



**2023 RNL NATIONAL
DONOR ENGAGEMENT
WORKSHOP** July 26-27

WELCOME



FY23 Fundraising Year in Review and Predictions for FY24



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2022: American Giving

64% \$319.04 billion

Giving by Individuals

↓ declined by 6.4% over 2021

21% \$105.21 billion

Giving by Foundations

↑ increased 2.5% over 2021

9% \$45.60 billion

Giving by Bequest

↑ increased 2.3% over 2021

6% \$21.08 billion

Giving by Corporations

↑ increased 3.4% over 2021



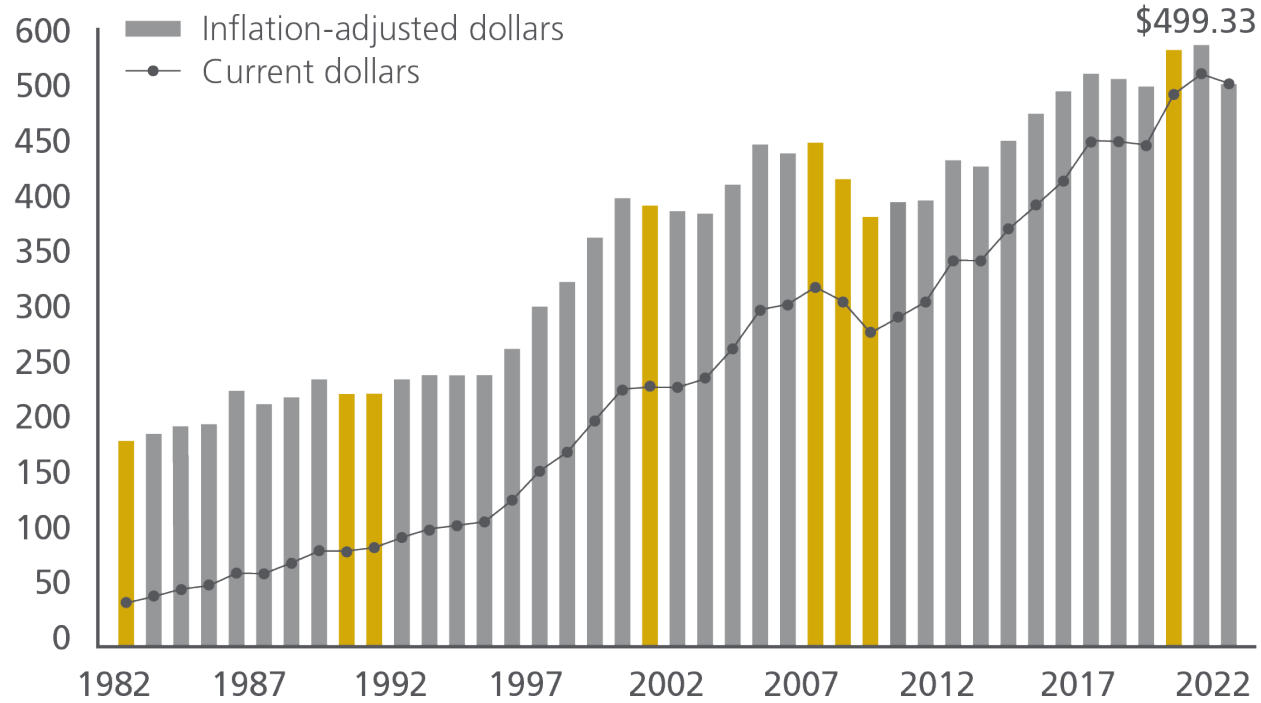
While giving by individuals continues to grow over time, it has fallen below 70% of all giving for the fourth consecutive year.

Foundations are growing as a share of giving over time. In 2022, over \$1 out of every \$5 that went to charity came from a foundation.

*All figures on this infographic are reported in current dollars unless otherwise noted. Inflation was especially high in 2022, at 8.0%, and results may differ when adjusted for inflation. Learn more in the chapters.

