The New Era of Philanthropy: Adapting to a Shifting Philanthropic Landscape
Today’s Speakers

Chris Looney
Principal &
Managing Director
CCS Fundraising

Antonia Hernández
President and CEO
California Community
Foundation

Susan Feder
Program Officer
Mellon Foundation
Today’s Philanthropic Landscape
Giving USA found that U.S. charitable giving reached an all-time high in 2020 at $471.44 billion.

While 2021 Giving USA estimates are not yet available, the Fundraising Effectiveness Project found that for the 9,000+ organizations in its sample, giving in the first three quarters of 2021 grew in aggregate by 1.4% compared to the first three quarters of 2020.
Giving Decreased by 7.5% for Arts and Culture

About the CCS Philanthropy Pulse

The CCS Philanthropy Pulse provides a window into the fundraising practices of 100 Arts and Culture Institutions based on data collected via an online survey in October and November 2021.

<table>
<thead>
<tr>
<th>Type of Organization</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performing Arts</td>
<td>46%</td>
</tr>
<tr>
<td>Museum</td>
<td>31%</td>
</tr>
<tr>
<td>Arts Education</td>
<td>11%</td>
</tr>
<tr>
<td>Historical Societies &amp; Historic Preservation</td>
<td>8%</td>
</tr>
<tr>
<td>Media &amp; Communications</td>
<td>6%</td>
</tr>
<tr>
<td>Visual Arts</td>
<td>5%</td>
</tr>
<tr>
<td>Humanities</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annual Operating Budget</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $1M</td>
<td>29%</td>
</tr>
<tr>
<td>$1M - $4.9M</td>
<td>30%</td>
</tr>
<tr>
<td>$5M - $9.9M</td>
<td>12%</td>
</tr>
<tr>
<td>$10M - $24.9M</td>
<td>15%</td>
</tr>
<tr>
<td>$25M - $49.9M</td>
<td>5%</td>
</tr>
<tr>
<td>$50M - $99.9M</td>
<td>7%</td>
</tr>
<tr>
<td>$100M - $499.9M</td>
<td>2%</td>
</tr>
<tr>
<td>More than $500M</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: CCS Philanthropy Pulse (2022)
Major Themes

- Lasting Pandemic Impacts
- 2022 Fundraising Optimism
- Opportunities as we Reemerge
- DEI Prioritized
Lasting Pandemic Impacts
The Pandemic Changed the Way Many Institutions Think About Endowments and Emergency Funds

Has the COVID-19 pandemic changed the way your organization thinks about emergency funds and/or endowments in a post-pandemic world?

- Yes: 53%
- No: 47%

Source: CCS Philanthropy Pulse (2022)
Organizations Pivoted to Virtual Programming Amid Closures

Has your organization produced virtual events, performances, and/or exhibits during the COVID-19 pandemic?

- Yes: 92%
- No: 8%

Will your organization continue any of the virtual programming after in-person operations have fully resumed?

- Yes: 67%
- Under consideration: 32%
- No: 1%

*Asked only of organizations that produced virtual programming*

Source: CCS Philanthropy Pulse (2022)
Virtual Programming Had Unexpected Benefits

Did your organization experience any of the following effects of virtual events/performances/exhibitions in the past year?

- Virtual programming helped us retain donors: 86%
- Virtual programming helped us expand our reach to previously untapped demographics: 82%
- Virtual programming helped us retain subscribers: 58%

Project Spotlight

Source: CCS Philanthropy Pulse (2022)
82% of Responding Institutions Plan to Continue Remote Work

What practices has your organization adjusted during the COVID-19 pandemic that you plan to continue?

- Remote work (part-time or full-time) 82%
- Part-time or occasional remote work schedules 70%
- Virtual events 67%
- Virtual gift requests 40%
- Enhanced social media presence 54%
- Enhanced personalized communication 31%
- Digital giving 54%
- Full-time remote work schedules 30%
- New or deeper engagement of certain donor groups 25%
- Gift planning focus 11%
- Other 1%

Source: CCS Philanthropy Pulse (2022)
2022 Fundraising Optimism
Respondents Had a Largely Positive Outlook for 2022 Fundraising Results

Do you anticipate a change in results for each of the following fundraising programs for the upcoming calendar year 2022, compared to the results you’ve seen in calendar year 2021 to date?

