

**LIBERTY COMMON SCHOOL
BOARD OF DIRECTORS MEETING
BUSINESS MEETING**

February 29, 2024

Liberty Common School- Aristotle Campus
2130 West Horsetooth Drive Fort Collins, CO

PLEDGE OF ALLEGIANCE

CALL TO ORDER

- Approve agenda 6:00PM

STAFF AND COMMUNITY COMMENT – (Two-minute limit per person)

ROUTINE BUSINESS

- Approve Minutes – Regular Meeting – January 25, 2024
- Approve Minutes – Special Meeting – February 6, 2024
- Approve Minutes – Special Meeting – February 13, 2024

DEPARTMENT REPORTS

- Academic Support Team –

ADMINISTRATION REPORT

- Headmaster Report – Mr. Schaffer

UNFINISHED BUSINESS

- 2024 Board Election Update – Ms. Timpe
- Fine Arts Proposal – Vote – Ms. Barber

NEW BUSINESS

Executive Session per C.R.S. §24-6-402(4)(a) Concerning potential real estate transactions.

- Expansion Asset Options Update – Mr. Kast

NEW BUSINESS (cont'd)

- Resolution to Clarify and Simplify Board Service Eligibility Policy 2.5 – First Reading – Mr. Arndorfer
- Resolution to Amend Literature Acquisition Policy 7.14 – First Reading – Ms. Barber
- Assign Lead to Review Liberty's Policies for Providing a Safe Place for Learning, Teaching and Gathering with Respect to Bullying and Harassment – Mr. Arndorfer

SUB-COMMITTEE REPORTS

- Security Committee – Mr. Dollar
- Academic Advisory Committee – Ms. Barber
- Advancement Committee – Ms. Skalicky
- Financial Accountability Committee – Mr. Dollar
- Policy Committee – Mr. Albright
- Governance Committee – Mr. Arndorfer
- Parent Education Committee – Ms. Story
- Building Corporation and Expansion Committee – Mr. Arndorfer

TOP THREE ITEMS FOR COMMON SENSE NEWSLETTER

- Ms. Barber

NEW BUSINESS (cont'd)

Executive Session per C.R.S. §24-6-402(4)(f) For a briefing with the Headmaster on a pending legal matter.

ADJOURN

Liberty Common School



Academic Support Team BOD Report

- *Katie Snyder (LCS – Aristotle) & Matt Kazy (LCS – Plato)*
- *Janice Garland (LCHS)*

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Program Guiding Philosophy

Program Guiding Philosophy

LCS Mission Statement:

“The Liberty Common School Academic Support Team, in collaboration with parents and teachers, will provide targeted academic support and intervention to ensure all Liberty Common students have access to the contextual body of organized knowledge, the values of a democratic society, and the skills of learning taught at Liberty Common School.”

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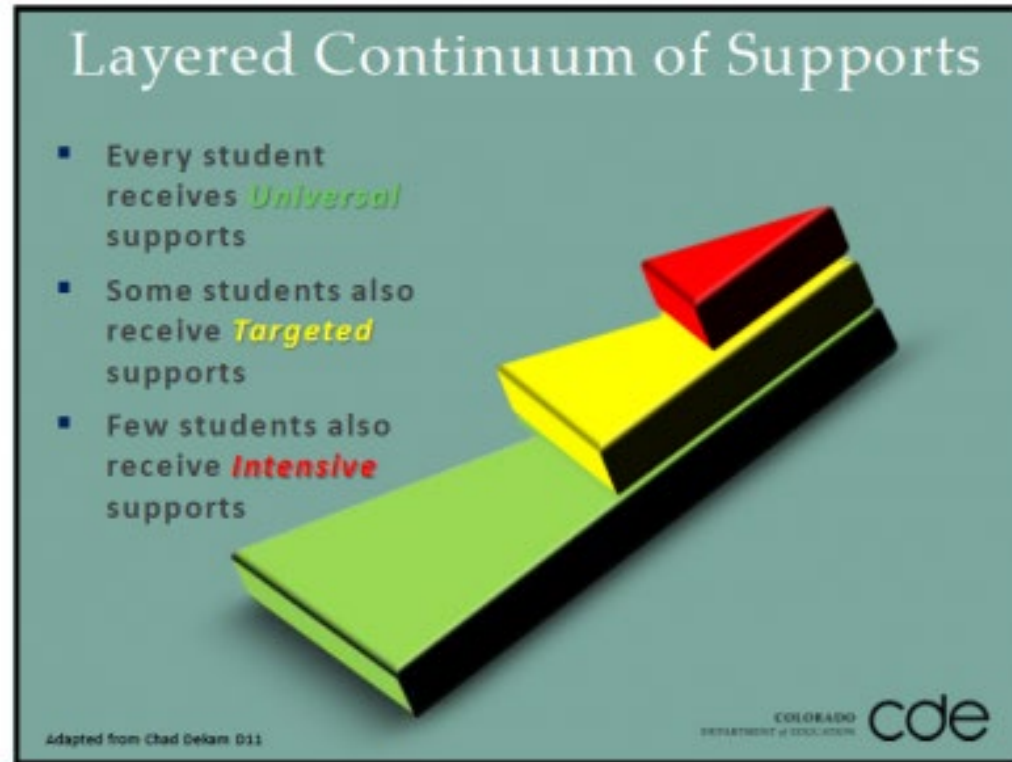
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Program Guiding Philosophy

Foundational Beliefs:

- All students can learn and achieve at high levels.
Student's needs should be met in the general education setting to the greatest extent possible.
General education teachers are essential to identification, intervention and academic support of students.
Parents have vast knowledge about their children and should be involved in all aspects of their education.
Students should be assisted when concerns arise before problems grow.
The effectiveness of any educational strategy must be monitored and evaluated frequently.
All students are best served when the school properly implements a multi-tiered system of supports.
- “Multi-Tiered System of Supports (MTSS) is a systemic, continuous improvement framework in which data-based problem-solving and decision making is practiced across all levels of the educational system for supporting students. The Individuals with Disabilities Education Act (IDEA 2004), supports implementation of a Multi-Tiered System of Supports because it has proven to be effective in accelerating learning for all students, including students with disabilities. When the MTSS framework is implemented with fidelity, students' educational needs are more intentionally addressed by designing, developing, and delivering needed, appropriate supports. How students

Multi-Tiered System of Supports



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Multi-Tiered System of Supports- Elementary

Tier I – Classroom teachers teach all students and provide a research-based curriculum including Core Knowledge, Singapore Math, Shirley Grammar, Getty-Dubay penmanship.

All students are assessed at least twice per year using NWEA and/or AIMSweb benchmark testing.

Tier II – Classroom teachers look at a body of evidence to identify struggling students. The body of evidence includes classroom grades, NWEA scores, STAR scores, AIMSweb scores, etc.

Interventions and supports are started in the classroom and at home by the classroom teacher and parents. These may include Moby Max, Read Naturally, Reflex Math, Lexia Core 5, behavior plans, study skills groups, etc.

