



2022 CHECK-IN ON FUNDRAISING TRENDS AND FUNDER PRIORITIES

20TH ANNUAL PHILANTHROPIC LANDSCAPE
in partnership with Philanthropy Missouri

August 25, 2022

Welcome

Dayna M. Stock, CEO

Welcome from COCA

Alesha Henley, Interim Executive Director and
Senior Managing Director



THE ROME GROUP

insights, strategies, solutions



Our Mission:

Strengthening the nonprofits that strengthen our communities

Our Vision:

**Stronger Nonprofits.
Stronger Communities.**

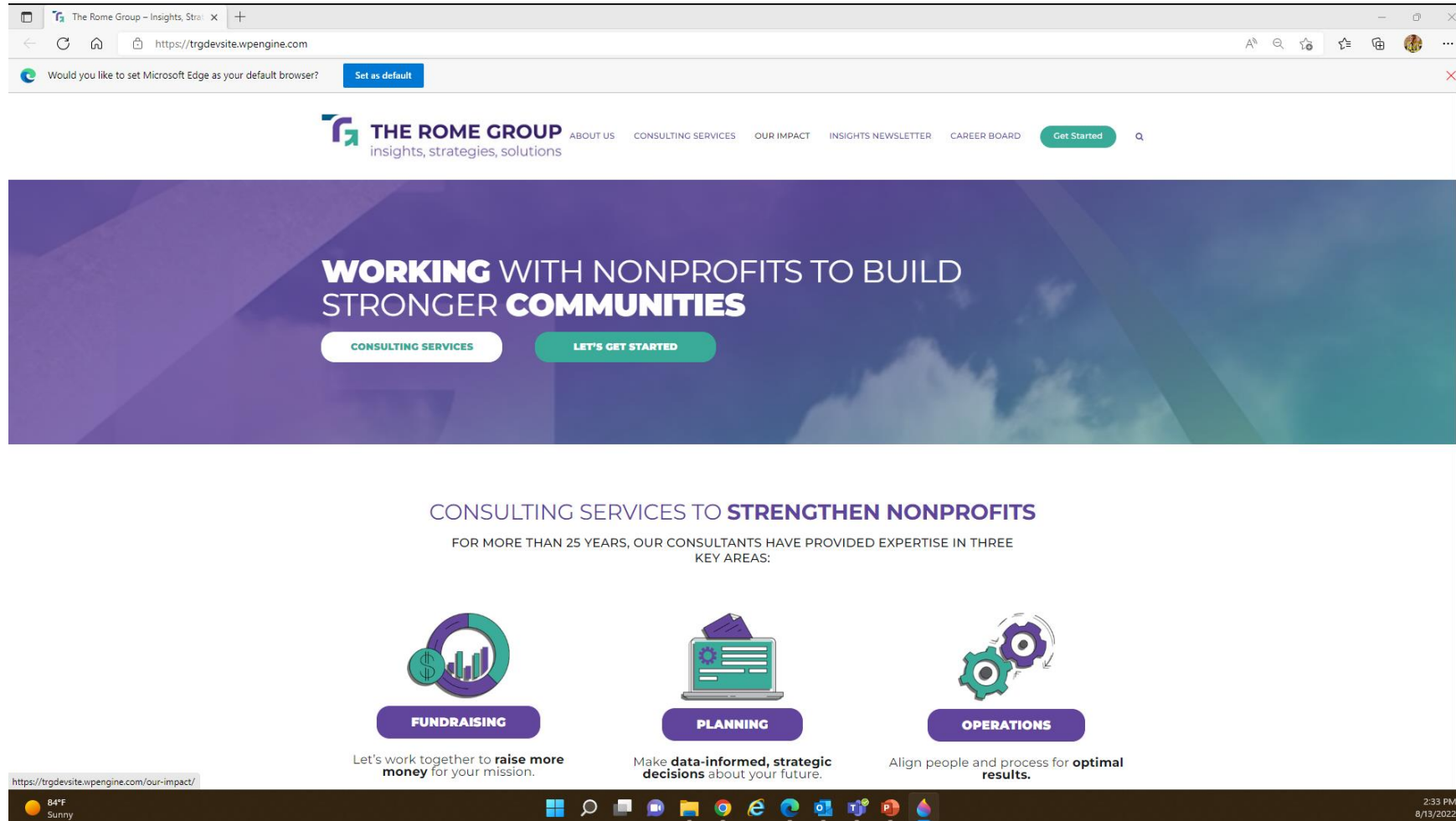
Our Work:

- Fundraising
- Planning
- Operations



THE ROME GROUP

New Website!





Dayna Stock, PhD

CEO

Expertise: Planning,
Fundraising, Organizational
Effectiveness



Ellen Howe, CFRE

Senior Consultant

Expertise: Fundraising, Team
Building, Coaching



Rachel Broom, MPA

Consultant

Expertise: Fundraising, Major
Gifts



LeeAnn Harris

Consultant

Expertise: Major Gift & Capital
Fundraising and Fundraising
Strategy



Jeannette Huey

Consultant

Expertise: Fundraising,
Coaching



Mary Pat O'Gorman, MS

Consultant

Expertise: Grant writing,
fundraising



Michelle Fiedler, MA

Consultant

Expertise: Grant writing



Monique Levy

Consultant

Expertise: Operations,
Organizational Performance,
Employee Development/Retention



Elizabeth Pickard, MA

Consultant

Expertise: Planning, Program
Development and
Effectiveness

Chyna Bowen

Consultant

Expertise: DEI, Strategic
Planning and Program
Development



Alice Squires

Client Services Manager

Expertise: Everything



Amy Rome

Founder

Expertise: Retirement

Agenda

I. National & Local Philanthropic Trends

II. Panel Discussion with Local Funders:



Michelle Miller
CEO
Philanthropy Missouri



Vianey Beltran
Vice President, Social
Impact & Sustainability
Wells Fargo



Elizabeth George
Director, Community
Investment
St. Louis Community
Foundation



Michelle Tucker
President & CEO
United Way of Greater
St. Louis

National and Local Philanthropic Trends



Giving
USA™

A public service initiative
of The Giving Institute



THE
Giving
Institute™

Shared intelligence.
For the greater good.

