The Annual Report on Philanthropy for the Year 2022

Presented by
The Phoenix Philanthropy Group

January 11, 2024

THE PHOENIX PHILANTHROPY GROUP

Special Thanks to:

American Public Gardens Association

THE PHOENIX PHILANTHROPY GROUP

THE PHOENIX PHILANTHROPY GROUP

ABOUT US

The Phoenix Philanthropy Group provides customized services to:

- **Accelerate** fundraising capacity
- **Build** organizational strength
- **Achieve** mission-driven results

We are proud members of The Giving Institute

What is *Giving USA*?

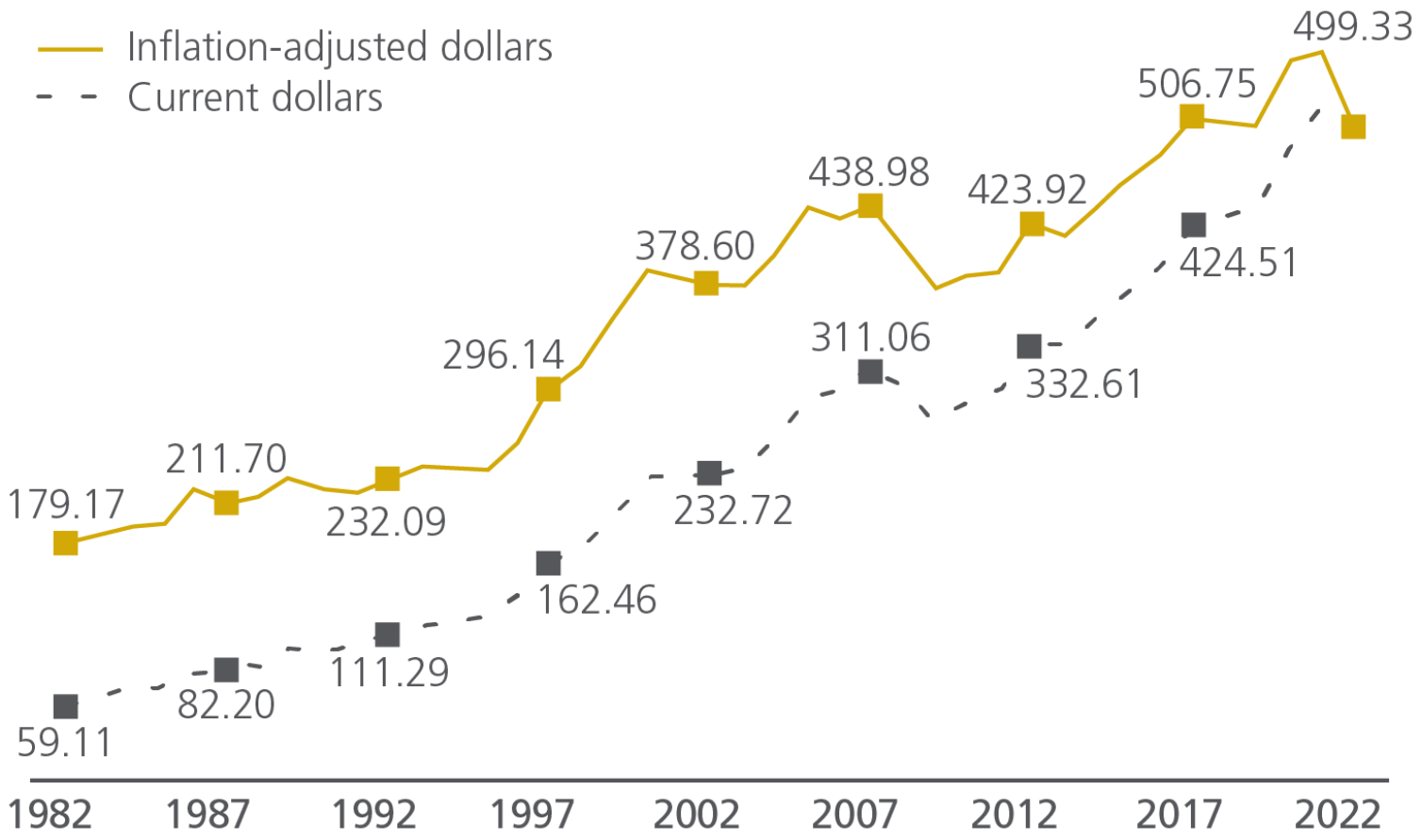
- The longest-running annual report on U.S. charitable giving
- Estimates for sources of giving and amounts received by type of organization
- Published by Giving USA Foundation™
- Since 1956
- Made possible by contributions from Giving Institute member firms, foundations, and other donors
- Researched, written by Indiana University Lilly Family School of Philanthropy

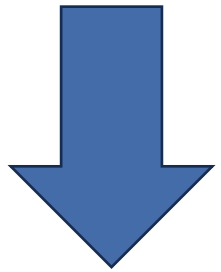
In a Snapshot: What Defines Giving in 2022?

- **Concern** about economy, inflation, stock market volatility, personal finances, wealth
- **Fatigue** from donors who stepped up in response to COVID, social unrest, and political climate of 2020-2021
- **Normalcy** – desire to put COVID and its health, social, and economic outcomes behind us, and move on
- **Resilience** – generosity in the US continues to be resilient, but inflation took its toll

Trends in total giving, 1982–2022

(in billions of dollars)





Giving USA™ A public service initiative of The Giving Institute

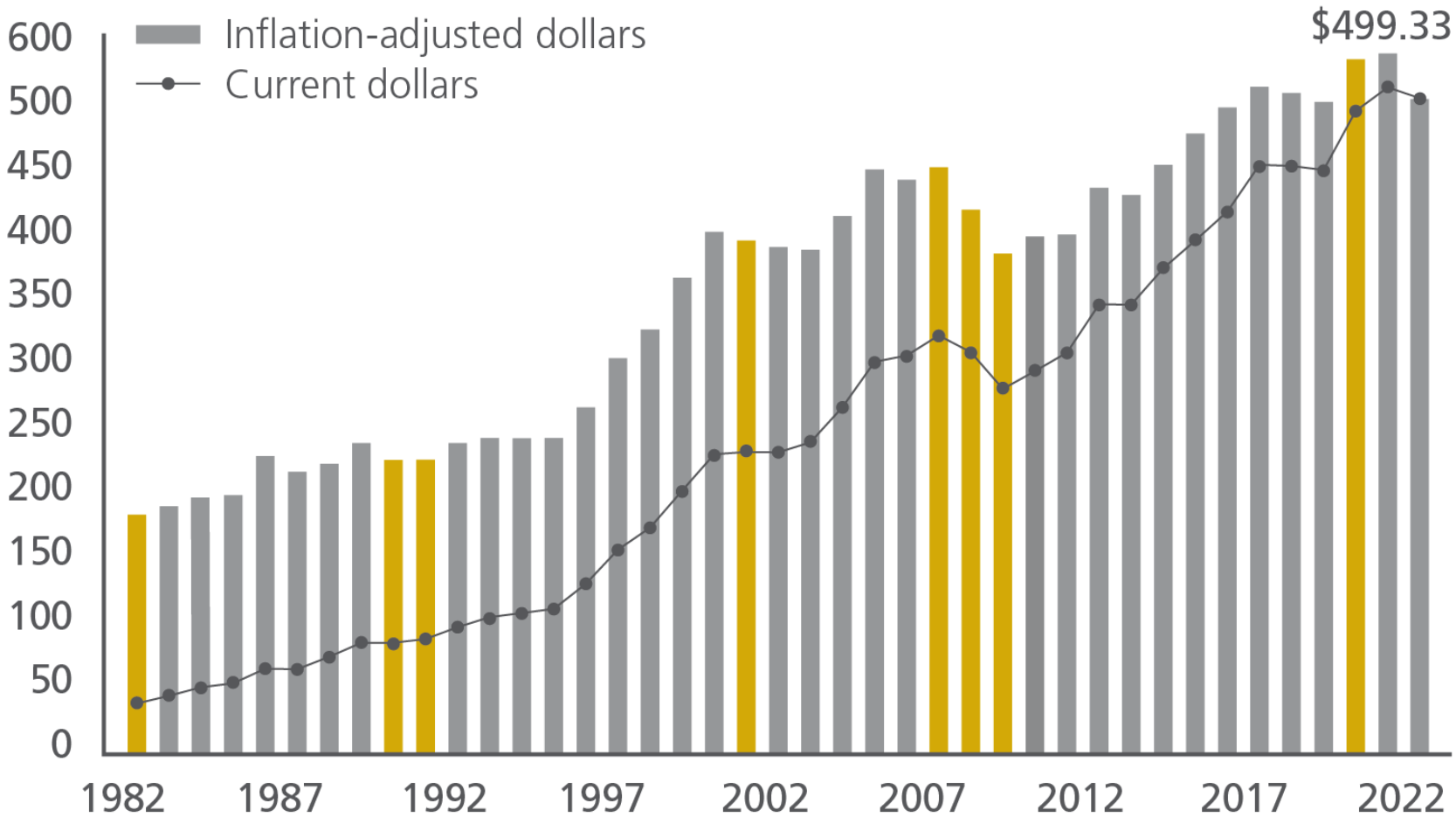
THE Giving Institute™ Shared intelligence. For the greater good.

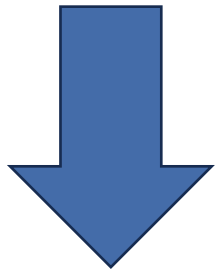
Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Total giving, 1982-2022

(in billions of dollars)



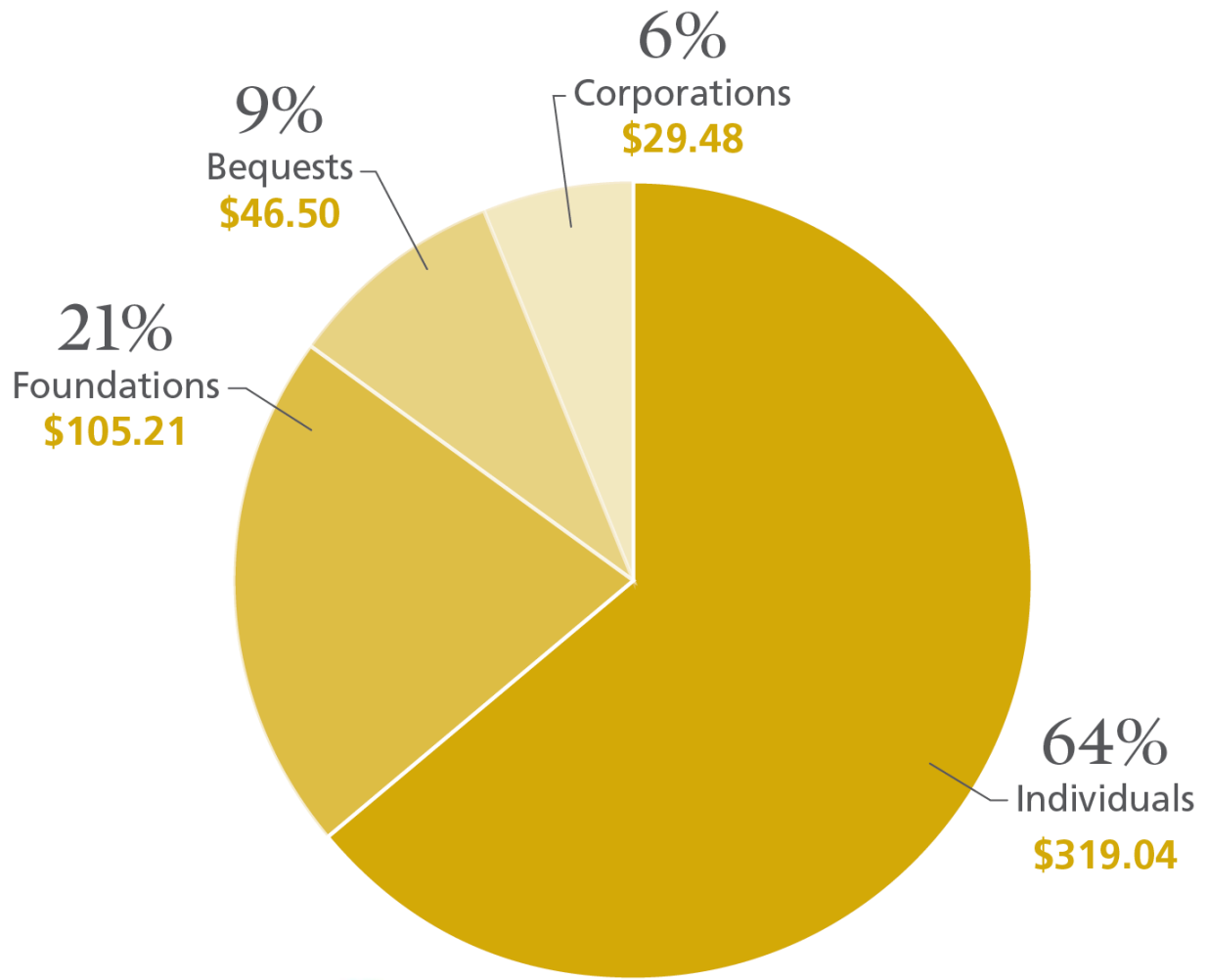


Giving USA™ | THE Giving Institute™ | Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

2022 contributions: $499.33 billion by source of contributions

(in billions for dollars – all figures are rounded)



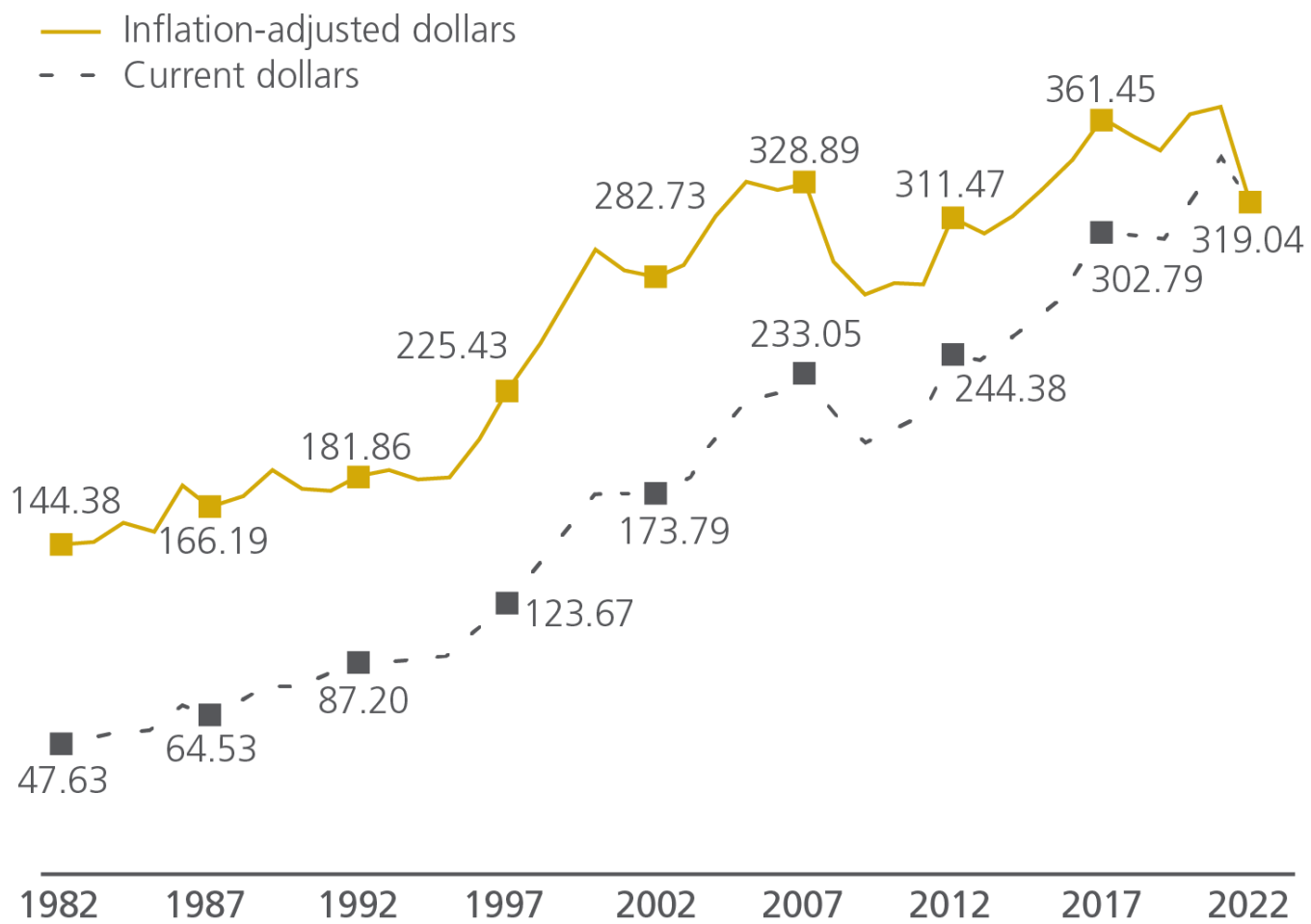
Individual Giving +
Bequests +
Family and Individual Foundations +
DAFs = 85%

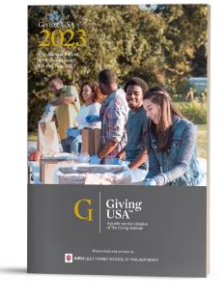
Giving USA™ | THE Giving Institute™ | Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

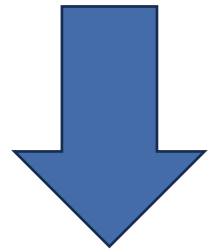
THE PHOENIX PHILANTHROPY GROUP

Giving by individuals, 1982-2022

(in billions of dollars)





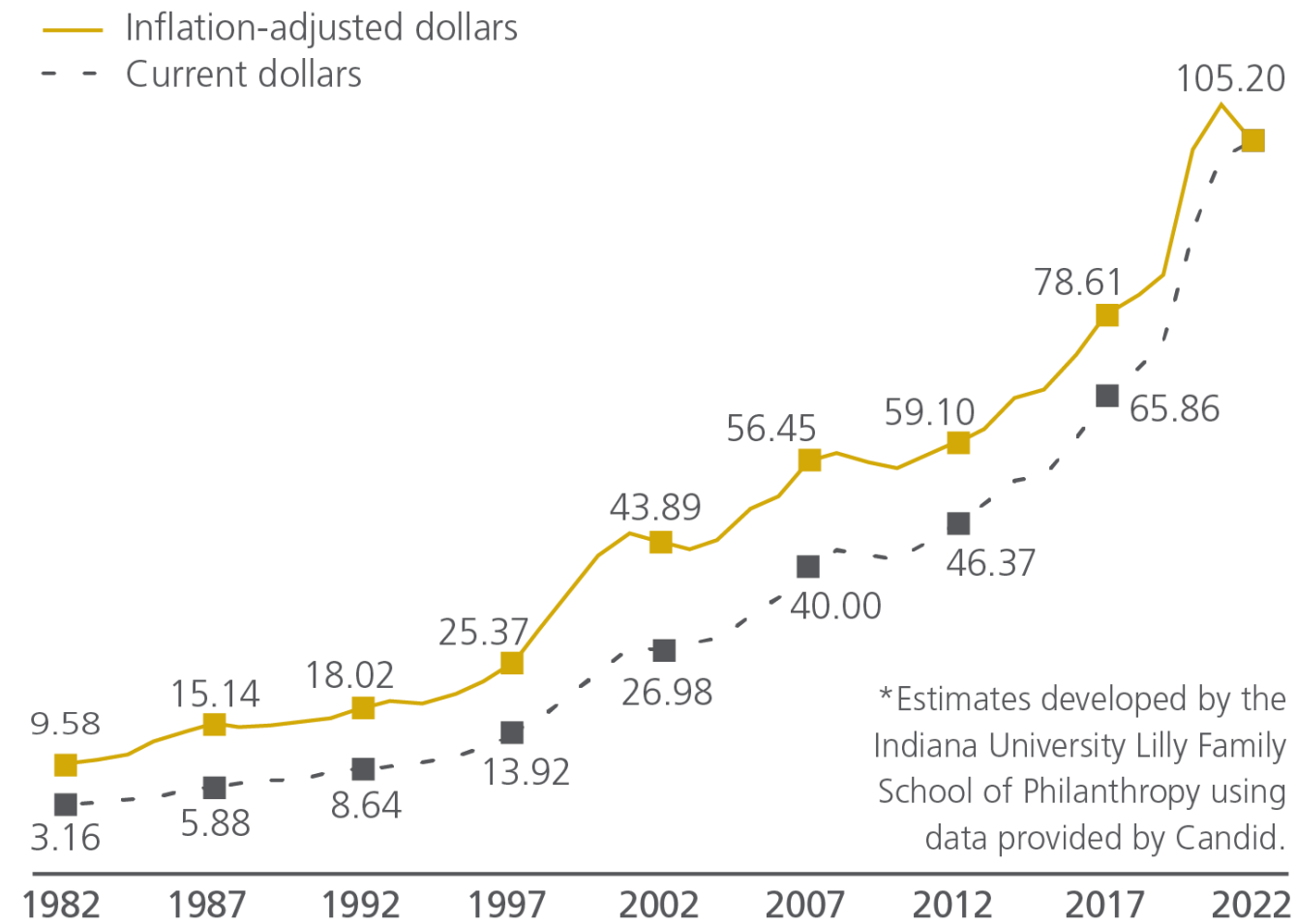


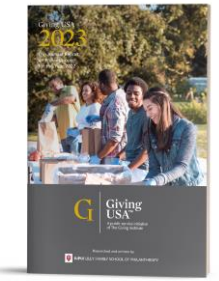
Giving USA™ | THE Giving Institute™ | Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

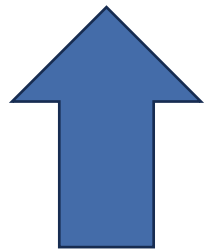
THE PHOENIX PHILANTHROPY GROUP

Giving by foundations, 1982-2022

(in billions of dollars)







Giving USA™ A public service initiative of The Giving Institute

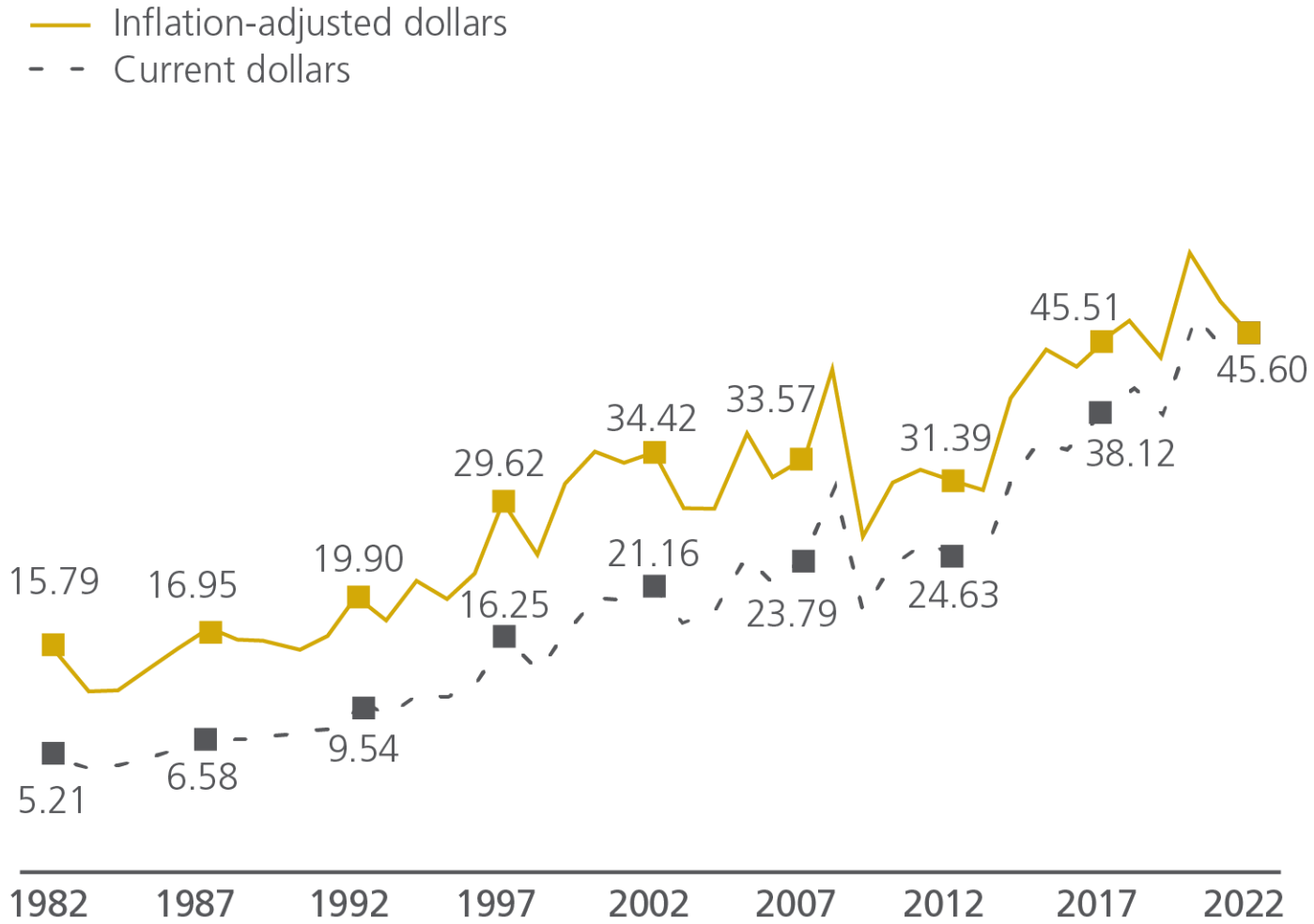
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