- Mid-Level Gifts: 63% Increase in 2022, 36% Stay Same in 2022, 1% Decline in 2022
- Events: 56% Increase in 2022, 19% Stay Same in 2022, 25% Decline in 2022
- Major Gifts: 55% Increase in 2022, 38% Stay Same in 2022, 7% Decline in 2022
- Membership: 53% Increase in 2022, 49% Stay Same in 2022, 19% Decline in 2022
- Annual Appeal: 49% Increase in 2022, 45% Stay Same in 2022, 5% Decline in 2022
- Corporations: 46% Increase in 2022, 41% Stay Same in 2022, 13% Decline in 2022
- Foundations: 45% Increase in 2022, 41% Stay Same in 2022, 14% Decline in 2022
- Direct Marketing: 41% Increase in 2022, 53% Stay Same in 2022, 6% Decline in 2022
- Deferred (Planned) Gift Commitments: 38% Increase in 2022, 50% Stay Same in 2022, 12% Decline in 2022
- Government Grants: 36% Increase in 2022, 26% Stay Same in 2022, 1% Decline in 2022

Excludes organizations that selected “Not Applicable,” indicating that the organization does not fundraise from this area.

Source: CCS Philanthropy Pulse (2022)
69% of Survey Participants Intend to Undertake Some Level of Campaign Activity This Year

What is your organization’s strategy for calendar year 2022 regarding major capital or comprehensive campaigns?

- In planning stages for a campaign: 26%
- Kick off active fundraising for a new campaign: 12%
- Continue an ongoing campaign: 18%
- Restart a paused campaign: 8%
- No plans for a campaign: 11%
- Not sure yet: 24%

Source: CCS Philanthropy Pulse (2022)
68% of Organizations Include DEI in Strategic Plans

Are diversity, equity, and/or inclusion part of your strategic plans for future fundraising priorities?

- 68% Yes
- 6% No
- 26% Under consideration

Source: CCS Philanthropy Pulse (2022)
99% Discuss DEI with Donors at Least Occasionally

Does your organization discuss the concepts of diversity, equity, and/or inclusion in your conversations with donors?

- Yes, always: 1%
- Yes, frequently: 18%
- Yes, occasionally: 37%
- No: 43%

Source: CCS Philanthropy Pulse (2022)
Board-Related Changes Were the Most Frequently Cited Tactic to Meet DEI Goals

<table>
<thead>
<tr>
<th>In the past two years, what tactics has your organization employed to make your fundraising practices/operations more diverse, equitable, and inclusive?</th>
</tr>
</thead>
<tbody>
<tr>
<td>We made changes to our board recruitment and/or relations practices</td>
</tr>
<tr>
<td>We modified the messaging we use with donors and/or the presentation of our case for support</td>
</tr>
<tr>
<td>We offered DEI training to fundraising staff and/or board members</td>
</tr>
<tr>
<td>We began fundraising for new projects/programs related to diversity, equity, and/or inclusion</td>
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<tr>
<td>We made changes to our staffing and/or leadership structure</td>
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<tr>
<td>We revised our strategies for building our donor pipeline</td>
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<tr>
<td>We sought to make our donor cultivation/solicitation approaches more culturally competent*</td>
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<tr>
<td>We made changes to our volunteer recruitment and/or relations practices</td>
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<tr>
<td>Other</td>
</tr>
<tr>
<td>None of the above</td>
</tr>
</tbody>
</table>

*E.g., tailoring engagement approaches for a major donor based on the complex and intersecting components of the donor’s identity

Respondents could select all answers that apply
Opportunities as we Reemerge
Donor Acquisition and Stewardship, Staffing and Data Use Are Key Fundraising Opportunities

<table>
<thead>
<tr>
<th>Donor acquisition</th>
<th>61%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor retention/stewardship</td>
<td>41%</td>
</tr>
<tr>
<td>Hiring and retaining fundraising staff members</td>
<td>28%</td>
</tr>
<tr>
<td>Leveraging data to make better decisions</td>
<td>24%</td>
</tr>
<tr>
<td>Working toward diversity, equity, and inclusion (DEI) goals</td>
<td>21%</td>
</tr>
<tr>
<td>Increasing deferred (planned) gifts</td>
<td>21%</td>
</tr>
<tr>
<td>Navigating data management issues (e.g., in your CRM)</td>
<td>17%</td>
</tr>
<tr>
<td>Shifting donor interests</td>
<td>13%</td>
</tr>
<tr>
<td>Adjustment to a more digital world</td>
<td>12%</td>
</tr>
<tr>
<td>Budget cuts</td>
<td>6%</td>
</tr>
<tr>
<td>Securing more gifts of non-cash assets</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>7%</td>
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Source: CCS Philanthropy Pulse (2022)
Welcoming Susan Feder

Susan Feder

Program Officer
Mellon Foundation
Welcoming Antonia Hernández

Antonia Hernández

President and CEO
California Community Foundation
Closing Remarks
And Takeaways
THANK YOU