Tier III – Intensive, targeted intervention administered by the Academic Support Team outside of the general education classroom. Therefore, prior to a student being approved for services, grade-level teams discuss student data in their regular problem-solving meetings and make recommendations through their STAT representative.

STAT Process - STAT representatives present cases to the team. When students are approved for Tier III services, they are placed in a content specific booster (i.e. writing, math, reading, etc.) and pulled from ELO or Study Hall to receive instruction from AST staff. Progress is monitored on a weekly basis in order to evaluate the effectiveness of the intervention.

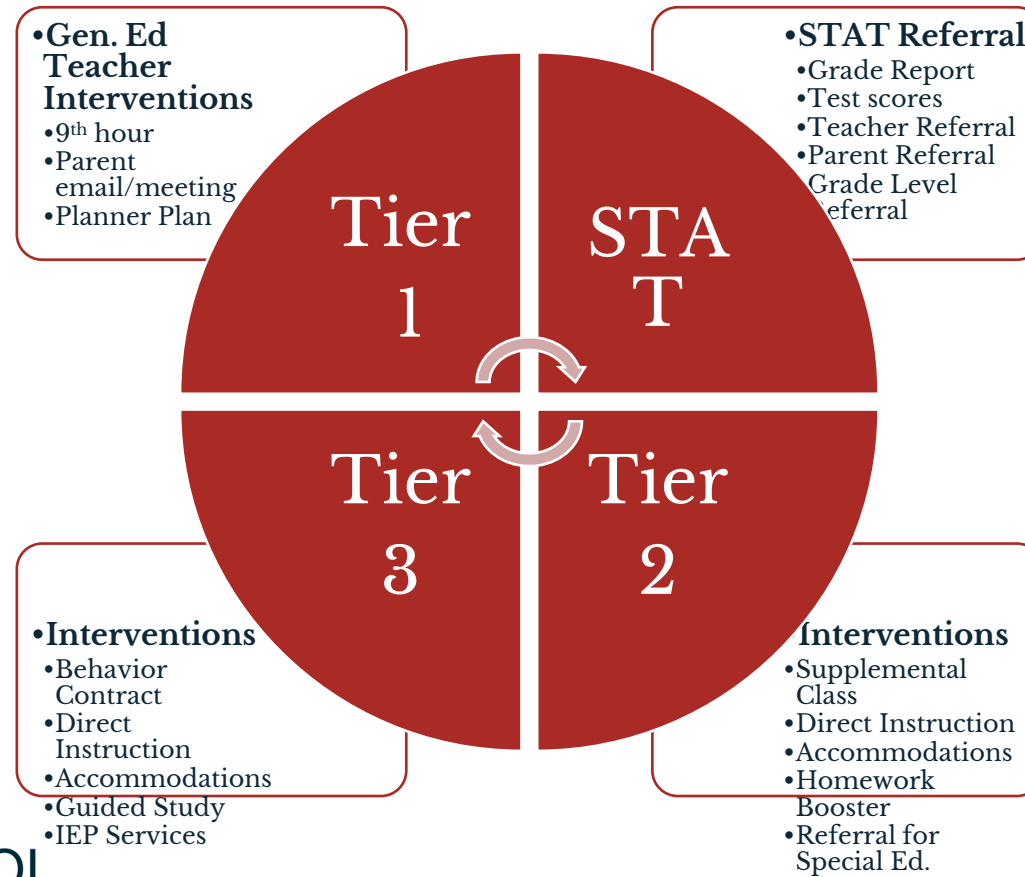
Interventions - Some interventions that are used include, but are not limited to, the following:

- Reading Interventions: *Lindamood LIPS, Seeing Stars, and Visualizing & Verbalizing, Phonics Pathway, Moby Vocabulary, Phonics Q, LETRS, West Virginia Phonics, Lexia Core 5*
- Math Interventions: *Singapore Math Strategies, Moby Math, Reflex Math, Cloud 9, ALEKS*
- Writing/Grammar Interventions: *Writing with Structure and Style, 15-Week Shurley Grammar Intervention, Visualizing & Verbalizing, Moby Language*
- Spelling Interventions: *Lindamood LIPS, Seeing Stars, Phonics Pathways, Spelling Works!*

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Multi-Tiered System of Supports



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Multi-Tiered System of Supports-LCHS

Tier I – Classroom teachers monitor students through Academic Performance, MAPS testing twice a year. Interventions provided by general education teachers include:

- Mandatory 9th hour (assistance with teachers) or peer mentor with NHS
- Parent communication
- Teacher Check- In/ Check-Out
- Planner Plan

Tier II – Referral of the Struggling Student to the STAT team. The STAT team looks at a body of evidence for the struggling student. A Student Snapshot is created with parent and teacher input, academic performance, and standardized assessment data. The body of evidence determines interventions that will be recommended by the STAT team. Tier I interventions and supports are continued by the general education teacher. Additional support will occur as a team with the general education teacher, supplemental teachers and/or parents. These may include:

- Supplemental English or Math Class, 9th hour AST daily check-in, Scaffolding and planning of large projects and assignments.
- Planner Plan, Behavior Contracts, Liberty 101, Writing Lab, Accommodations, ALEKS math program.

Tier III – The Academic Support Team provides the Tier III pull-out or push-interventions. These services include Guided Study classes directed at review and re-teach in English, math and/or organization, Attending class with student, ALEKS math program, Reading Naturally, Daily Planner Checks, Weekly PowerSchool Check, Homework Contracts, Weekly Emails, Quarterly Rubrics, Parent Conferences, Direct instruction in Executive Functioning Skills, and progress monitoring on AST SMART Goals in reading, writing, math, and organization which incorporate student reflections.

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Program Guiding Philosophy

- AST is a service and not a place. It is our hope that all students receiving AST services should be challenged to their full potential. They should be encouraged to strive for achievement, to appreciate growth and skill building, and to foster character development.
- AST identifies students that are in need of additional supports to access the rich and meaningful curriculum in their education. These supports are provided only to the level appropriately necessary and in the least restrictive environment.
- AST serves students on a variety of educational plans (IEP, Section 504, ELL, ALP, Safety Plan); however, a plan is not required to access AST services.
- AST is a collaboration with parents, students and educational professionals that include special education teachers, special service providers (OT, PT, Speech, School Psychologist) math and literacy interventionists, and general education teachers. The goal is to create an Academic Support Team that determines best practices to support students in academic goals and monitors progress of these goals.