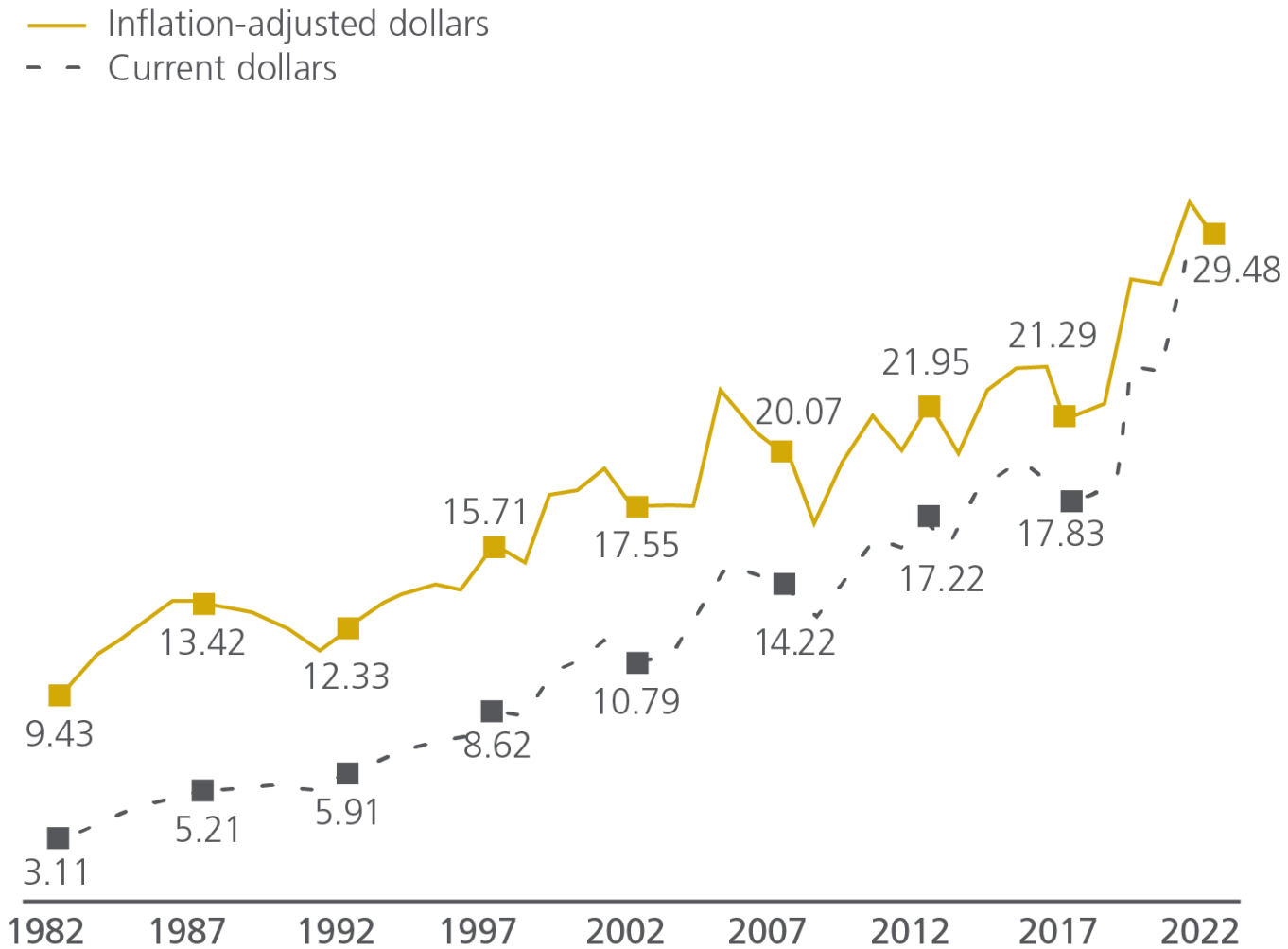
Giving by bequests, 1982-2022

(in billions of dollars)



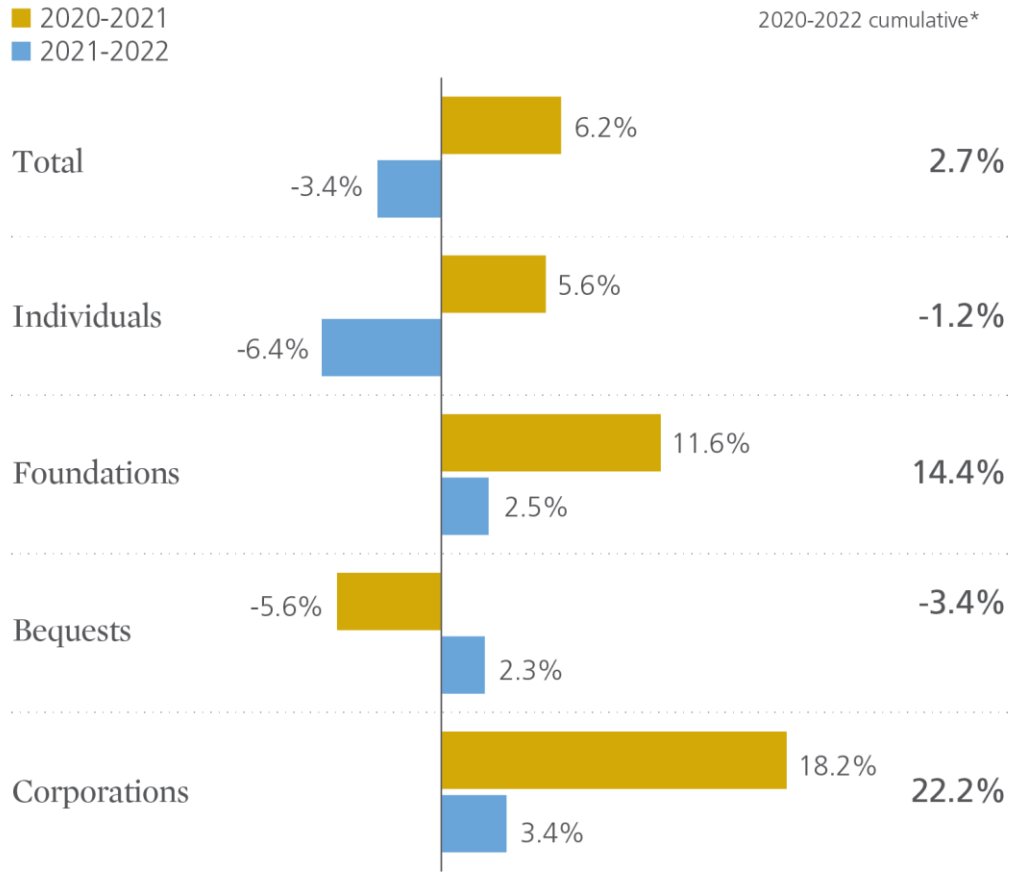
Giving by corporations, 1982-2022

(in billions of dollars)



Changes in giving by source: 2020–2021 and 2021–2022, 2020–2022 cumulative

(in current dollars)



*The two-year change is calculated separately and is not the sum of the changes in the two years.

Giving USA™ A public service initiative of The Giving Institute

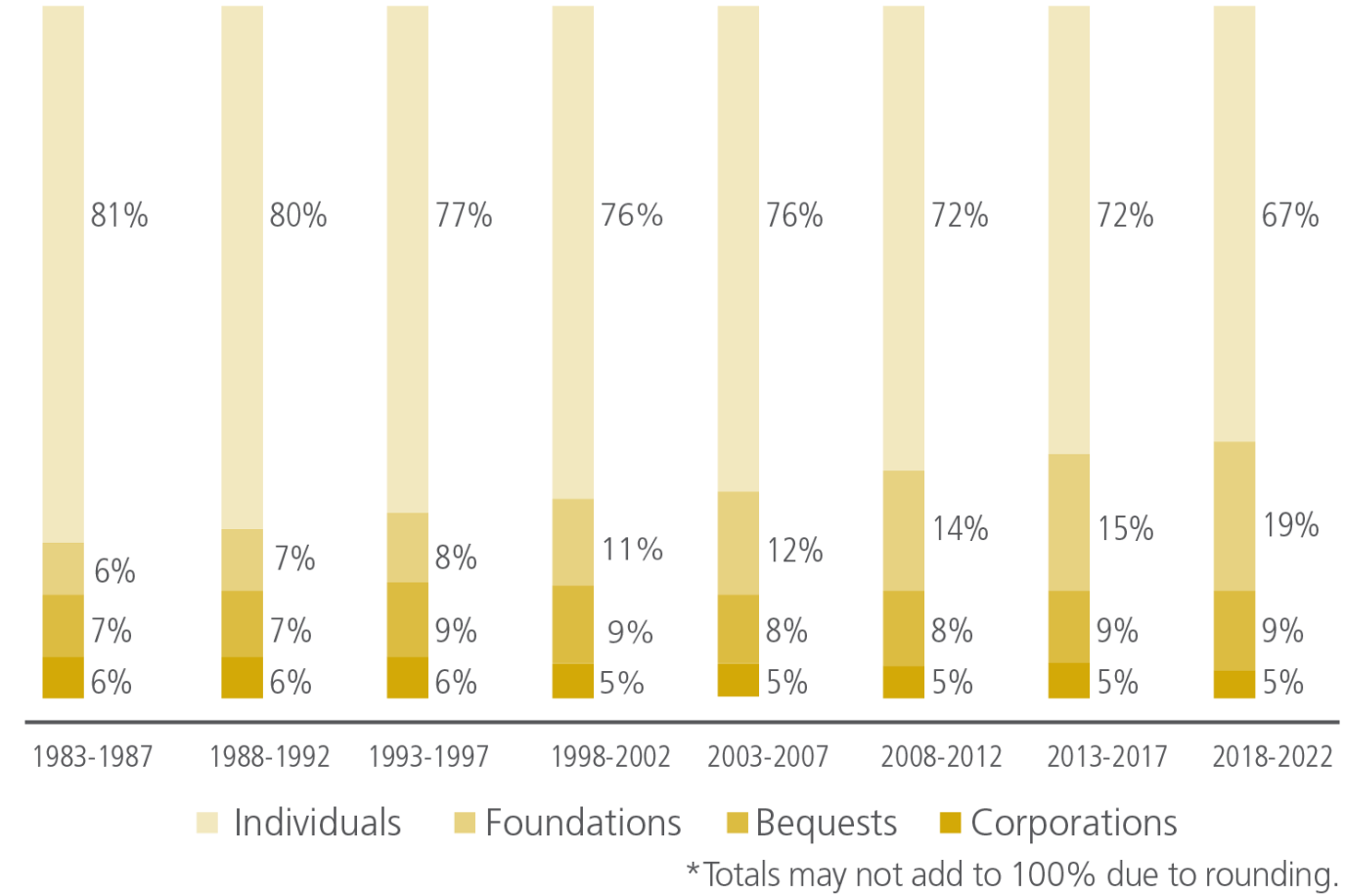
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Giving by source: Percentage of the total in five-year spans, 1983-2022*

(in inflation-adjusted dollars, 2022 = $100)



*Totals may not add to 100% due to rounding.

Giving USA™ A public service initiative of The Giving Institute

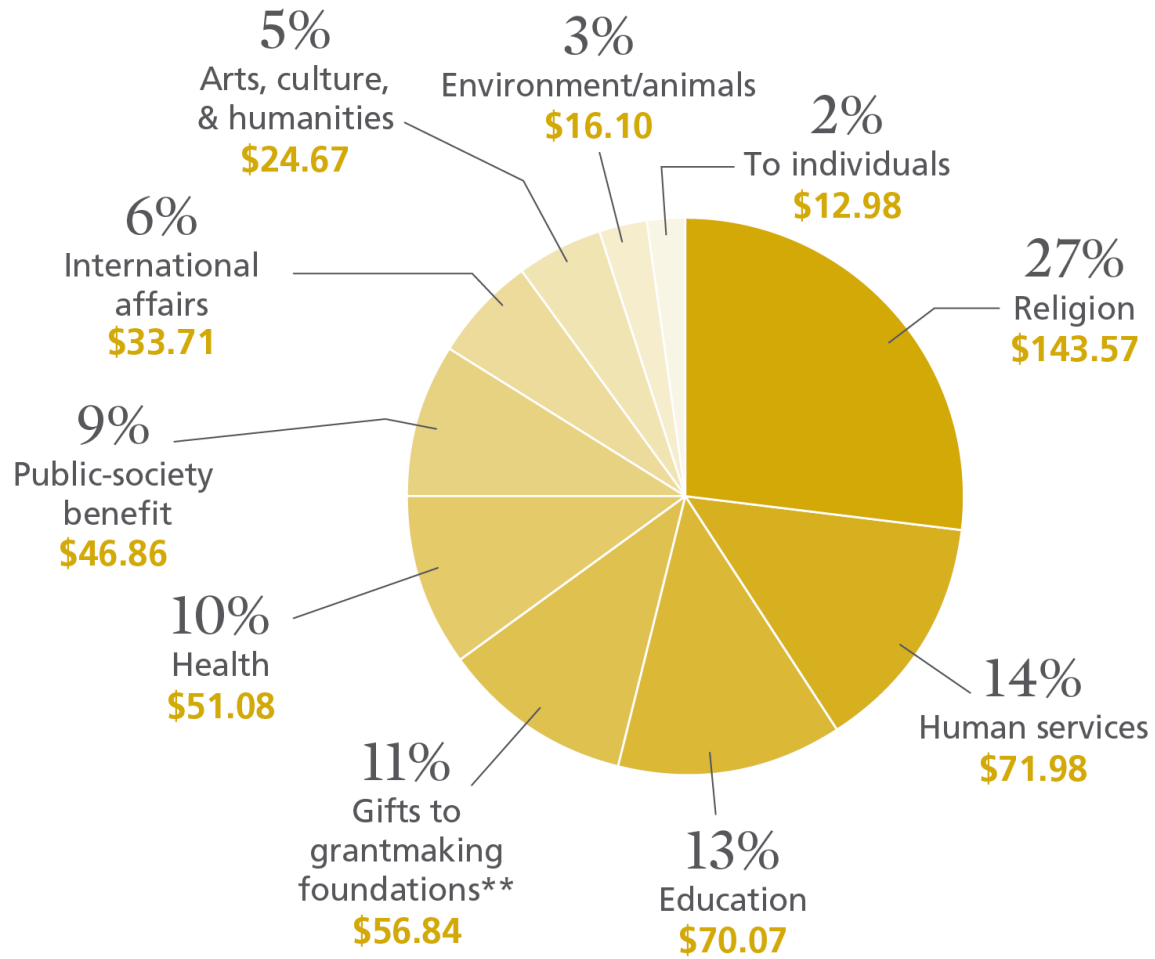
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

2022 contributions: $499.33 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)



* Total includes unallocated giving, which totaled -$28.54 billion in 2022.

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

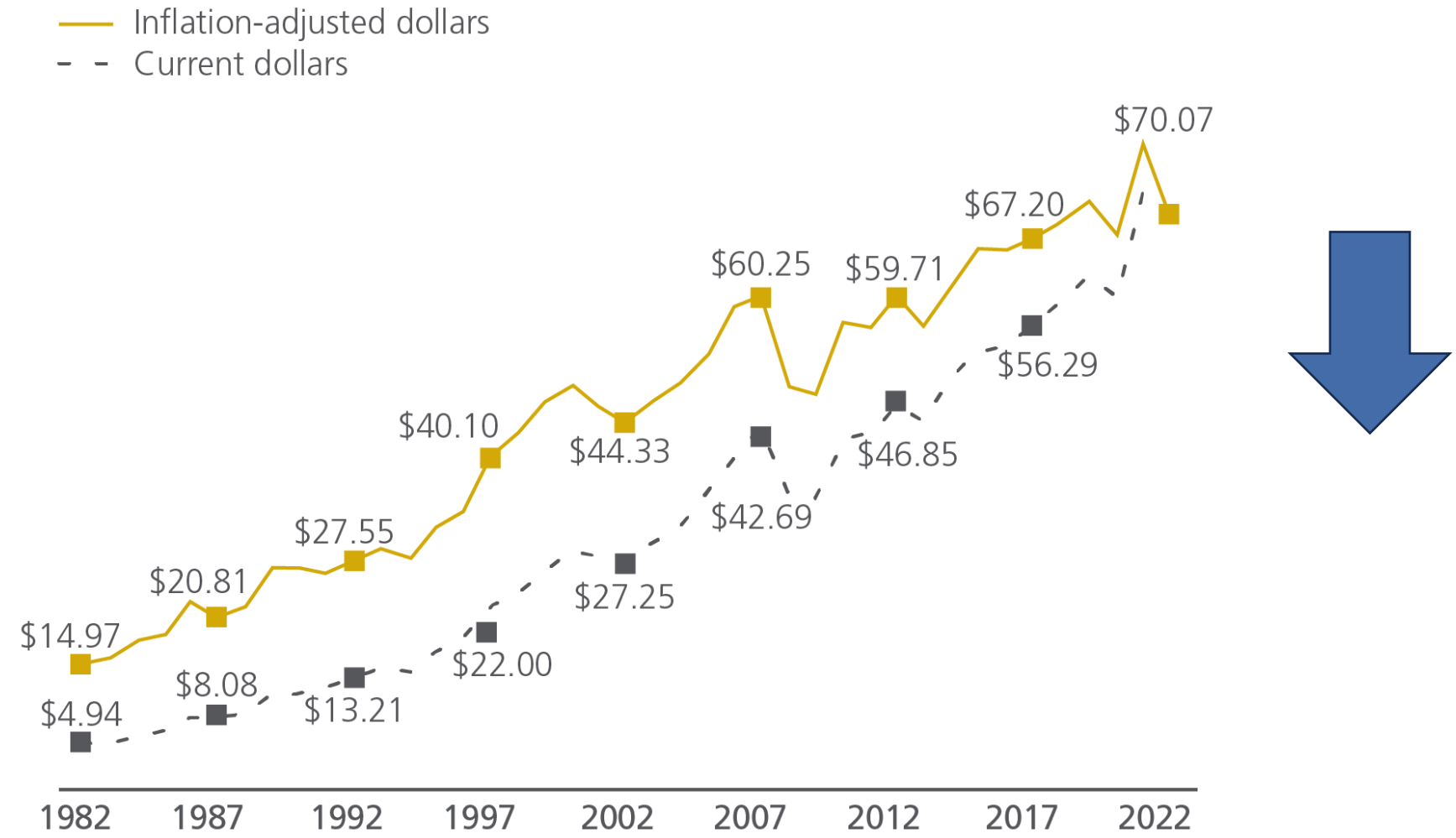
Giving USA™ | THE Giving Institute™

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Giving to education, 1982–2022

(in billions of dollars)



Giving USA™ A public service initiative of The Giving Institute

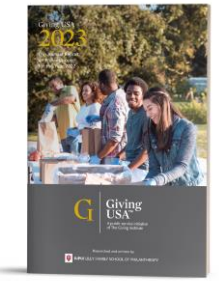
THE Giving Institute™ Shared intelligence. For the greater good.

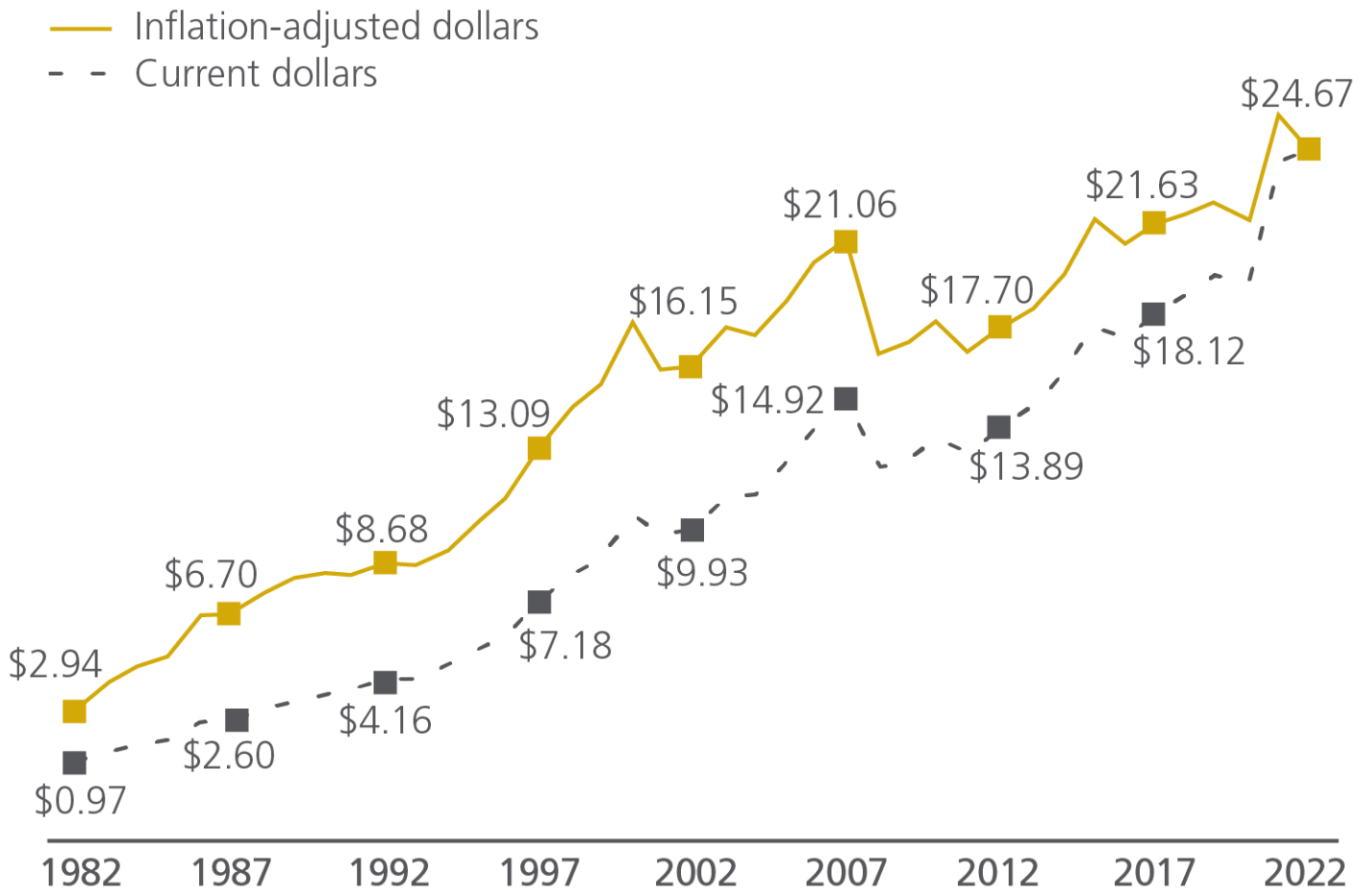
Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

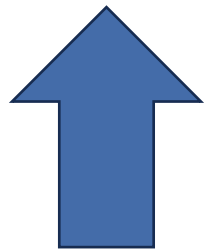
THE PHOENIX PHILANTHROPY GROUP

Giving to arts, culture, and humanities, 1982–2022

(in billions of dollars)







