

↑1%

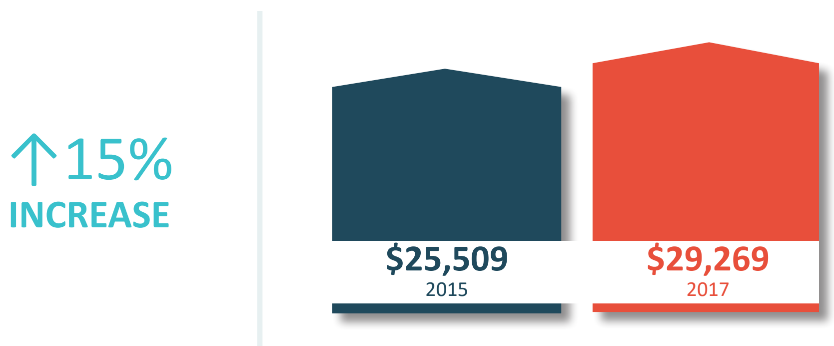
The number of gifts over $1M **increased 1%** between 2011-2015, but the value of those gifts increased 15%

*High Net Worth Individuals (HNWIs) are those having investible assets of $1 million or more, excluding primary residence, collectibles, consumables, and consumer durables.
**Donor whose net worth exceeds $50 million.

Sources:
1 Credit Suisse: *Global Wealth Report,* 2018
2 Institute for Policy Studies: *Gilded Giving*, 2018

90% of High Net Worth (HNW) households donated to charity in 2017.

AVERAGE GIFT AMOUNT



85% of HNW households reported giving to secular causes

49% of HNW households reported giving to religious causes

Source: Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2018

Nearly Half of High Net Worth Individuals Volunteered

48% — **48%** of HNWIs volunteered for a charitable organization

142 — Those who volunteered did so for an average of **142** hours, approximately 2.7 hours per week

3 — HNWIs volunteered for an average of **three** organizations

REPORTED VOLUNTEERING BY DEMOGRAPHICS

GENDER

56% of Women Volunteered

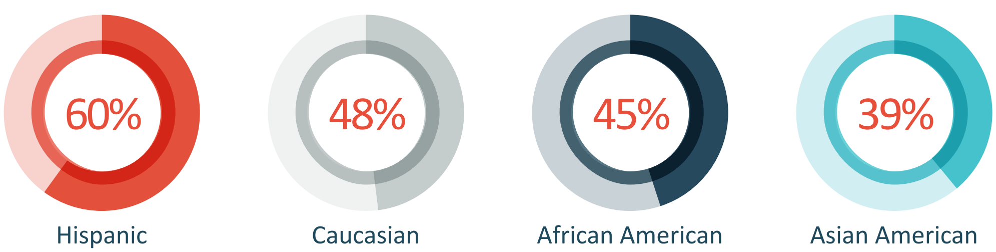
41% of Men Volunteered

AGE

43% of Millennials Volunteered

49% of Generations Older Than Millennials Volunteered

ETHNICITY



Wealthy Hispanic households volunteered at a higher rate than other groups surveyed.

Source: Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2018

High Net Worth Individuals Serve on Boards to Affect Change

24% of HNWIs serve on the board of a nonprofit organization.

THE EFFECTS SERVING ON A BOARD HAS ON GIVING TO AN ORGANIZATION

43%	38%	20%
Give the Same	Give More	Give Less

Note: Numbers may be rounded

REASONS BOARD MEMBERS GIVE

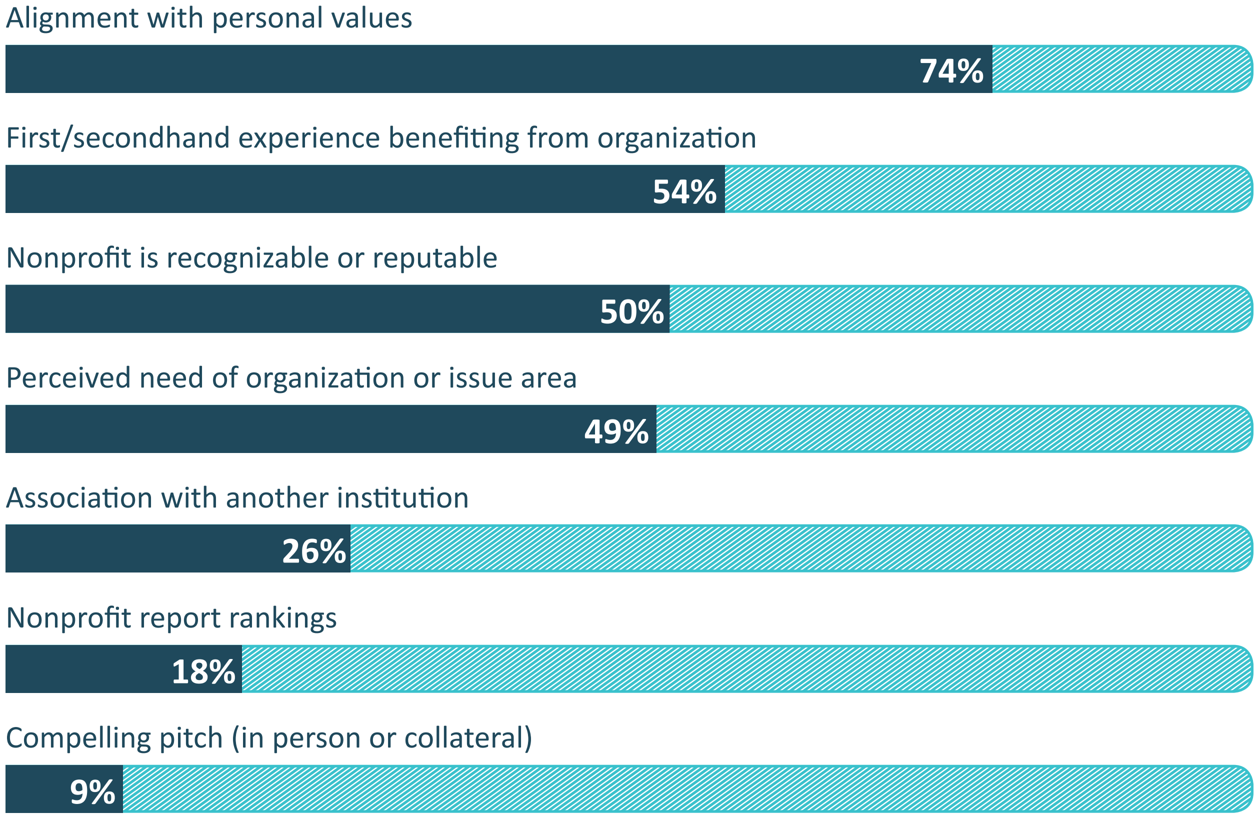
TOPIC	%
Belief in the mission	81%
Personal fulfillment	53%
Desire to support specific projects	51%
Belief in organization's leadership	40%
Sense of obligation	29%
Have a “give or get” policy*	26%
Requirement from organization	9%

*Requiring a specific amount of giving or leveraging connections to raise a certain amount of funds.