Structure of AST personnel and services (K-12)

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Aristotle:

Katie Snyder	AST Coordinator and IEP/504 case manager
Trisha Wadsworth	Literacy Specialist
Kathy Elder	Math Specialist
Bonnie Beach	Resource Teacher/ELL Coordinator
Elizabeth Nelson	Instructional Interventionist (Literacy)
Luke Richardson	Instructional Interventionist (Math)

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Structure of AST personnel and services (K-12)

Plato:

Sandy Stolfus	Principal & District Liaison
Jenna Allen	Assistant Principal - AST administrative
Matt Kazy	AST Coordinator and IEP/504 case manager
Nancy Harmon	Literacy Specialist
Kathy Lovely	Instructional Interventionist (Literacy)
Lisa Murphy	Administrative Assistant, Interventionist, Homework
Booster Lead	
Shey Reinhart	Instructional Interventionist (Literacy)
Becky Scarpella	Instructional Interventionist (Math)
Liam Williams	Behavioral Interventionist

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Structure of AST personnel and services (K-12)

High School:

Kathleen Kearney
Janice Garland
manager

Mackenzie Wiggs
Lynette Krueger
Megan Messaros
Teacher

Liz Jackson
Nicole Ranstrom

Assistant Principal - AST administrative
AST Coordinator and IEP/504 case

Literacy Specialist and ELL
Junior High Resource Teacher
High School Math and Science Resource

Junior High Instructional Paraprofessional
Testing Center Proctor

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Structure of AST personnel and services (K-12)

Special Service Providers/Clinicians: (Contracted through Poudre School District)

Andrea Sosa (Occupational Therapist): directly serves students on IEP's and consults with teachers to help students engage in the specific physical activities that make up the daily life.

Tami O'Malley (Speech Language Pathologist) – directly serves students on IEPs, completes screening assessments, consults with staff, and completes observations.

Michael Crane (School Psychologist) – Consults with each Academic Support Teams regarding special education process, eligibility, relevant testing, and behavioral plans.

Jessica Albers (Physical Therapist) directly provides services for students and consults with teachers to help students engage in the specific gross motor physical activities that make up the daily life.

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Structure of AST personnel and services (K-12)

Student Teacher Assistance Team (STAT):

The STAT team meets regularly to discuss students' needs, recommend general education interventions and determine the optimal allocation of AST resources. This is part of the Multi-Tiered Support System.

Aristotle: Principal Churchill, Katie Snyder and 3 teacher representatives.

Plato: Principal Stoltzfus, Assistant Principal Allen, Matt Kazy, Nancy Harmon, and 4 teacher representatives

High School: Lead Jason Mayer, Assistant Principal Kearney and Reynolds, Janice Garland, Michalla McKenna and 2 High School Teachers and 3 Middle School Teachers.

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Students served:

Students Served:

Aristotle

Grade	IEP / 504 / Tier 3/ HWB	Graduated
K	8	3
1	9	4
2	11	2
3	9	2
4	16	5
5	15	2
TOTAL	68	18

Plato

Grade	IEP / 504 / Tier 3/ HWB	Graduated
K	17	2
1	9	6
2	16	5
3	9	3
4	10	3
5	16	2
6	14	2
TOTAL	91	23

High School

Grade	IEP 504 Tier 3/ (Supp)	Graduated/ Disenrolled
7	24(4)	8
8	8 (5)	5
9	11(4)	3
10	16(4)	6
11	10(3)	5
12	3 (1)	0
TOTAL	93	26

Students Served on Educational Plans:

Plans	Aristotle	Plato	LCHS	Total
IEP	15	9	7	31 (2.1%)
Section 504	7	26	37	70 (4.8%)
ELL	5	1	2	8 (0.6%)
READ Act	9	11	0	20 (1.4%)
ALP	1	0	0	1
Safety Plans	0	0	3	3
Total	37	47	49	133 (8.9%)

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Program Continuity (K-12)

Program Continuity K-12

- Section 504 professional development.
- Poudre School District Integrated Services trainings.
- Elementary coordination with Plato and Aristotle.
- Weekly meetings with Special Service Providers (SSP).
- 6th to 7th transition meetings for students with educational plans.
- 6th grade team meeting with LCHS AST to determine schedules, supports, and interventions.
- Family orientation meetings for incoming 7th graders.

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Key Accomplishments Supporting Guiding Philosophy

Key Accomplishments Supporting Guiding Philosophy

Aristotle

- ELL Coordinator Success for all three campuses.
- Added two new team members and continued with strong continuity.
- Professional Development through Reading Rev.
- Huge academic gains from all students.
- Implemented parent education monthly meeting for all homework booster families.
- Researched and worked with Matt to select next progress monitoring system for Read Act data.
- CK Network Presentation “Dyslexia in a Core Knowledge classroom”.
- Unified math language for 2nd grade at both campuses.

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Key Accomplishments Supporting Guiding Philosophy

Plato

- Trained general education teachers in a variety of behavior intervention techniques.
- Collaborating with school nurse and health technician to devise accommodation/supports for students struggling with type 1 diabetes and school avoidance.
- Professional development with the Collaborative for Exceptional Education, a group that assists charter schools in meeting the needs of students with disabilities and implementing MTSS.
- Selected a new progress monitoring system for gathering and submitting READ Act data.
- Expanded the team: hired and trained 2 new paraprofessionals; 1 literacy service provider and 1 behavioral interventionist.
- Induction presentations for new teaching staff regarding special education and MTSS give new teachers a “deep dive” into meeting the needs of students with disabilities.
- CK Network presentation “Access for All: Serving Students with Disabilities in a Core Knowledge School.”

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Key Accomplishments Supporting Guiding Philosophy

High School

- Increased parental communication (weekly individualized emails, quarterly rubrics, fall and spring semester conferences).
- AST team leads faculty meeting 6 times a year to allow collaboration, professional development, and compliance for teachers.
- Developed a modified curriculum at LCHS that serves a student with significant cognitive needs.
 - CoAlt Training and advising with general education teachers on best practices for alternate standards.
- Developed multi-year academic plans for students with guided study classes.
- Created Student-Family Transition Guide to explore post-graduation accommodations for students with disabilities.
 - Collaborated with Dana Jones to support accommodations with Aims concurrent enrollment.
- Continue to support students with specific emotional needs through make-up plans and daily check-ins.
 - Suicidal ideation, eating disorder, anxiety, absences, and long-term residential treatment.
 - Attended Safety Training with Poudre School District and implemented Suicidal Risk Screener.
- Testing Center provided assessment proctored 3200 assessments.
 - 2200 assessments proctored for students on plans in the first semester with 16% of students using extended time.
 - 135 exams proctored for fall semester finals.
 - 1,000 (32%) general education make-up assessments were proctored.
- Participant in Poudre School District 504 Task Force for two years.

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Goals & Top Concerns

Goals & Top Concerns

Goals

- Help teachers increase their capacity to provide accommodations and interventions for struggling learners who don't meet criteria for learning plans.
- Homogenize math and literacy IEP goals and monitor for progress.
- Continue professional development (reading, early number sense, disability law, behavior, and mental health).
- Continue training general education teachers in special education (induction and de-escalation).
- Research Tier 2 supports for students with math and literacy needs that are not computer-based.
- Continue to develop post-graduation transition resources for students with disabilities.