Giving USA™ A public service initiative of The Giving Institute

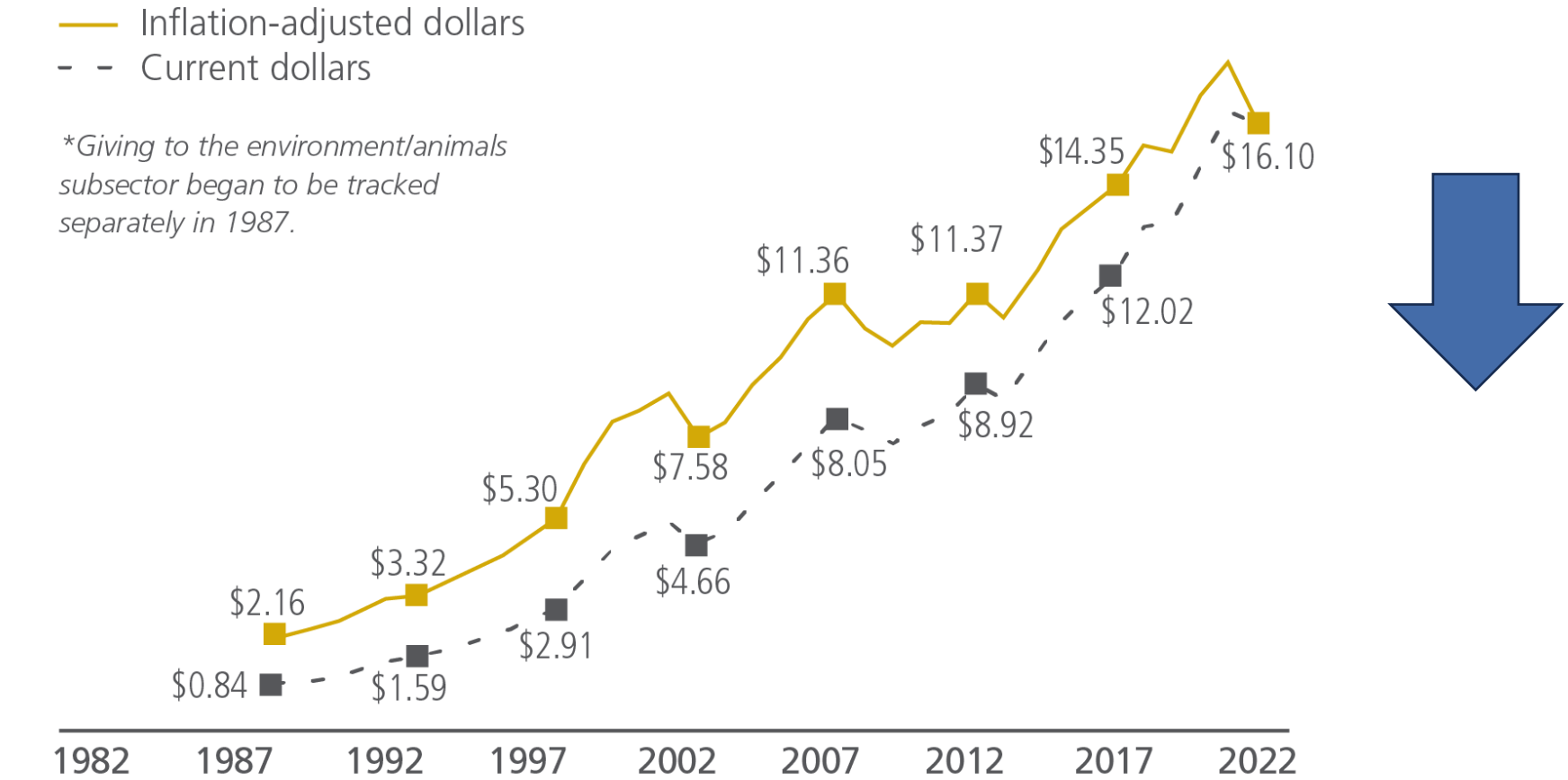
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Giving to environment/animals, 1987–2022*

(in billions of dollars)



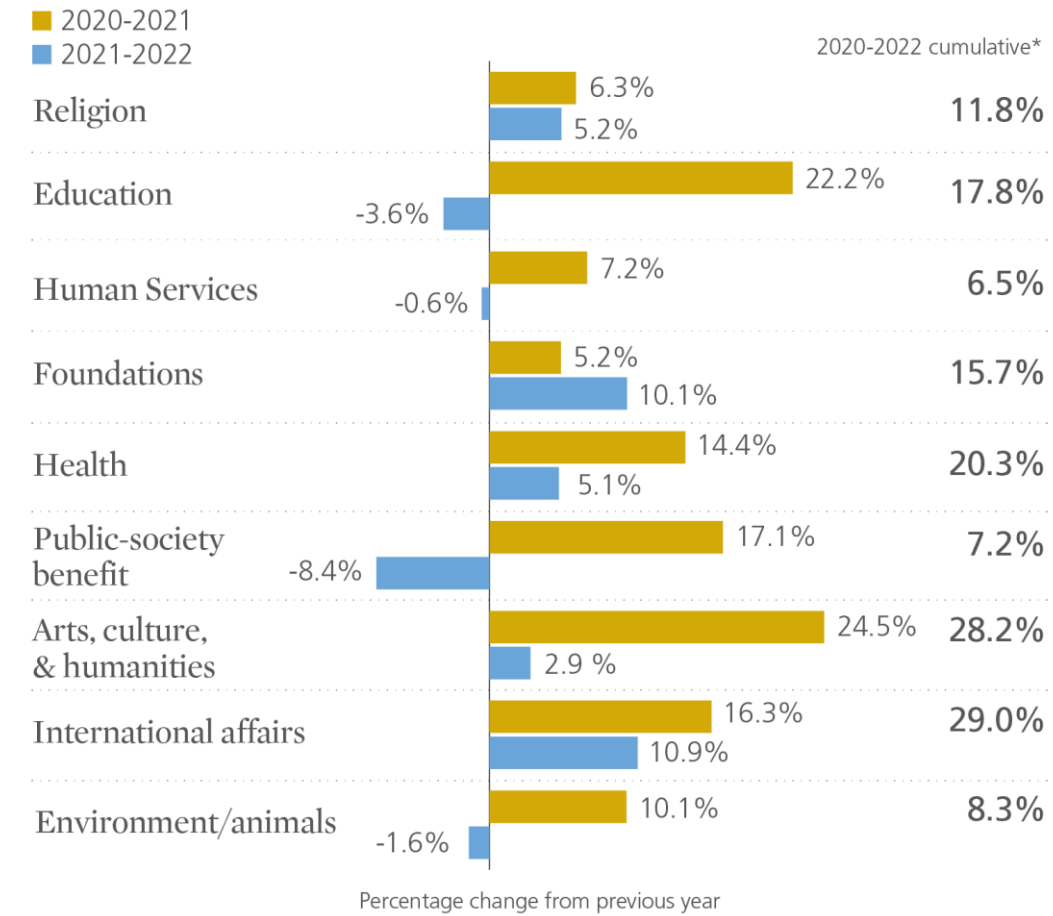
Giving USA™ | THE Giving Institute™

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Changes in giving by type of recipient organization: 2020–2021 and 2021–2022, 2020–2022 cumulative

(in current dollars)



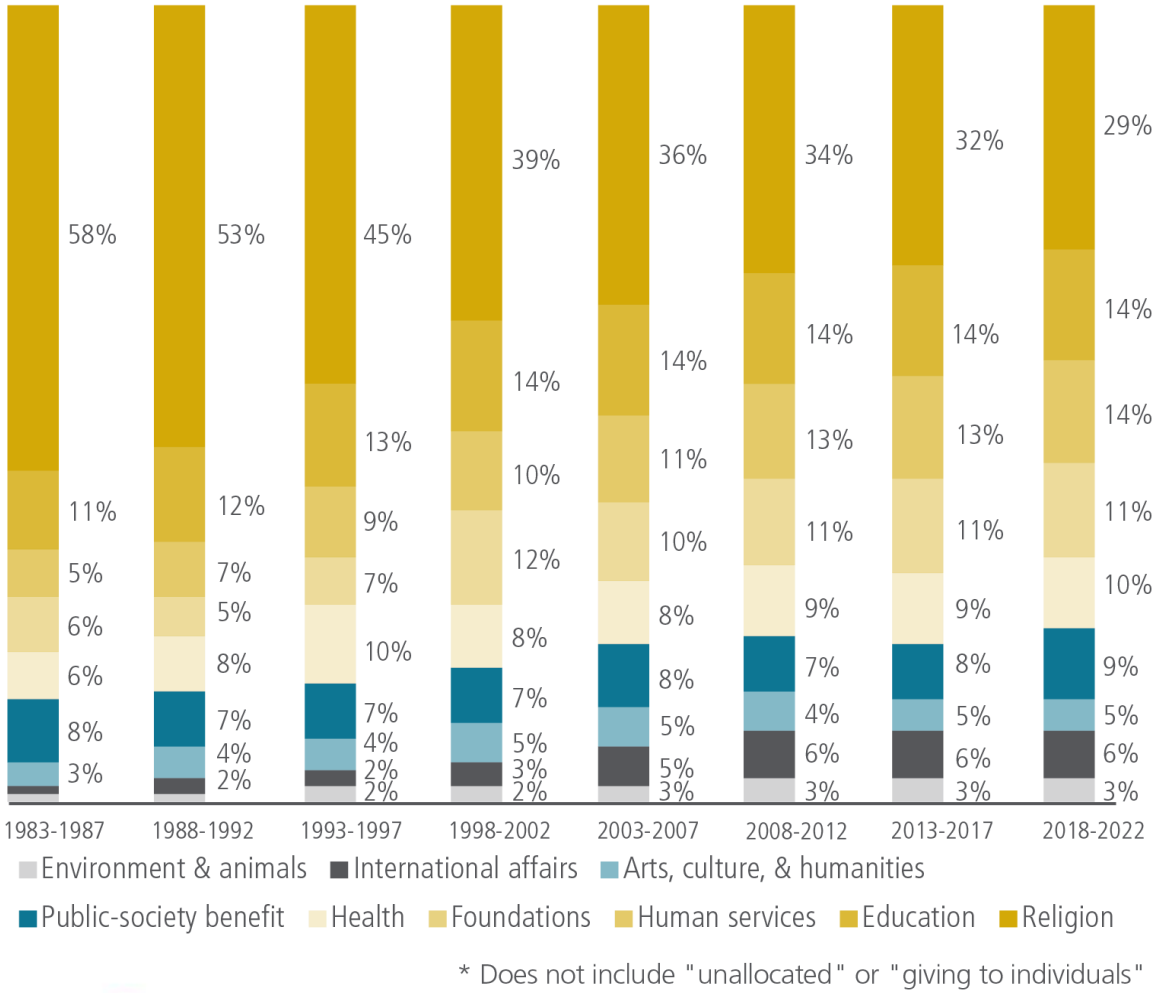
*The two-year change is calculated separately and is not the sum of the changes in the two years.

Giving USA™ | THE Giving Institute™ | Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Giving by type of recipient: Percentage of the total in five-year spans, 1983–2022*

(adjusted for inflation, 2022 = $100)



* Does not include "unallocated" or "giving to individuals"

Giving USA™ — A public service initiative of The Giving Institute

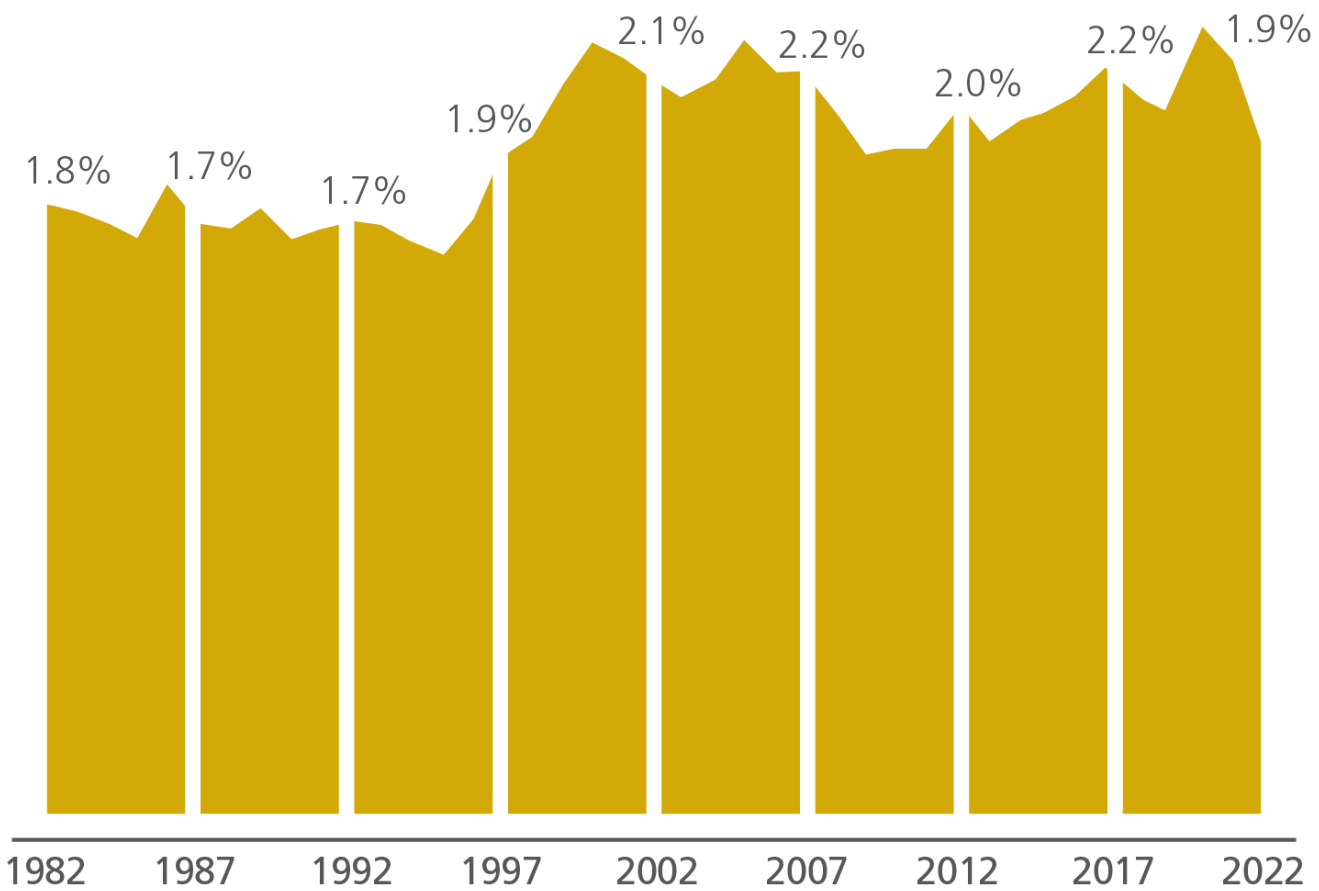
THE Giving Institute™ — Shared intelligence. For the greater good.

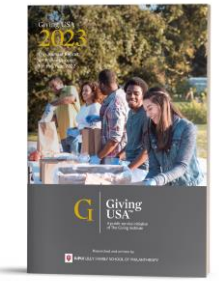
Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Total giving as a percentage of Gross Domestic Product, 1982–2022

(in current dollars)





Giving USA™ A public service initiative of The Giving Institute

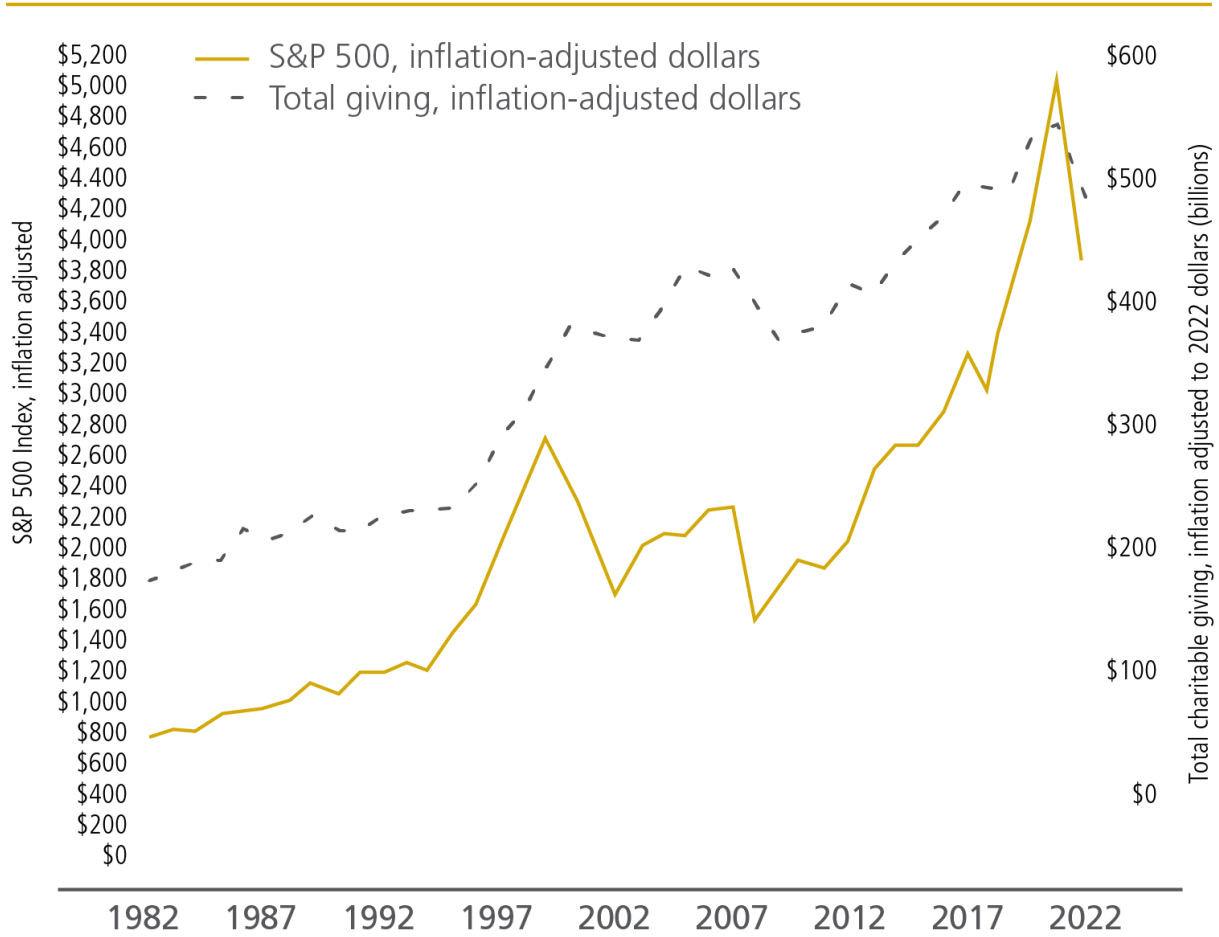
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Total charitable giving graphed with the Standard & Poor's 500 Index, 1982-2022

(in billions of inflation-adjusted dollars, 2022 = $100)



Giving USA™ A public service initiative of The Giving Institute

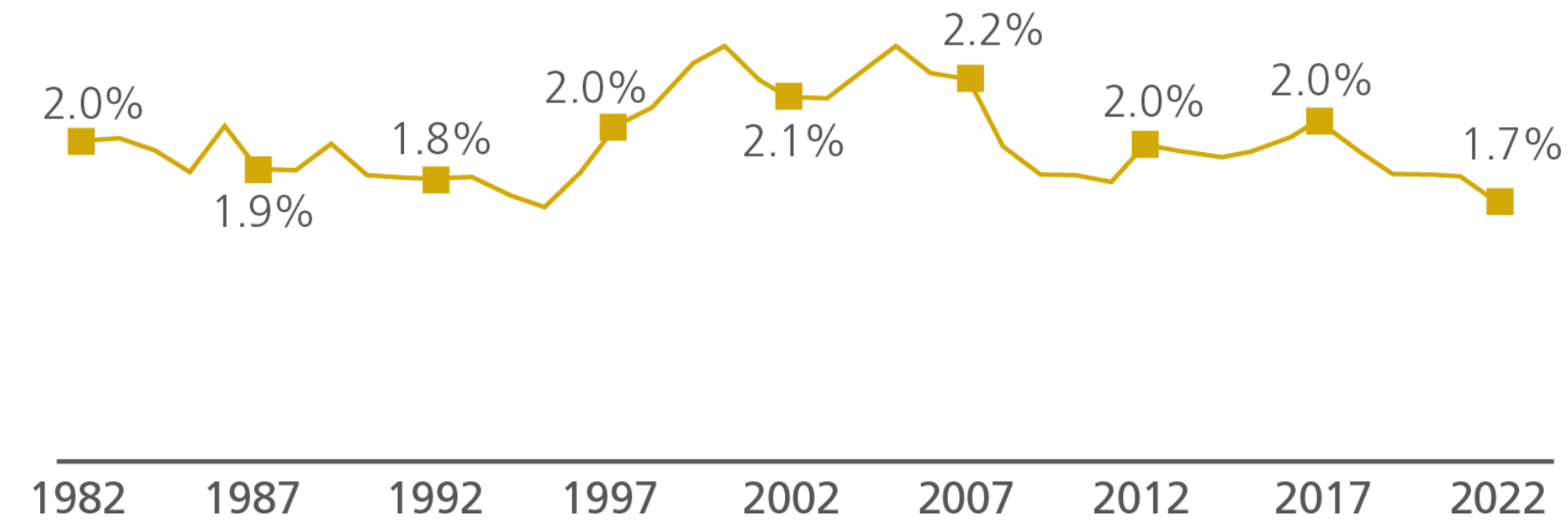
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Individual giving as a share of disposable personal income, 1982-2022

(in current dollars)



Giving USA™ A public service initiative of The Giving Institute

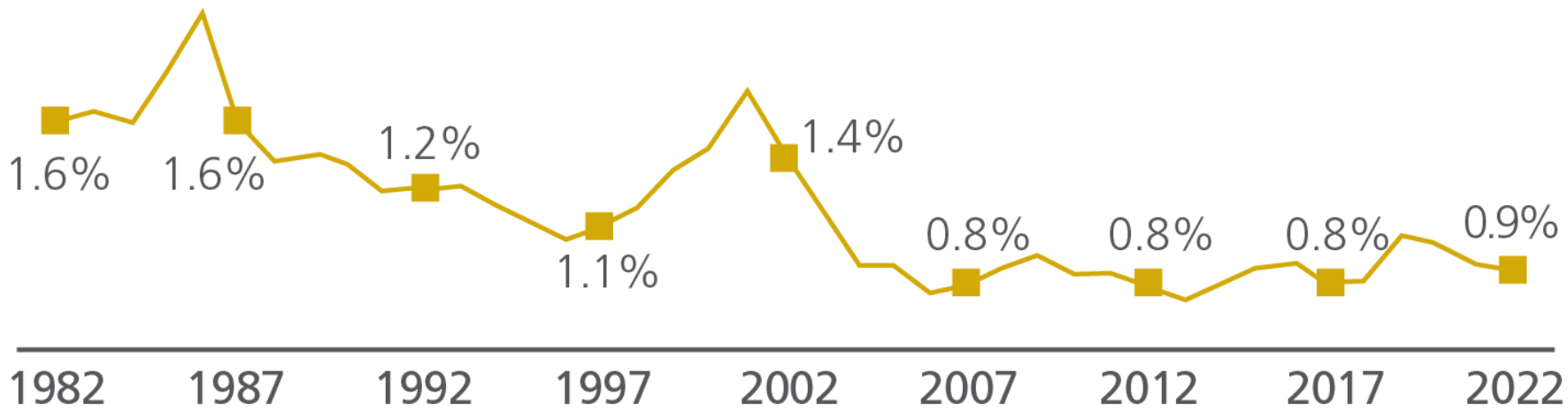
THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

Corporate giving as a percentage of corporate pre-tax profits, 1982–2022

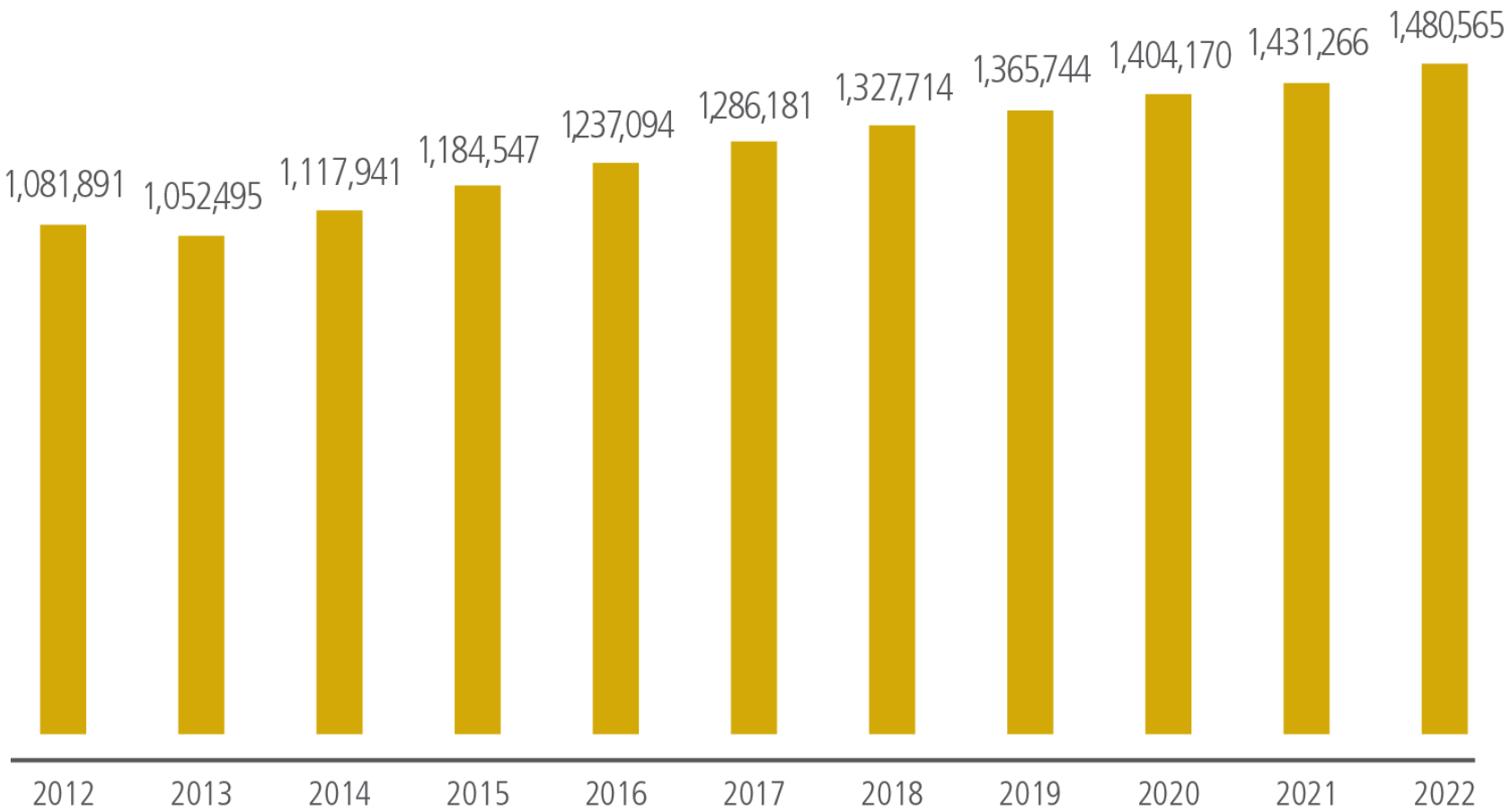
(in current dollars)



Giving USA™ | THE Giving Institute™ | Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

The number of 501(c)(3) organizations, 2012-2022



Giving USA™ A public service initiative of The Giving Institute

THE Giving Institute™ Shared intelligence. For the greater good.