Giving USA 2022

The Annual Report on Philanthropy for the year 2021

Comprehensive Presentation PowerPoint

Researched and written by



IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

Giving USA

2022

The Annual Report
on Philanthropy
for the Year 2021



Giving
USA™

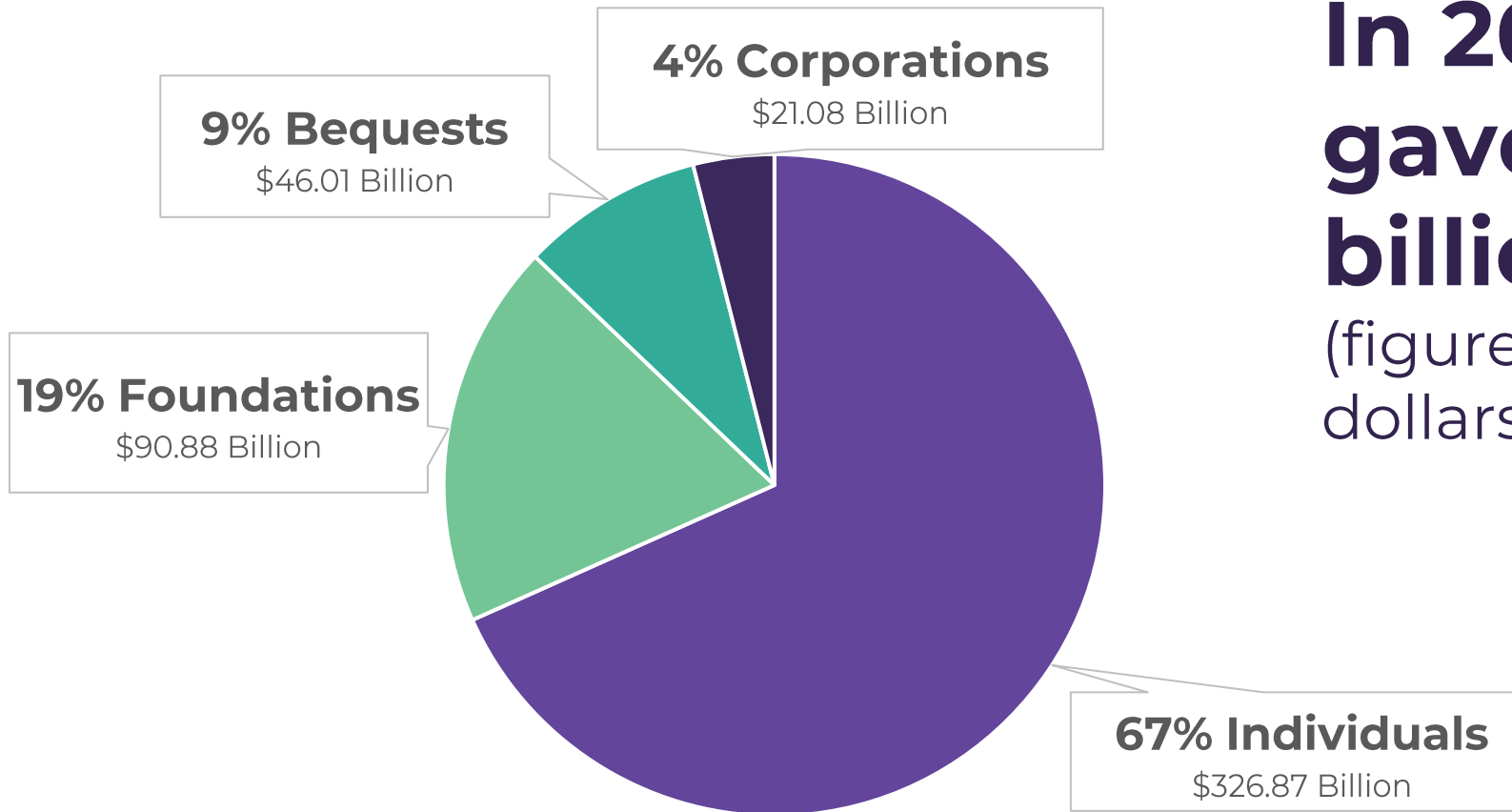
A public service initiative
of The Giving Institute

Researched and written by



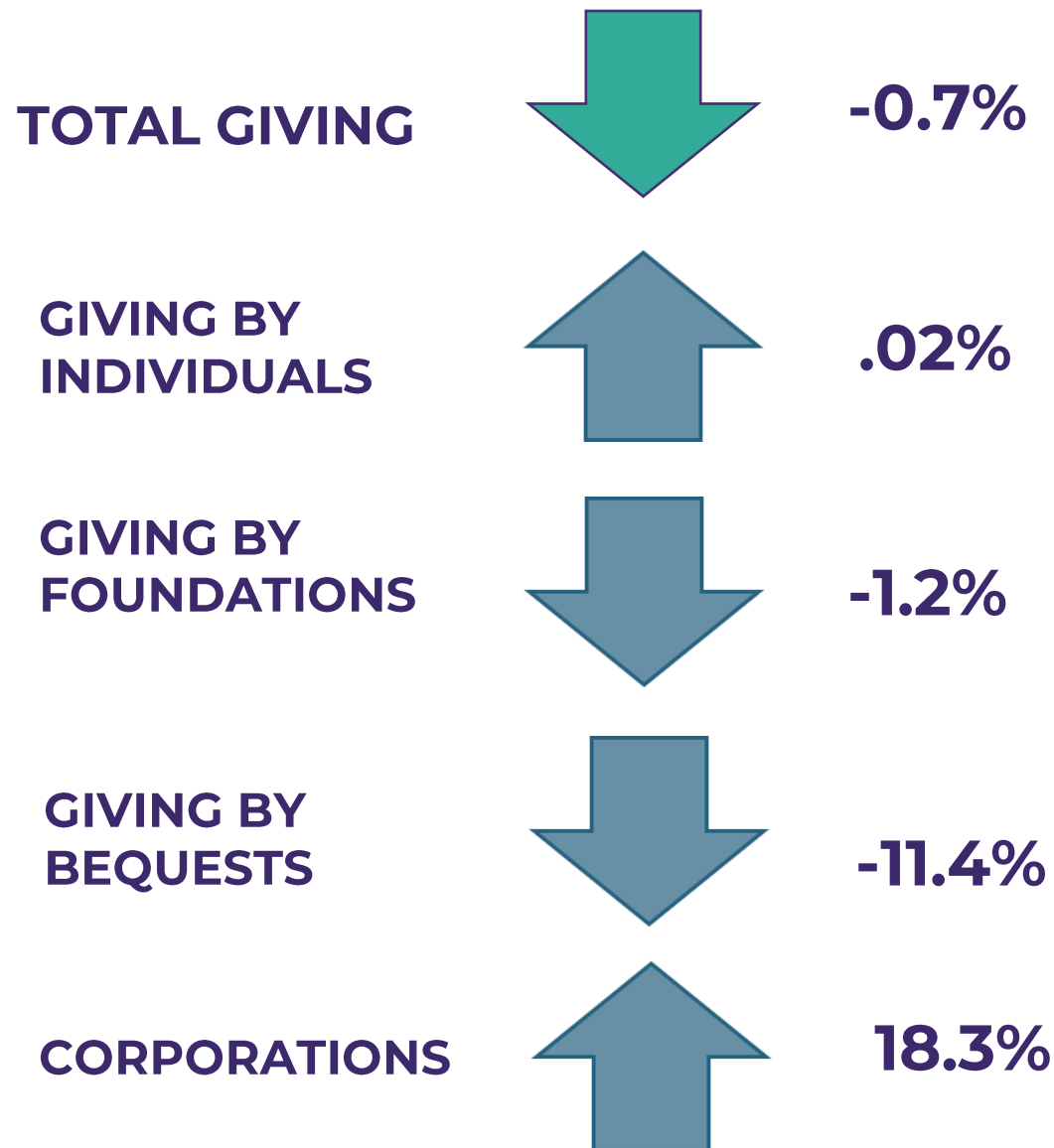
IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