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Goals & Top Concerns

Concerns

- Junior High Expansion: Increased students correlate with increased academic support plans (and all the increased cognizance/workload that goes with those).
- Increased demands for support for students experiencing social-emotional challenges.
- Increased numbers of students enrolling with educational gaps and the need to remediate.
- Increase special service provider time as we identify more students with disabilities.
- An increase in the number of parental requests for learning plans, which requires an initial evaluation. The evaluation process necessitates the use of additional resources and requires 3-30 hours to complete.
- Parent education needs regarding homework and study skills.



APPENDIX: Useful Terms

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AIP Academic Improvement Plan: Tier 1 Plans made to support students who are struggling academically or have partially proficient standardized test scores. These plans are initiated by general education teachers, but progress monitoring and parent communication are also documented in Student Notes.

Accommodations: Supports and services provided to help a student access the general education curriculum usually provided at the direction of a learning plan or medical diagnosis (i.e. preferential seating, hard copy of notes.)

ALP: Advanced Learning Plan. ECEA 12.00. Plans for students who are at or above 95th percentile according to multiple standardized measurements.

Behavioral Supports: Planner plan, Homework Contract, Rewards Systems, and determining behavioral antecedents and responses.

CDE: Colorado Department of Education is the administrative arm of the [State Board of Education](#) and is responsible for implementing state and federal education laws.

ELL: English Language Learner: Students who are unable to communicate fluently or learn effectively in English, who often come from non-English-speaking homes and backgrounds, and who typically require specialized or modified instruction in both the English language and in their academic courses.

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Executive Functions: A set of processes that all have to do with managing oneself and one's resources to achieve a goal. It is an umbrella term for the neurologically based skills involving mental control, organization, and self-regulation.

APPENDIX: Useful Terms

Guided Study Classes: AST teachers provide direct and targeted instruction to students in a small group environment. These classes specialize in review and reteach of math and English concepts and incorporate organizational foundations.

Homework Booster (HWB): Afterschool program to assist with homework completion at the elementary school.

Intervention: a systematic plan of action consciously adapted to address and reduce the causes of academic failure

IEP: Individualized Education Plan: A plan or program developed to ensure that a child who has a disability identified under IDEA (Individual Disability Educational Act) receives specialized instruction and related services directed by special education resource teacher and guarantees that all students receive a free and appropriate public education (FAPE).

504 Learning Plan: A student is eligible for accommodations under a 504 Plan if he or she has a physical or mental health disability that limits one or more major life functions. A 504 Plan is supported by the federal civil rights law, Section 504 of the Rehabilitation Act of 1973 and provides that all students receive a free and appropriate public education (FAPE).

MTSS Multi-tiered Support System: In Colorado, a Multi-Tiered System of Supports (MTSS) is defined as: a prevention-based framework of team-driven data-based problem solving for improving the outcomes of students through family, school, and classroom collaboration. (CDE)

Tier 1: Interventions and strategies implemented by general education teachers.

Tier 2: Intensified interventions and strategies usually implemented by AST or through a specific

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supplemental class.
~~Tier 3: Direct Instruction~~ by resource teachers or paraprofessional in small classroom setting through AST.

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APPENDIX: Useful Terms

READ Act: This Colorado law focuses on K-3 literacy development and includes requirements for assessment, individualized READ plans for students who have been identified as having a significant reading deficiency, and specifics around parent communication and involvement.

Safety Plan: Plan that outline specific protocol for educational staff to follow when students have been identified needs (Epilepsy, Self Harm, Suicidal Ideation).

STAT: Student/Teacher Assistance Team: This team is made up of administrators, AST, and general education teachers and meets regularly to evaluate the academic needs of individual students. The STAT team makes recommendations after receiving referral from parents, teachers or the students and evaluating academic and testing data.

Student Notes: Confidential note system on local server that allows teachers to document services, interventions, behaviors, and accommodations that students are receiving.

Supplemental Classes (Supp.): English, Latin and math classes that provide review and reteach to students. The curriculum of this class assists students in passing current classes and remediates skills in content area. This is taught by general education teachers in collaboration with AST.

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libertycommon.org | @libertycommon

With Gratitude

Janice Garland, Matt Kazy and Katie Snyder
AST Coordinators

Thank You

- Thank you to the Board of Directors for your hours of service.
- Thank you to the administration especially Sandy Stoltzfus for her insights and communication skills, Casey Churchill for his steadfastness, Kathleen Kearney for her partnership, Dr. Robinson for his willingness to problem solve and remain calm, and Headmaster Schaffer for believing in the importance of AST!
- Thank you for making Liberty Common School truly “a common school” that serves all students including those with mental and physical impairments.
- Thanks to all the members of the AST teams whose dedication, humor, gifts, and talents support students in tangible and intangible ways.

HEADMASTER UPDATE



BOD Regular Meeting – THU 29 FEB 2024

Personnel:

- **All Campuses:**
 - **Volunteer-Appreciation Week.** Mon 12 FEB - Thu 15 FEB 2024 | Success.
 - **Hillsdale Teacher-Job Fair.** Wed 14 - Fri 16 FEB 2024 | Hillsdale, Mich | **Mayer, Lovely** attended | Success.
 - **Core Knowledge Network Conference.** Fri 16 FEB 2024 | | **Mr. Simmons** - inspiring | Success.
 - **Spring-Break Vacation.** Sat 9 - Sun 17 MAR 2024 | All employees, students.
- **Elementary:**
 - **Jurgens Resigning.** Mon 29 JAN 2024 | 6th-grade | Not returning SY 24-25 | **Hersh** to replace, move from 5th-grade position.
 - **Faculty Interviews Commenced.** Fri 23 FEB 2024 | Aristotle-Campus Assistant Principal | Two 6th-grade teaching positions (one Aristotle, one Plato) | One 5th-grade teaching position (Plato) | One 4th-grade teaching position (Plato).
 - **Staff Bowling.** Sat 24 FEB 2024 | Success.
- **High School:**
 - **AST Positions Posted.** Thu 22 FEB 2024.
 - **Long-Term Sub.** Tue 20 FEB 2024 | **Mrs. Angie Shoemaker** serving English Department for roughly one quarter.