Researched and written by IUPUI LILLY FAMILY SCHOOL OF PHILANTHROPY

THE PHOENIX PHILANTHROPY GROUP

MEMBERSHIP CONSULTANTS

Pulse of Membership Survey for Gardens and Arboreta

2023 Mid-Year Survey Results and Membership Trends

January 2024

About Us

- 35+ years in the membership arena
- Membership Organizations ranging from startups to 50,000 members or more
- Educational, professional, conservation, cultural, art and humanities organizations
- Full suite of services from planning and projecting to implementing, analysis and reporting

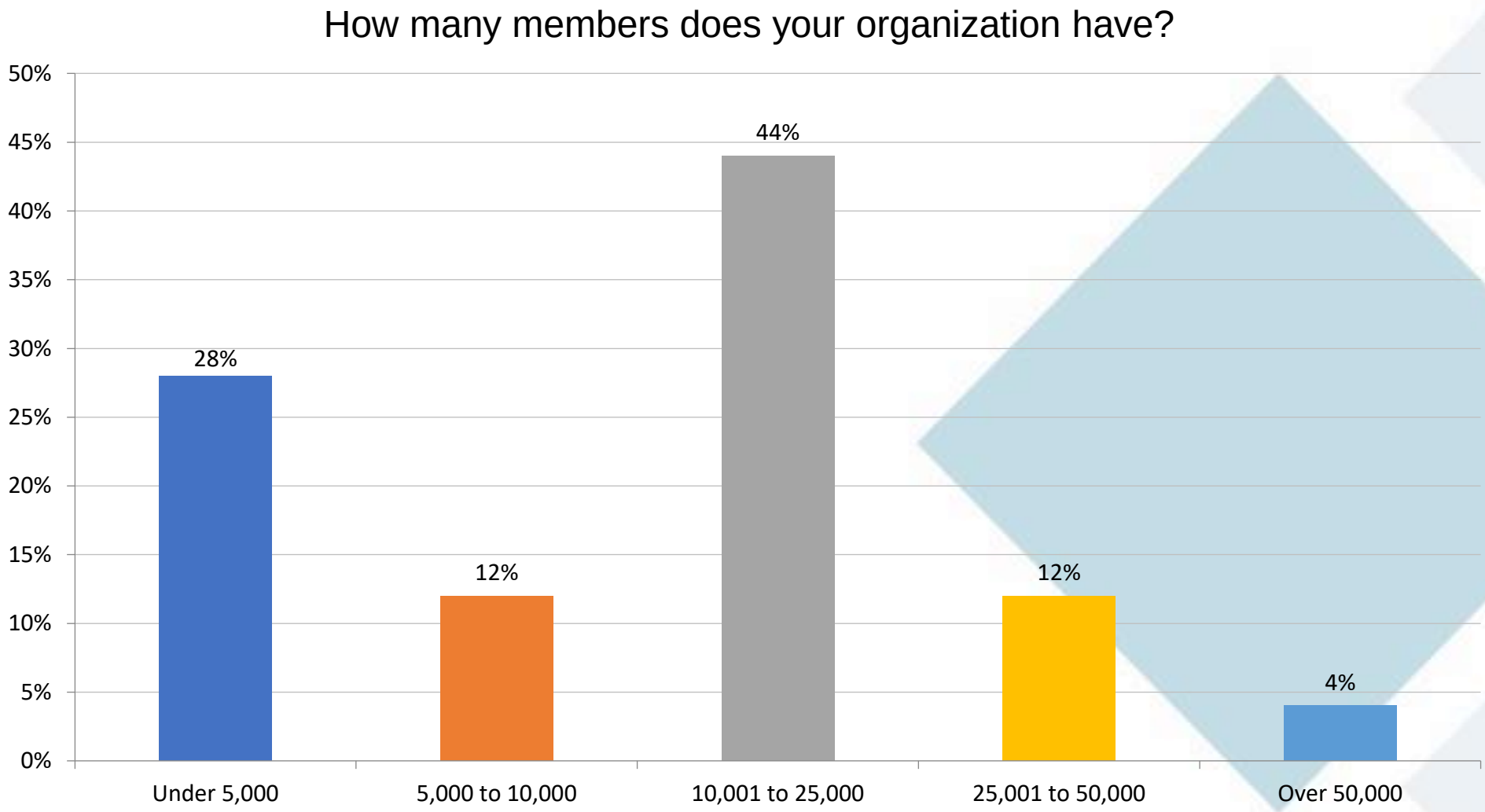
Pulse of Membership Survey

- When?
  - 2009, Economic downturn
- Who?
  - Membership Managers
  - All types of membership organizations
- Why?
  - Get the ‘pulse’ of membership
  - See trends in our industry
- What?
  - Benchmarking for membership programs
  - DATA!

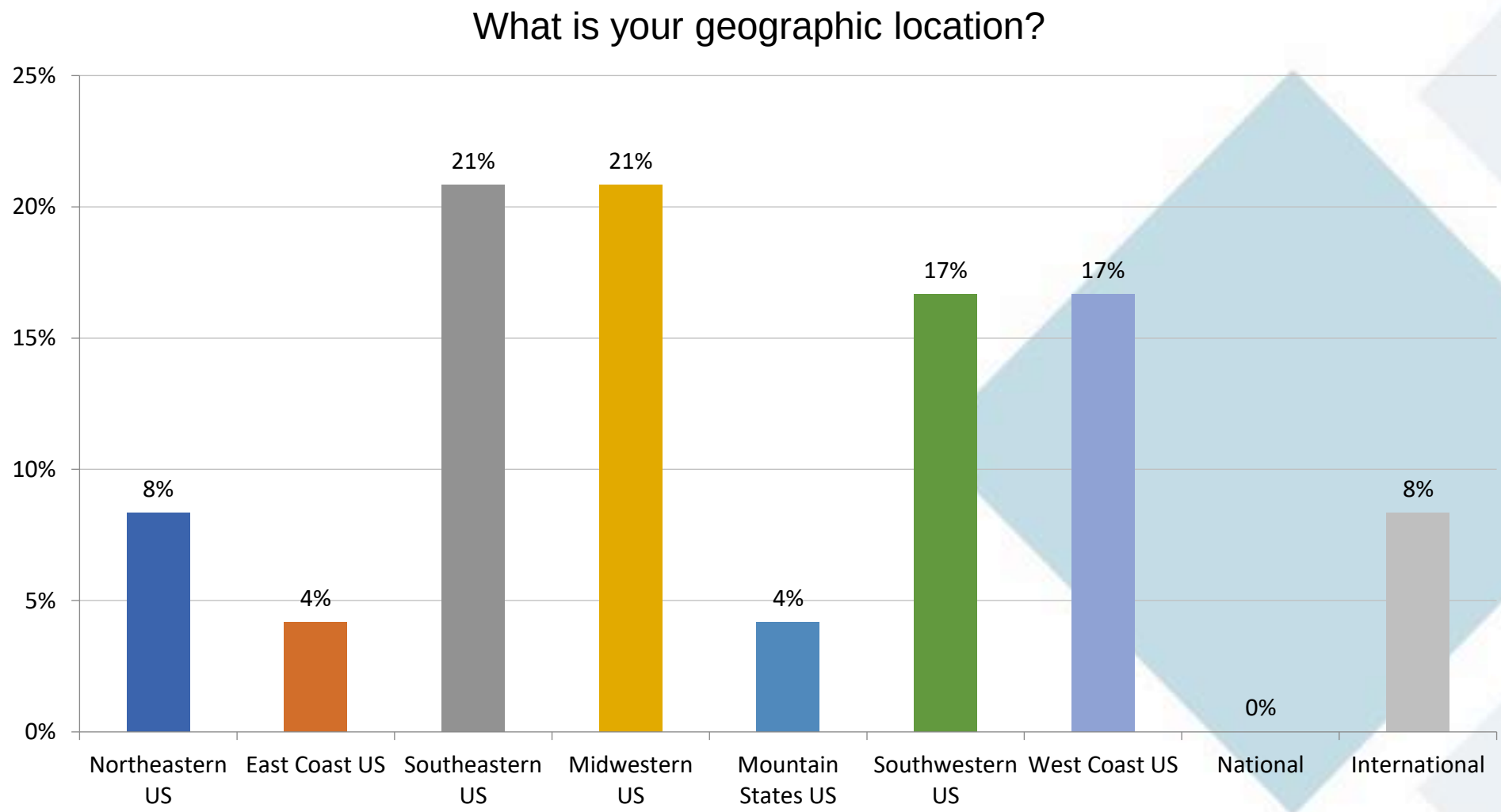
Pulse of Membership Survey

- Demographics of Survey Participants
- Trends
  - Membership Totals
  - Membership Revenues
  - Acquisition
  - Budgets
  - Visitation
  - Renewals
  - Digital
  - Dues, categories, benefits
  - Staffing and salary
- Membership Outlook
- Going Forward
- Q and A

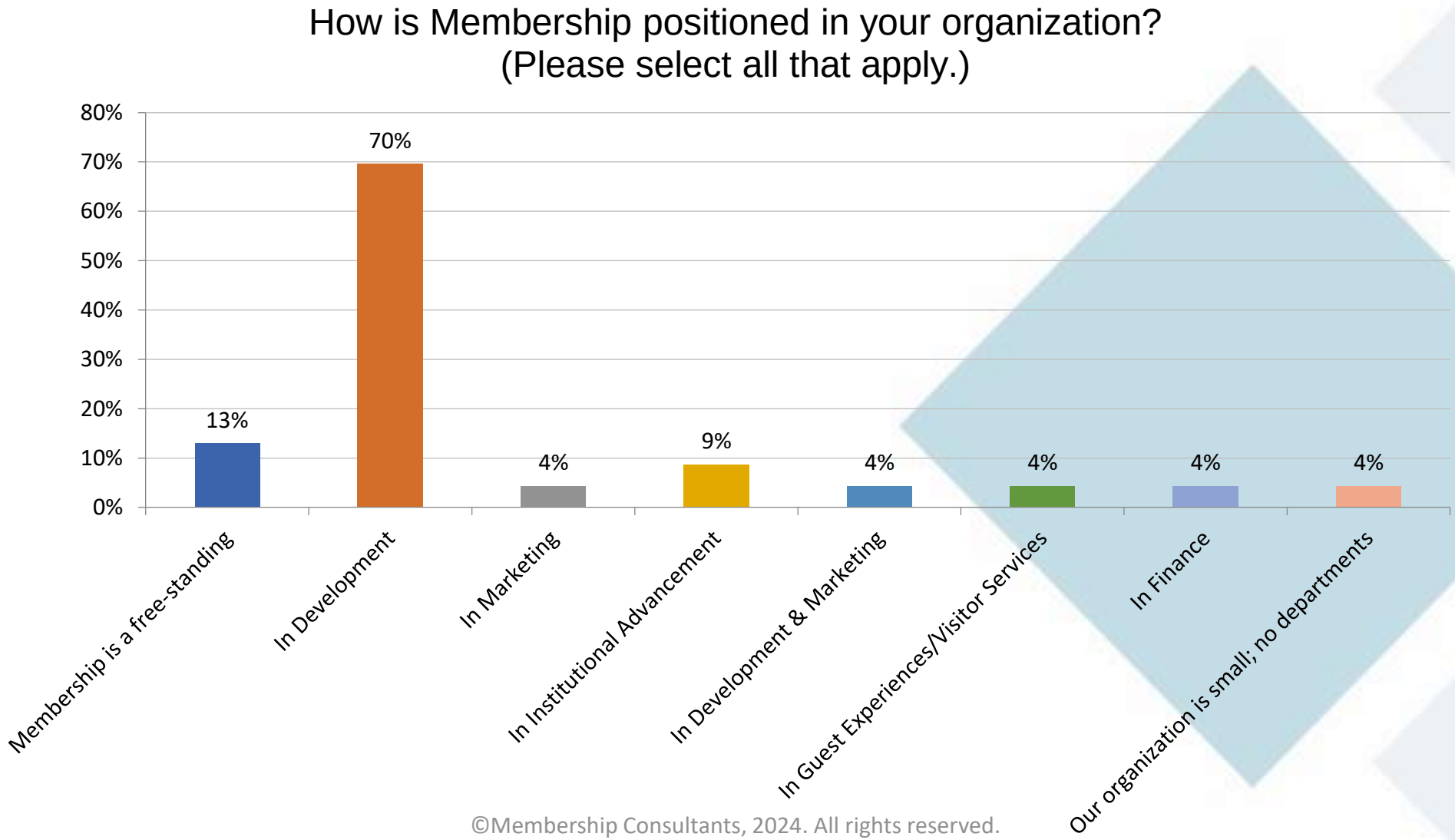
Demographics



Demographics



Demographics

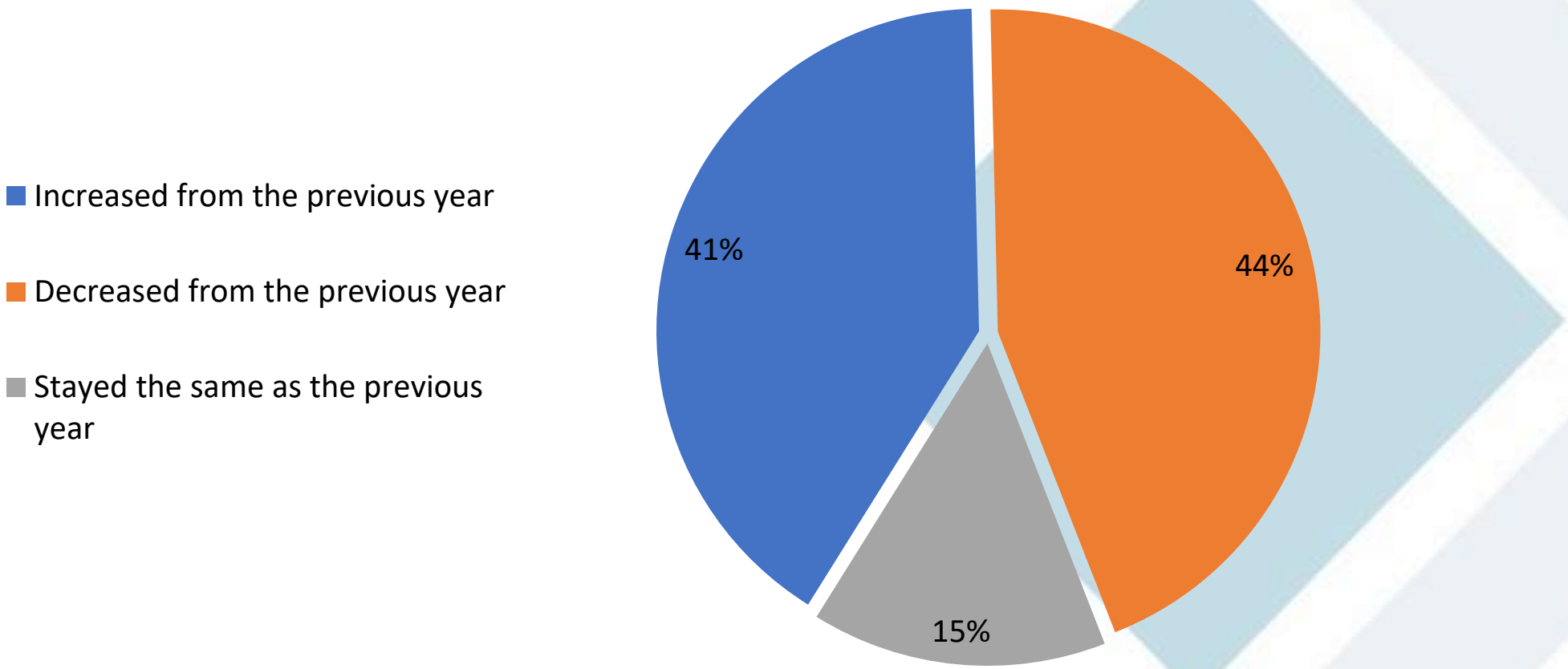


Trends

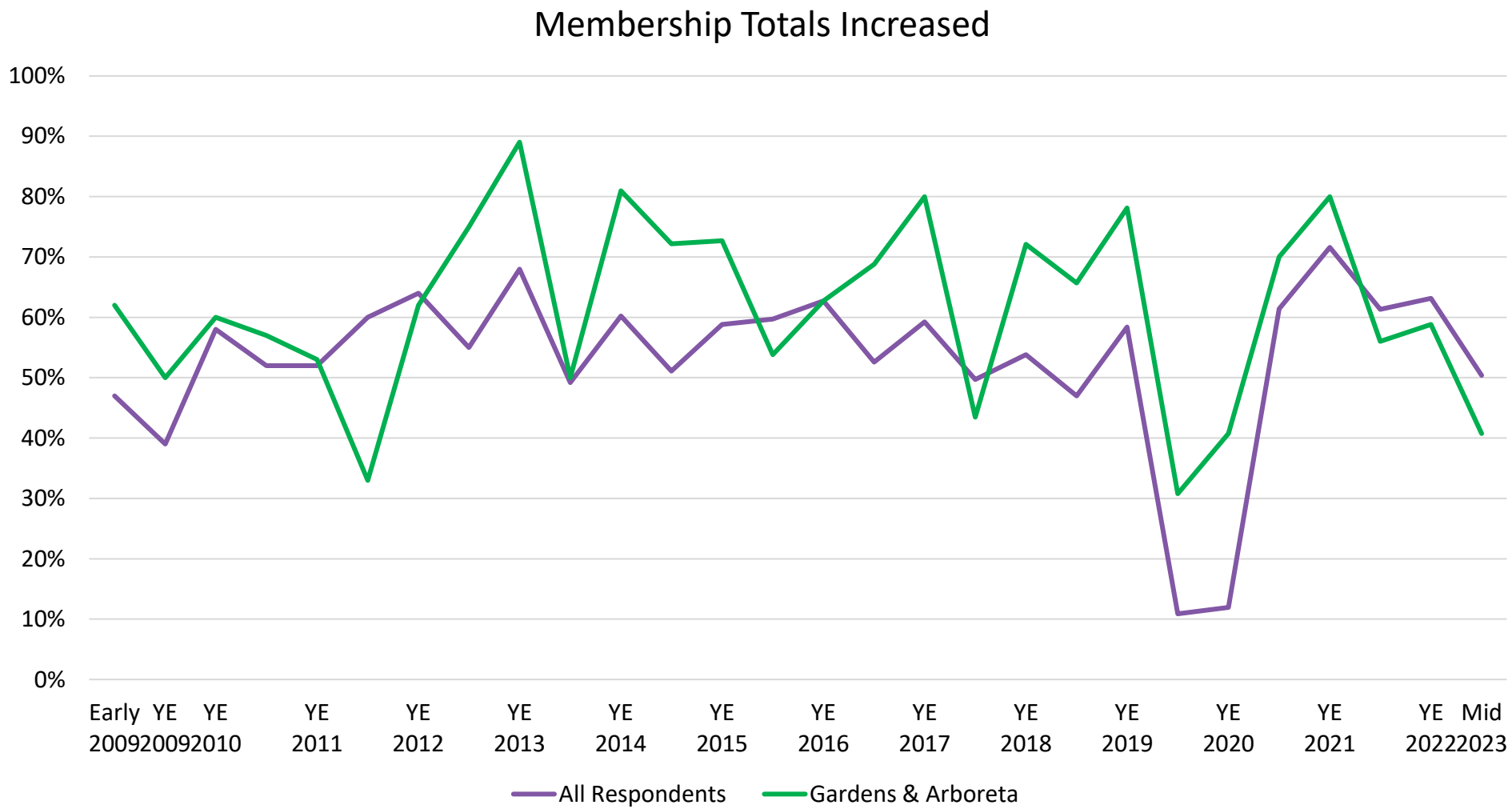
Mid-Year 2023 Pulse of Membership Survey Data

Trends – Member Totals

Comparing mid-year membership totals for 2023 to mid-year membership totals for 2022, your membership totals...

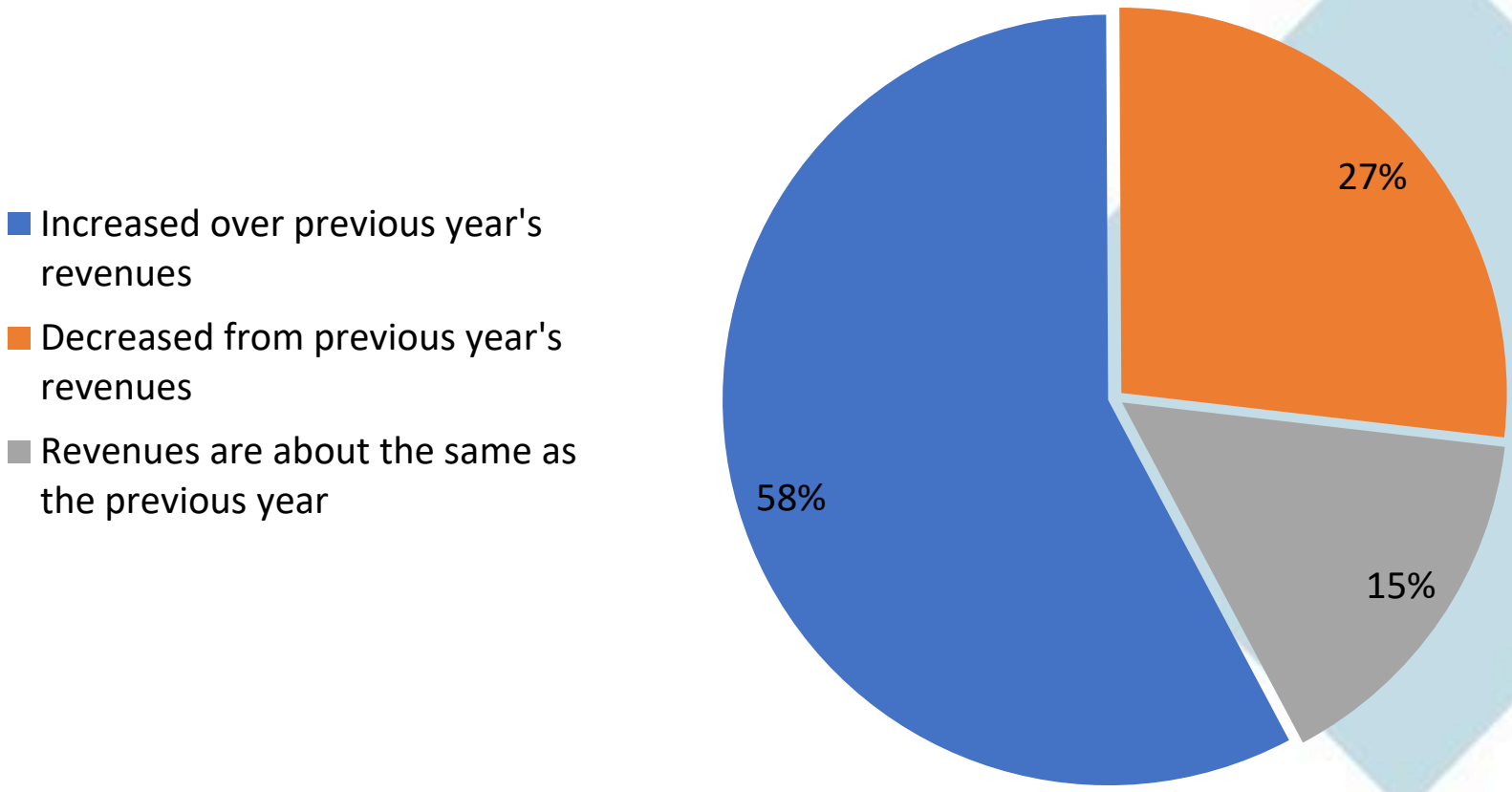


Historical Trends – Member Totals

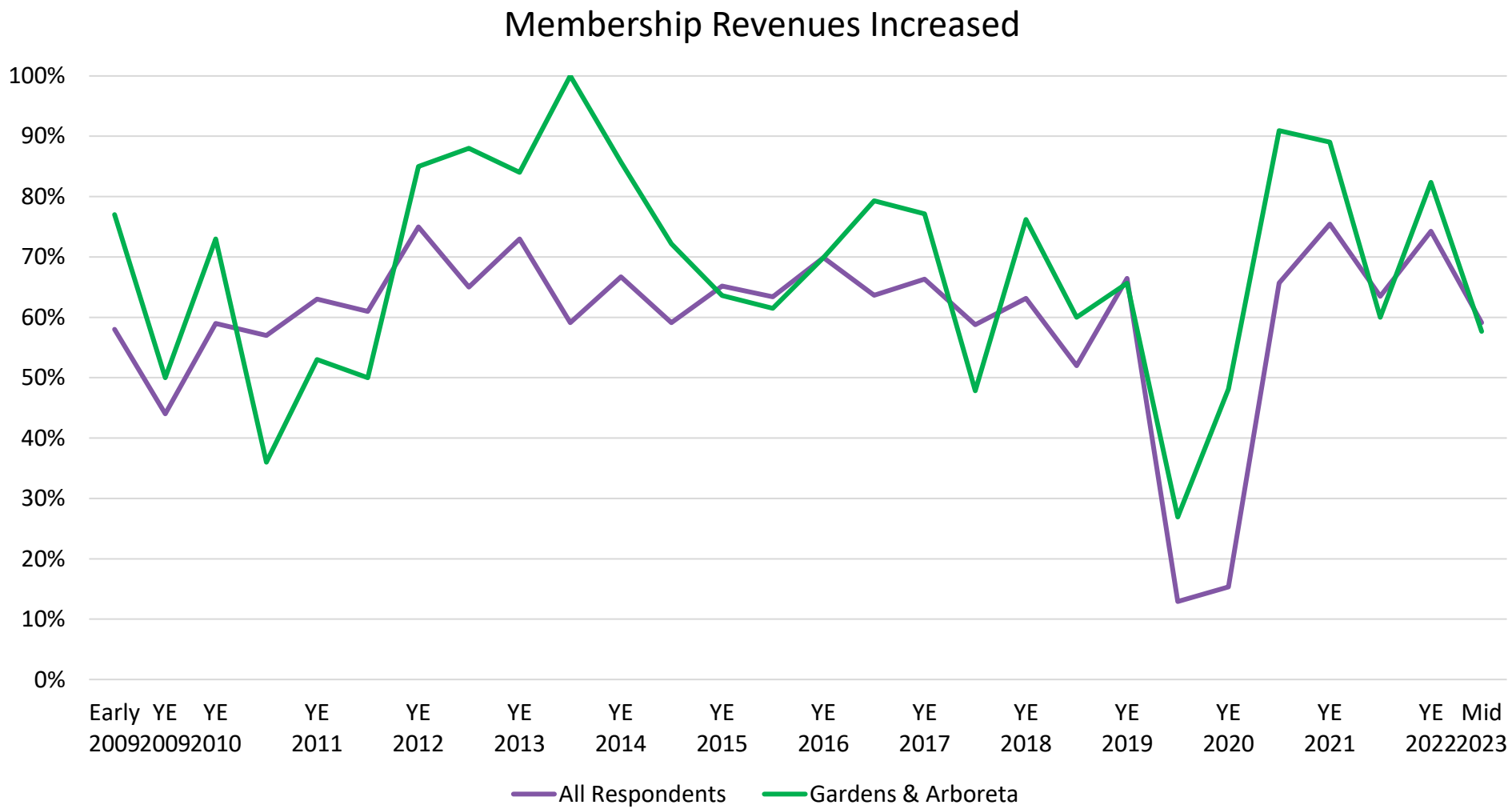


Trends – Revenues

In comparing membership revenues at mid-year 2023 to membership revenues at mid-year 2022, your membership revenues...