Contributions by Source



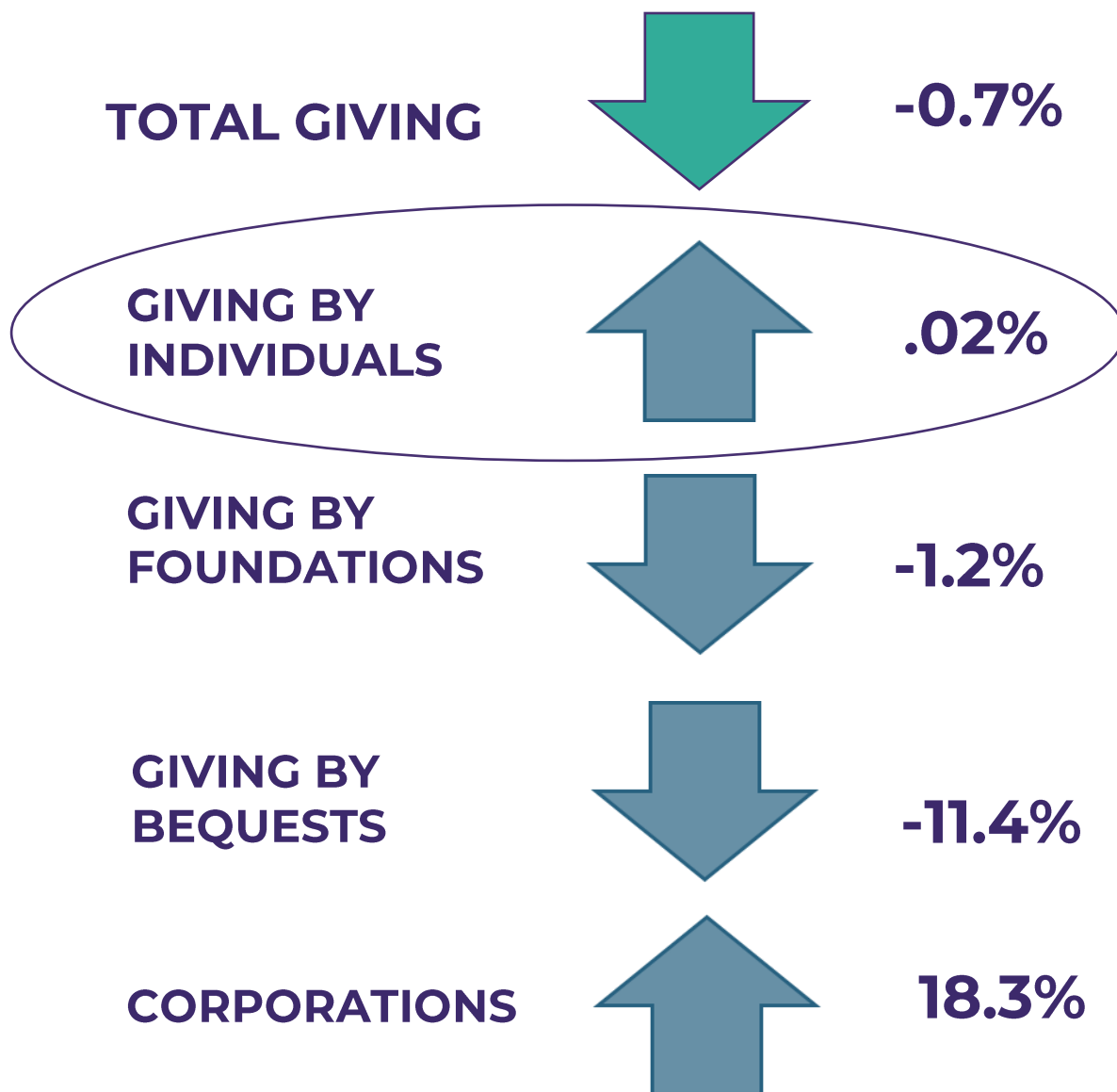
In 2021, Americans gave \$484.85 billion to charity.
(figures shown are in current dollars)