Enrollment:

- **Elementary (both):**
 - **24-25 Kindergarten.** Fri 19 JAN 2024 | Sibling enrollment and lottery draws for remaining openings.
- **Plato. 2023-24 Enrollment** | 605/610
 - Kindergarten 88 | Full
 - 1st Grade 86 | -1 | seat filled by a sibling for SY 24-25
 - 2nd Grade 85 | -2 | seats filled by Aristotle transfers for SY 24-25
 - 3rd Grade 86 | -1 | seat filled by a child of staff for SY 24-25
 - 4th Grade 89 | +2

- 5th Grade 85 | -2
- 6th Grade 86 | -1
- **2024-2025 Kindergarten Enrollment Underway.**
 - 85/88 students enrolled.
 - 3 seats held for retention.
- **Aristotle. 2023-24 Enrollment: 322/330**
 - Kindergarten 76 | -1 Part-time and -1 Full-time
 - 1st Grade 50 | Full
 - 2nd Grade 51 | Full
 - 3rd Grade 44 | -6
 - 4th Grade 51 | Full
 - 5th Grade 50 | Full
 - 1 students withdrew since Fri 12 JAN 2024.
 - 1 new student has enrolled since Fri 12 JAN 2024.
 - 24-25 Kinder enrollment: 66/78
 - 18 have accepted part time
 - 46 have accepted full time
 - 2 spots are being held for retentions
- **High School. 2023-24 Enrollment | 545/535**
 - 7th 94
 - 8th 92
 - 9th 94
 - 10th 82
 - 11th 84
 - 12th 77
 - **Lottery: 19 OCT 2023 | Listed, eligible for enrollment:**
 - 7th - 39
 - 8th - 40
 - 9th - 12
 - 10th - 7

Growth (BOD Strategic Goal):

Expansion:

- **Task Force. Kearney leading.**
 - **Meeting.** Tue 13 FEB 2024 | Success.
 - **Next Meeting.** Tue 9 APR 2024 3:45PM | LCHS Washington Hall.

Facilities:

- **Elementary:**
 - **Plato:**
 - **HVAC Maintenance.** Thu 15 FEB 2024 | Ongoing Adjustments.
 - **Bathroom Leaks.** Fri 16 FEB 2024 | Repaired.
 - **Window Replacement.** Fri 23 FEB 2024 | Scheduled.

- **Summer Maintenance.** Fri 23 FEB 2024 | Front/middle driveway repairs/resurfacing, stairway resurfacing, carpet, gym-storage updates | Upgrades pending expansion plans, suitable quotes.
- **Aristotle:**
 - **Security.** Thu 18 JAN 2024 | Installed lock, repaired door.
 - **Choking-Rescue Kit.** Mon 29 JAN 2024 | Added to cafeteria.
 - **Art-Room Kiln.** Mon 29 JAN 2024 | Estimate requested for SKUT venting package.
 - **Electrical Projects.** Wed 8 FEB 2024 | Complete on kiln | Success.
 - **Playground Maintenance.** Mon 12 FEB 2024 | Complete.
 - **Exit Door.** Mon 12 FEB 2024 | Repaired broken wires.
 - **Computer Lab.** Thu 15 FEB 2024 | Relocated.
 - **Reorganizing Rooms.** Fri 16 FEB 2024 | To facilitate a rapid and smooth move during summer.
 - **Deep Clean.** Fri 16 FEB 2024 | Disinfectant applied to help curb illness.
 - **Health-Dept Inspection.** Fri 23 FEB 2024 | Success.
- **High School:**
 - **Replacement Deck.** Mon 19 FEB 2024 | 2nd-floor structure done | Success.
 - **Door Lock.** Thu 8 FEB 2024 | Repaired lock cylinder | Success.
 - **RTU 6 Repair.** Fri 9 FEB 2024 | Replaced ignition components | Success.

Resources (*BOD Strategic Goal*):

Financial:

- **Amended Budget.** Mon 29 JAN 2024 | Submitted to PSD.
- **CCSP Budget Revision.** Thu 1 FEB 2024 | Submitted | Revisions ongoing.
- **Higher FPC, PPR.** Thu 1 FEB 2024 | First payment received; \$757k catch-up to be spread over remaining 5 months of SY.
- **JAN Unaudited Close.** Mon 5 FEB 2024 | Completed.
- **Milk Program.** Fri 9 FEB 2024 | Reimbursement for student-milk purchases - process initiated.
- **Good Standing.** Tue 20 FEB 2024 | Build Corp , LCS recovered “Good Standing” status with Colo. Sec. of State.
- **FAC Meeting.** Wed 21 FEB 2024 | Success.
- **Transportation Funding.** Thu 22 FEB 2024 | Operations investigating funding from the state for annual costs exceeding \$250k.
- **FY24-25 Budget.**
 - Wed 21 FEB 2024 | Major assumptions consent from FAC.
 - Wed 20 MAR 2024 | First-draft review and total-comp decision final.
 - Mon 15 APR 2024 | Prelim financials due to PSD.
 - Thu 25 APR 2024 | Board adoption of budget.

Advancement:

- **Total Revenue 23-24.** Wed 31 JAN 2024.
 - Total Received: \$684k.
 - Total Pledged: \$467k | All grants.
 - In-Kind Received: 18k.

- Raise-the-Torch Received: \$193k.
- **Grants**
 - **CCSP Grant.** Budget revision #2 progressing.
- **Year-End Appeal**
 - **Total Received.** Wed 31 JAN 2024 | \$223k.
 - **Gifts.** Wed 31 JAN 2024 | 214 received.
 - **“Libertas Society.”** Wed 31 JAN 2024 | 89 members.
- **Capital-Campaign Management.** Consultant proposals solicited.
- **Grants Specialist.** New part-time position | Interviews underway.

Communication (*BOD Strategic Goal*):

Special Projects.

- **Internal:**
 - **Calendars.** Fri 26 JAN 2024 | [DETAIL LINK.](#)
 - **ASCENT Website Page.** Thu 1 Feb 2024 | [DETAIL LINK.](#)
 - **New College-Center Brochure.** Mon 5 FEB 2024 | Completed, posted.
 - **Libertas-Society Logo Complete.** Thu 15 FEB 2024 | Digital version located in shared drive.
- **External:**
 - **Festival of Ideas Sponsor Package and Brochure.** Mon 12 FEB 2024 | New brochure and sponsor document created to promote at the Classical Ed Symposium.

Ongoing Tactics:

- **Outreach.**
 - **Friedman Leadership Meeting.** Fri 26 JAN 2024 | Success.
 - **Visit/Tour.** Mon 30 JAN 2024. LCHS | Coloradans For Ukraine delegation visit, tour, guest lecture.
 - **Core Knowledge Talk.** Tue 30 JAN 2024 | **Mr. Churchill** at Trinity Lutheran Church and School | Success.
 - **NoCo Community Foundation Briefing.** Tue 6 FEB 2024 | **Schaffer, Harkey** attended | Success.
 - **Philosophy Night.** Fri 9 FEB 2024 | BOD, founders, admin, staff | **Dybzinski** lecture | Produced by LCS Parent-Ed Committee | Success.
 - **Choosing Better Schools.** Thu 15 FEB 2024 | Success.
 - **Parlor-Night Promo.** Fri 23 FEB 2024 | [DETAIL LINK.](#)
 - **Neenan Dinner.** Tue 27 FEB 2024 | **Churchill, Albright, Schaffer** attending | Denver | Conjunction w/ day-1 CLCS annual conference.
 - **Republican Caucus.** Thu 7 MAR 2024 | Aristotle Campus will host.
- **Earned Media**
 - **In Print and Online.** Thu 1 Feb 2024 | *The Gazette* | Topic: **Rep. Mike Lynch**, speaking to LCHS students | [DETAIL LINK.](#)
 - **Online.** Tue 13 Feb 2024 | *The Colorado Times Reporter* | Topic: Daniel’s Fund | LCS mentioned | [DETAIL LINK.](#)
 - **Online.** Mon 12 Feb 2024 | *The Coloradoan* | Topic: **Josie Stahl** State Championship | [DETAIL LINK.](#)
 - **Online.** Mon 12 Feb 2024 | *The Coloradoan* | Topic: **Daniel Verderaime** first state qualifier in wrestling for LCHS | [DETAIL LINK.](#)