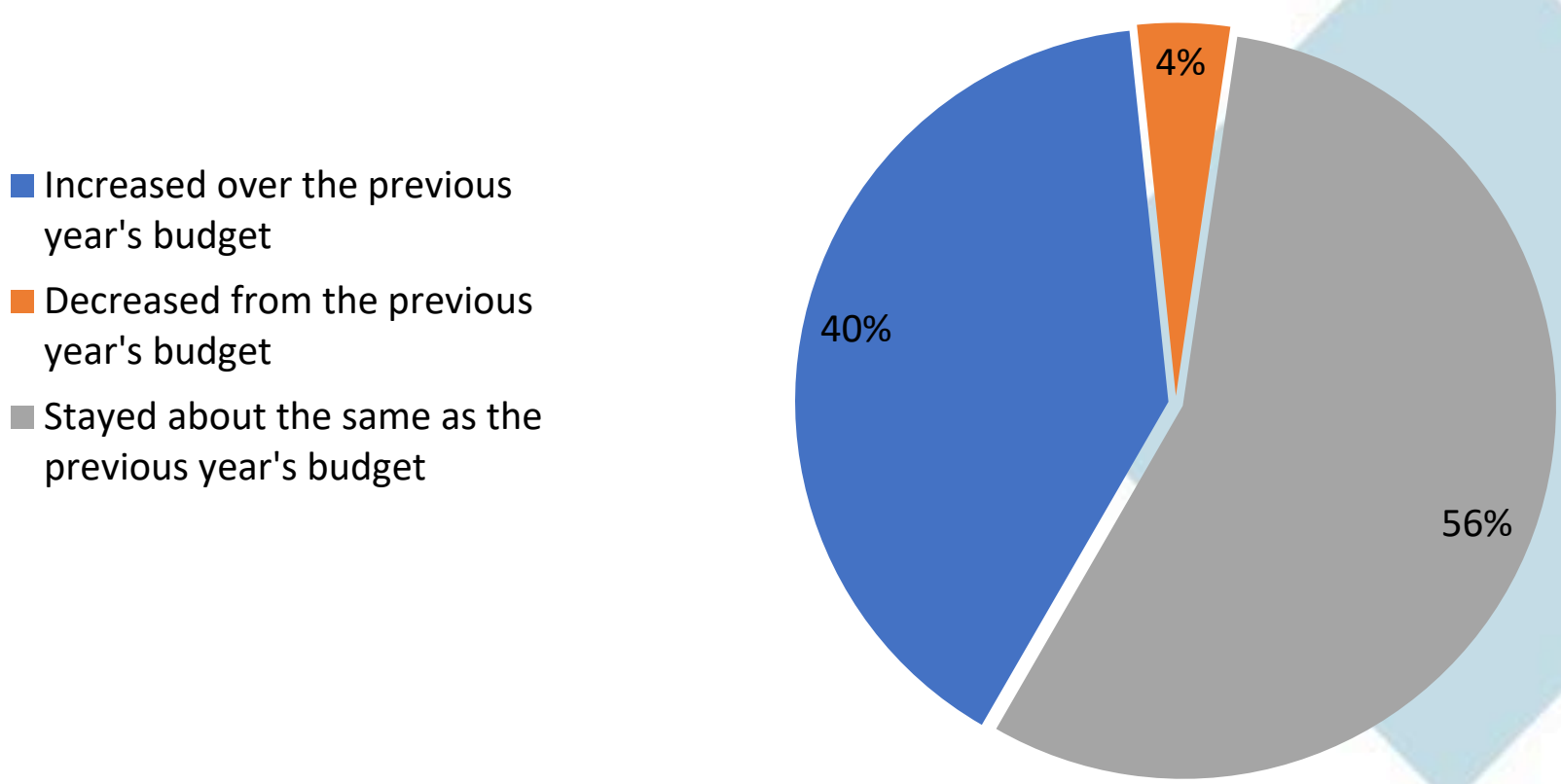


Historical Trends – Revenues

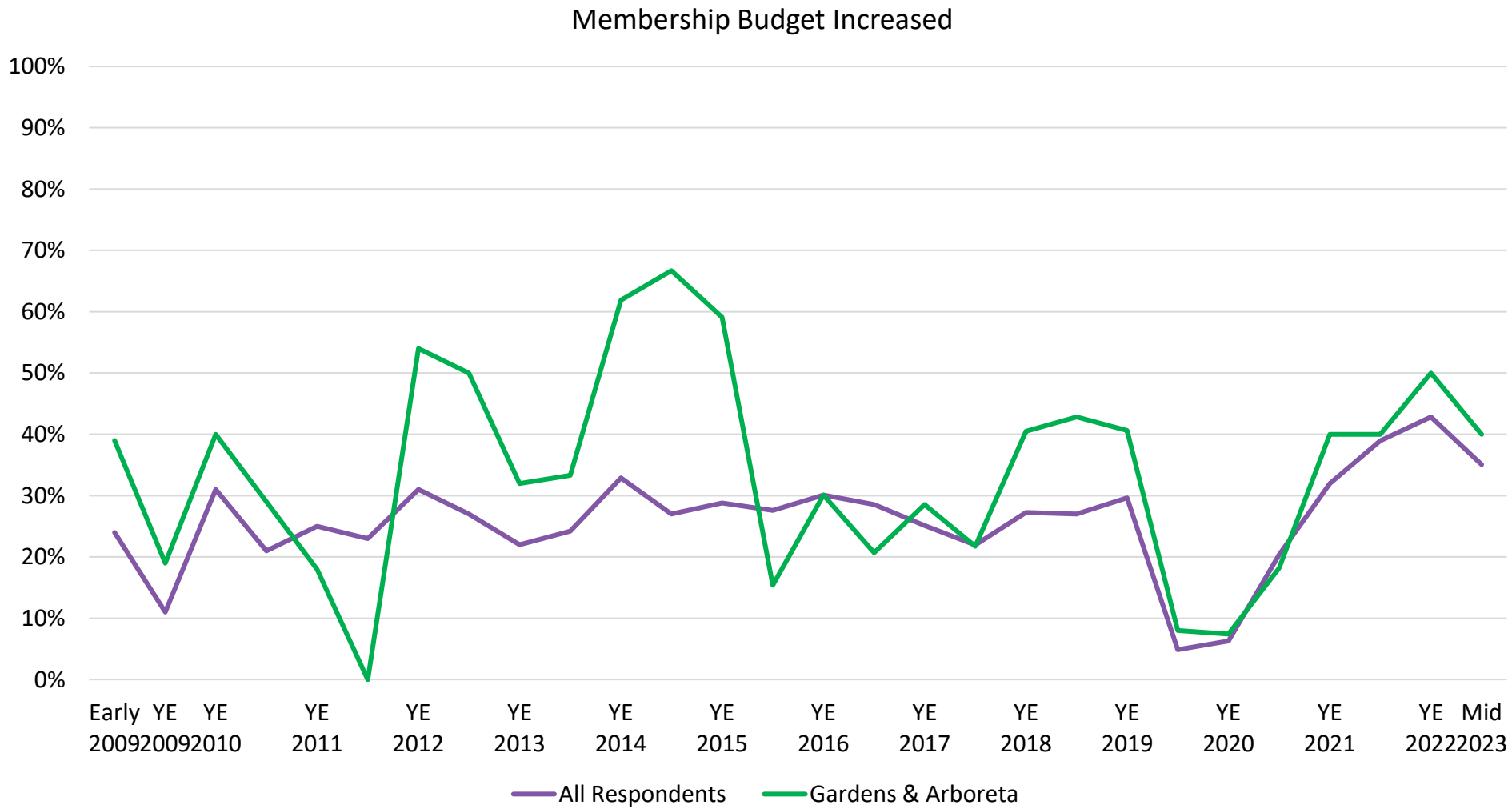


Trends – Expense Budget

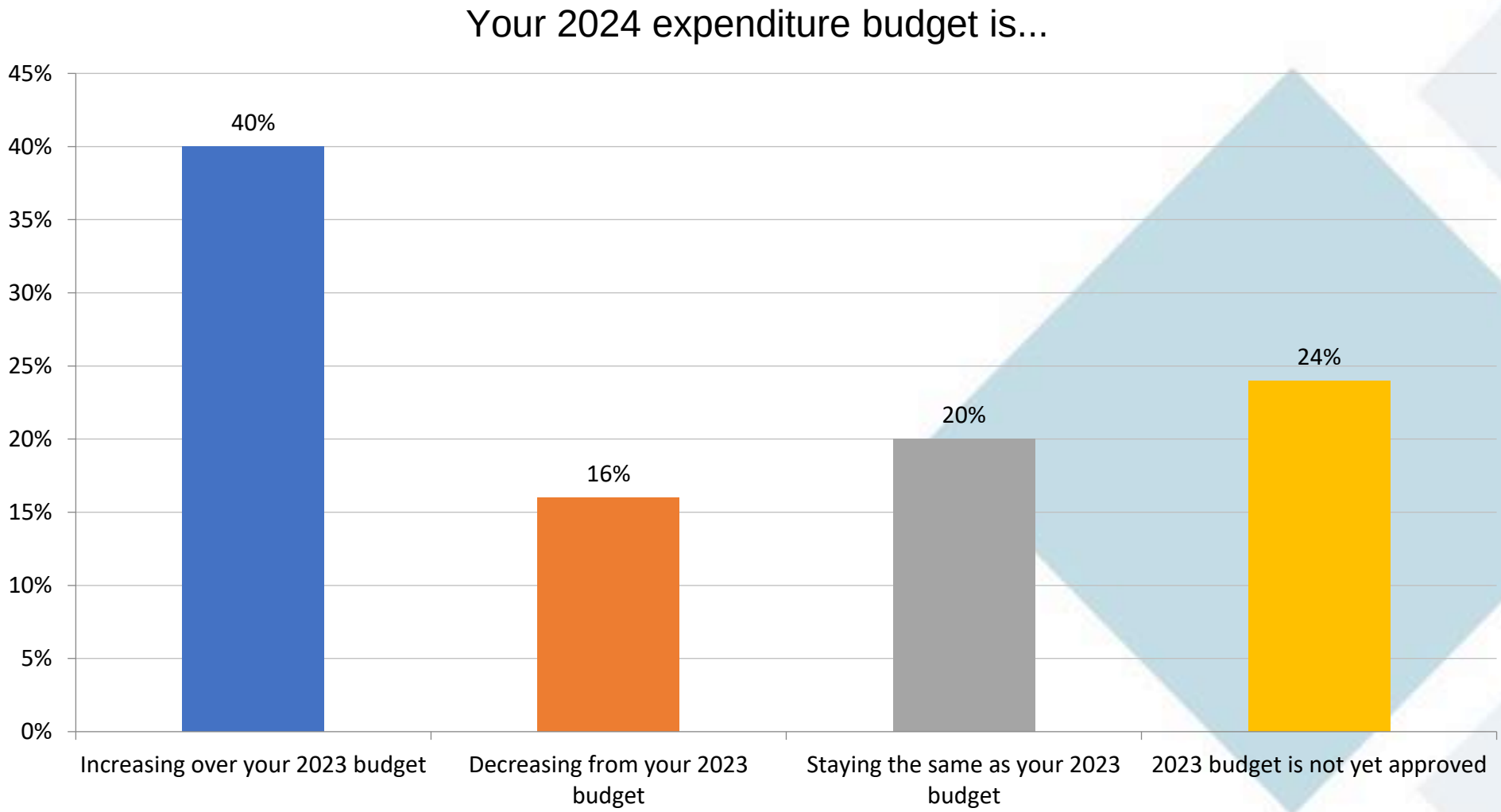
Comparing your membership expenditure budget for mid-year 2023 to your membership expenditure budget from 2022, your membership expenditure budget...