Source: Bank of America: *U.S. Trust Insights on Wealth and Worth*, 2018

Why High Net Worth Individuals Give to a Particular Charity

Organizational factors that contribute to giving decisions:

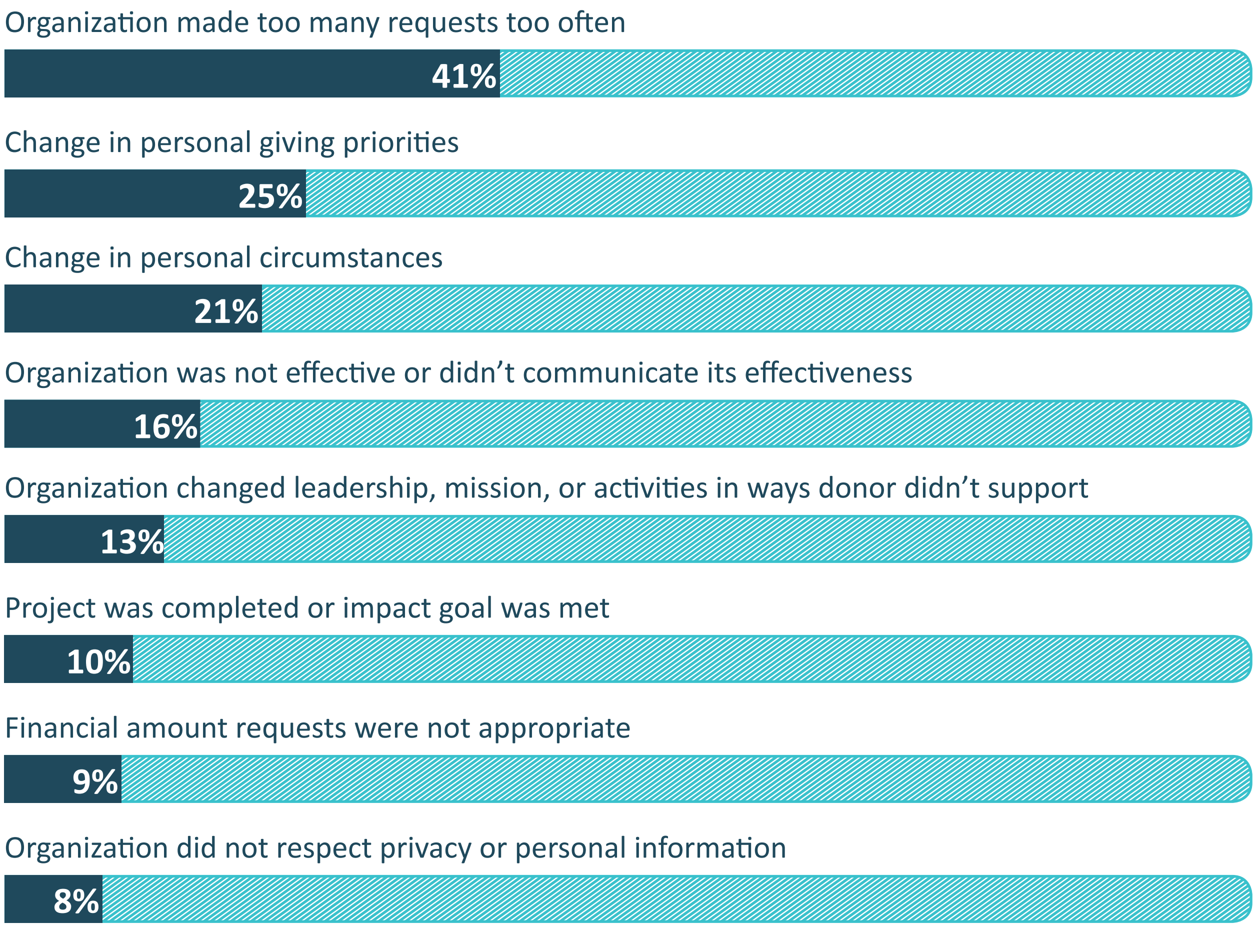


INDIVIDUAL MOTIVATIONS FOR GIVING THAT RANK HIGHEST IN IMPORTANCE	%
Belief in mission	54%
Belief gift can have an impact	42%
Giving to same cause each year	34%
Religious beliefs	25%
Tax benefits	17%

Source: Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2018

Why High Net Worth Individuals Stop Giving

28% of HNWIs stopped giving to an organization they had given to in previous years.



WHEN ASKED IF THEIR GIFT IS HAVING THE IMPACT THEY INTENDED	%
Yes	42%
No	4%
Don't know	54%

Source: Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2018

Nearly Half of High Net Worth Individuals Have a Giving Strategy

Of the HNW donors who participated in impact investing,* the majority (**68%**) said it is not a substitute to already existing charitable giving, but an addition.

19% — **19%** said it replaces some charitable giving

9% — **9%** said it replaces all of their charitable giving

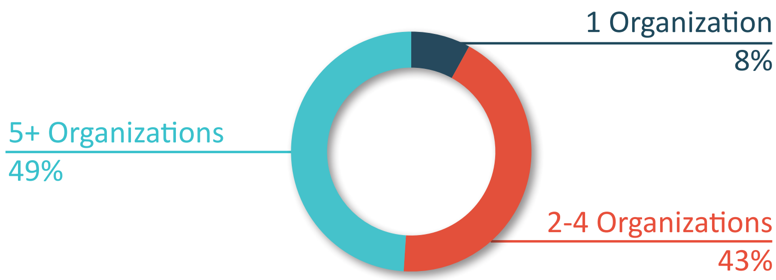
The more knowledgeable donors become about philanthropy/charitable giving, the more likely they are to create a strategy and a budget.

49% Have a Giving Strategy

48% Have a Giving Budget

86% of donations come from personal assets and income.

MOST DONORS GIVE TO MULTIPLE ORGANIZATIONS ANNUALLY



7 HNWIs give to an average of seven organizations

*Impact Investing: Investments made into companies, organizations, and funds with the intention to generate a measurable, beneficial social or environmental impact alongside a financial return.

Source: Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2018

The 2018 Philanthropy 50

The *Chronicle of Philanthropy* compiles a list of those who give the most over the course of a year.

	DONOR	TOTAL 2018 GIVING	LOCATION	WEALTH SOURCE	TOP CAUSE
1	Jeff and Mackenzie Bezos	$2.0B	Seattle, WA	Technology	Human Services
2	Michael Bloomberg	$767.0M	New York, NY	Media & Entertainment	Various
3	Pierre and Pam Omidyar	$392.0M	Honolulu, HI	Technology	Various
4	Stephen Schwarzman	$390.0M	New York, NY	Finance	Higher Education
5	Steve and Connie Ballmer	$295.0M	Hunts Point, WA	Technology	Various
6	Paul Allen	$261.4M	Seattle, WA	Technology	AI; Medical Research
7	Mark Zuckerberg and Priscilla Chan	$213.6M	Palo Alto, CA	Technology	Various
8	John and Laura Arnold	$204.3M	Houston, TX	Energy; Finance	Various
9	Jay Alix	$200.0M	New York, NY	Consulting	Higher Education
10	Edward Bass	$160.0M	Fort Worth, TX	Family Wealth; Finance	Higher Education
11	Craig Newmark	$143.8M	San Francisco, CA	Advertising	Various
12	Bill and Melinda Gates	$138.0M	Medina, WA	Technology	Various
13	Richard and Susan Rogel	$110.0M	Avon, CO	Finance; Insurance	Cancer Research
14	Irwin and Joan Jacobs	$108.8M	La Jolla, CA	Telecommunications	Various
15	Robert and Karen Hale	$105.0M	Quincy, MA	Telecommunications	Healthcare
16	David and Rita Nelson	$103.0M	De Pere, WI	Media & Entertainment	Various
17	Raymond and Barbara Dalio	$102.8M	Greenwich, CT	Finance	Various
18	Shelby Davis	$101.0M	Jackson Hole, WY	Finance	Higher Education
19	Sheryl Sandberg	$100.7M	Menlo Park, CA	Technology	Various
20	Evan and Sara Williams	$100.3M	San Francisco, CA	Technology	Various
21	Marc and Lynne Benioff	$100.3M	San Francisco, CA	Technology	Various
22	Robert and Nancy Carney	$100.0M	Houston, TX	Finance; Media & Entertainment	Higher Education
23	Harry and Linda Fath	$100.0M	Cincinnati, OH	Real Estate	Conservation; Human Services
24	Denny Sanford	$100.0M	Sioux Falls, SD	Finance	Education
25	Charles Munger	$90.4M	Santa Barbara, CA	Investments	Conservation