Academic:

➤ All Campuses:

- **D'Evelyn Visit.** Mon 5 FEB 2024 | Admin, BOD touring/visiting top-performing “alternative” school in JeffCo. | Success.
- **Academic-Advisory Committee Meeting.** Wed 7 FEB 2024 | Success.
- **Philosophy Night.** Fri 9 FEB 2024 7:00PM | Admin, faculty, BOD | Success.
- **Professional-Development Day.** Fri 16 FEB 2024 | Success.
- **Nat'l Classical-Ed Symposium.** Wed - Fri 20-22 MAR 2024 | Phoenix | Delegation attending.
- **AAC Meeting.** Wed 6 MAR 2024 5:30-7:30PM | Plato Refectory.

➤ Elementary, Both:

- **Colorado Symphony Youth Concert.** Tue 30 JAN 2024 | Denver | 3rd-graders | Success.
- **1st- and 2nd-Grade Choir Concerts.** Tue 6 FEB 2024 | Success.
- **CMAS.** Fri 23 FEB 2024 | Planning, training underway.
- **New-Kinder-Parent Orientation.** Mon 25 MAR 2024.

➤ Plato:

- **Loveland Opera Theater Performance.** Fri 8 FEB 2024 | *Three Little Piggies* to 1st grade | Success.
- **AST Caseload.** 103 students | 16.78% of population.
 - 9 - Individualized Education Plans (IEP)
 - 27 - Section 504 Plans.
 - 11 - Read-Act Plans.
 - 1 - English-Language-Development Plans (ELD)
- **AST-Transition Planning.** Occurring with LCHS for 6th-to-7th transition.
- **Summer Camp.** Fri 23 FEB 2024 | Teachers secured | Student-registration planning underway.

➤ Aristotle:

- **Loveland Opera Theater Performance.** Fri 8 FEB 2024 | Circus Maximus | *Three Little Piggies* | Success.
- **AST Caseload.** 68 students | 21% of population.
 - 15 - IEP.
 - 5 - ELD plan.
 - 9 - Read Act Plans
 - 7 - 504 plan.
 - 1 - ALP.
- **Summer Camp.** Wed 14 FEB 2024 | All teachers secured.

➤ High School:

- **Access Testing.** Mon 22 - Fri 26 JAN 2024 | Success.
- **Classroom-Registration Visits.** Mon 29 JAN - Thu 15 FEB 2024 | Success.
- **Practice ACT.** Sat 2 MAR 2024 8:00AM-12:00PM | LCHS Great Hall.

Safety/Security:

➤ All Campuses:

- **Bus-Violation System.** Wed 14 FEB 2024 | Drivers and monitors tracking student behavior | System emails parents, tracks violations.
- **Plato Campus, City.** Thu 15 FEB 2024 | City to revisit school-zone needs on Sharp Point Drive | City to begin research Fall 2024.
- **Team Meeting.** Thur 22 FEB 2024 | Updates, concerns | Success.
- **Team Meeting.** Tue 16 APR 2024 4:00PM LCHS | Stop-the-Bleed, tactical-emergency-casualty care.

Athletics/Co-Curricular:

- **Swim Coach-of-the-Year.** Sat 3 FEB 2024 | **Rob Huey** named | Patriot League | Led team to 4th-consecutive title.
- **Swim Success.** Sat 10 FEB 2024 | LCHS Frosh **Josie Stahl** won 3A title | 100m breaststroke.
- **Wrestling Success.** Sat 10 FEB 2024 | **Daniel Verderiame** first state qualifier | Men's wrestling.
- **Spring-Sport Kickoff.** Mon 19 FEB 2024.

Student Life:

- **All-School:**
 - **LEGIO XIII.** Fri 26 JAN 2024 | Senior-kinder Challenge-Key exchange | Success.
 - **Parlor Night.** Fri 23 FEB 2024 | Success.
 - **6th-Grade Day.** Fri 8 MAR 2024.
- **Elementary:**
 - **Both:**
 - **Kindergarten Challenge-Key Ceremony.** Fri 26 JAN 2024 | Success.
 - **Class Photo Day.** Fri 1 MAR 2024.
 - **Folk-Dance Night.** Tue 26 MAR 2024 | Plato Agora.
 - **Plato:**
 - **Winter Carnival.** Fri 26 JAN 2024 | Success.
 - **Citizenship Assembly.** Mon 29 JAN 2024 | LCHS School Captains | Success.
 - **6th-Grade Movie Night.** Fri 23 FEB 2024 | Success.
 - **Discipline Update.** Total: 24 as of Fri 23 FEB 2024 | 2- Inappropriate language, 7- Inappropriate behavior, 3 - Dishonesty, 1 -Rough housing, 1- Swearing, 1- Fighting, 1- Vandalism, 1- Stealing, 4- Hitting, 3- Disrespectful behavior.
 - **Aristotle:**
 - **Citizenship Assembly.** Mon 29 JAN 2024 | Poudre Fire Authority | Success.
 - **Winter Carnival.** Fri 2 FEB 2024 | Success.
 - **Discipline Update.** Total: 9 as of Tue 20 FEB 2024 | 1-Inappropriate Behavior/Speaking 4-Vandalism 2-Tardies 2-Roughhousing.
 - **Integrity Assembly.** Mon 26 FEB 2024 | **Brain Bates** will discuss the James Webb Telescope.
- **High-School:**
 - **Junior-High Event.** Tue 23 JAN 2024 | Success.
 - **Senior Speakout.** Wed 24 JAN 2024 | Success.
 - **LCHS Free-Dress Day.** Fri 2 FEB 2024 | Success.