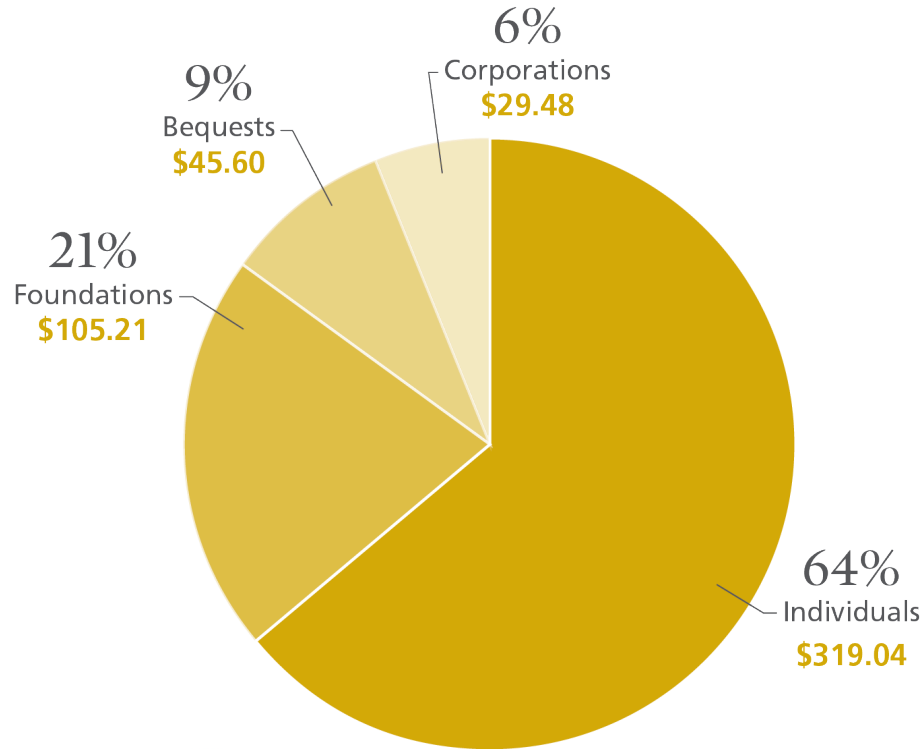
Total giving, 1982-2022

(in billions of dollars)



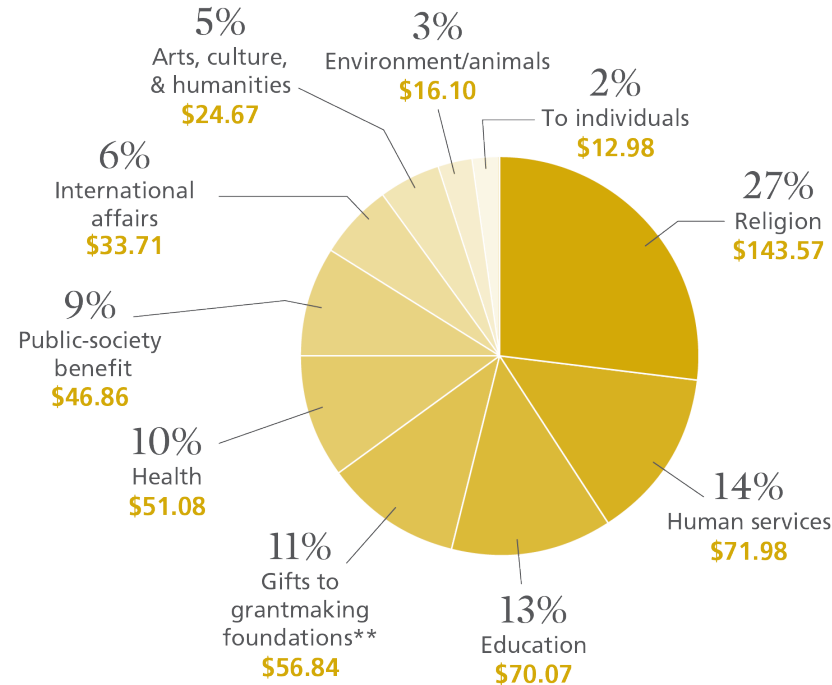
2022 contributions: \$499.33 billion by source of contributions

(in billions for dollars – all figures are rounded)



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.



But, let's be careful here.

Candid.