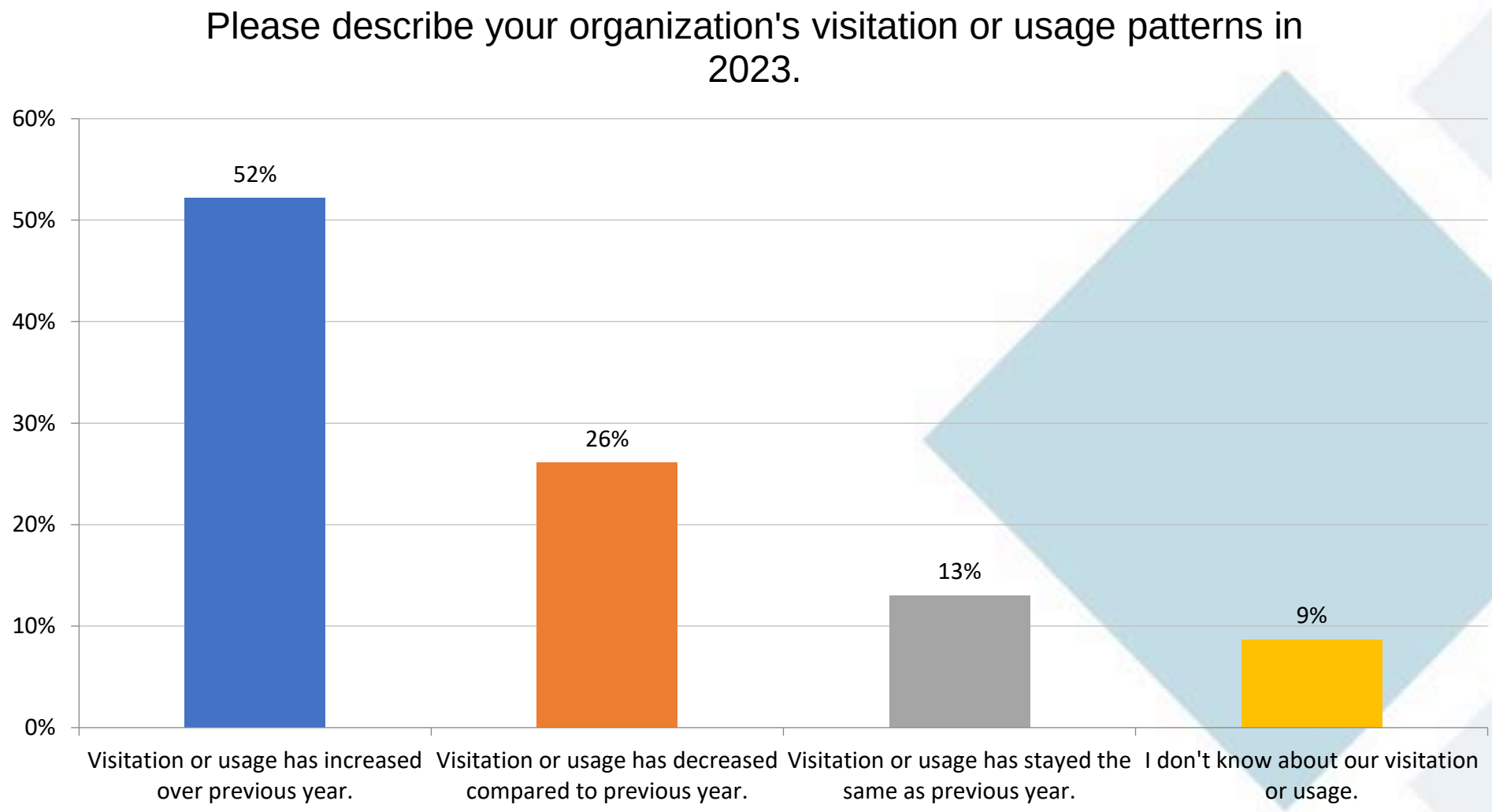
Historical Trends – Expense Budget



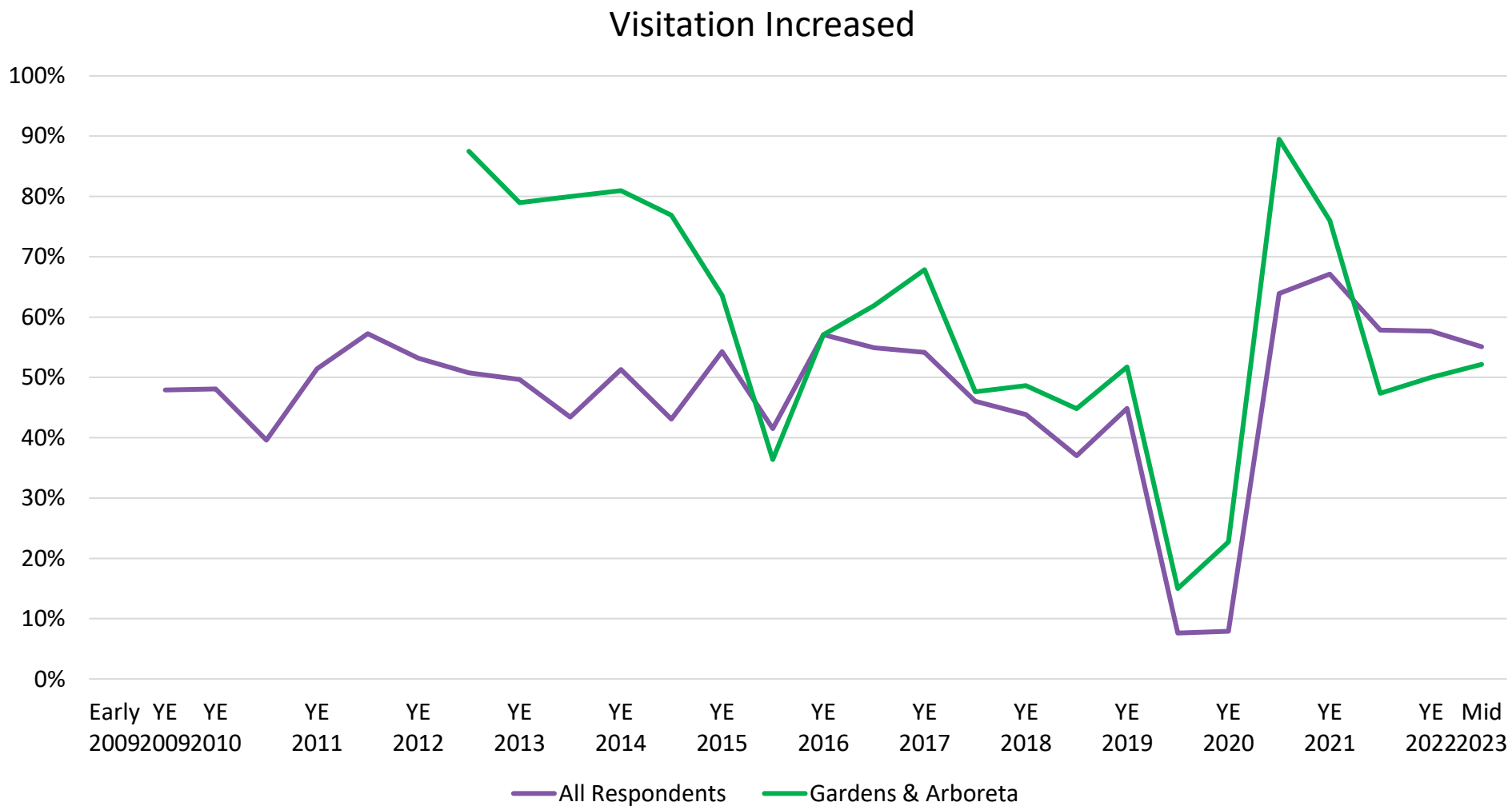
Trends – Expense Budget



Trends – Visitation

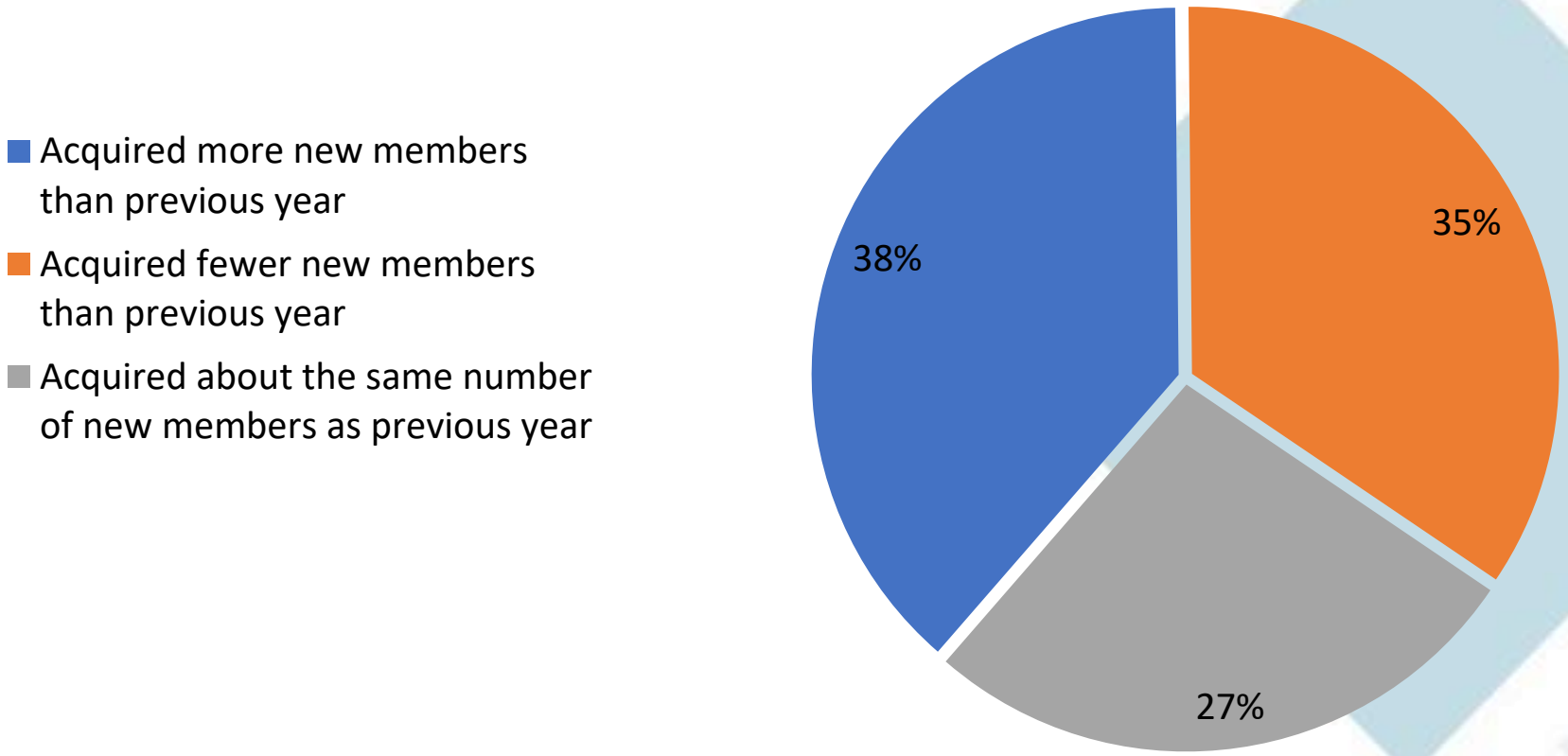


Historical Trends – Visitation

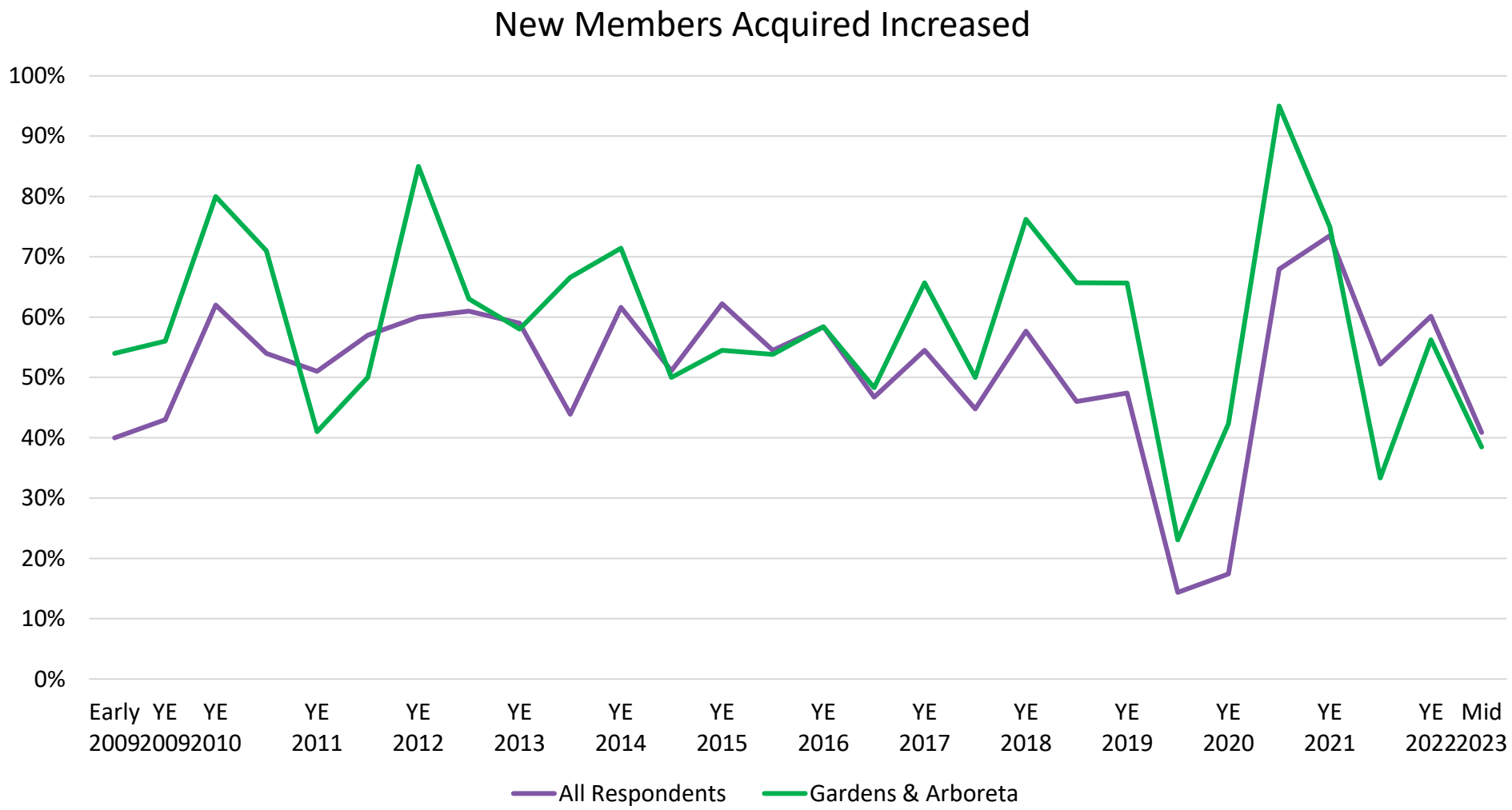


Trends – Acquisition

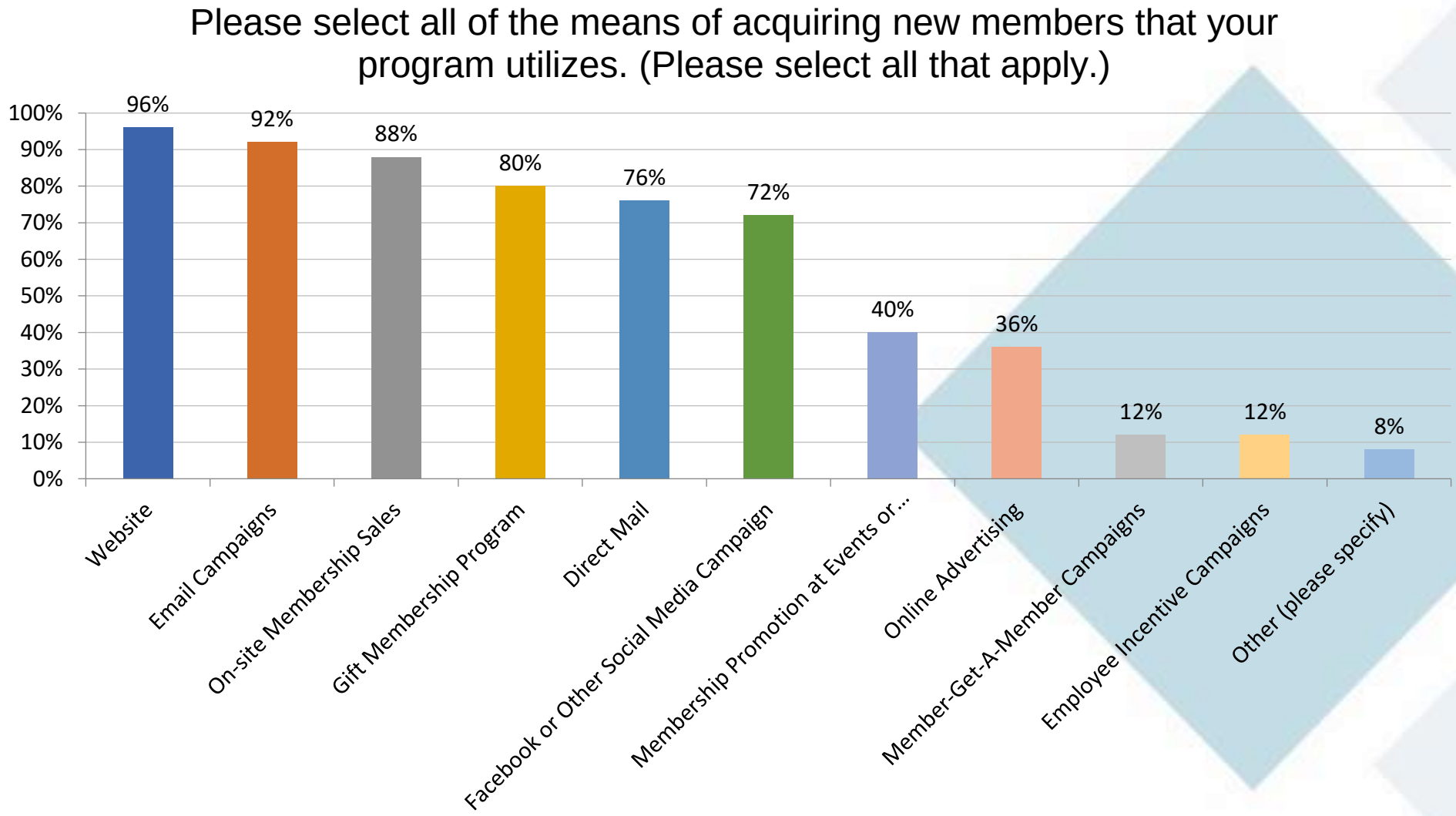
Comparing new members acquired in 2023 year-to-date to new members acquired in 2022 year-to-date, your membership acquisition efforts have...



Historical Trends – Acquisition

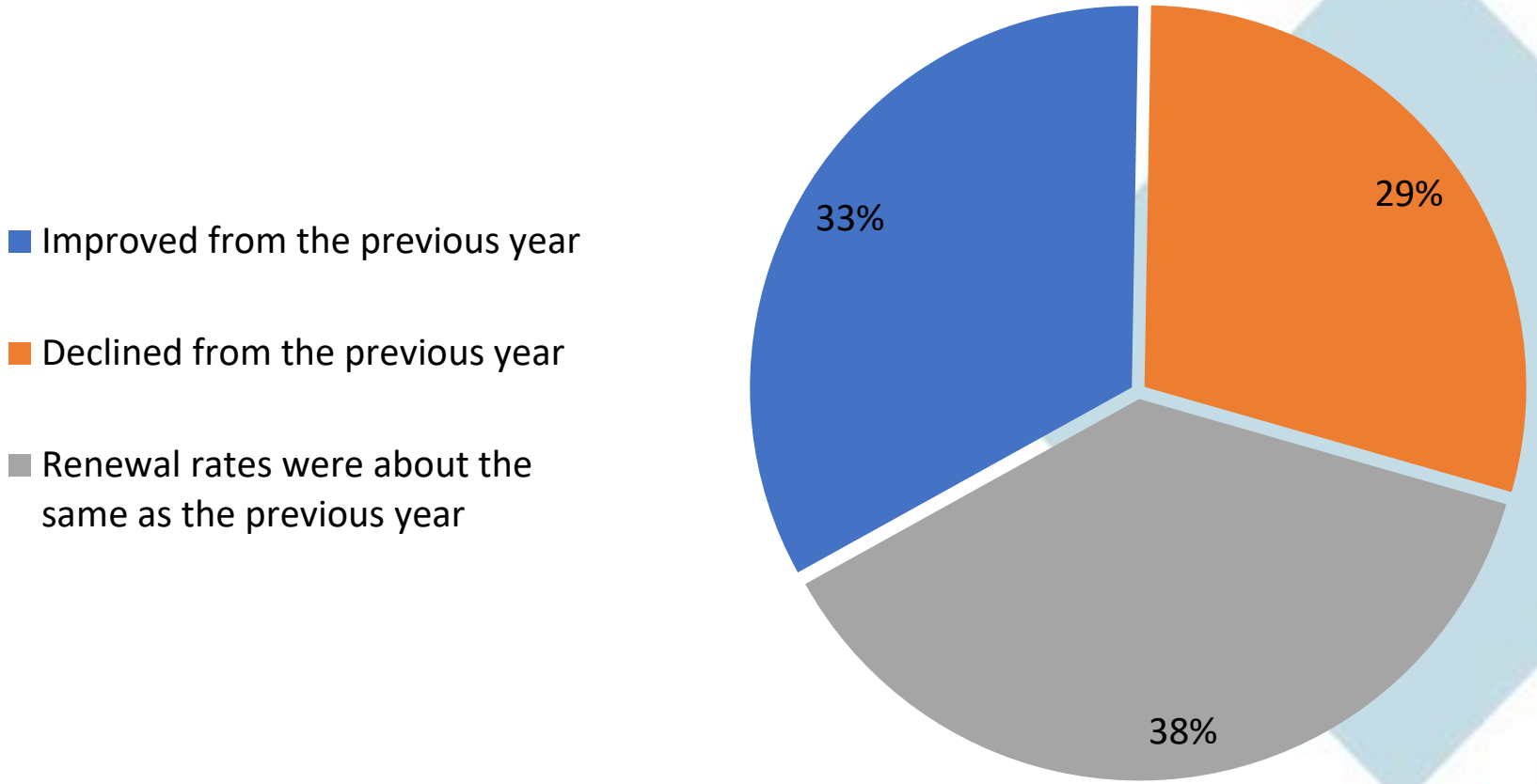


Trends – Acquisition

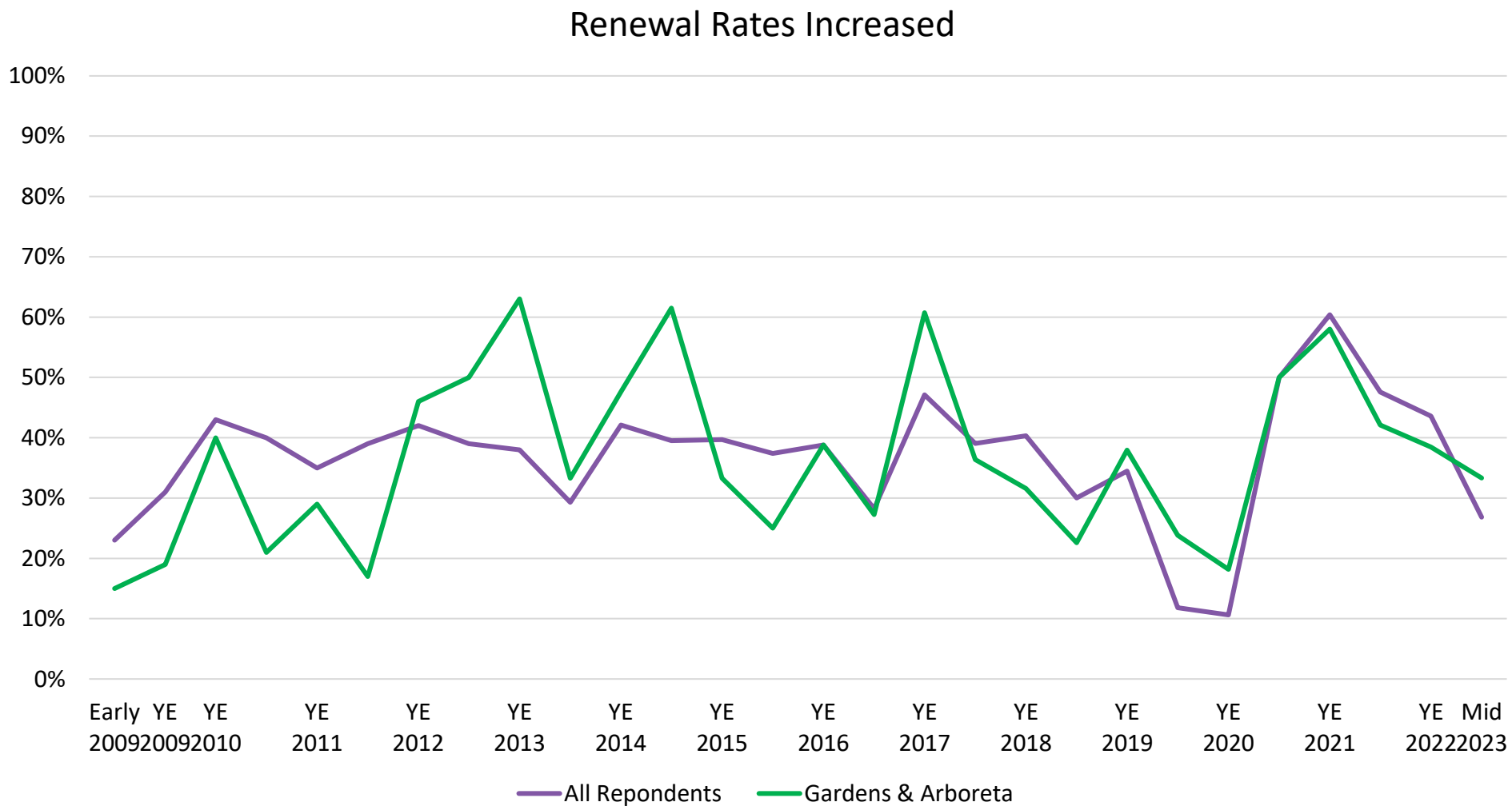


Trends – Renewals

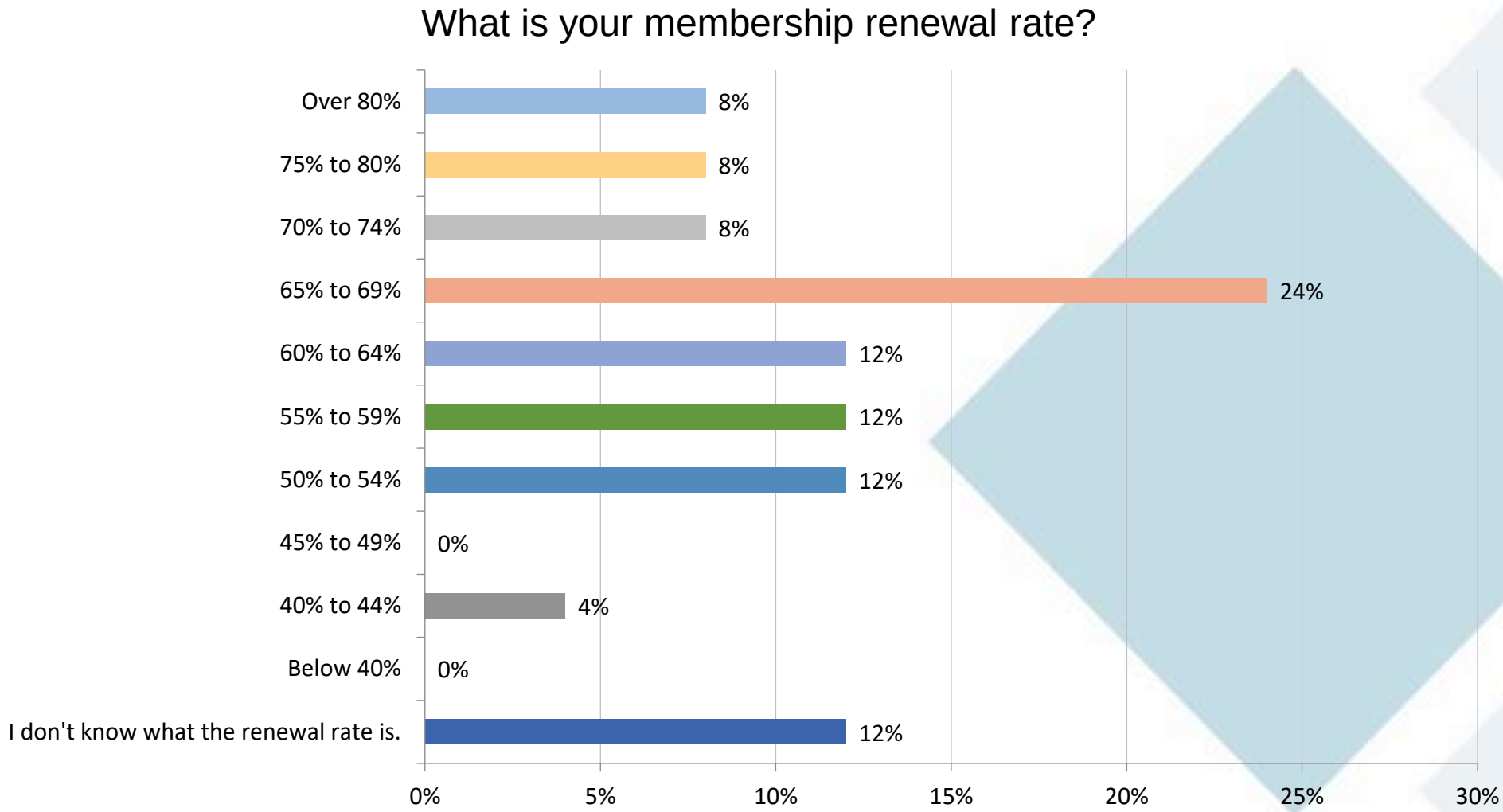
Comparing membership renewal rates in 2023 compared to those in 2022, would you say that renewal rates...