Source: Giving USA 2022: The Annual Report on Philanthropy for the Year 2021



Changes in giving by source 2020-2021

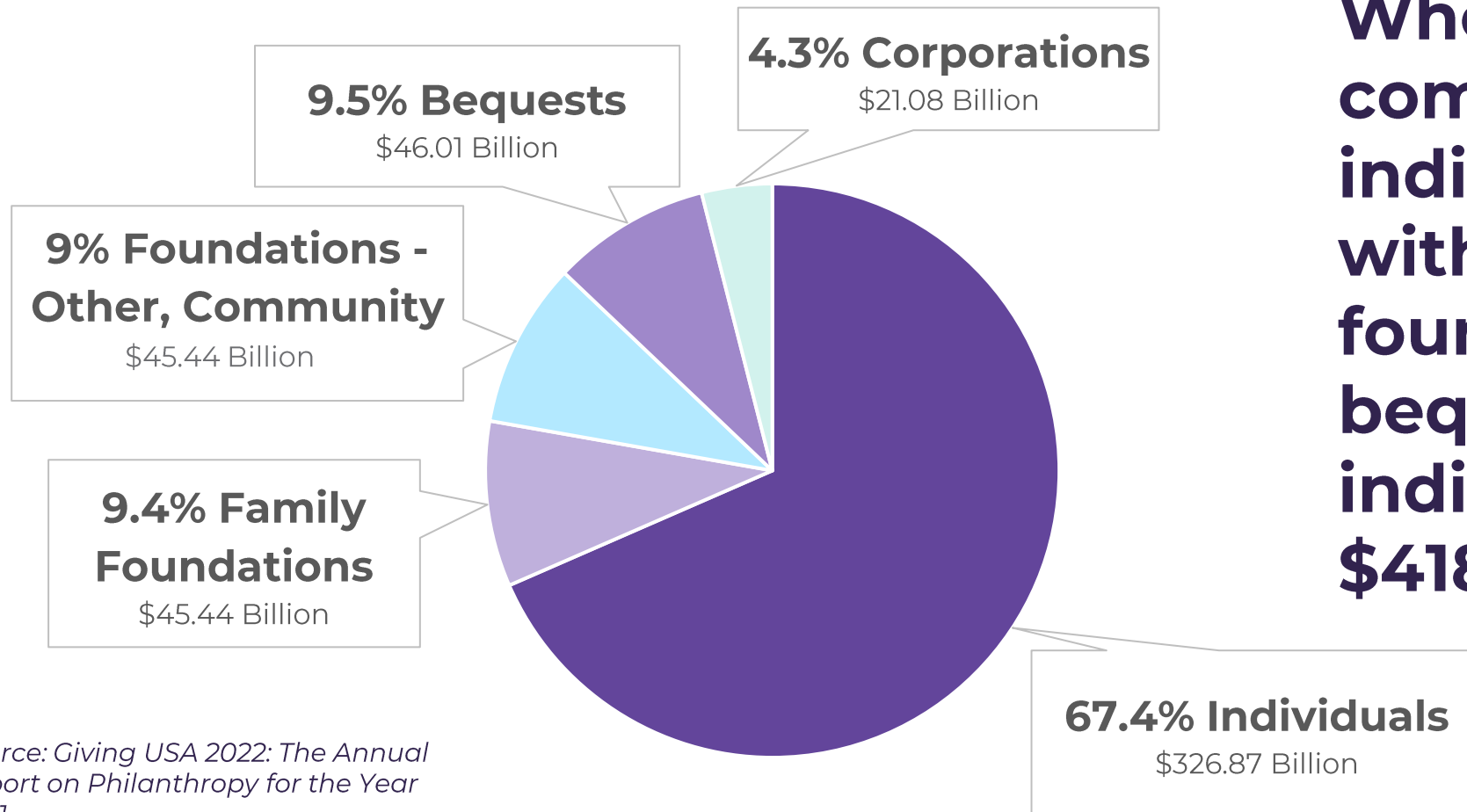
(in inflation-adjusted dollars)



Changes in giving by source 2020-2021

(in inflation-adjusted dollars)

Individual Giving (figures shown are in current dollars)



When you combine individual giving with family foundations and bequests, individuals gave \$418.32B or 86%.

Source: Giving USA 2022: The Annual Report on Philanthropy for the Year 2021

Stewarding Individuals

- **Segment** and tailor your messages based on generational differences.
- Focus on **donor retention**.
- Make **online giving** easy. Make **mobile giving** easy.



Biggest decreases in recipient type

(% change reflects inflation-adjusted totals)

Sub Sector	Dollars in billions	% share of total	% change from 2020
Religion	\$135.78	27	0.7
Education	\$70.79	14	-2.8
Human Services	\$65.33	13	2.2
Foundations	\$64.26	13	4.4
Public-society benefit	\$55.85	11	17.9
Health	\$40.58	8	7.7
International Affairs	\$27.44	5	-4.5
Arts, culture & humanities	\$23.50	5	21.8
Environment/animals	\$16.32	3	6.1

Source: *Giving USA2022: The Annual Report on Philanthropy for the Year 2021*

Biggest increases in recipient type

(% change reflects inflation-adjusted totals)

Sub Sector	Dollars in billions	% share of total	% change from 2020
Religion	\$135.78	27	0.7
Education	\$70.79	14	-2.8
Human Services	\$65.33	13	2.2
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Arts, culture & humanities	\$23.50	5	21.8
Environment/animals	\$16.32	3	6.1

Source: *Giving USA 2022: The Annual Report on Philanthropy for the Year 2021*

Changes in DAF contributions 2020 to 2021

• National Philanthropic Trust	+75.8%
• Vanguard Charitable	+103.3%
• Schwab Charitable	+50.7%
• Fidelity Charitable	+42.7%

The Giving USA Special Report on DAFs

- Grants from large national DAF sponsors = \$22.01 B in FY'21, up 50.3%.
- Education = Top recipient category (29%) followed by religion.
- Other rankings mirror overall Giving USA data.

Grantmaking from Donor Advised Funds

- DAFs at community foundations: Much higher distribution rates than endowments.
- 65% of DAF accounts = 4-year payout rate of 5+%.
- 86% made at least one grant in the 4-year period.

Source: *Donor-Advised Account Patterns and Trends Report* (Vance-McMullen and Heist, 2022):

Make DAFs part of your strategy

- Get to know your donors.
- Get to know DAF sponsors.
- Talk about DAFs on your website.