Philanthropy News Digest

[Home](#) > [Philanthropy news](#) > [Damar Hamlin GoFundMe page raises more than \\$9 million](#)

Damar Hamlin GoFundMe page raises more than \$9 million

February 12, 2023

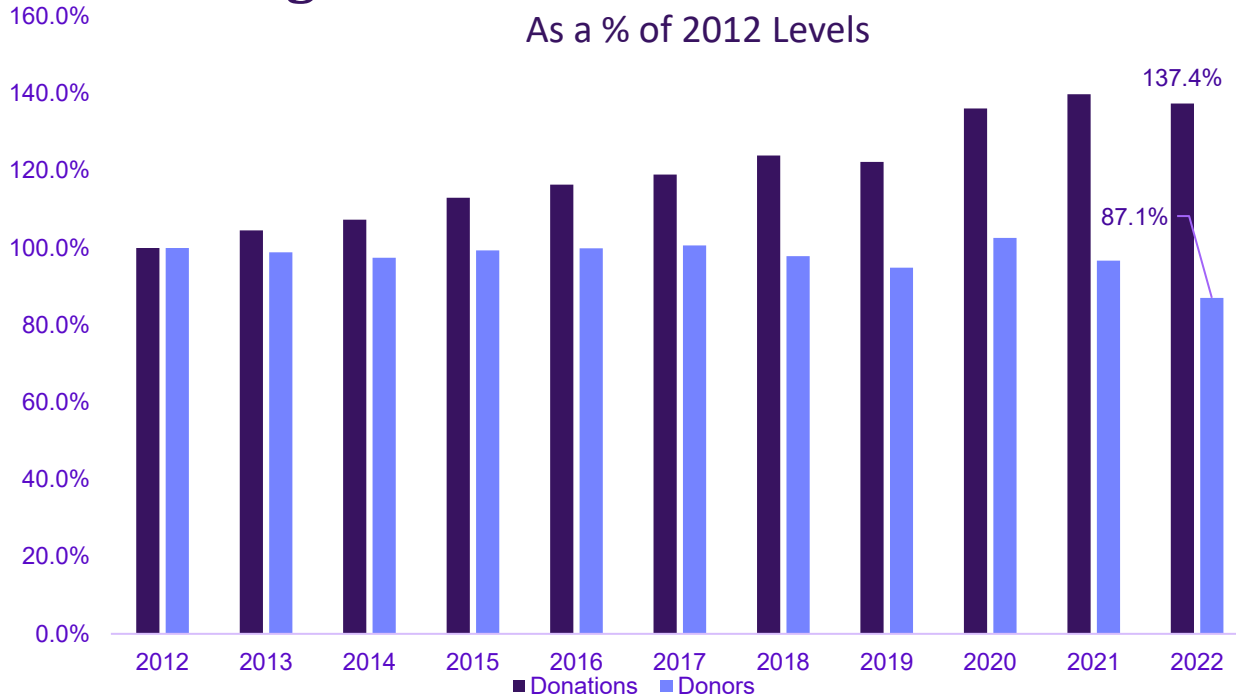
One month after Damar Hamlin almost died of a cardiac arrest during a football game against the [Cincinnati Bengals](#), the 24-year-old [Buffalo Bills](#) defensive back's [fundraising page](#) has received more than \$9 million in contributions, the [Rochester Democrat and Chronicle](#) reports.

Hamlin created the [GoFundMe](#) page in 2020 to benefit a community toy drive at Kelly and Nina's Daycare Center —operated by Hamlin's mother, Nina—in McKees Rocks, Pennsylvania, near Pittsburgh. Hamlin, who attended the [University of Pittsburgh](#), began the fundraising effort through his Chasing M's Foundation with an initial goal of raising \$2,500. To date, more than 247,000 donations have been made to the fund.