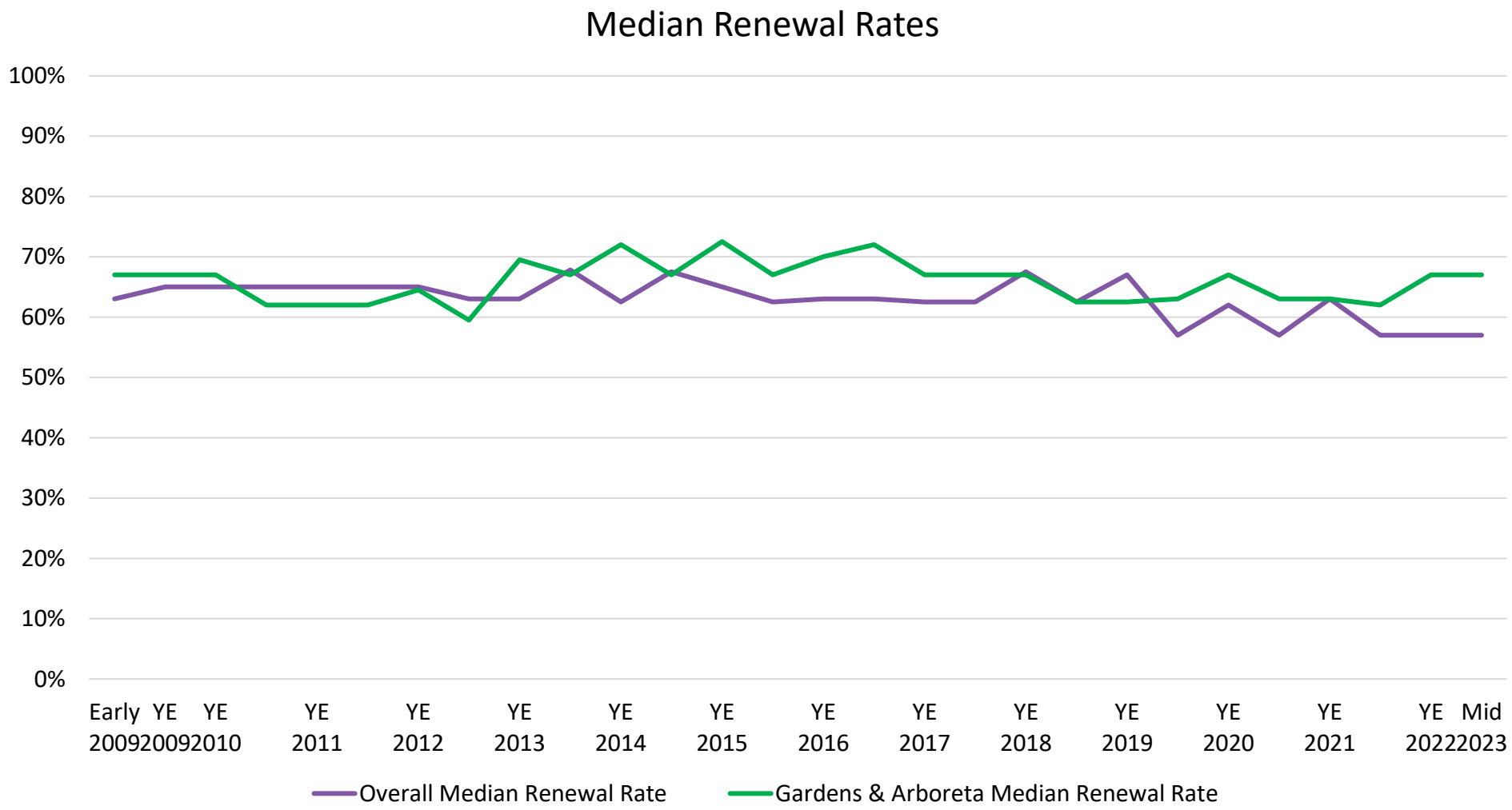
Historical Trends – Renewals



Trends – Renewals

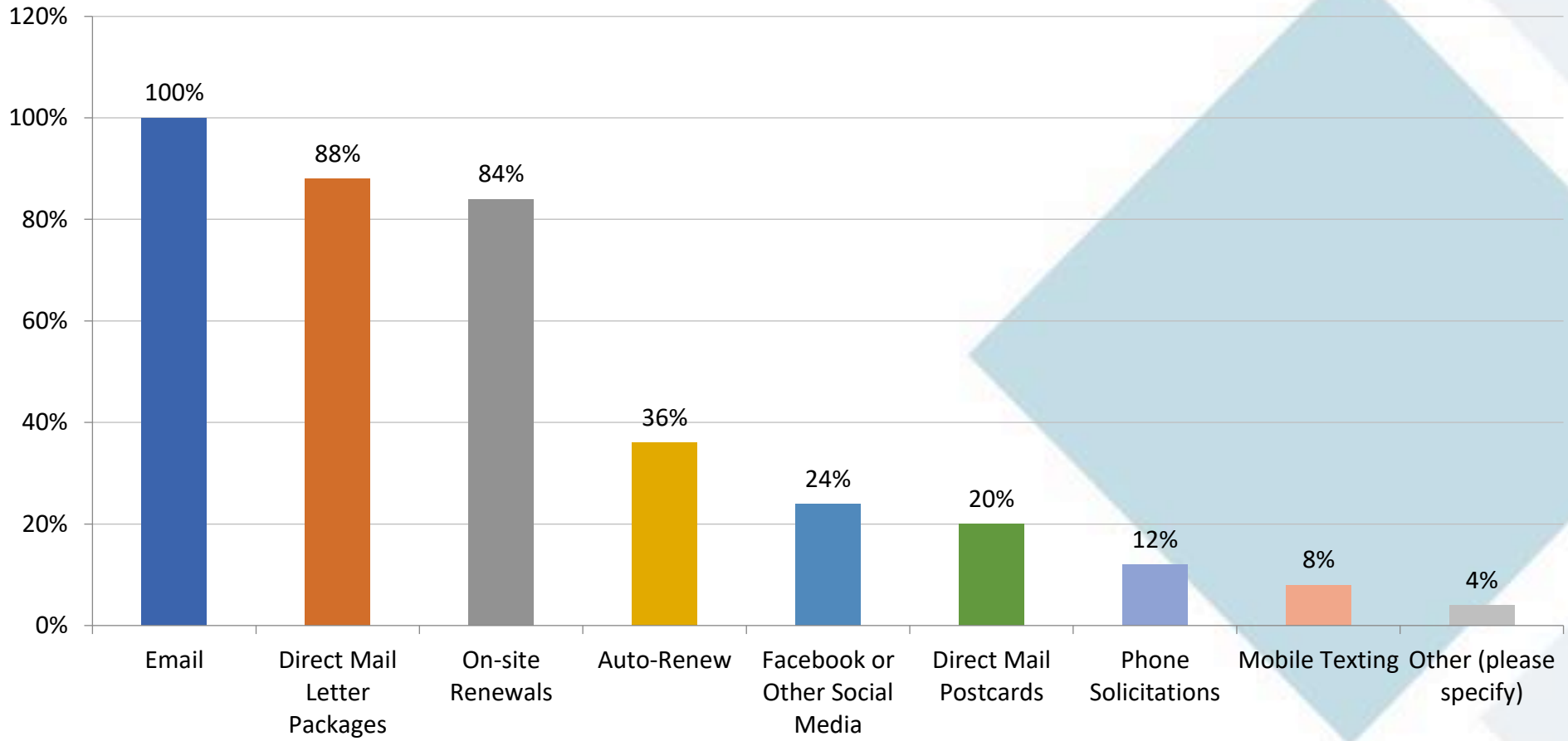


Historical Trends – Renewal Rates

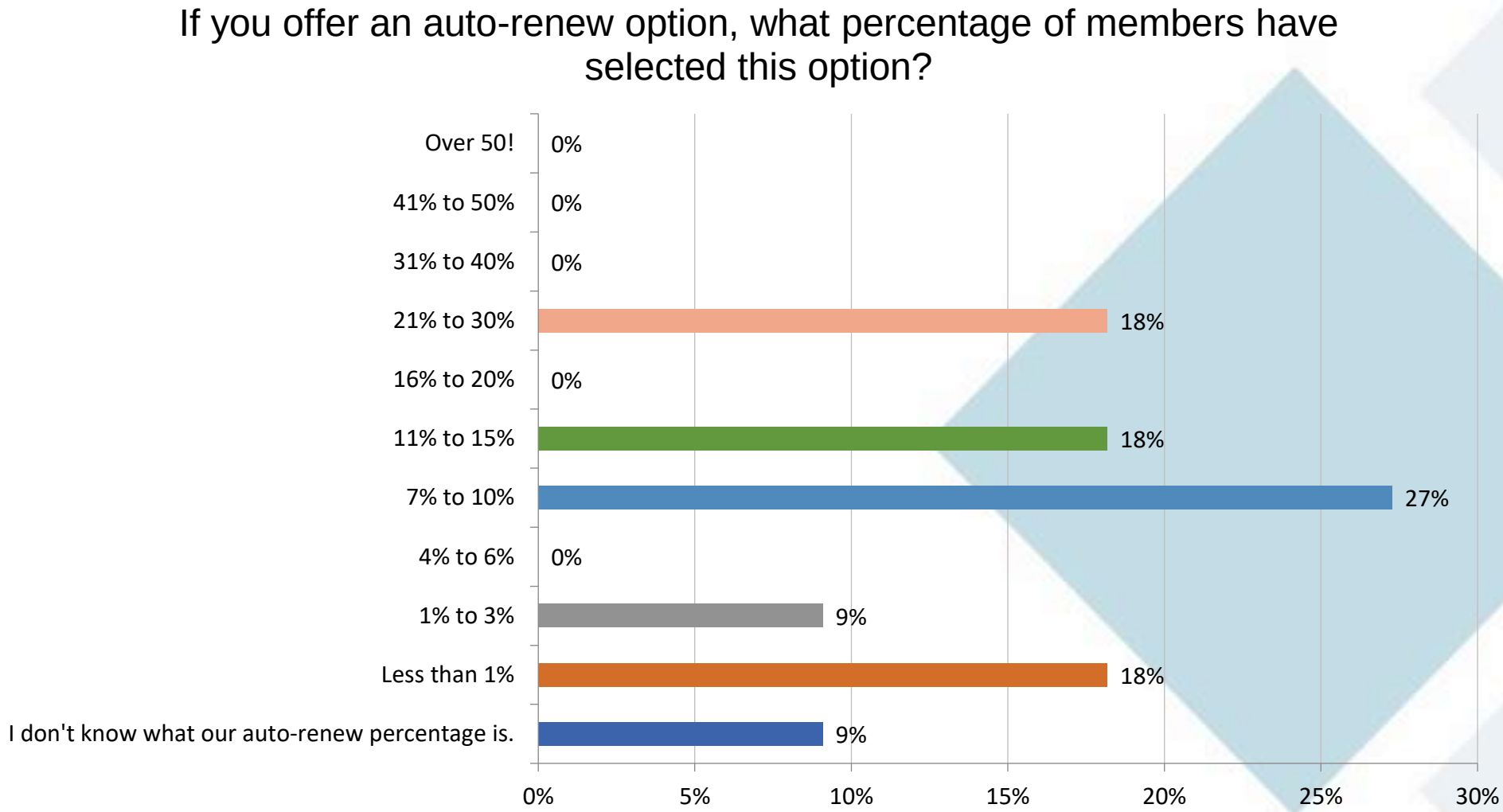


Trends – Renewals

Please indicate the methods your program utilizes to drive membership renewals. (Please select all that apply.)

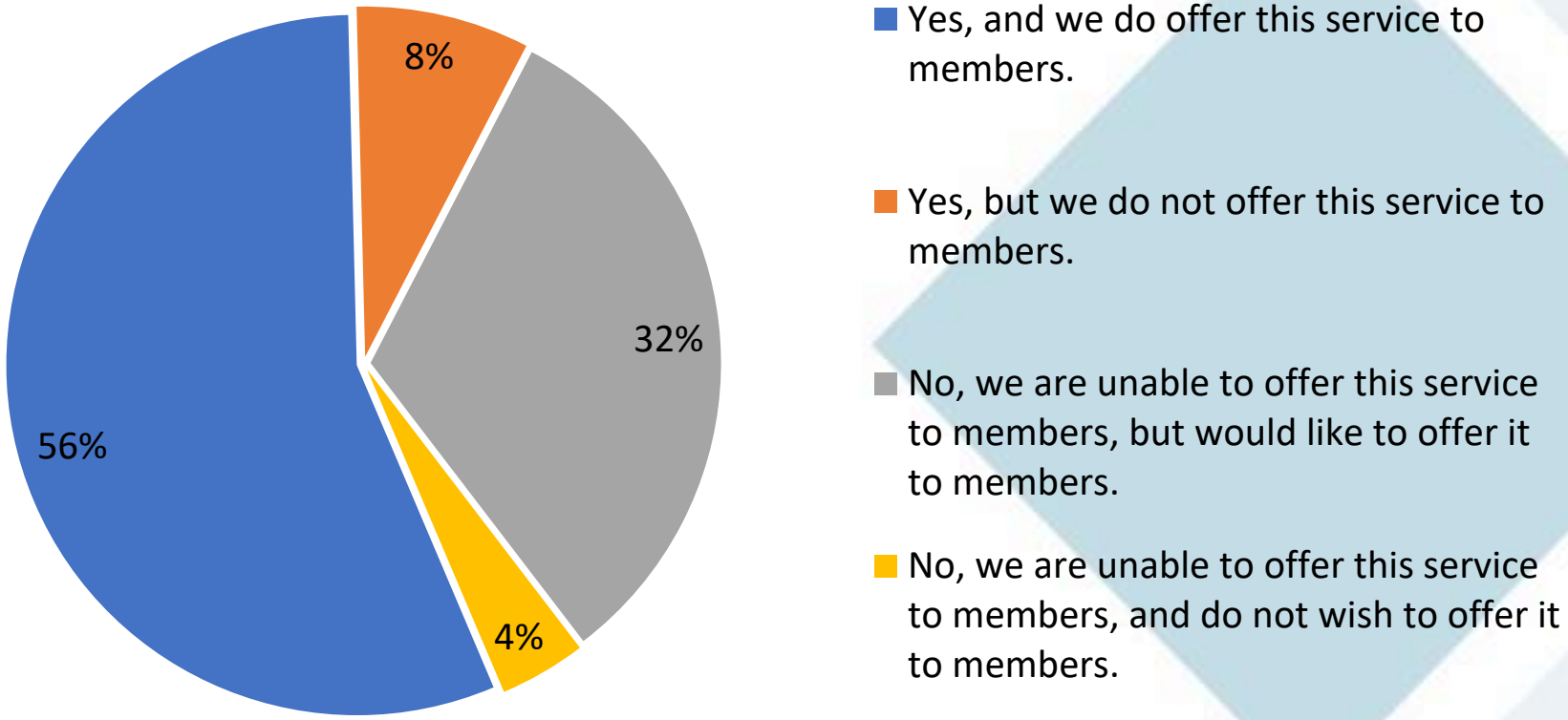


Trends – Renewals

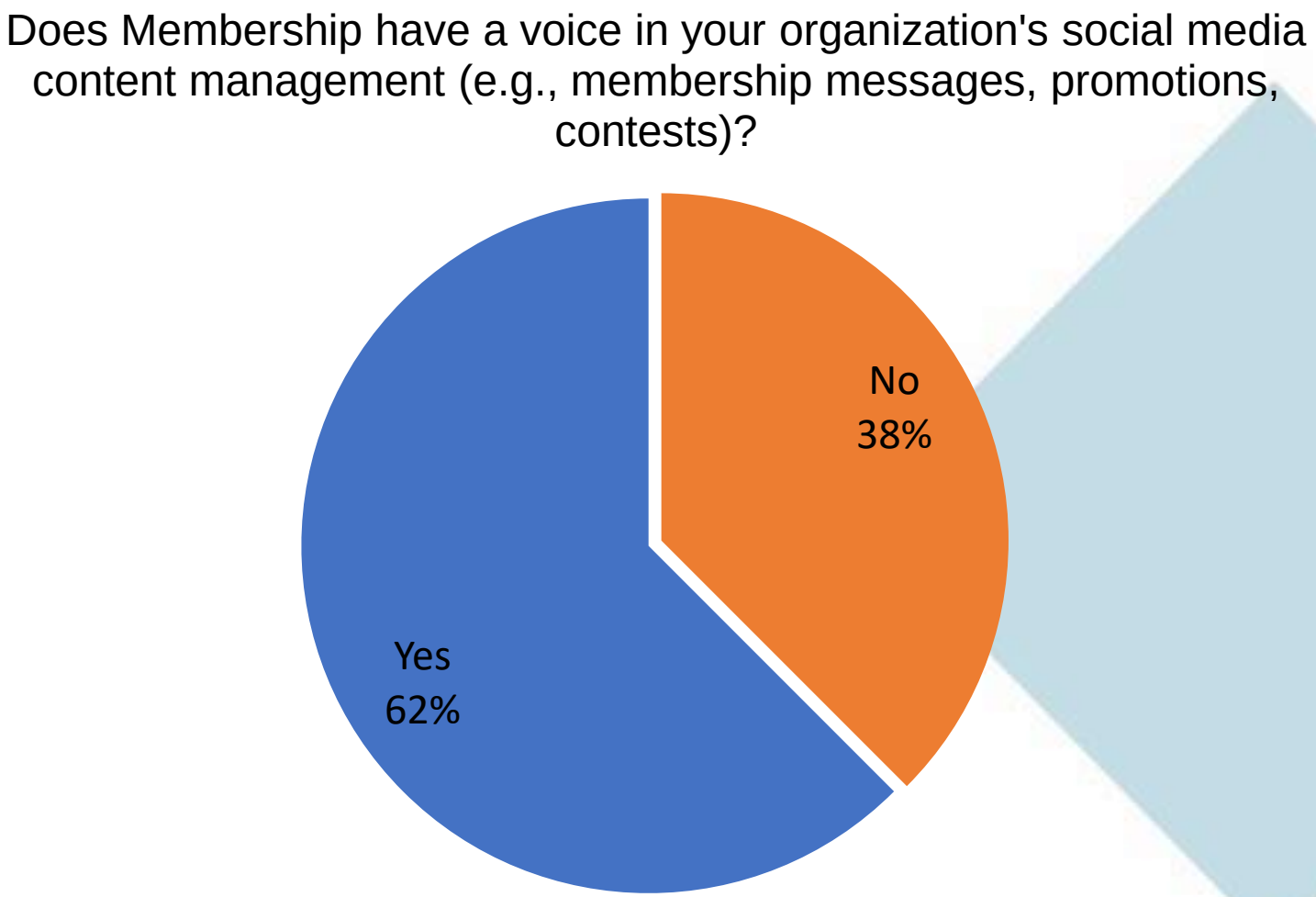


Trends – Digital Media

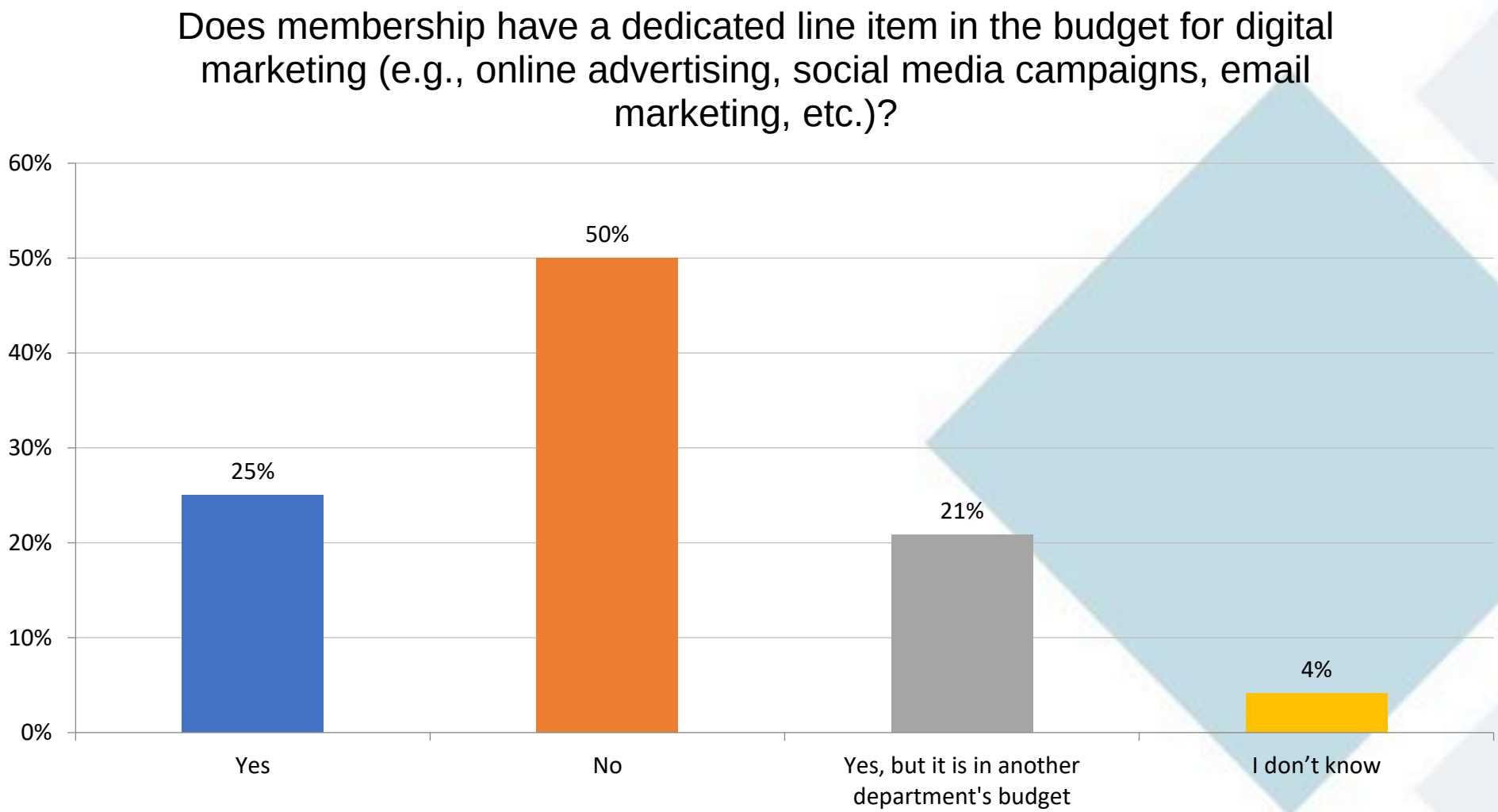
Are you currently able to deliver digital membership cards to your members?