- **All-School Lyceum.** Wed 7 FEB 2024 | Success.
- **Junior-High Winter Ball.** Fri 9 FEB 2024 | Success.
- **LCHS Free-Dress Day.** Tue 20 FEB 2024 | Success.
- **Junior-High Lyceum.** Wed 21 FEB 2024 | Success.
- **High-School Lyceum.** Thu 22 FEB 2024 | Success.
- **High-School Sadies Dance.** Sat 24 FEB 2024 7:00-9:00PM | LCHS Great Hall.
- **Instrumental and Choral Concert.** Thu 7 MAR 2024 6:30-8:30PM | LCHS Colosseum.
- **House Event.** Sat 23 MAR 2024 | TBD.
- **Junior-High Lyceum.** Wed 27 MAR 2024 2:15-2:45PM | Colosseum.
- **National Honor Society Induction Ceremony.** Wed 27 MAR 2024 6:30PM-8:30PM | LCHS Great Hall.
- **High-School Lyceum.** Thu 28 MAR 2024 2:15-2:45PM | Colosseum.
- **Discipline Update.** Quarter 3 Violations to Date:
 - Tardy: 200
 - Dress Code: 103
 - Skiving: 47
 - Gum: 39
- **Discipline Case.** A high-school student copied a peer's Economics homework and submitted it as his own. Both students received a score of zero on the homework, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** A high-school student copied a peer's Latin homework and submitted it as his own. Both students received a score of zero on the homework, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** A high-school student plagiarized his English essay by using online sources and submitting the work as his own. The student received a score of zero on the essay, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** A high-school student wrote formulas on his desk to complete a quiz for math class. The student received a score of zero on the quiz, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Cases.** Five high-school students used an online resource to copy work for AP Physics and submitted the work as their own. Each student received a score of zero on the assignments, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** Two high-school students made racially inappropriate jokes to a group of students. Each student served a one-day in-school Capstone-research project day.
- **Discipline Case.** A high-school student copied a peer's Western Literature vocabulary quiz. Both students received a score of zero on the homework, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** A junior-high school student copied a peer's Latin homework and submitted it as his own. Both students received a score of zero on the

homework, wrote apology letters, served detentions, and completed a Capstone-research project.

- **Discipline Case.** A high-school student stole various items out of multiple students' lunch boxes. The student wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** A junior-high school student copied a peer's Latin homework and submitted it as his own. Both students received a score of zero on the homework, wrote apology letters, served detentions, and completed a Capstone-research project.
- **Discipline Case.** A junior-high school student intentionally threw and broke a calculator belonging to the school. The student served detentions, wrote apology letters, completed a Capstone-research project, and paid for the replacement of the calculator.
- **Discipline Case.** A high-school student copied a peer's Latin homework without permission and submitted it as his own. The student received a score of zero on the homework, wrote apology letters, served detentions, and completed a Capstone-research project.

Operations:

- **Data Pipeline:** Thu 15 FEB 2024 | 2021.2022 Civil-Rights report delivered | Success.
- **Data for Student Demographics, Student School Association.** Thu 15 FEB 2024 | Delivered. Wed 14 FEB 2024 | Data Pipeline for HR error free | Success.
- **February Accounts.** Mon 5 FEB 2024 | Bank accounts reconciled | FAC briefed | Success.
- **Health.**
 - **Tdap-Booster Letters.** Thu 1 FEB 2024 | Success.
 - **24-25 CDPHE Immunization Parent Letter Posted.** Fri 8 FEB 2024.
 - **Kinder- Orientation Materials.** Tue 13 FEB 2024 | Submitted.
 - **CPR/First-Aid/AED Class.** Tue 20 FEB 2024 | Success.
- **Information Technology:**
 - **Inventory System (CCSP).** Thu 21 MAR 2024 | Meeting with CDE and CCSP grant-funded schools to present Liberty's inventory-mgt system.
 - **Lock Installation.** Fri 9 FEB 2024 | Installation at Plato campus complete minus two back-ordered crash bars | Next steps: Link fire-control panel to interior door locks for emergency unlocking.

Political/Policy/Compliance:

- **PSD.**
 - **Charter Renewal.**
 - Tue 23 JAN 2024 | PSD BOE vote on application | Initiates contract-negotiations phase.
 - **Principals Meeting.** Thu 8 FEB 2024 | **Robinson** attended.
 - **Patriot League Principals Meeting.** Wed 14 FEB 2024 | **Robinson** attended.
 - **OCR Notice.** Thu 15 FEB 2024 | Superintendent named respondent in investigation of LCS student-on-student allegation.

- **Principal Meeting.** Thu 7 MAR 2024 | **Robinson, Churchill, Stoltzfus** attending.
- **Principals Meeting.** Thu 21 MAR 2024 | **Robinson** attending.
- **State.**
 - **AMC Mentoring Meeting.** Wed 7 FEB 2024 | Heritage Heights Academy | **Churchill** participated.
 - **CDE “Support Forum.”** Tue 13 FEB 2024 | Charter School Black, Indigenous & People of Colorado Leader Forum | Second session | **Schaffer, Churchill, Allen** participated.
 - **CDE “Support Forum.”** Tue 20 FEB 2024 | Charter School Black, Indigenous & People of Colorado Leader Forum | Third session | **Schaffer, Churchill, Allen** participated.
 - **AMC Mentoring Meeting.** Wed 6 MAR 2024 | Aristotle Campus will host | **Churchill** participating.
- **CAC.**
 - **Testimony.** Thu 15 FEB 2024 | **Hunt** testified before House Ed Committee opposing HB 1039 re: non-legal name changes for students.
 - **Board Meeting.** Fri 16 FEB 2024 | Success.
 - **Webinar.** Fri 1 MAR 2024 | Legislative update.
- **CLCS.**
 - **Advocacy Day.** Thu 1 FEB 2024 | LCHS student delegation, **Schaffer, Hunt, Stoltzfus, Bradley** attended.
 - **CLCS.** Tue 27 FEB 2024 | Annual Conference | **Schaffer, Churchill, Albright** attending | **Currell** presenting | Denver.

END OF REPORT

7.14 Literature Acquisition

Liberty Common School will be discerning when purchasing books as well as in accepting book donations, such that all materials at the school support the school's literacy goals as described in our Charter and the Reading and Literacy Policy. Books are to be selected according to criteria beyond current popularity. The quality of language, the value of a story to the human experience, the contribution to character education, and the support of the 2010 Core Knowledge Sequence will play a part in Liberty's selection of books. The majority of literature at the school should be generally acknowledged as traditional classics or children's classics. To support our character education program, we will make available books which provide examples, over and over again, of the reasons for living well.

This policy applies to any book or media available to students in the school's library or classrooms as well as to books read to students by parents and teachers in the classroom. To support their children's education at Liberty, parents are encouraged to understand the principles of this policy and to assist their children in selecting books for outside reading which are consistent with school policy.

LITERATURE PURCHASED BY THE SCHOOL

Fiction

As described in our Charter and in our Reading and Literacy Policy, the focus of the school's reading program is the development of mature and moral literacy "*as students become acquainted with a broad and rich body of knowledge and become familiar with many well-written, diverse, and meaningful works of literature.*" According to Neil Postman, whose ideas are frequently referenced in our Charter, "Human beings require stories to give meaning to the facts of existence... If our stories are coherent and plausible and have continuity, they will help us to understand why we are here, what we need to pay attention to, and what we may ignore." Our goal, then, is to immerse students in great stories.

How do we identify great stories (i.e. good literature)?

Great authors do not write stories so that students can identify the main characters or write plot summaries. Rather, they seek to portray characters struggling with the great issues of life (e.g. truth, love, war, faith, politics, even loneliness). As our Charter states, "*literature that will be introduced is chosen... because it provides access to deeper meaning of universal human problems.*" We recognize these stories because they hold our interest, even as adults. We recognize these stories because the characters have something to learn. They develop and grow as the plot unfolds. We recognize these stories because readers desire to emulate their heroes. Good literature has withstood the filter of time, speaking to the universal struggles of humans throughout the ages.