Long Term Trend in Dollars and Donors

As a % of 2012 Levels



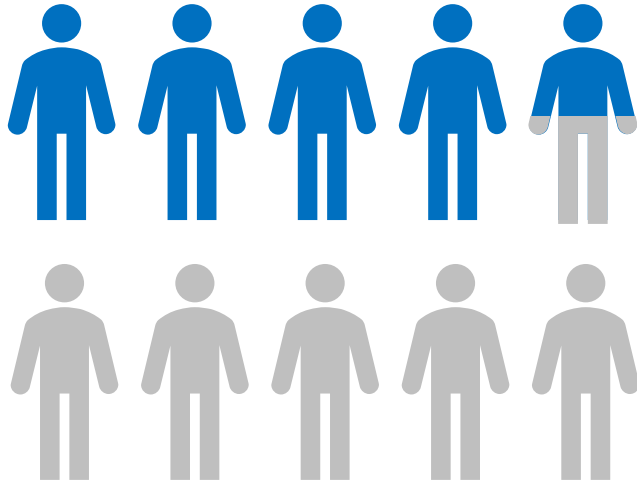
Key Takeaways

There is a long-term trend of fewer donors donating more money

Contributing Factors:

- Continued widening of the wealth gap
- Continued Expansion of the number of nonprofits
- Expansion of ways to give
- Cost to acquire and retain donors has risen

2022 Overall Donor Retention



43%

↓ -3.5%
YOY Change

New Donor Retention 2022



19%

↓ -17%
YOY Change

Repeat Donor Retention 2022



58%

↓ -5%
YOY Change

Recapture Rate 2022



4%

↓ -15%
YOY Change

2



FY2022 + 23: Higher Education Giving


Figure 1: Estimated Voluntary Support of Higher Education by Source and Purpose, 2021 and 2022ⁱⁱ
(Dollars in Millions)

	2021		2022		Percentage Change 2021 to 2022	
	Amount Raised	Percentage of Total	Amount Raised	Percentage of Total	Current \$	Adj. for Inflation
Total Voluntary Support	\$52,900	100.0	\$59,500	100.0	12.5	4.7
Source						
Alumni	\$12,250	23.2	\$13,500	22.7	10.2	2.6
Nonalumni Individuals	8,800	16.6	9,500	16.0	8.0	0.5
Organizations	31,850	60.2	36,500	61.3	14.6	6.7
Purpose						
Current Operations	\$32,300	61.1	\$34,250	57.6	6.0	-1.3
Capital Purposes	20,600	38.9	25,250	42.4	22.6	14.1

Alumni Donor Count (VSE)

	2019 to 2020	2020 to 2021	2021 to 2022	2019 to 2022
<i>Up</i>	19.7%	54.6%	26.2%	18.9%
<i>Down</i>	80.3%	45.4%	73.8%	81.1%
<i>N=</i>	737	727	687	667

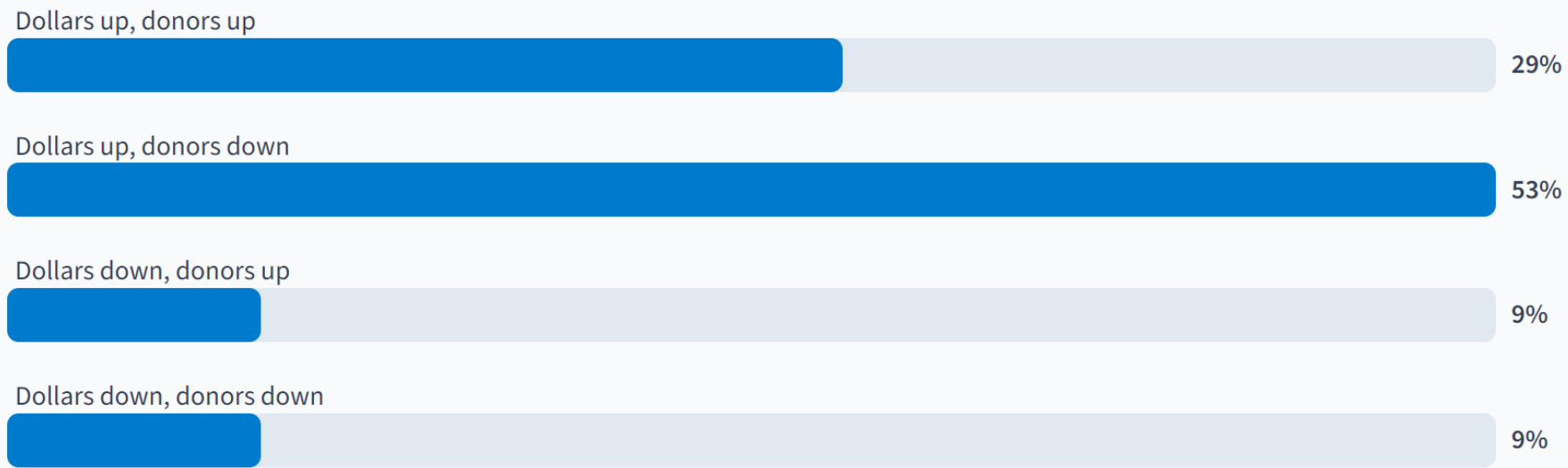
So...anyone feel lonely?