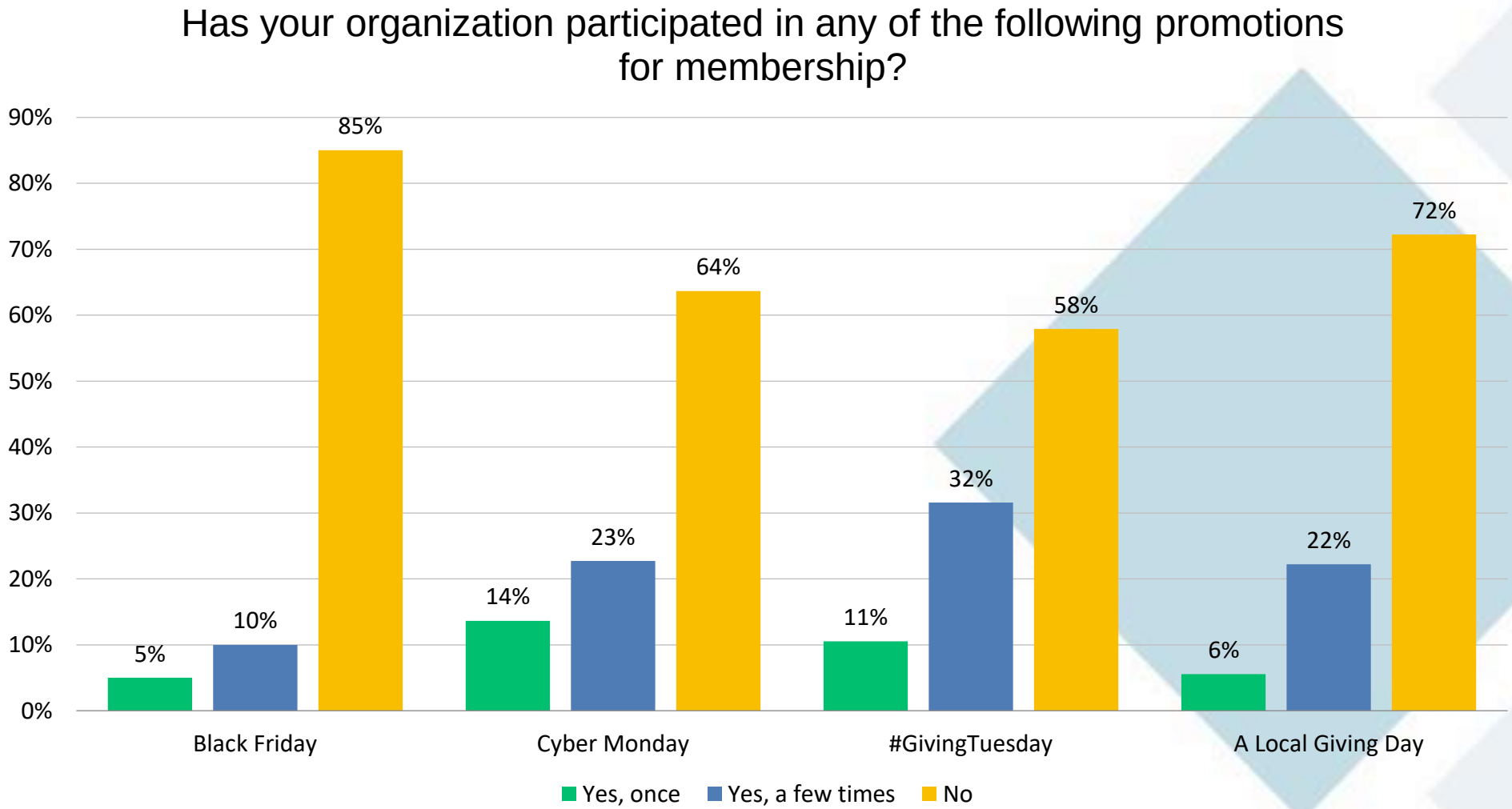
Trends – Digital Media



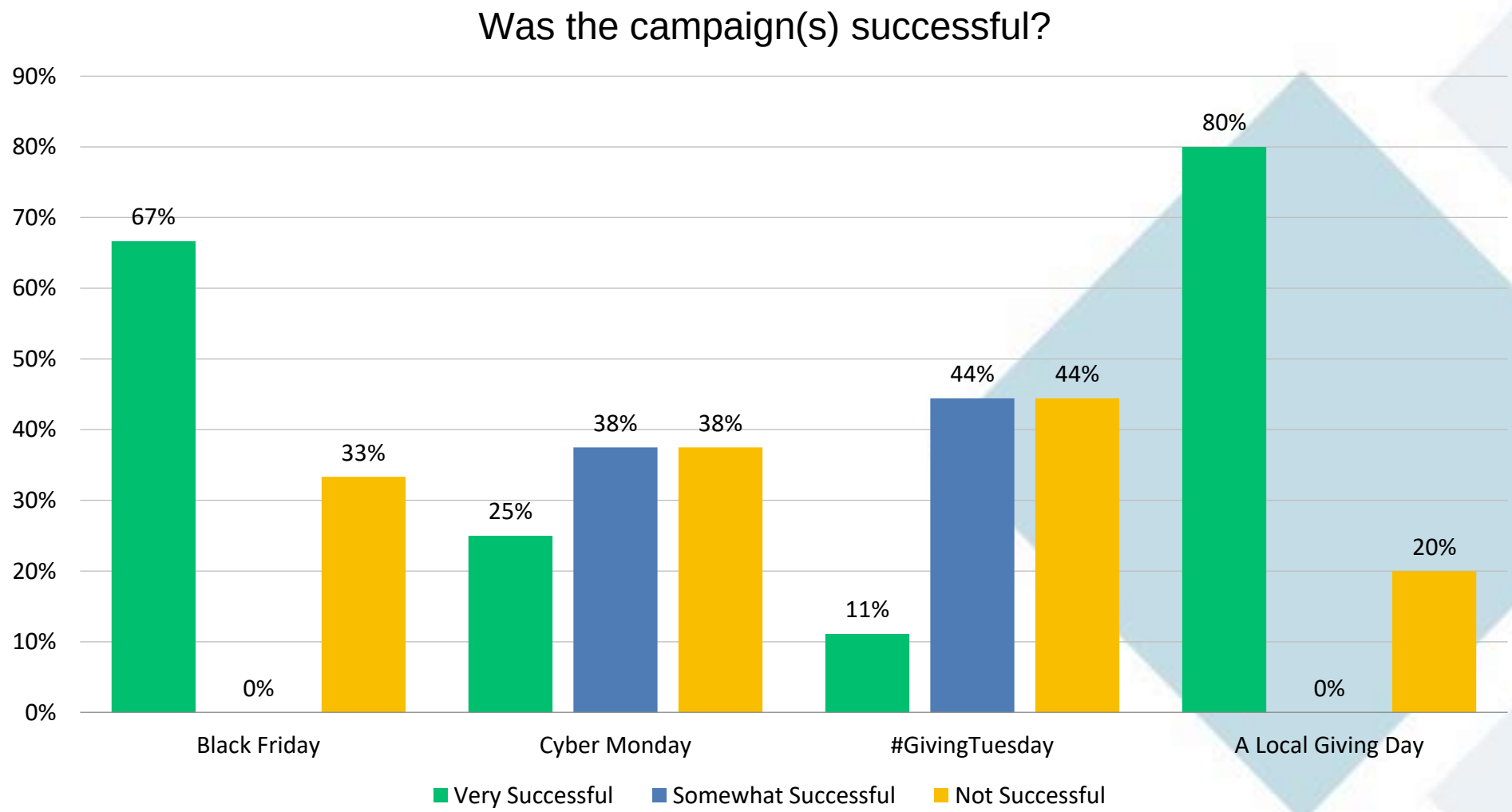
Trends – Digital Media



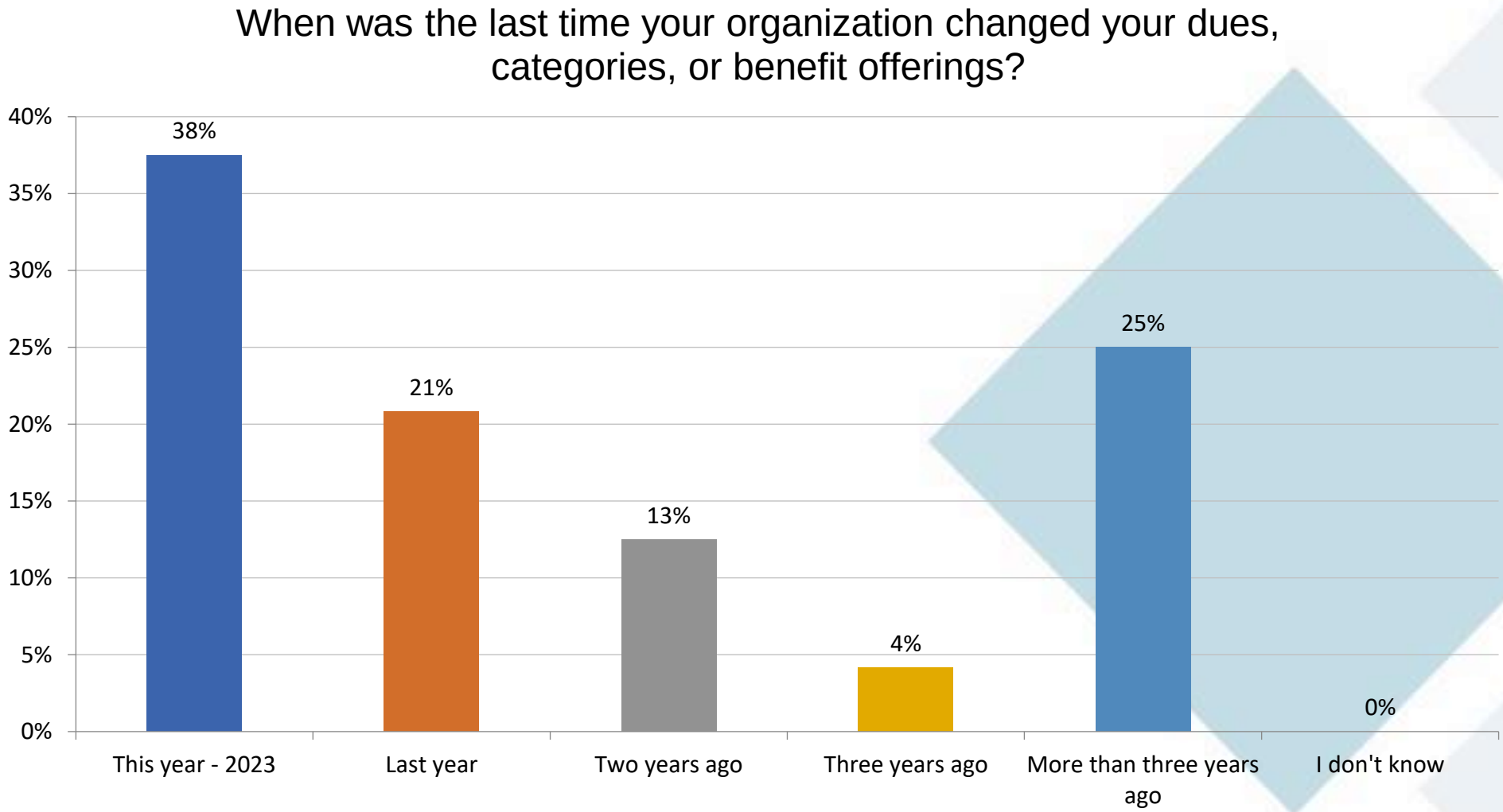
Trends – Digital Media



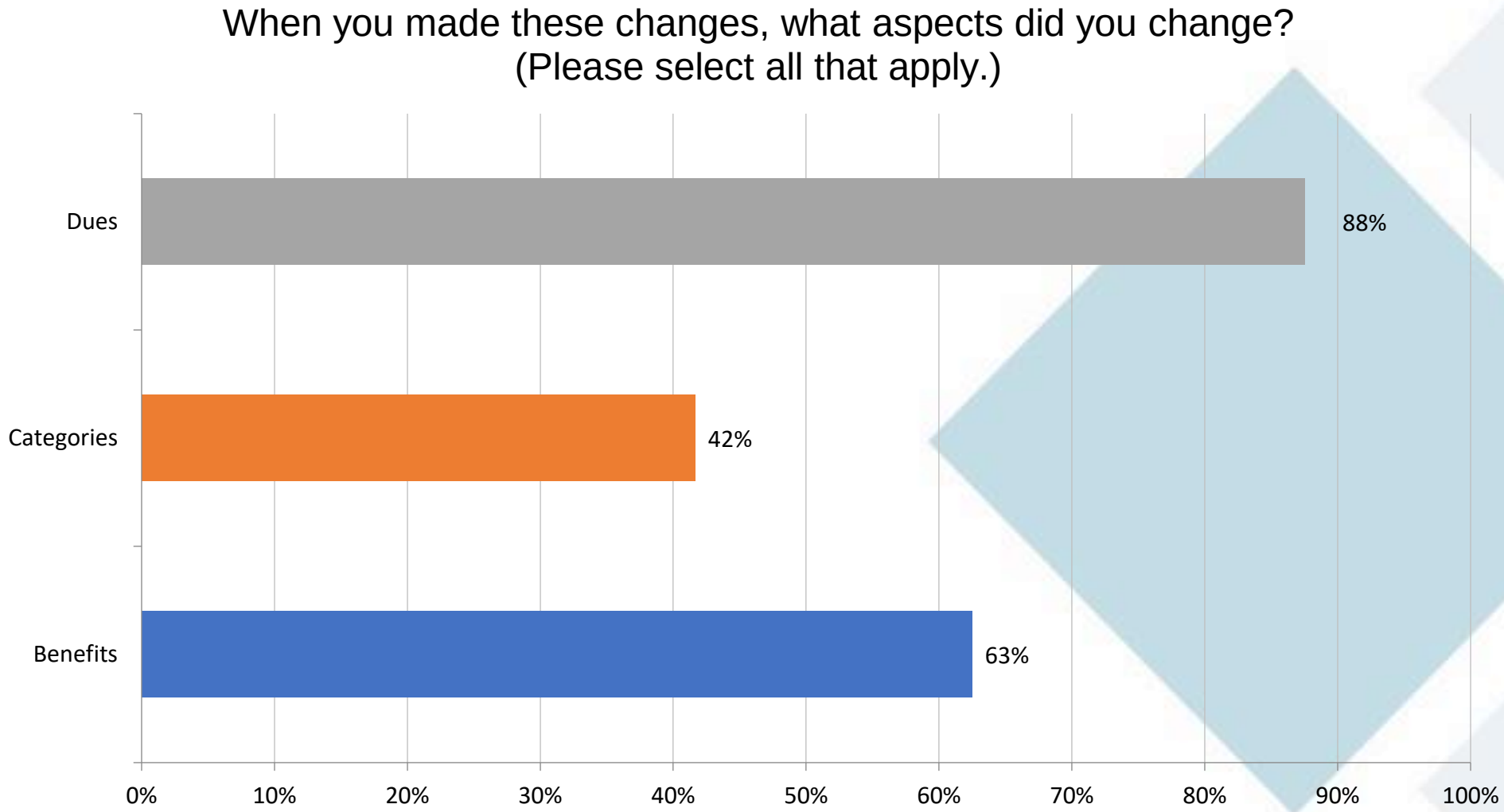
Trends – Digital Media



Trends – Dues, Categories, Benefits

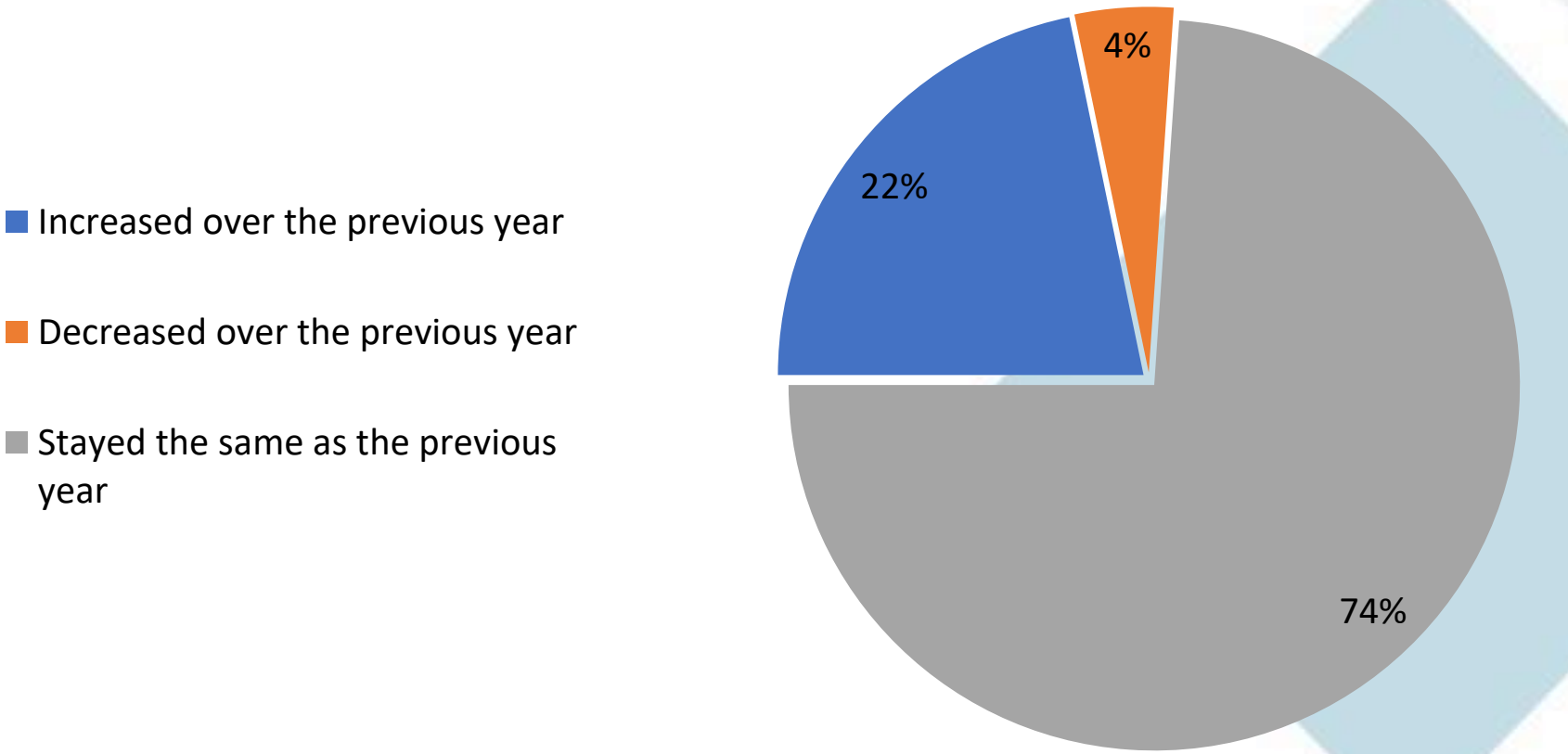


Trends – Dues, Categories, Benefits

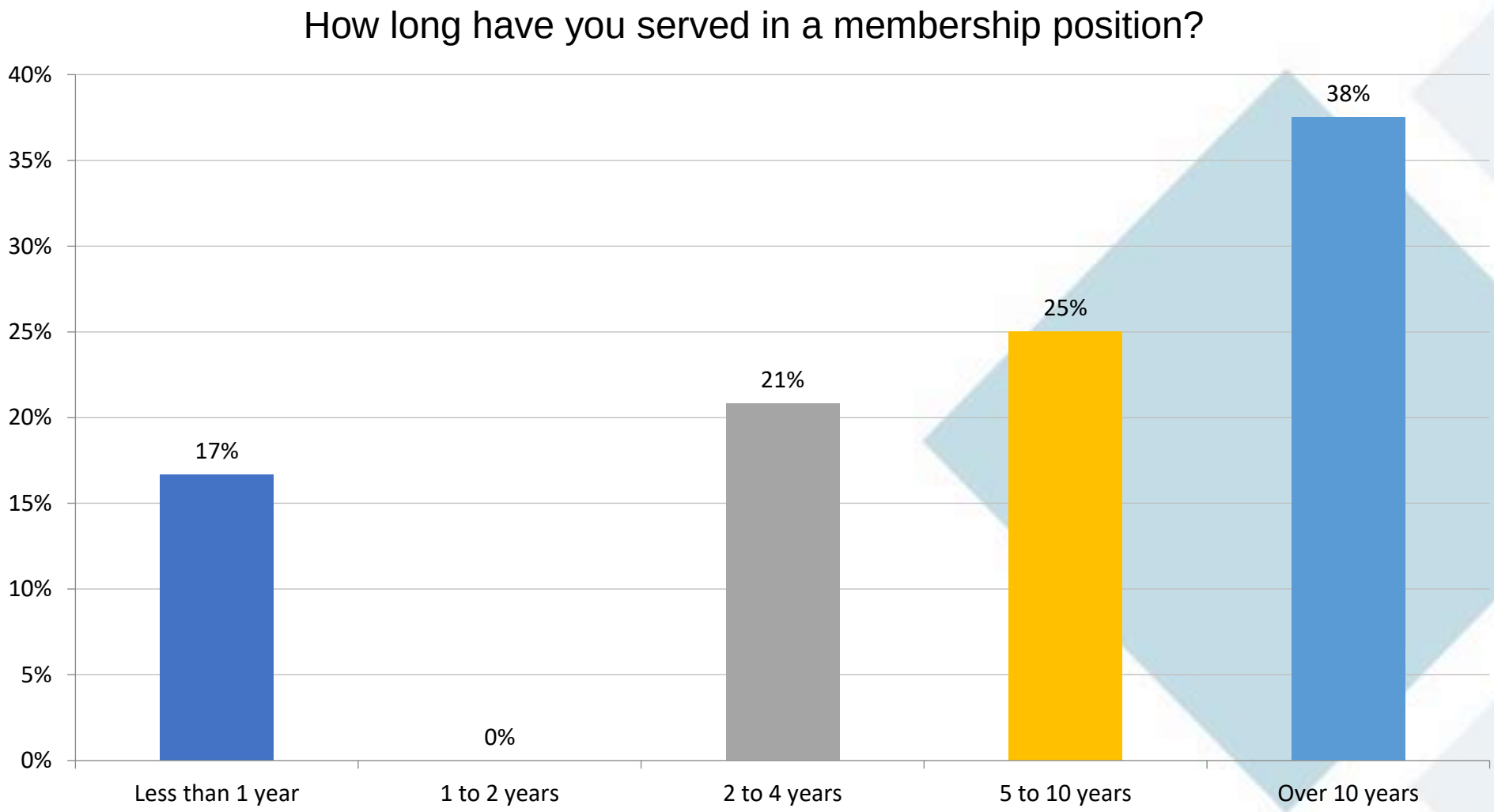


Trends – Staffing & Salary

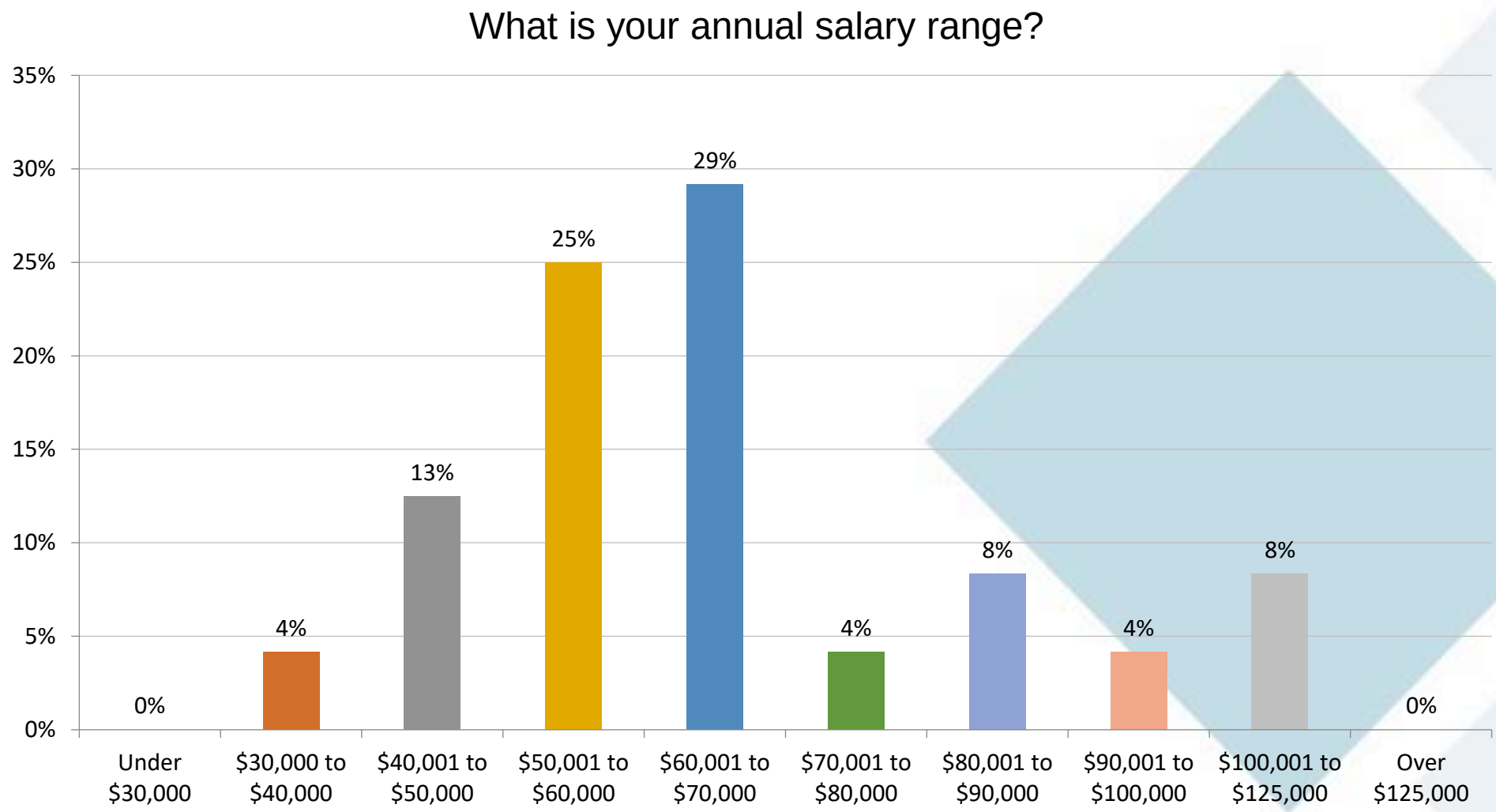
In 2023 year-to-date, staffing levels within the membership department...



Trends – Staffing & Salary



Trends – Staffing & Salary



Highlights – Gardens & Arboreta

Mid-Year 2023

Reported *increase*

- 41% membership totals
- 58% revenues
- 40% expenditure budgets
- 38% new members
- 52% visitation
- 33% renewals

Median Renewal Rate = 67%

Mid-Year 2022

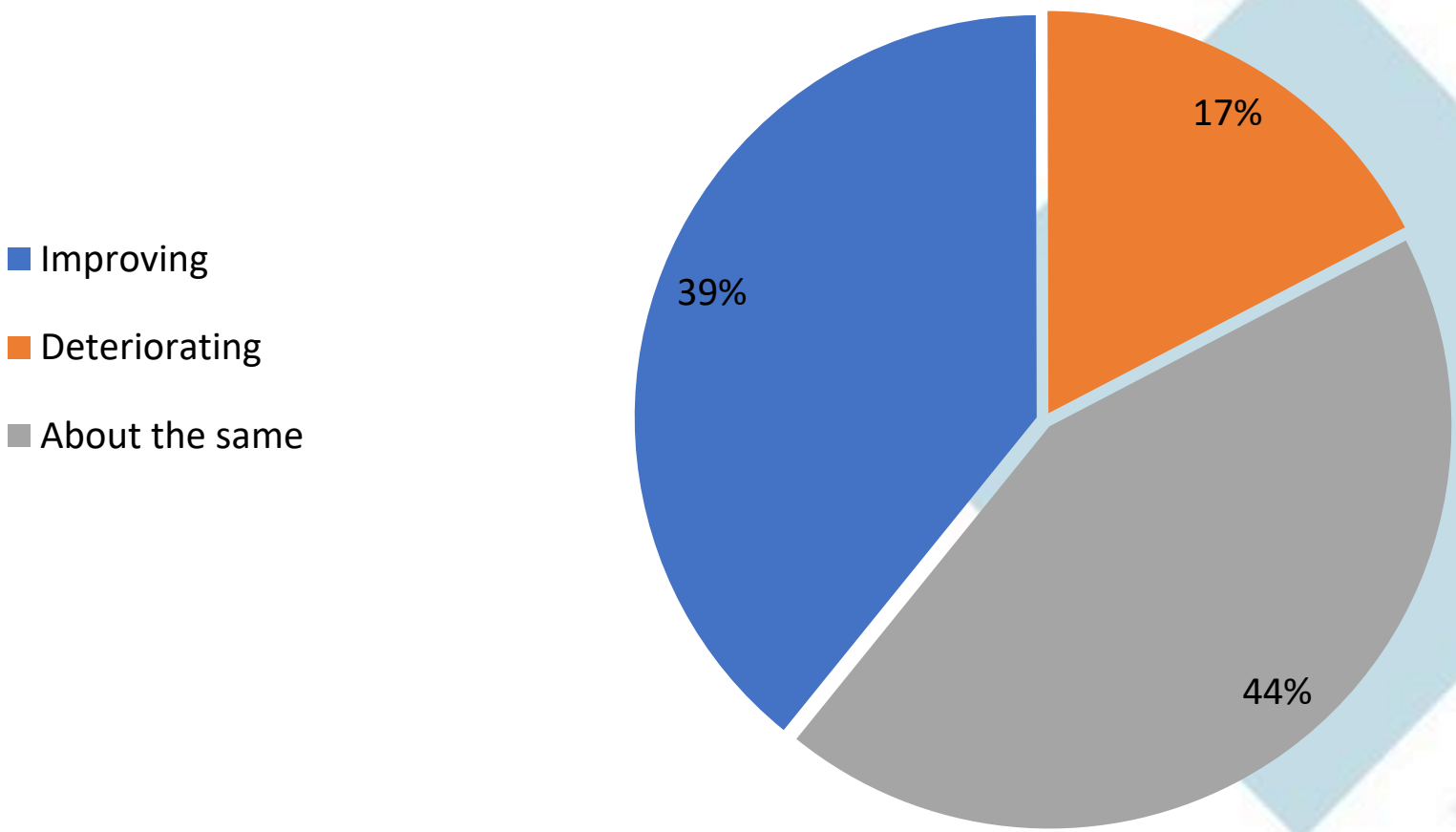
Reported *increase*

- 56% membership totals
- 60% revenues
- 40% expenditure budgets
- 33% new members
- 47% visitation
- 42% renewals

Median Renewal Rate = 62%

Membership Climate

In your professional opinion, comparing 2023 to 2022, the membership climate is...



Going Forward

- Utilize as many tools as possible
- Use Tried and True practices
- Continue to Adopt digital
- Reporting and Trends
- Collaborate with your internal and external partners
- Professional Development
- Share your victories!

Coming Up

Membership Marketing: Strategic Planning for Success Virtual Seminar

January 22-24

https://bit.ly/MemSeminarJan24

Pulse of Membership Year-End 2023 survey out soon! Join our email list for participation invite!

https://bit.ly/SignUpforMC

Top Take-Aways to Guide Your Fundraising Strategies

1. Rebalance – a bit – Your Portfolio of Funding Sources and Donors

- Pursue all sources, remembering individuals and their foundations still make up 85% of giving
- Go where the money is

Top Take-Aways to Guide Your Fundraising Strategies

2. Partner with Individual Donors to Optimize Giving Options and Potential

- Outright cash, multi-year pledges, planned/legacy, stocks, bitcoin, real property, trusts, and more
- Know all the options, help donors explore what's best for them

Top Take-Aways to Guide Your Fundraising Strategies

3. Partner with Corporations to Diversify and Optimize their Support

- Beyond just philanthropy to corporate sponsorships, cause-related marketing, CSR/ESG, advertising and promotion, employee and client entertainment, employee giving and matching, and volunteer leadership

Top Take-Aways to Guide Your Fundraising Strategies

4. Explore Multiple Funding Options in Partnership with Other Organization Executives

- An organization's revenue sources fluctuate
- Work with leadership to manage fluctuations
- When it comes to philanthropy, plan how to approach donors, structure gifts

Top Take-Aways to Guide Your Fundraising Strategies

5. Diversify Revenue and…

Diversify Messaging and Positioning, Fundraising Priorities, Prospect and Donor Base, Volunteer Leadership

- Show sustainability and strength
- Be transparent about financial position
- Prioritize initiatives with greatest impact
- Engage leadership to access new donors and champions

Top Take-Aways to Guide Your Fundraising Strategies

6. Build the Case for Short- and Long-term Funding

- Identify resources needed
- Communicate to donors in a compelling way

Top Take-Aways to Guide Your Fundraising Strategies

7. Consider the Opportunity for Building Endowment

- Donors want organizations to be sustainable, able to weather economic and societal storms

Top Take-Aways to Guide Your Fundraising Strategies

8. Be Patient and Persistent

- Build long-term relationships
- Stay in contact – in good times and bad
- Don’t apologize when asking

Top Take-Aways to Guide Your Fundraising Strategies

9. When in Doubt – Ask!

- History, research, instincts only get us so far
- If you don't know – go to the source
- Make donor part of the process
- Working together produces best results

For downloads and to purchase complete report http://givingusa.org/

Thank You!

Richard Tollefson
tollefson@phoenixphilanthropy.com
www.phoenixphilanthropy.com

Dana Hines
Dana@Membership-Consultants.com
www.membership-consultants.com