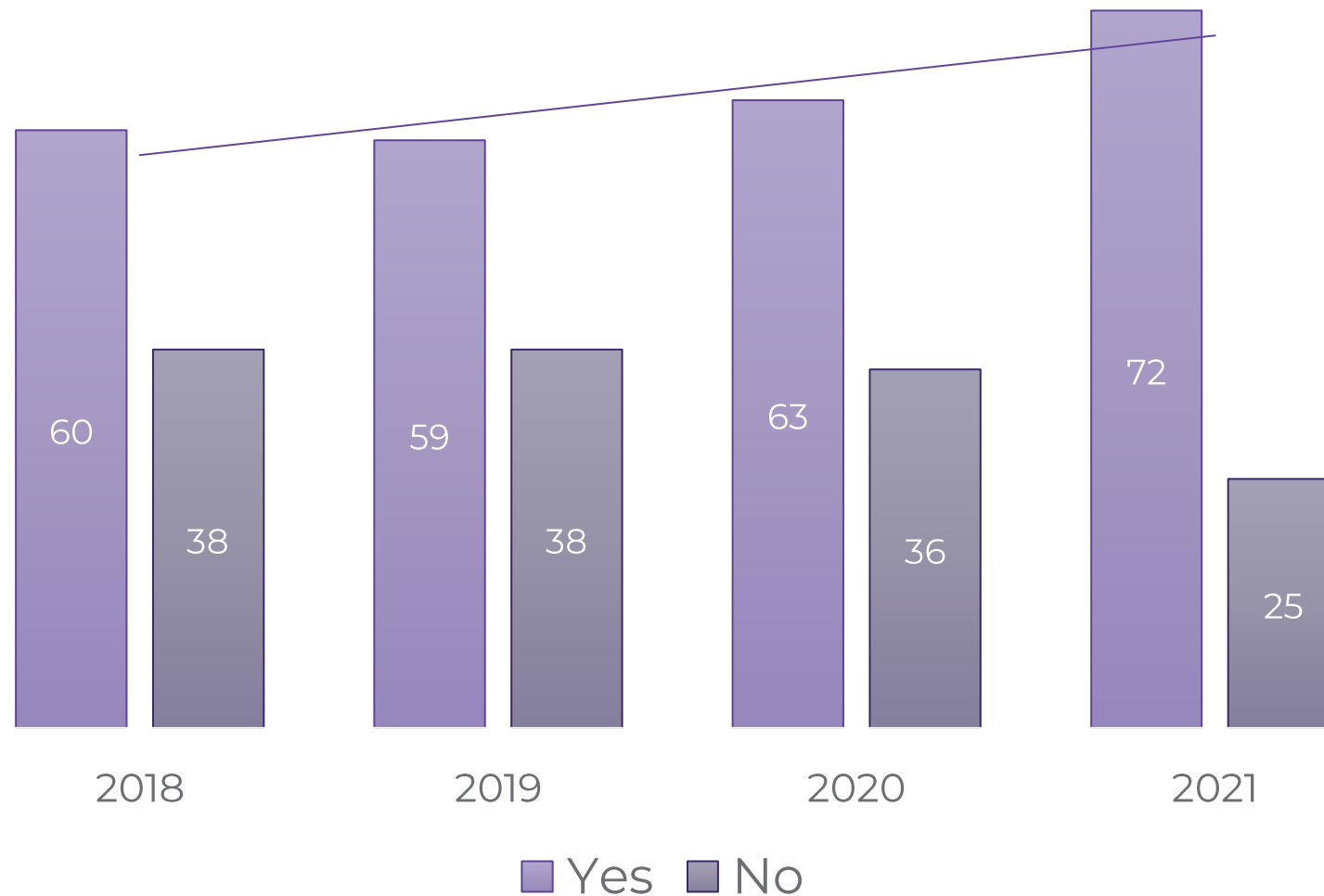


Local Philanthropy

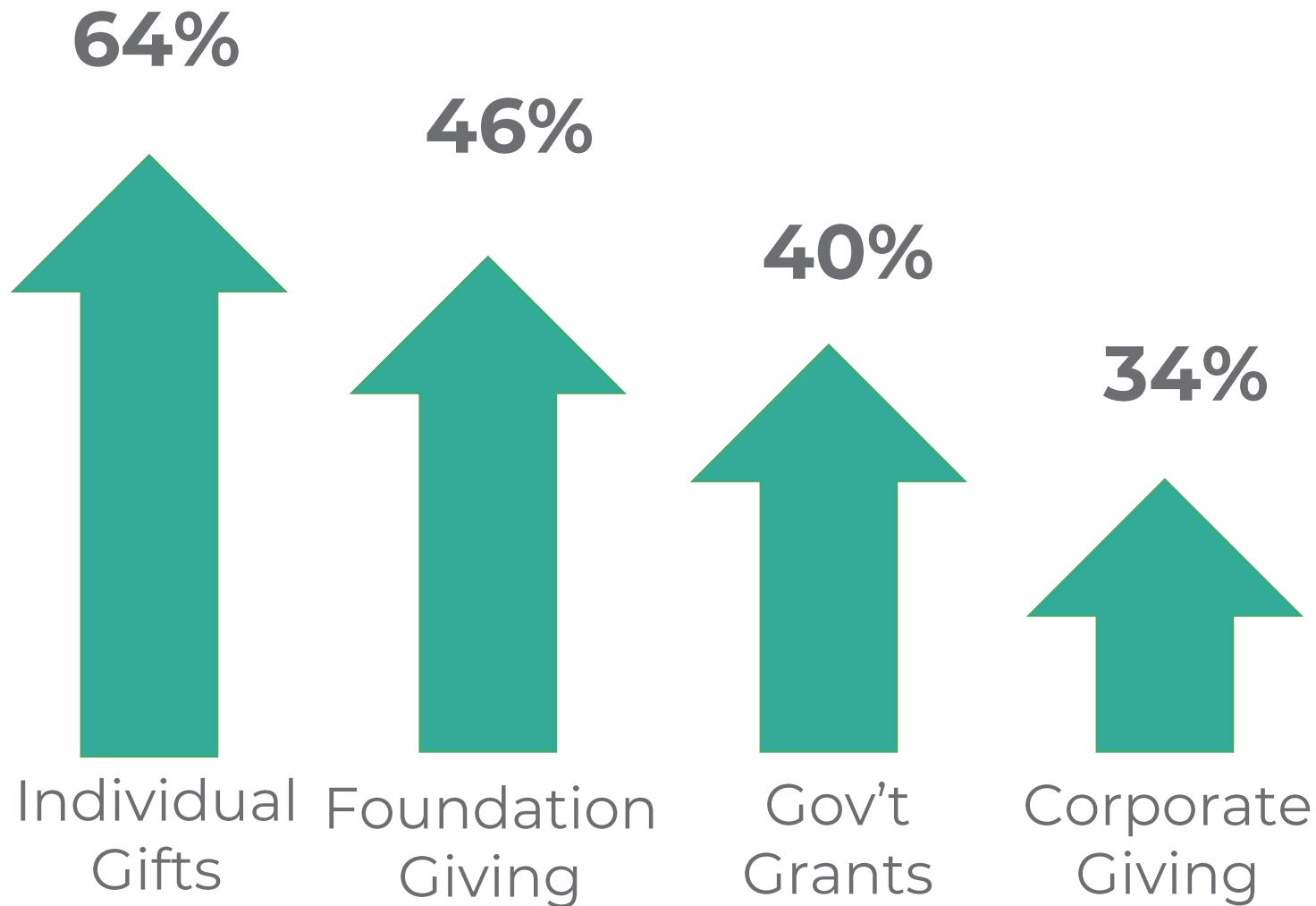


**72% of local nonprofits reached
their 2021 fundraising goal**

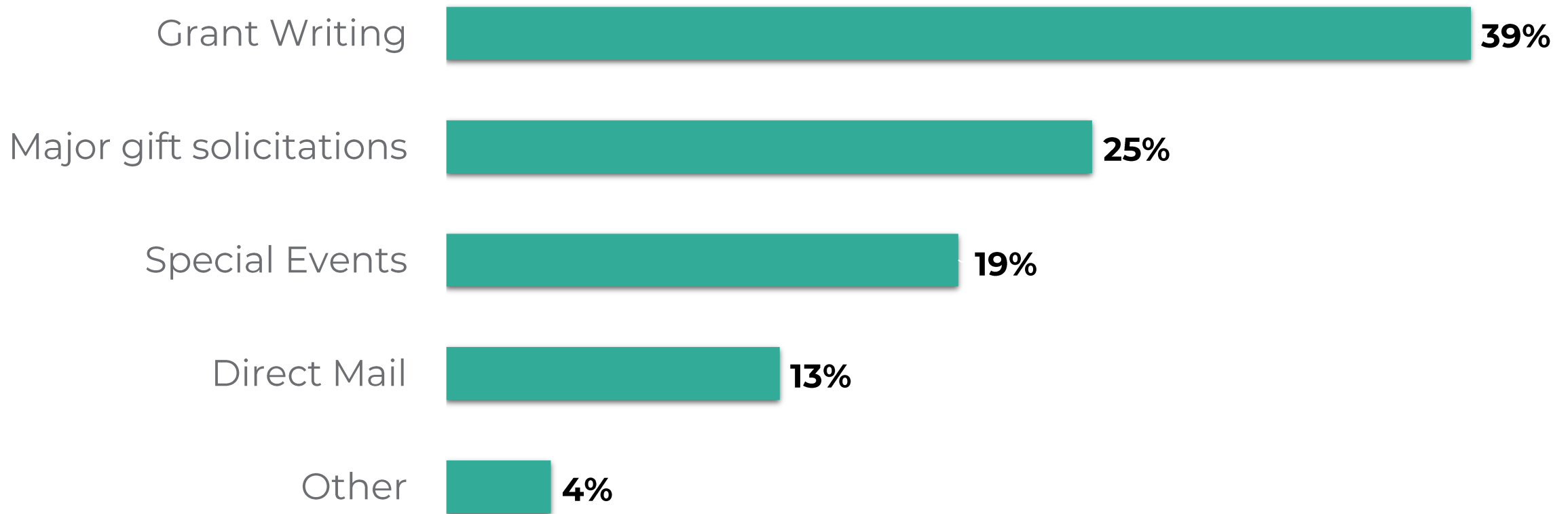