A group of four people (three men and one woman) are sitting around a table in a meeting room, looking at laptops. The scene is dimly lit with blue tones. The text is overlaid on the right side of the image.

**Poll:
How were
your results?**

RNLvoices.com

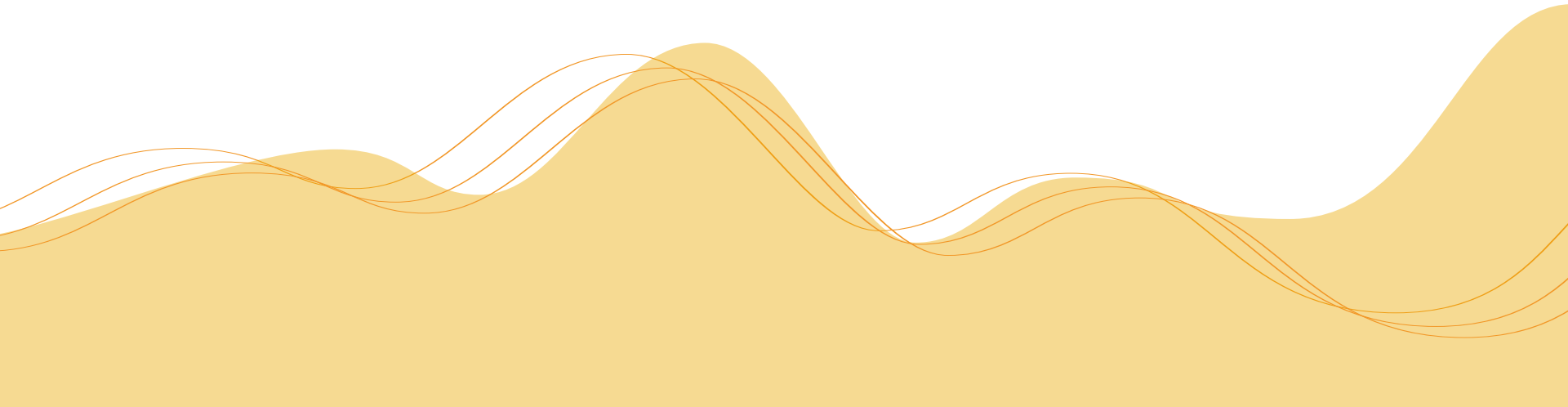
How were your FY23 results?



3



2023: Trust and Temperature



Trust in Higher Education is Declining

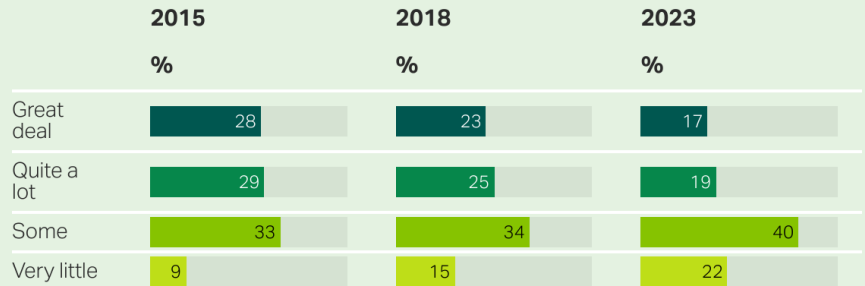
...Fast

A Gallup poll shows only 36% of Americans have “a great deal” or “quite a lot” of confidence in higher education.