Source: Chronicle of Philanthropy: "Philanthropy 50," 2018

	DONOR	TOTAL 2018 GIVING	LOCATION	WEALTH SOURCE	TOP CAUSE
26	Paul Rady	$80.0M	Denver, CO	Oil	Higher Education
27	Jeanne and Rex Sinquefield	$79.9M	Westphalia, MO	Finance	Higher Education
28	William Miller III	$75.0M	Baltimore, MD	Finance	Higher Education
29	Sheldon and Miriam Adelson	$70.0M	Las Vegas, NV	Hotels	Religion
30	Ernest and Evelyn Rady	$67.9M	La Jolla, CA	Real Estate	Human Services
31	Lester and Sue Smith	$61.0M	Dallas, TX	Energy	Healthcare
32	Bruce Leven	$60.0M	Mercer Island, WA	Retail	Healthcare
33	Julian Robertson Jr.	$60.0M	New York, NY	Finance	Various
34	Andrew Viterbi	$55.0M	Los Angeles, CA	Technology	Higher Education
35	Brian Acton	$50.0M	San Francisco, CA	Technology	New Technologies
36	Gary Carlson	$50.0M	Westlake Village, CA	Healthcare	Higher Education
37	Craig and Janet Duchossois	$50.0M	Chicago, IL	Investments	Arts & Culture
38	William and Carolyn Franke	$50.0M	Paradise Valley, AZ	Finance	Higher Education
39	Tod and Cindy Johnson	$50.0M	Port Washington, NY	Finance	Financial Aid
40	Amin and Julie Khoury	$50.0M	Wellington, FL	Engineering	Higher Education
41	Samuel and Ann Mencoff	$50.0M	Chicago, IL	Finance	Higher Education
42	Marc and Carolyn Rowan	$50.0M	New York, NY	Finance	Higher Education
43	Wallace and Barbara Weitz	$50.0M	Omaha, NE	Finance	Higher Education
44	Stewart and Lynda Resnick	$49.1M	Beverly Hills, CA	Agriculture; Food & Beverage	Arts & Culture
45	Bob and Renee Parsons	$48.1M	Scottsdale, AZ	Technology	Various
46	Paul and Betty Woolls	$40.1M	Napa, CA	Food & Beverage	Higher Education
47	Leon and Debra Black	$40.0M	New York, NY	Finance	Arts & Culture
48	Gary and Kathleen Rollins	$40.0M	Atlanta, GA	Chemicals	Higher Education
49	Mike Walker	$40.0M	Houston, TX	Manufacturing	Higher Education
50	Raymond Suckling	$37.1M	Sewickley, PA	Family Wealth; Investments	Various

Source: Chronicle of Philanthropy: "Philanthropy 50," 2018

The Top 50 U.S. Donors Gave Less in 2018

Defined as those who gave the most over the course of 2018, the top 50 donors gave **$7.8 billion**, a steep decline from the $14.7 billion given by the top 50 in 2017.[1]

Combined giving by the Top 50 donors accounted for **1.8%** of total U.S. charitable giving in 2018.

A CLOSER LOOK AT THE TOP 50[2]

17 made their money in finance

13 live in California, 7 live in New York

12 made their money in technology

3 left bequests

Sources:
1 Chronicle of Philanthropy: "Betting On Tomorrow," 2019
2 Chronicle of Philanthropy: "Philanthropy 50," 2019

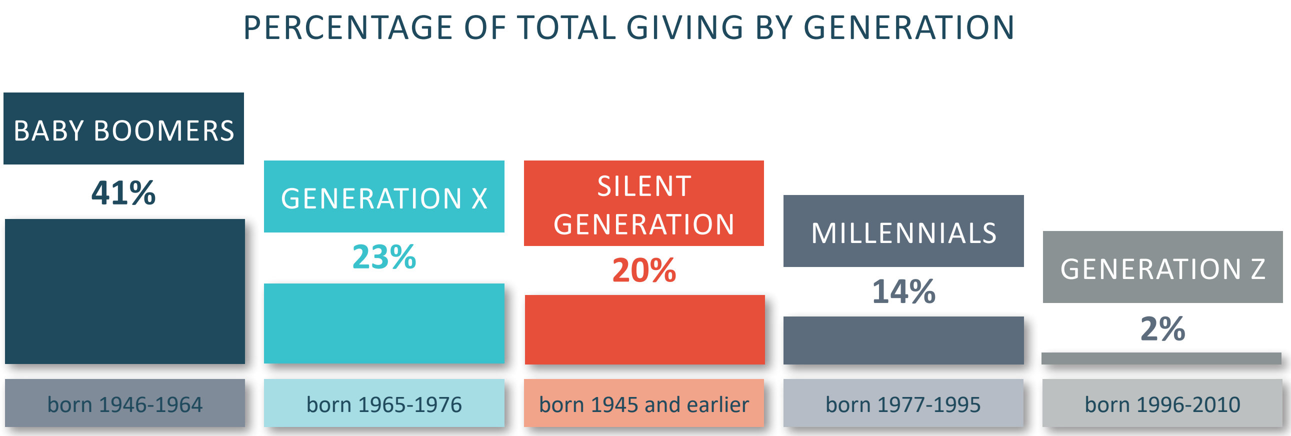
Forbes 400 List of Richest Americans Continues to Rise

- **21** individuals from the Philanthropy 50 were also listed on the Forbes 400.[1]
- These 21 donors gave a total of $5.5 billion in 2018, which is $2.2 billion less than the combined contributions from the top two donors in 2017.
- There were **15** newcomers, 12 of whom are self-made entrepreneurs.[2]
- The minimum net worth to make the Forbes 400 is now a record **$2.1 billion**, which is $100 million higher than it was in 2017.
- In 2018, the group's total net worth reached **$2.9 trillion**, a 7 percent growth over 2017.

Sources:
1 Chronicle of Philanthropy: "Philanthropy 50," 2019
2 Forbes: "Forbes 400," 2018

Generational Giving: Baby Boomers Remain Top Givers While Generation X Rises

1,339 organizations were surveyed to provide the following information:



Generation X	Generation X surpassed the Silent Generation in total giving, and are approaching the prime age for giving.
Silent Generation	The Silent Generation donated to a larger number of charities and gave more per capita ($1,235) than any other cohort.
Baby Boomers	Baby Boomers gave 41 percent of donations last year. Almost three-fourths of Baby Boomers said their giving would either remain the same in 2018 (60 percent) or increase (12 percent).

Source: Blackbaud: *The Next Generation of American Giving*, 2018

2018 OVERVIEW BY GENERATION

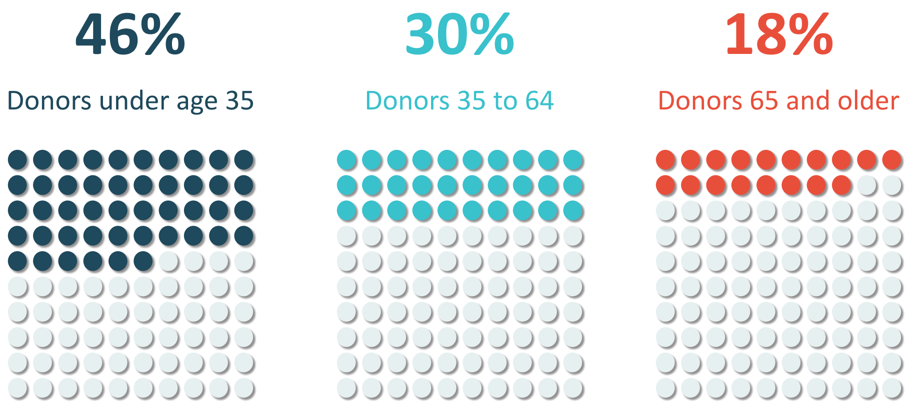
	% THAT GAVE	NUMBER OF DONORS	AVERAGE GIVING PER PERSON	AVERAGE NUMBER OF CHARITIES	TOTAL GIVING
SILENT GENERATION	78%	23.5M	$1,235	6.3	$29.0B
BABY BOOMERS	75%	55.3M	$1,061	4.2	$58.6B
GENERATION X	55%	35.8M	$921	3.8	$32.9B
MILLENNIALS	51%	34.1M	$591	3.5	$20.1B
GENERATION Z	44%	9.3M	$341	4.6	$3.2B

Nearly 2 in 3 charitable dollars came from
Baby Boomers and Generation X.