Did your organization reach its fundraising goal?



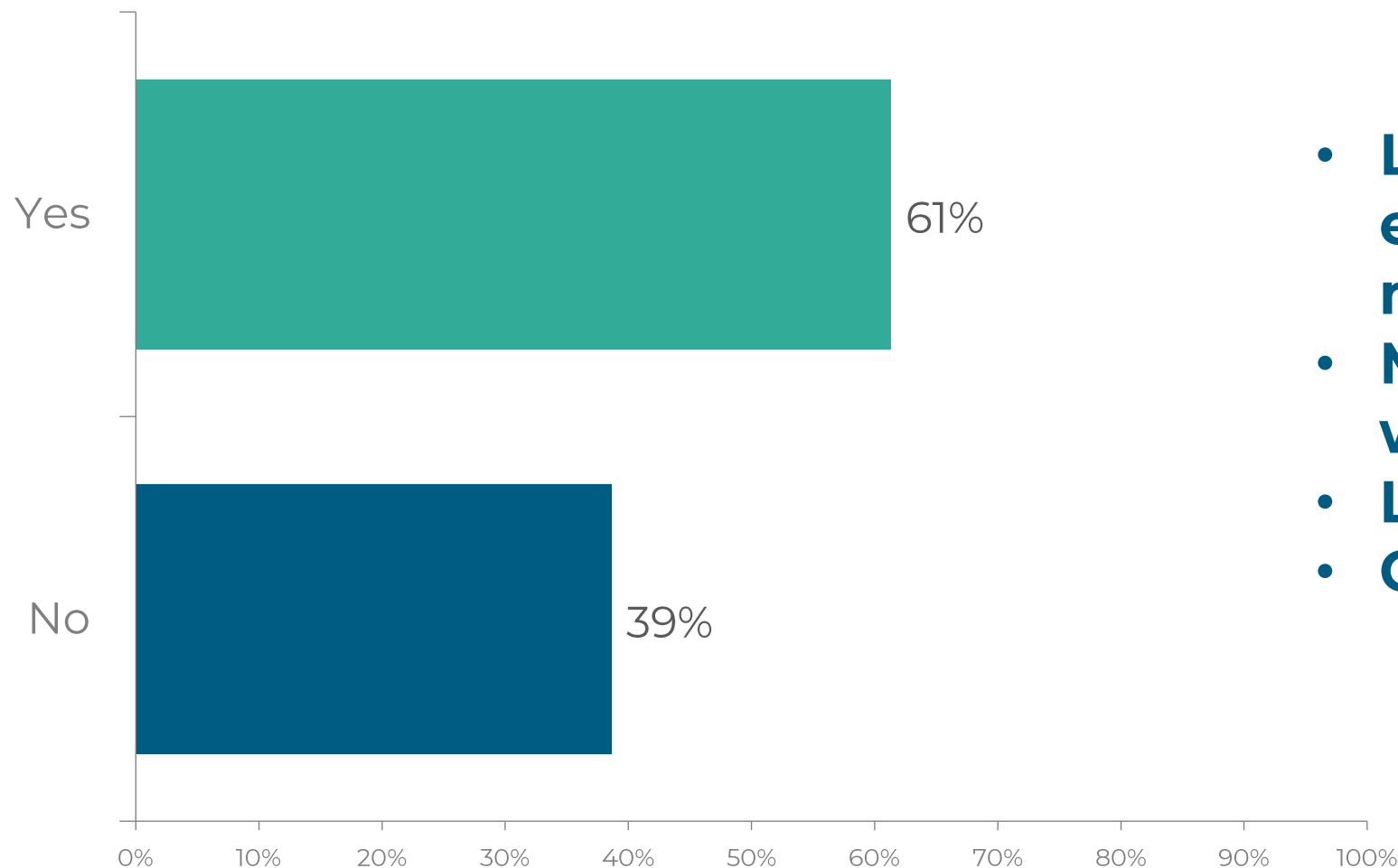
Nonprofits reporting increases, by source



Most Effective Strategies



Have you changed any of your fundraising practices as a result of the COVID-19 pandemic?