- down by 20 percentage points from eight years ago.*

Americans' Confidence in Higher Education Continues to Fall

Now I am going to read you a list of institutions in American society. Please tell me how much confidence you, yourself, have in each one -- a great deal, quite a lot, some or very little. **Higher education**



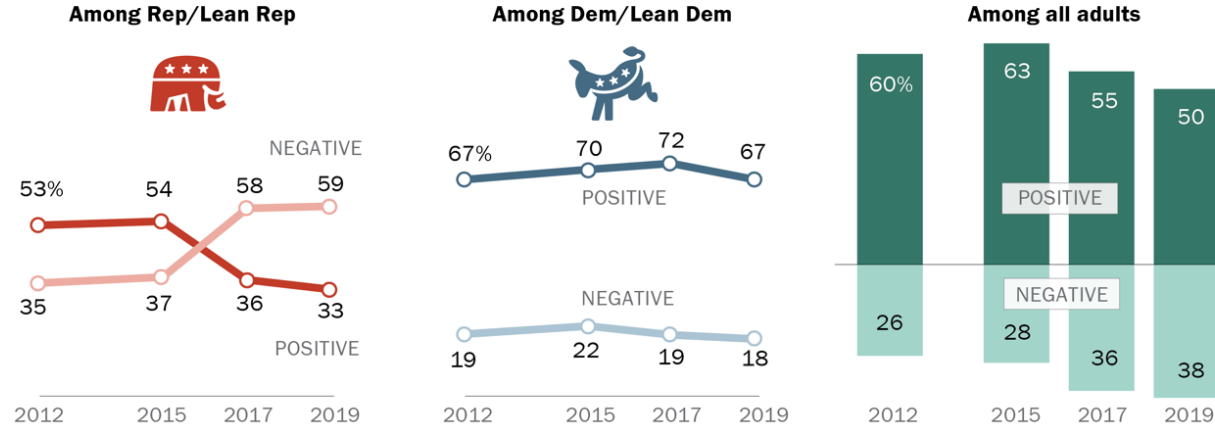
Those with no opinion are not shown.

GALLUP

We are becoming more polarized

Increase in the share of Americans saying colleges have a negative effect on the U.S. is driven by Republicans' changing views

% saying colleges and universities have a positive/negative effect on the way things are going in the country



Note: Share of respondents who didn't offer an answer not shown.

Source: Pew Research Center surveys of U.S. adults conducted by telephone July 10-15, 2019, June 8-18, 2017, Sept. 16-Oct. 4, 2015, and Feb. 8-12, 2012.

PEW RESEARCH CENTER

State of Advancement

So, how's that young alumni giving?

Figure 7: Alumni Support and Participation by Graduation Cohort, 2022

	<u>Percentage of \$</u>	<u>Percentage Who Gave</u>
0-5 Years Out	0.6%	6.4%
6-10 Years Out	0.9%	5.3%
11-20 Years Out	4.7%	5.5%
21-30 Years Out	8.1%	8.1%
31-40 Years Out	20.8%	10.1%
41-50 Years Out	22.2%	12.5%
50+	37.8%	14.6%
Non-Degreed	5.0%	2.1%
N = 200		

An intense national conversation

The courts, elections looming, state issues continue



Evolving External Circumstances

- #of states with new fundraising regulations
 - Governed by states when federal oversight lacks
- Scrutiny on privacy and security
 - PCI, Texting, etc.
 - HIPAA, FERPA
- Politicization/polarization
 - DeSantis goes after accrediting bodies
 - DEI
- Leadership turnover
- Preparing for Unknown
-

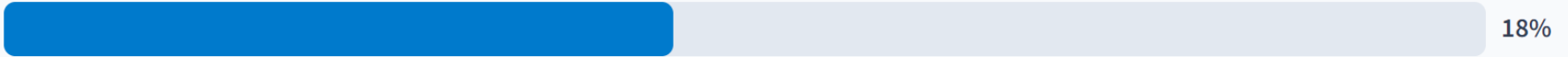
A group of people are seated around a table in a meeting room, looking at laptops. The image is overlaid with a semi-transparent blue filter. Large white text is centered on the right side of the image.

**Poll:
Is inclusion a
topic in your
advancement
shop?**

RNLvoices.com

Is inclusion a topic in your advancement shop?

It's a major topic.



It's a significant topic.