Source: Blackbaud: *The Next Generation of American Giving*, 2018

Younger Donors are Increasing Their Philanthropic Presence

Percentage of donors who said they were going to give more in 2018 than in 2017:



Millennials are more likely than older donors to support new causes. 48 percent increased the number of charities they supported in 2017, compared with 26 percent of middle-aged donors and 19 percent of those over 65.

Source: Chronicle of Philanthropy: "Philanthropy 50," 2018

What donors say charities can do to inspire more giving:

38% Make a compelling case of extraordinary need

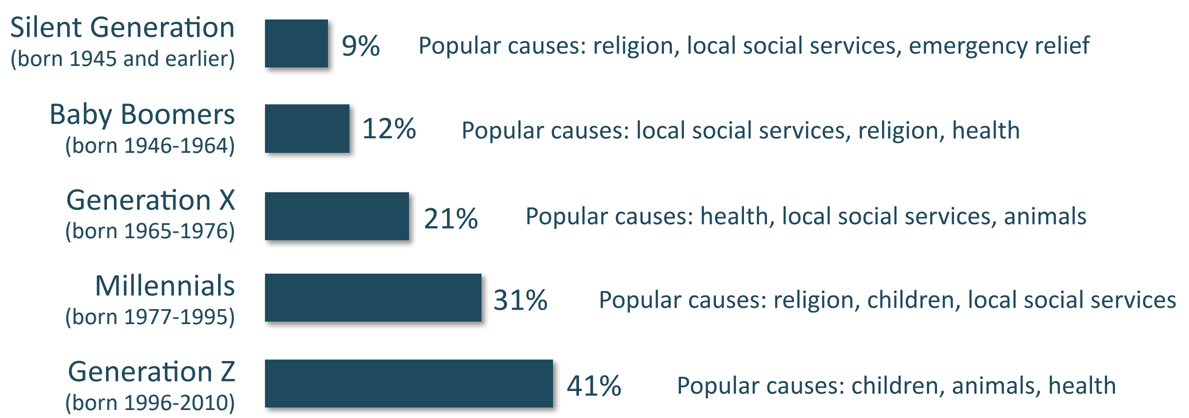
28% Stop sending unwanted trinkets

21% Reduce overhead costs

19% Offer matching gifts

19% Don't send so many appeals

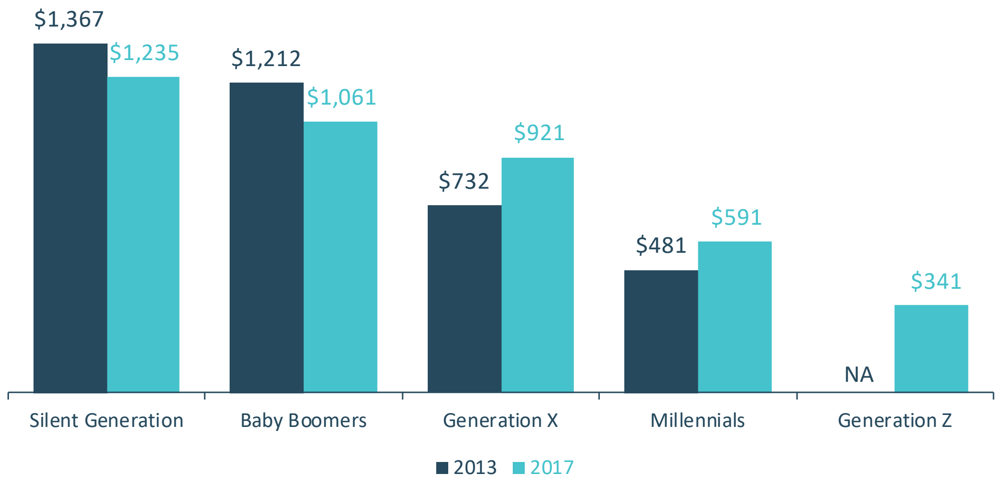
Young donors planned to increase giving more than older donors in 2018.



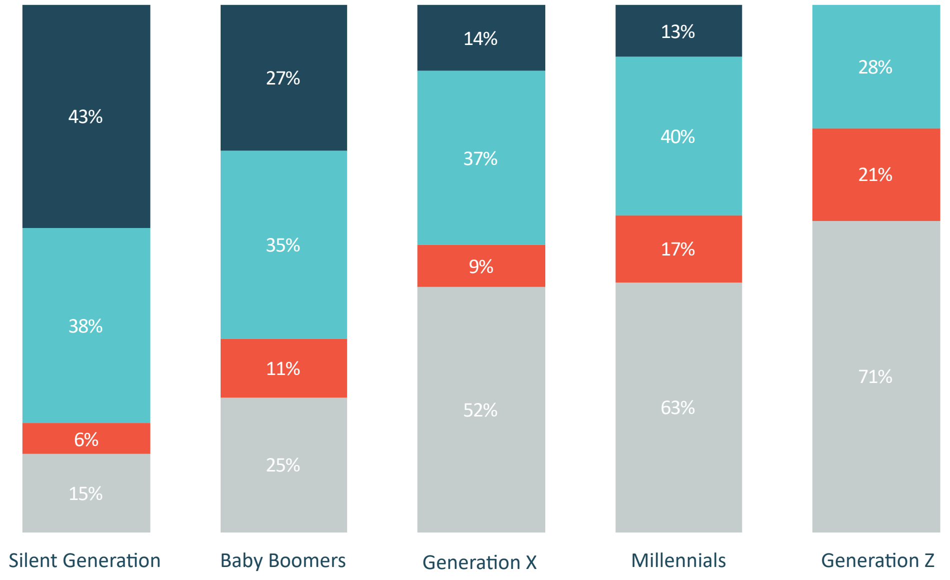
Source: Chronicle of Philanthropy: "The Disappearing Donor," 2018

Year Over Year Change Showed Even Distribution Amongst Sectors

Generation X is gaining on Baby Boomers in average annual donations:



How they gave in 2017:



- Direct Mail - still favored by the oldest donors
- Website - popular with all generations
- Social Media - preferred by Generation Z and Millennials
- Smartphone - popular with Generation X and younger donors

Source: Chronicle of Philanthropy: "The Disappearing Donor," 2018

Online Giving Rose, But Growth Slowed

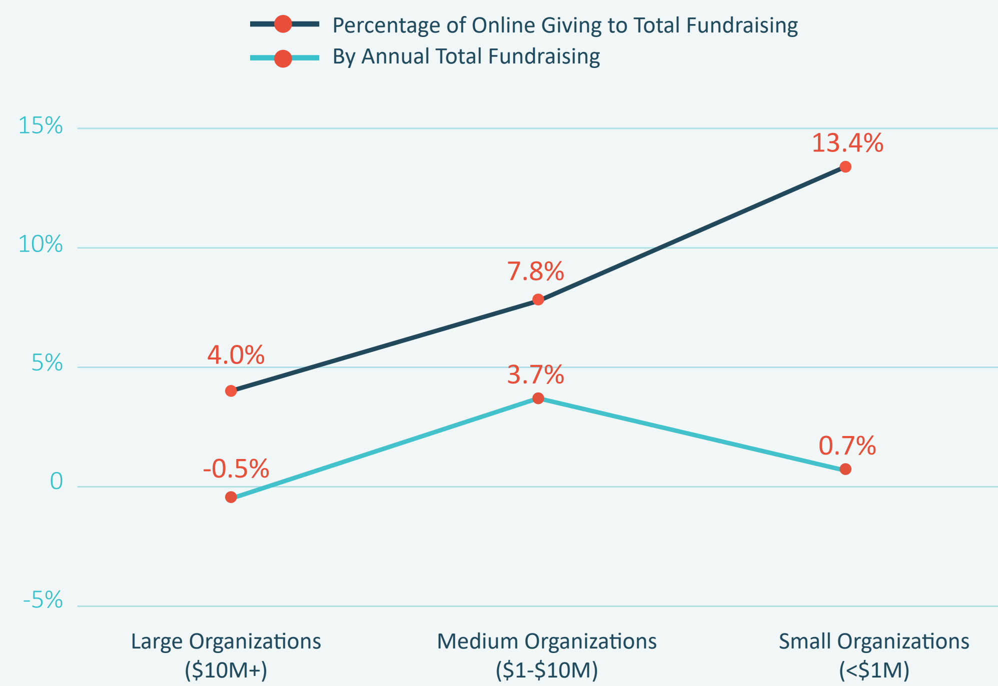
1.2% Online giving growth slowed significantly to an average of **1.2%** in 2018, after 12% growth in 2017