- **Less in person everything (events, meetings, etc...)**
- **More virtual contact with donors**
- **Less reliance on events**
- **Changes to events**

Things that keep you up at night:

We had **massive staff turnover in 2021-2022** and have functioned most of 2022 with **less than 50% of our original staff**, so it has been hard to do everything we planned to do with fundraising with **people covering multiple roles** as we try to re-staff in this competitive market.

We are concerned **that inflation will impact** support overall in 2022.

We **received CARES Act and ARPA funding that** won't be available going forward.

The Rome Group Nonprofit Career Board

Almost 900 jobs posted this year

- **28% Development**
- 18% Program Management
- 12% Executive Management
- 10% Admin Support
- 10% Communications and Marketing
- 13% Other

Currently:

**31 jobs posted for
Director or Officer-level
Development roles**

**10 jobs posted for
Executive Director**

Recession Concerns

	Typical Recession Conditions	Current Conditions
GDP	Declining for 2 quarters	Declining for 2 quarters
Corporate Environment	Profits decline, layoffs	Lowest unemployment since start of pandemic (3.6%); Wages are strong
Stock Market	Volatility when concern about underlying assets (tech bubble, housing crisis)	Less chaotic than first half of the year

Prepare but don't panic.

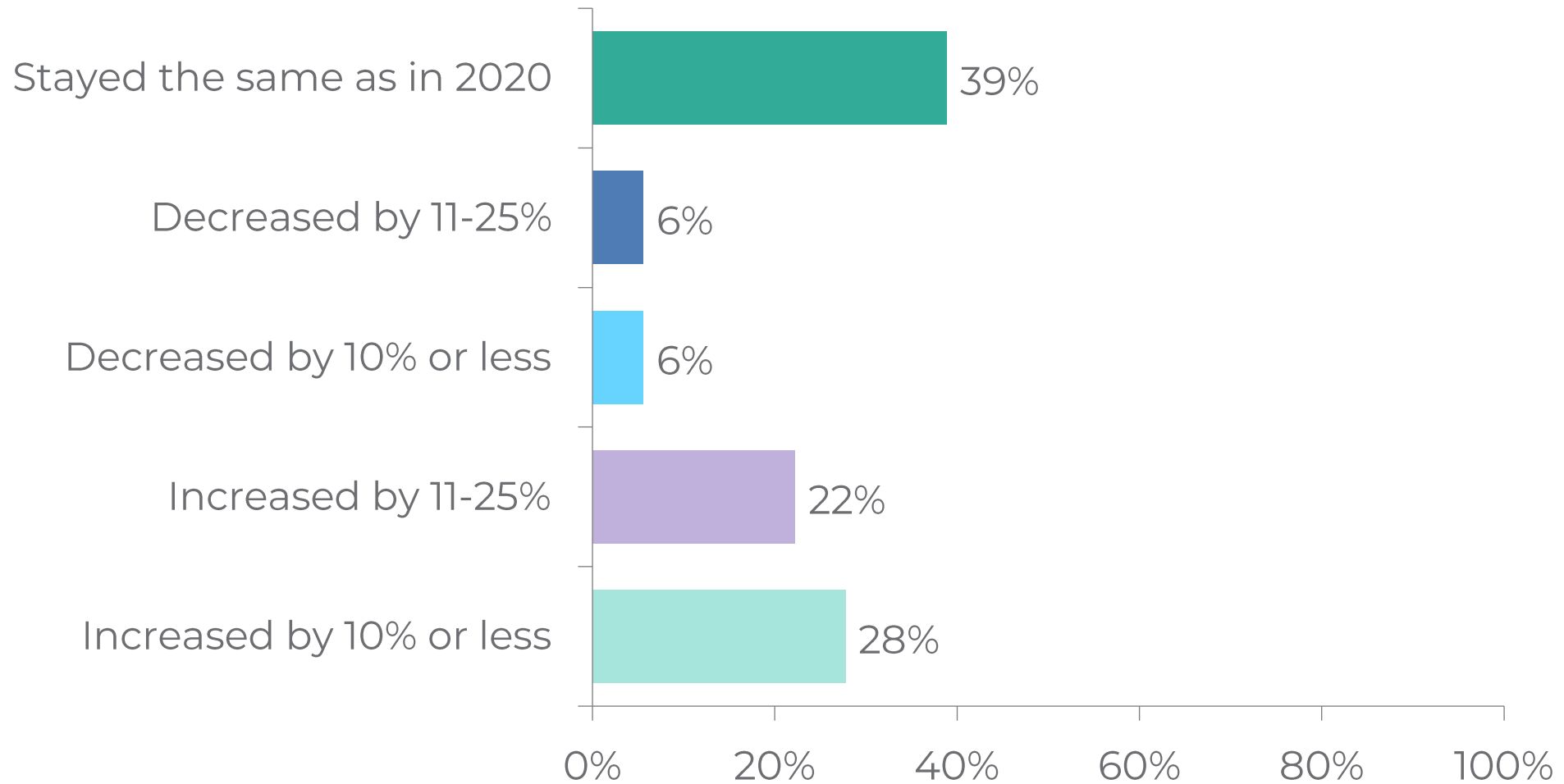
**Very strong
relationship
between the stock
market at year end
and year-end
giving.**