It's not much of a topic.

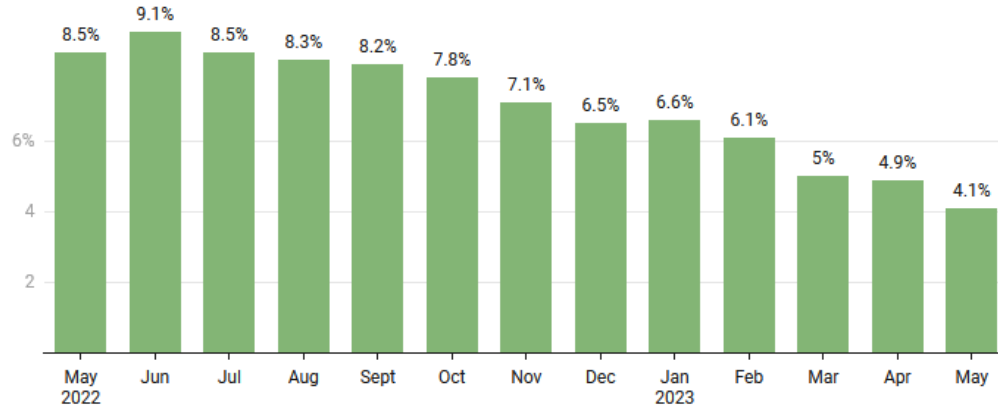


The economy is...

Getting better?

Consumer Price Index

Year-over-year change



Note: Seasonally adjusted

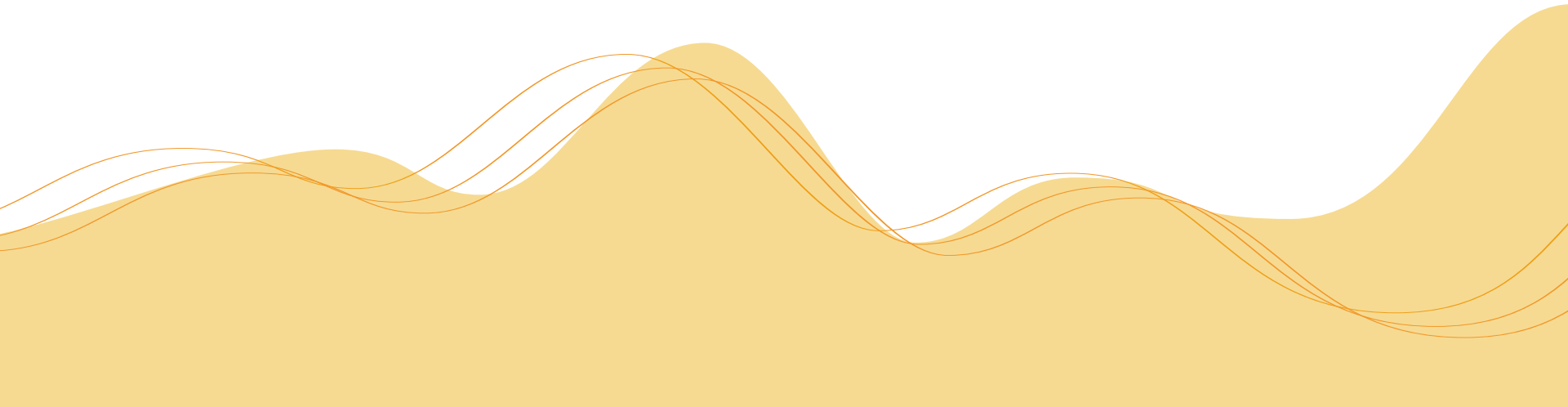
[Get the data](#) • Created with [Datawrapper](#)

- **Unemployment** still at historic low.
- Wages relatively **stagnant**.
- **Student loans** set to un-pause in October – maybe?
- **Loan cancellation** off the table – maybe?
- CPI is national, and weighted heavily by **major commodities**.

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2023: Key Topics and Trends



The bombshell...maybe?