17% Overall online growth since 2016 was **17%**

8.5% Online giving rose slightly to contribute **8.5%** to total giving

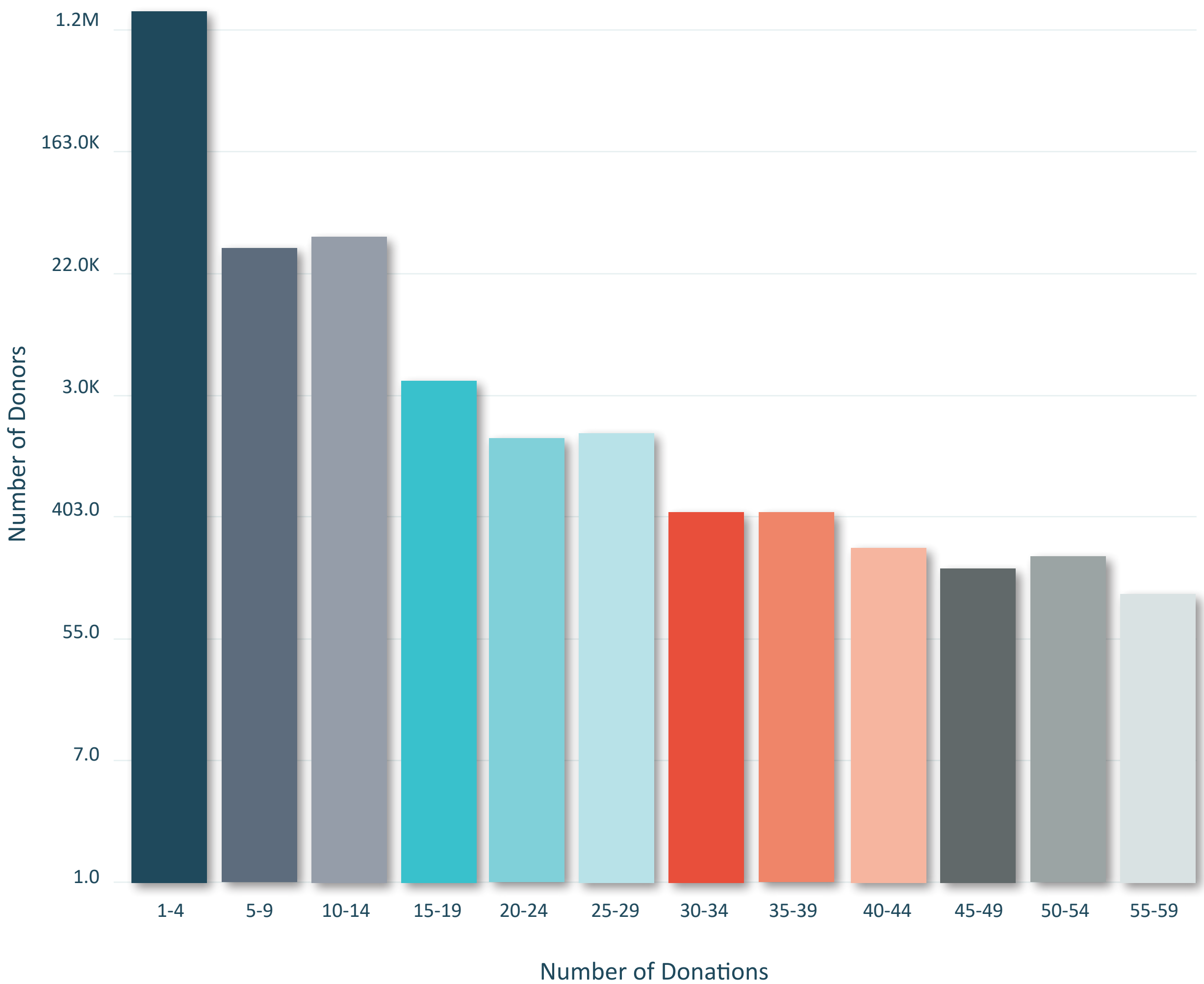
$147 Average online donation amount was **$147**

CONTRIBUTIONS RECEIVED BY ORGANIZATIONS OF DIFFERENT SIZES



Source: Blackbaud: *Charitable Giving Report,* 2019 (tracks online giving data from 5,537 nonprofits representing $2.7 billion in online fundraising in 2018)

FREQUENCY OF ONLINE GIVING



About **95 percent** of donors gave fewer than five times a year, but their gifts represented 79 percent of the total amount given online.

Source: Chronicle of Philanthropy, “Online Trends,” 2017

Mobile Giving Continues to Rise

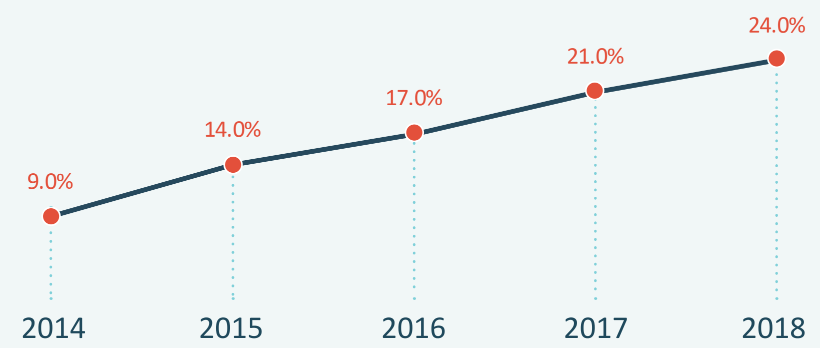
$167

The average mobile donation pledge was **$167**[1]

64%

64% of mobile donations were made by women

GROWTH IN FUNDS RECEIVED VIA MOBILE DEVICES[2]



DONORS USE MOBILE DEVICES TO[1]:

25%
discover nonprofits

51%
visit a nonprofit's website

25%
complete their donations

Sources:
1 Nonprofits Source: "Online Giving Statistics," 2018
2 Blackbaud: *Charitable Giving Report,* 2019

Social Media Remains an Effective Tool

55% of people who engage with nonprofits via social media end up taking some form of action:

53%
volunteer

59%
donate money

52%
donate clothing, food, or other personal items

43%
participate in charitable events in their community

40%
purchase a product that benefits charity

25%
contact their political representatives

15%
organize their own community events

Source: Nonprofits Source: "Online Giving Statistics," 2018

Foundation Giving Showed the Largest Growth in 2018 with $75.9 Billion

18%

18% of all giving came from foundations[1]

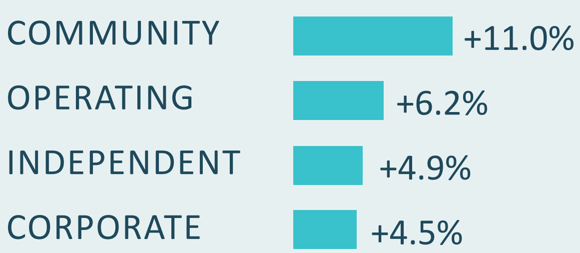
17%

Foundations have seen a **17%** increase over two years

7.3%

Foundation giving increased by **7.3%**

GRANTMAKING INCREASED FOR ALL FOUNDATION SUBCATEGORIES[2]