**This is the thing to
watch.**

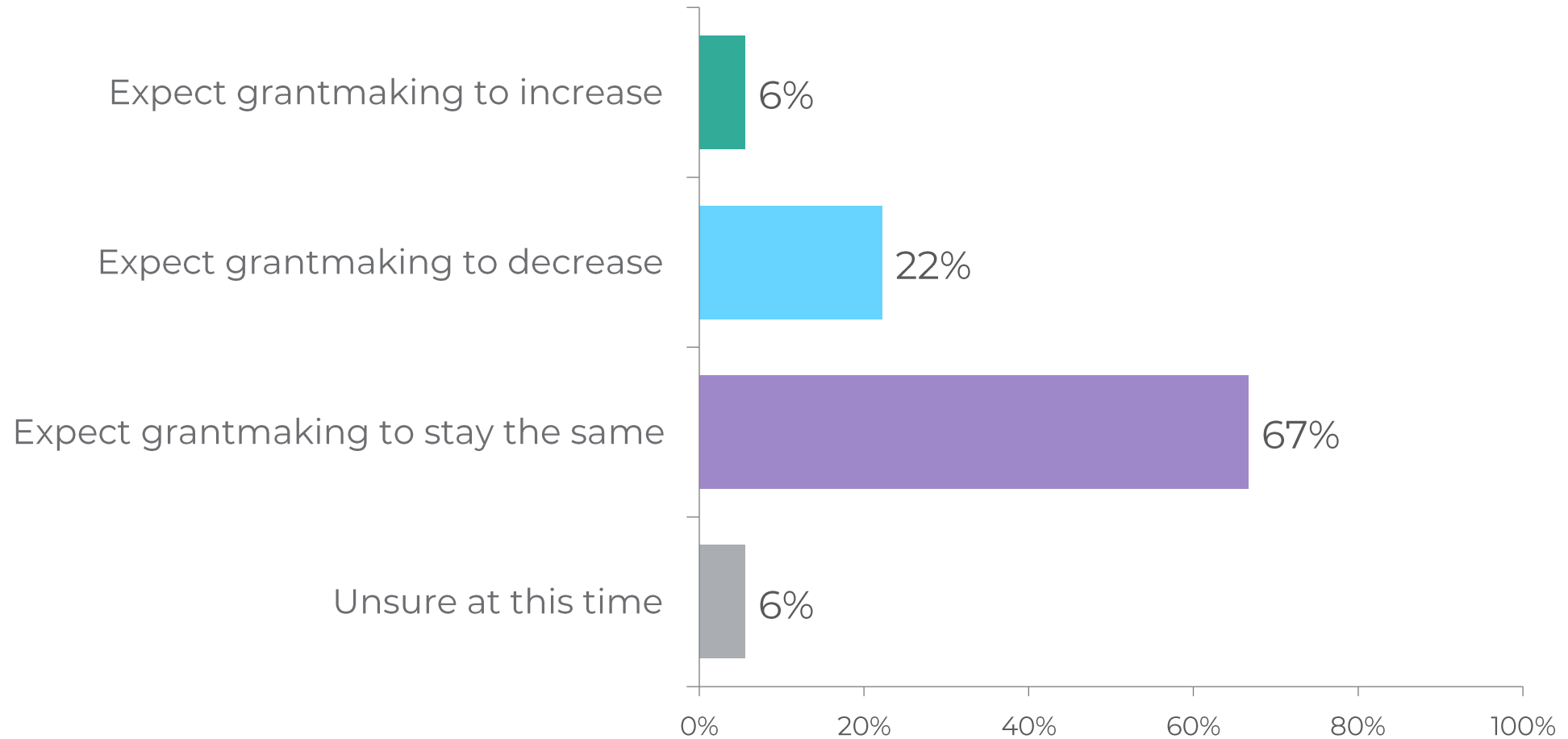


Funders

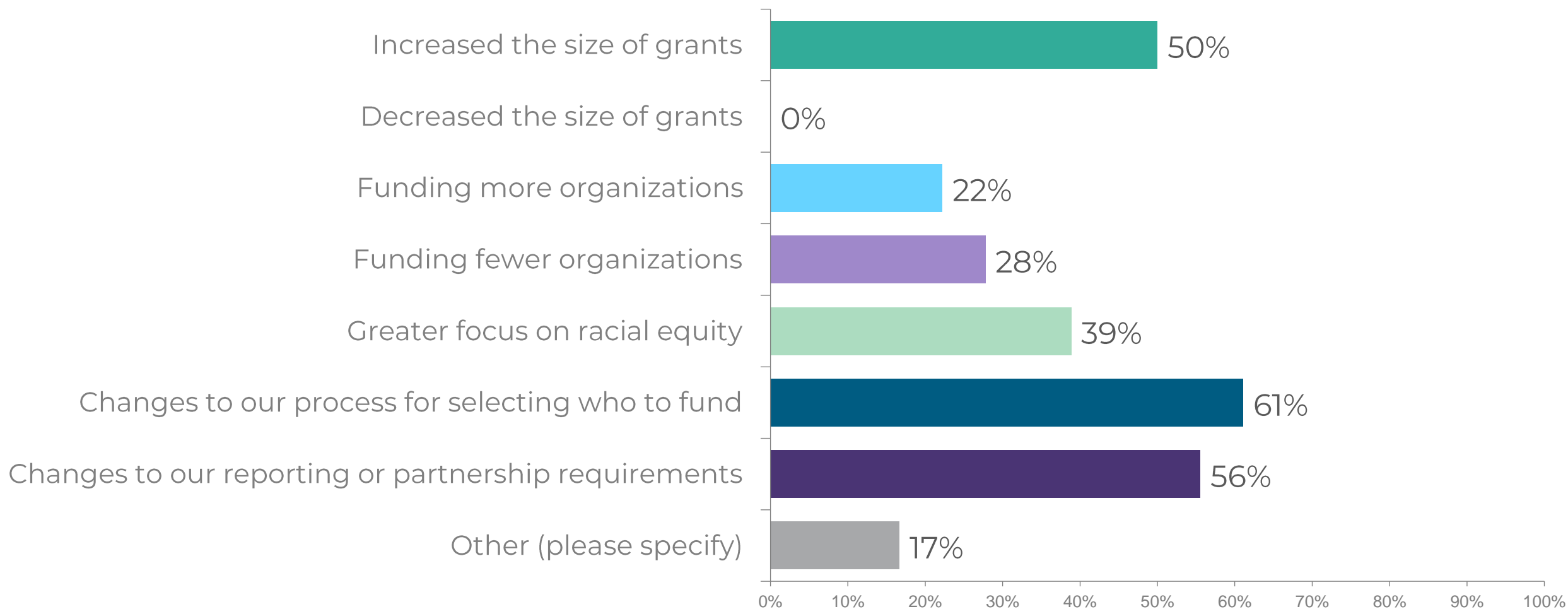
In 2021, did your total St. Louis area contributions increase, decrease or stay the same as in 2020?



How do you predict your grantmaking in 2022 will compare to 2021?



What are the 2-3 biggest changes you have made to your giving over the past 10 years?





PHILANTHROPY
MISSOURI

Funder Panel

Michelle Miller, CEO Philanthropy Missouri
Moderator



Michelle Miller
CEO

Philanthropy
Missouri

Vianey Beltran
Vice President,
Social Impact &
Sustainability

Wells Fargo

Elizabeth George
Director, Community
Investment

St. Louis Community
Foundation

Michelle Tucker
President & CEO

United Way of
Greater St. Louis



THE ROME GROUP

insights, strategies, solutions



**PHILANTHROPY
MISSOURI**

Thank you to our partners and panelists

COCA

Vianey Beltran, Wells Fargo

Elizabeth George, St. Louis
Community Foundation

Michelle Miller, CEO, Philanthropy
Missouri

Michelle Tucker, President & CEO,
United Way of Greater St. Louis

Butler's Pantry