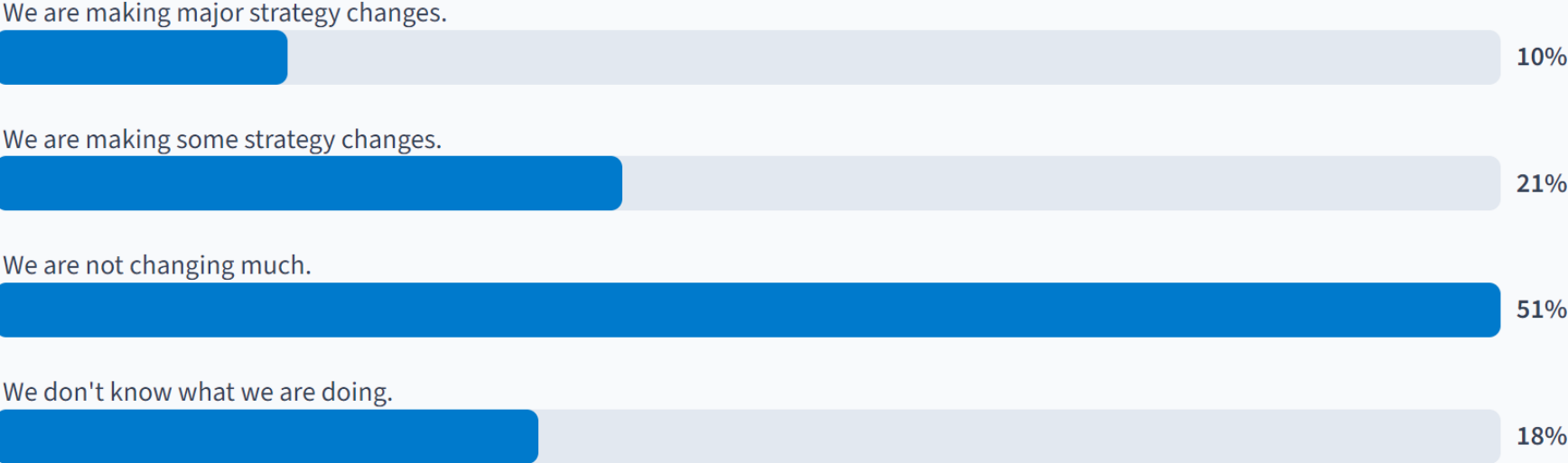




**Poll:
What are you
doing about
APR?**

RNLvoices.com

What are you doing about APR? (alumni participation rate)



A woman with glasses, wearing a business suit, is sitting at a desk with a laptop. She has her hand to her chin, appearing to be in deep thought. The background is a blurred office setting with a plant and a window. The entire image has a blue tint.

Poll:
**What are the
top goals in
your shop?**

RNLVoices.com

Poll:

What are the top goals in your shop?

Summary

Response	Count
Growing annual giving dollars	65
Growing pipeline to major gifts	62
Growing leadership giving	52
Growing major or planned gift commitments	40
Growing participation statistics	38
Completing a campaign	30
Growing donor rolls	30
Diversifying our donor base	28
Building our talent	21
Total	366

5



FY2024: Our Predictions

Key Trends For FY 24

(Tell us what you think live on the app)

- Artificial Intelligence
- New Metrics
- Leadership Giving
- Inclusion
- Engagement / AEM
- Staff and Talent
- Budgets and The Cliffs



Greta's Predictions

~6 out of 10



Universities that keep their current business models will survive/thrive in 10 years.

- A dedicated focus on WOMEN will move the needle – on every level of your donor pipeline
- Non-profits will seek talent with transferrable skills from outside the industry
- More institutions will start to use terminology like venture philanthropy/impact investing in 2024
- The new presidential term is 5 years – max
- Diversity and Inclusion will be under siege
- New metrics will be about movement

Brian's Predictions

- AI is gonna be a thing.
- You will develop new metrics.
- Leadership donors will receive more focus.
- You will spend more time describing your donor base than counting their heads.
- Impact investment, venture philanthropy, giving circle...
- You are less likely to argue with a provost about an Excel spreadsheet.
- You will spend more time with volunteers.
- Congrats, you're planning a second giving day!

104%



*chance that you
will use the word
pipeline weekly
next year.*

Thank You

Let's keep talking.

Connect with RNL on LinkedIn,
and share with us what you'd like us to be talking about in the coming year.