Sources:
1 The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019
2 UBS and Hauser Institute for Civil Society: *Global Philanthropy Report*, 2018

Top 25 Independent Foundations by Total Giving

	FOUNDATION	TOTAL GIVING	TOTAL ASSETS
1	Bill & Melinda Gates Foundation (WA)	$3.8B	$40.4B
2	The Susan Thompson Buffett Foundation (NE)	$520.4M	$2.4B
3	Ford Foundation (NY)	$511.9M	$12.2B
4	Lilly Endowment Inc. (IN)	$439.9M	$11.7B
5	Foundation to Promote Open Society (NY)	$431.3M	$7.3B
6	Hod Foundation (NY)	$376.4M	$60.8M
7	Walton Family Foundation Inc. (AR)	$373.5M	$3.1B
8	The William and Flora Hewlett Foundation (CA)	$353.5M	$9.0B
9	The Robert Wood Johnson Foundation (NJ)	$347.9M	$10.3B
10	The David and Lucile Packard Foundation (CA)	$300.2M	$7.0B
11	W. K. Kellogg Foundation (MI)	$296.2M	$418.9M
12	Gordon and Betty Moore Foundation (CA)	$290.7M	$6.3B
13	Bloomberg Philanthropies (NY)	$280.2M	$7.1B
14	The Leona M. and Harry B. Helmsley Charitable Trust (NY)	$279.8M	$5.5B
15	The John D. and Catherine T. MacArthur Foundation (IL)	$256.5M	$6.1B
16	Richard F. Aster, Jr. Foundation (DE)	$237.1M	$60.7K
17	Simons Foundation (NY)	$233.7M	$2.6B
18	The Andrew W. Mellon Foundation (NY)	$209.8M	$6.1B
19	John Templeton Foundation (PA)	$187.7M	$2.9B
20	The California Endowment (CA)	$184.5M	$3.7B
21	The Rockefeller Foundation (NY)	$166.1M	$4.1B
22	Eli & Edythe Broad Foundation (CA)	$158.3M	$1.9B
23	Carnegie Corporation of New York (NY)	$156.7M	$3.3B
24	The Kresge Foundation (MI)	$145.4M	$3.7B
25	Robert Woodruff Foundation (GA)	$142.7M	$3.1B

Source: Foundation Center: "Foundation Statistics Database," 2015

Community Foundations Doubled Their Assets, Gifts, and Grants Over the Last 10 Years

TOP 100 LARGEST COMMUNITY FOUNDATIONS BY TOTAL ASSETS

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Assets	$38.9B	$40.4B	$43.7B	$44.9B	$49.6B	$57.9B	$64.0B	$65.9B	$69.5B	$82.7B
Gifts	$4.4B	$3.5B	$4.0B	$4.4B	$5.9B	$6.8B	$7.7B	$7.1B	$8.1B	$8.9B
Grants	$3.9B	$3.5B	$3.6B	$3.6B	$3.9B	$4.3B	$5.2B	$5.9B	$6.8B	$7.9B

Total reported assets, gifts, and grants for 2017:

$91.1B Assets

$9.7B Gifts

$8.3B Grants

Between 2016 and 2017 there was a:

↑**12.7%** increase in total assets

↑**7.0%** increase in total gifts

↑**10.0%** increase in total grants

Operations

- The majority of revenue comes from administrative fees (on average 71 percent)
- Two-thirds of expenses go to personnel costs (66 percent)
- The smallest (by assets) of 253 community foundations surveyed have a far greater proportion of endowed assets (89 percent) than the largest community foundations (54 percent)

Source: Foundation Center: *The Columbus Survey*, 2017

Top 25 Community Foundations by Assets

	FOUNDATION	2017 ASSETS	2017 GIFTS	2017 GRANTS
1	Silicon Valley Community Foundation (CA)	$13.5B	$1.3B	$1.8B
2	Tulsa Community Foundation (OK)	$4.4B	$264.0M	$166.7M
3	Greater Kansas City Community Foundation (KS)	$3.1B	$505.9M	$396.4M
4	The Chicago Community Trust (IL)	$2.8B	$383.7M	$309.0M
5	The New York Community Trust (NY)	$2.8B	$81.3M	$222.0M
6	Foundation For The Carolinas (NC)	$2.4B	$617.1M	$319.2M
7	The Cleveland Foundation (OH)	$2.4B	$112.2M	$141.0M
8	The Columbus Foundation (OH)	$2.2B	$222.4M	$223.5M
9	The Oregon Community Foundation (OR)	$2.2B	$196.1M	$107.8M
10	Marin Community Foundation (CA)	$1.7B	$141.9M	$149.1M
11	California Community Foundation (CA)	$1.6B	$287.8M	$179.0M
12	The San Francisco Foundation (CA)	$1.4B	$93.9M	$153.7M
13	The Saint Paul & Minnesota Community Foundations (MN)	$1.2B	$78.8M	$90.3M
14	The Pittsburgh Foundation (PA)	$1.2B	$37.9M	$64.2M
15	Omaha Community Foundation (NE)	$1.1B	$168.7M	$125.2M
16	The Boston Foundation (MA)	$1.1B	$193.7M	$135.0M
17	The Community Foundation for Greater Atlanta (GA)	$1.0B	$145.4M	$99.2M
18	Communities Foundation of Texas, Inc. (TX)	$1.0B	$95.3M	$137.0M
19	Hartford Foundation for Public Giving (CT)	$1.0B	$16.6M	$34.4M
20	Oklahoma City Community Foundation, Inc. (OK)	$983.1M	$88.8M	$34.6M
21	Seattle Foundation (WA)	$965.4M	$120.0M	$115.6M
22	The Rhode Island Community Foundation (RI)	$957.3M	$38.4M	$43.3M
23	The Greater Milwaukee Foundation (WI)	$913.4M	$46.1M	$95.5M
24	Community Foundation for Southeast Michigan (MI)	$912.0M	$86.2M	$74.0M
25	Community Foundation Serving Richmond and Central Virginia (VA)	$858.5M	$113.9M	$88.2M

Source: Foundation Center: *The Columbus Survey*, 2017

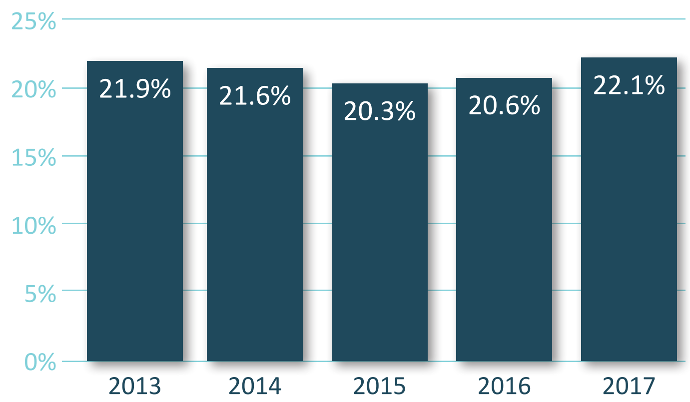
Donor-Advised Funds and Private Foundations are on the Rise

DONOR-ADVISED FUNDS COMPARED TO PRIVATE FOUNDATION GROWTH[1]

DONOR-ADVISED FUNDS (DAFs)*	2015	2016	2017
Number of DAFs	272,845	289,478	463,622
Assets	$77.18B	$86.45B	$110.01B
Grantmaking	$14.22B	$15.91B	$19.08B
PRIVATE FOUNDATIONS			
Number of Foundations	79,489	80,988	82,516
Assets	$734.10B	$792.62B	$855.81B
Grantmaking	$44.13B	$45.16B	$49.50B

While the number of DAFs has quickly outpaced private foundations, growing by **60.2 percent** between 2016 and 2017, the assets held by private foundations have grown at a faster rate. Additionally, the amount granted by DAFs represents about **40 percent** of the grants made by private foundations.

GRANT PAYOUT PERCENTAGES



DAF payout rate is on the rise again, and has remained above 20 percent for every recorded year.

*Donor-Advised Fund (DAF): A fund that allows donors to make contributions and then recommend preferred grants over time.

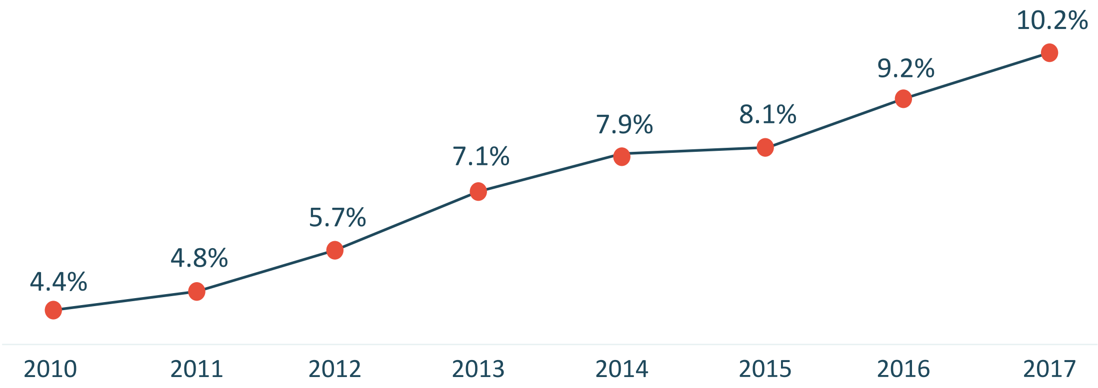
Source: National Philanthropic Trust: *Donor-Advised Fund Report*, 2017

DONOR-ADVISED FUND GROWTH PERCENTAGES (IN BILLIONS)

	2016	2017	% CHANGE
Charitable Assets	$86.45	$110.01	27.3%
Total Contributions	$25.09	$29.23	16.5%
Total Grant Dollars	$15.91	$19.08	19.9%
Grant Payout	20.6%	22.1%	1.5%
Total Number of DAF Accounts	289,478	463,622	60.2%
Average Size of DAF Account ($)	$298,628	$237,356	-20.5%

DAFs saw growth in all metrics except the average account size, calculated by dividing the total assets by the total number of accounts. One possible explanation for this could be a large increase of accounts that hold fewer assets.

GIVING TO DONOR-ADVISED FUNDS SHOWN AS A PERCENTAGE OF TOTAL INDIVIDUAL GIVING



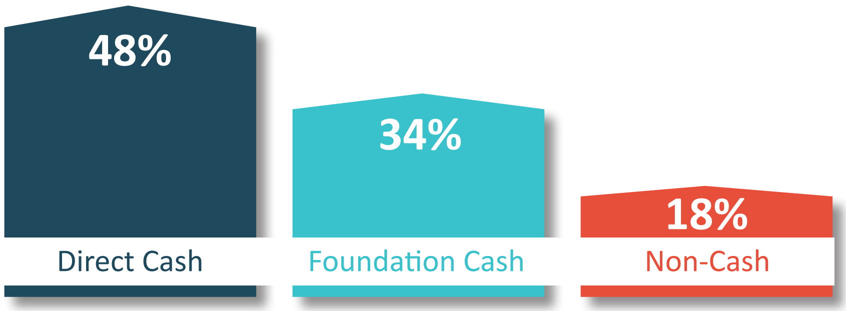
In 2017, individual giving was estimated at **$286.65 billion**, making up 67 percent of the $424.7 billion total giving. Contributions to DAFs totaled **$29.23 billion**, making that 10.2 percent of all individual giving.

Source: National Philanthropic Trust: *Donor-Advised Fund Report*, 2017

Corporate Contributions Rose Slightly in 2018 to $20.1 Billion

5.0%	**5.0%** of all giving came from corporations[1]
5.4%	Corporate giving increased by **5.4%**
5.2%	The gross domestic product increased by **5.2%,** which had a positive effect on corporate giving

2017 CORPORATE GIVING BY FUNDING TYPE[2]



6 out of 10 companies increased giving between 2015-2017.
The median increase was 15 percent.

Sources:
1 The Giving Institute: *Giving USA: The Annual Report on Philanthropy*, 2019
2 CECP: *Giving in Numbers*, 2018 (sample size: 252)

Annual Revenue is Up but Giving as a Percentage of Revenue Maintains

Total giving rose **14.35%**, from $21.6 million in 2015 to $24.7 million in 2017. Despite this growth, giving as a percent of revenue stayed at 0.13%.

TOTAL GIVING INCREASE

$55.3 million was the median total giving for the top-quartile leaders.

A Closer Look at Corporate Giving

- Giving to disaster relief increased over **300 percent**, as median cash giving rose from $212,000 in 2015 to $862,000 in 2017.
- Education (K-12 and Colleges & Universities) was the top sector, making up **27 percent** of contributions, followed closely by Health Services at 25 percent.
- Corporate grantmakers are focusing their charitable efforts by increasing support to fewer organizations. The number of grants fell **22 percent** between 2015-2017, but the median grant amount increased 19 percent. Recipients also decreased, from 52 in 2015 to 38 in 2017.

Source: CECP: *Giving in Numbers*, 2018

The Majority of Corporations Invest in Gift Matching Programs

93%

93% of surveyed companies had an employee volunteer program, and the average participation rate was 30%

92%

92% offered a matching gift program of any kind

12.2%

Matching gifts made up a median of **12.2%** of total cash giving

21.3%

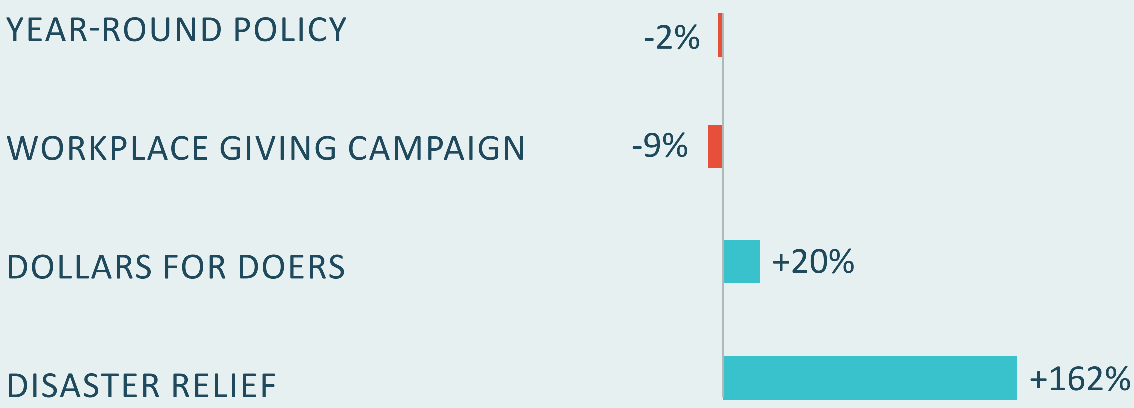
Top quartile matching gifts were a median of **21.3%** of total cash giving

10%

Median employee matching gift participation over five years, from 2013 to 2017, rose from 9% to **10%**

Source: CECP: *Giving in Numbers Report*, 2018

CHANGE IN MEDIAN CONTRIBUTION AMOUNT BETWEEN 2015-2017[1]:



It is estimated that **$6-$10 million** in matching gift funds are not claimed each year.[2]

Sources:
1 CECP: *Giving in Numbers Report*, 2018
2 The Giving Institute: *Giving USA: Evolution of Workplace Giving*, 2018

Top 50 Corporations by Total Giving

The following represents total giving reported by the *Chronicle of Philanthropy*

	CORPORATION	PRE-TAX PROFIT	TOTAL CASH DONATIONS	TOTAL DONATIONS
1	Pfizer (NY)	$12.3B	$210.1M	$4.8B
2	Merck & Company (NJ)	$6.5B	$93.8M	$2.7B
3	Google (CA)	$27.1B	$255.1M	$1.7B
4	Gilead Sciences (CA)	$13.5B	$388.1M	$1.6B
5	Johnson & Johnson (NJ)	$17.6B	$227.0M	$1.4B
6	Microsoft Corporation (WA)	$23.1B	$169.4M	$1.3B
7	Bristol-Myers Squibb (NY)	$5.1B	$162.7M	$1.1B
8	Amgen (CA)	$9.5B	$23.6M	$1.1B
9	Eli Lilly and Company (IN)	$2.1B	$33.5M	$971.5M
10	Cisco Systems (CA)	$12.2B	$73.6M	$367.3M
11	IBM (NY)	$11.4B	$36.6M	$297.7M
12	Wells Fargo & Company (CA)	$27.3B	$286.5M	$286.5M
13	Goldman Sachs Group (NY)	$11.1B	$279.6M	$279.6M
14	JPMorgan Chase & Company (NY)	$35.9B	$250.0M	$250.0M
15	Target Corporation (MN)	$3.6B	$104.9M	$217.6M
16	ExxonMobil Corporation (TX)	$18.6B	$204.0M	$204.0M
17	Kroger Company (OH)	$4.6B	$12.0M	$189.0M
18	Bank of America (NC)	$29.2B	$180.6M	$185.9M
19	Citigroup (NY)	$22.7B	$146.8M	$146.8M
20	General Mills (MN)	$2.5B	$91.2M	$136.7M
21	PepsiCo (NY)	$9.6B	$51.4M	$108.9M
22	Ford Motor Company (MI)	$8.1B	$103.6M	$103.6M
23	Procter & Gamble (OH)	$14.0B	$60.5M	$99.5M
24	Mondelez International (IL)	$3.1B	$8.1M	$90.2M
25	Intel Corporation (CA)	$20.3B	$88.5M	$88.5M

Source: Chronicle of Philanthropy database: "Drug, Tech, and Financial-Services Companies Top List of Corporate Donors," 2018

	CORPORATION	PRE-TAX PROFIT	TOTAL CASH DONATIONS	TOTAL DONATIONS
26	Prudential Financial (NJ)	$7.7B	$73.3M	$73.3M
27	State Farm Mutual Automobile Insurance Company (IL)	N/A	$60.0M	$60.0M
28	U.S. Bancorp (MN)	$7.5B	$60.1M	$60.1M
29	UPS (GA)	$7.1B	$55.1M	$55.1M
30	Dow Chemical Company (MI)	$2.7B	$52.7M	$52.7M
31	Capital One Financial Corporation (VA)	$5.5B	$56.5M	$56.5M
32	FedEx (TN)	$4.5B	$49.3M	$49.3M
33	Exelon Corporation (IL)	$3.8B	$51.0M	$51.0M
34	PNC Financial Services Group (PA)	$5.4B	$48.8M	$48.8M
35	Kohl's (WI)	$875.0M	$44.0M	$44.0M
36	Marriott International (DC)	$2.8B	$18.5M	$18.5M
37	MetLife (NY)	$5.0B	$43.0M	$43.0M
38	Dominion Foundation (VA)	$3.0B	$42.6M	$42.6M
39	Nationwide (OH)	$562.0M	$41.8M	$41.8M
40	Aetna (CT)	$2.9B	$41.1M	$41.1M
41	Duke Energy Corporation (NC)	$4.2B	$39.7M	$39.7M
42	American Express Company (NY)	$7.4B	$37.8M	$37.8M
43	ConocoPhillips (TX)	$2.6B	$36.7M	$36.7M
44	Costco Wholesale Corporation (WA)	$4.0B	$34.5M	$34.5M
45	Deere & Company (IL)	$3.1B	$33.4M	$33.4M
46	Caterpillar (IL)	$4.0B	$33.0M	$33.0M
47	Colgate-Palmolive (NY)	$3.4B	$25.5M	$25.5M
48	HCA (TN)	$4.3B	$32.0M	$32.0M
49	Northrop Grumman Corporation (VA)	$3.0B	$30.7M	$30.7M
50	Ecolab (MN)	$13.8B	$22.1M	$22.1M

Source: Chronicle of Philanthropy database: “Drug, Tech, and Financial-Services Companies Top List of Corporate Donors,” 2018

Glossary of Terms

Baby Boomers
Those born between 1946 and 1964.

CAGR
Compound annual growth rate. The rate of growth of an investment over a specific period of time.

Charitable Trust
A trust that is not tax exempt, all of the unexpired interests of which are devoted to one or more charitable purposes, and for which a charitable contribution deduction was allowed under a specific section of the Internal Revenue Code.

Community Foundation
Nonprofit organization dedicated to a particular area.

Donor-Advised Fund (DAF)
A fund that allows donors to make contributions and then recommend preferred grants over time.

Family Foundation
Nonprofit organization funded by the endowment from a family.

Foundation Cash
Grant awarded by corporate foundations.

Generation X
Those born between 1965 and 1976.

Generation Z
Those born between 1996 and 2010.

Gifts to Individuals
In-kind gifts to individuals in need, made by foundations or assistance programs.

High Net Worth Individual (HNWI)
Those having investible assets of $1 million or more, excluding primary residence, collectibles, consumables, and consumer durables.

Independent Foundation
Nonprofit organization not governed by a benefactor, family, or corporation.

Impact Investing
Investments made into companies, organizations, and funds with the intention to generate a measurable, beneficial social or environmental impact alongside a financial return.

Millennials
Those born between 1977 and 1995.

Non-Cash
A form of corporate giving that includes in-kind gifts and pro bono services.

Public-Society Benefit
Organizations focused on voter rights, civil rights, consumer rights, and community or economic development.

Silent Generation
Those born in 1945 and earlier.

Ultra High Net Worth Individual
Individual whose net worth exceeds $50 million.

About CCS Fundraising

1947
Established

400+
Professional Staff Members

12,000+
Organizations Served

CCS Fundraising is a strategic consulting firm that partners with nonprofits for transformational change. As leading experts in capital campaign management, we plan, develop, and implement campaigns to advance causes and secure sustainable futures for premiere organizations throughout the world.

Members of the CCS team are highly experienced and knowledgeable across sectors, disciplines, and regions. With offices throughout the United States and globally, our unique, customized approach provides each client with an embedded team member for the duration of the engagement.

Beyond comprehensive, hands-on campaign implementation, we also deliver step-by-step strategic guidance for organizations at any stage in the development process. Our services include:

- Capital Campaigns
- Feasibility & Planning Studies
- Development Assessments & Audits
- Interim Development Management
- Learning & Leadership Strategy
- Research & Analytics
- Major Gift Initiatives

Nonprofits benefit most when fundraising knowledge is combined with best practices from diverse experience. Our expansive perspective helps us bring fresh insights and offer real-time solutions unique to each situation. While the results of our work are immediate, the impact of the strategies, tools, and methods we develop with our partnering institutions is enduring.

We have a proven track record of notable, high-profile projects in the following sectors:

- Colleges & Universities
- Primary & Secondary Education
- Healthcare
- Faith-based Organizations
- Human Services
- Environmental & Animal Welfare
- Arts, Culture, & Humanities
- Science & Technology
- Policy Groups
- Associations

CCS is a proud member and supporter of highly-recognized associations and member organizations across the fundraising industry. We partner annually with the Giving Institute, the IUPUI Lilly Family School of Philanthropy, the Association for Fundraising Professionals, as well as many sector-specific groups that develop and promote best practices each year.

CCS INSIGHTS

Practical Tools Include:

- Philanthropic Landscape Annual Report
- Publications
- Infographics
- Webinars
- Digital Media

As a leading firm with a presence across all nonprofit sectors, we understand the challenges you face, as well as the major opportunities available on the horizon. That's why we are excited to offer practical tools and tips through our ***Insights Page on the CCS Website***. This comprehensive hub for articles, data reports, publications, and digital media has been designed to help you better navigate the philanthropic terrain and advance your missions. Your roadmap to success is now one click away!

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