Great stories are intended to be enlarging experiences, rather than cures prescribed for a given sociological, political, or emotional problem. To be avoided are genres which encourage narrow self-preoccupation, are void of meaningful character development, encourage acceptance of and identification with poor role models, or strive to give children “appropriate” attitudes about contemporary social issues (e.g. divorce, sex, war, gender). See “Reading and Fiction” in the Student & Parent Handbook.

The school will give first priority to the works of fiction required by the 2010 Core Knowledge Sequence, Board-approved additions to the sequence, and books on the AAC-approved Great Books lists below:

- LCS K – 2nd Grade Recommended Great Books List
- LCS 3rd – 4th Grade Great Books List
- LCS 5th – 6th Grade Great Books List
- LCS 7th – 8th Grade Great Books List
- LCHS High School Recommended Great Books List

Non-Fiction

The school will strive to provide content-based non-fiction books necessary to support the 2010 Core Knowledge Sequence, Board-approved additions to the Sequence, and a student reference section. Teachers may recommend books for purchase (other than textbooks, which require the approval of the Board of Directors) to support their instruction of the curriculum. These suggestions should adhere to the parameters of this policy, the Charter, and the Reading and Literacy Policy.

Children’s ‘non-books,’ a prevalent trend in children’s non-fiction, are composed of tiny facts and snippets of interesting material with visually pleasing photography which have no sustained narrative, carefully developed argument, or background knowledge. They require little concentration or focused thinking, but like television, are instantly accessible. The most conspicuous example of a ‘non-book’ is the *Guinness Book of World Records*. Such books commonly are but diverting filler and fail to meet our criteria for prioritized acquisitions.

In addition to the student reference section, a teacher reference section and a parent education section will be maintained. The school will supply copies of the 2010 Core Knowledge Sequence for each grade along with supporting books and references published by the Core Knowledge Foundation and the books referenced in the bibliography of our Charter.

DONATED LITERATURE

Classroom teachers and the school librarian will be the initial arbiters of the quality of books donated to the school. This discernment will require adherence to this policy, the Charter, and the Reading and Literacy Policy.

Elementary-school teachers, including Mos Maiorum and AST, will maintain a current inventory of all books (book title and author) in their classroom libraries for student use including leveled readers and read-aloud books. Building principals are responsible for ensuring all inventories are current and audited regularly for policy compliance.

MEDIA ACQUISITION

It is the policy of this school to expose students to subject matter through direct instruction, project, practice, and literature to near exclusivity (see Video Viewing Policy). Professional video productions should not serve as isolated expositions of subject matter. Video and film media will only be purchased and utilized to the extent that these materials supplement the pedagogy outlined herein, with the approval of the Headmaster.

REQUESTS FOR LIBRARY ADDITIONS

Students, teachers, and parents may request additions to the school's library and classroom collections. These requests will be considered by the school with respect to the criteria outlined herein with the understanding that not all literature is destined to be considered "classic" and that student interest in reading should be affirmed and encouraged. These purchases will be subsequent to those necessary to satisfy the curriculum and required reading program, and must be consistent with the intent of this policy. Given the limited space in the library, decisions about what to add will naturally be limited to things that support and promote the mission of the school.

Questions about literature acquisition should be directed to the school librarians or the Headmaster. The Board of Directors is the final authority regarding any book or other media offered by the School for education or enjoyment.

REQUESTS FOR ADDITIONS TO THE GREAT BOOKS LISTS

Students, parents, and teachers may request that books be added to or removed from the Great Books lists. A Great Books Request form will be provided by the school librarians. Completed forms may be returned to a school librarian. Any request will be considered by the school's Literature Review Team (LRT), a subcommittee of the AAC. The Literature Review Team will consist of staff members (i.e. teachers, teaching assistants, and administrators). Changes to the Great Books lists will be reviewed first through the LRT using the AAC-approved rubric. Once changes have been approved by a majority of the Literature Review Team, they will be presented to the AAC for final approval. Any proposed changes to the Great Books lists will be presented to the AAC annually. All changes will take effect at the start of the academic year following the approval of the AAC.

BOOKS FAIRS AND LITERARY EVENTS

The school may choose to host events designed to promote literacy and love of good literature among Liberty's young scholars including but not limited to an annual book

fair. Such events should be designed in alignment with the school's Reading and Literacy Policy with emphasis given to books on the Great Books lists. The purpose of a book fair would be to encourage families to create home libraries of these classic books for their families or individual children.

SUPPORTING REFERENCE

The Case for Good Taste in Children's Books, Meghan Cox Gurdon, *The Wall Street Journal*, July/August 2013, Volume 42, Number 7/8

Adopted: 03-24-2005

Amended: 12-03-2011

Amended: 09-19-2013

Amended: 1-18-2018

Amended: 3-28-2024

**LIBERTY COMMON SCHOOL
ACADEMIC ADVISORY COMMITTEE MEETING**

February 7, 2024

5:30PM

Liberty Common Elementary School
1725 Sharp Point Drive Fort Collins, CO
Zoom:

ATTENDANCE (X) Present (R) Remote

	Voting Membership		Administration		Visitors (Faculty & Parent)
x	Randy Everett	x	Bob Schaffer	x	Sarah Clark
x	Ruth Ann Everett		Sarah Hunt	x	Todd Arndorfer
x	Maureen Schaffer	x	Kathleen Kearney		
x	David Van Maren	x	Robert Robinson		
	Laurel Van Maren	x	Casey Churchill		
x	Kelly Krapes	x	Sandy Stoltzfus		
x	Nancy Hoyer	x	Jenna Allen		
x	Jenny Cardenas	x	Chris Reynolds		
x	Lander Hultin				
	Kay Lannen (Secretary)				
x	Elizabeth Barber (Chair)				

ATTENDANCE

CALL TO ORDER

ROUTINE BUSINESS

- Approve Agenda
- Approve AAC Meeting Minutes 18 JAN 2024

UNFINISHED BUSINESS

- 7.14 Literature Acquisition Policy Review – Vote – Elizabeth Barber

- Maureen moved to approve policy with Ruth Ann potentially adding further supporting references for the policy.
- Randy seconded.
- Motion passed unanimously.

SUBCOMMITTEE REPORTS

- 1st/2nd-Grade Literacy Subcommittee – Casey Churchill
 - School will continue to use Open Court Books.
 - Pedersen/Tamez are leading a comprehensive effort to document the entire 1st/2nd-grade literacy scope and sequence (literary terms and skills taught through the individual stories in Open Court resources).
- Upper Level Latin Curriculum Subcommittee – Robert Robinson
 - Teachers have drafted a plan and are currently testing it in the classroom.
 - A full proposal will be submitted in the fourth quarter after testing is complete (and AP changes are known).
- Physical Education Subcommittee – Chris Reynolds
 - First meeting 2-7-24 and will meet monthly. Much more to come next month.

ADJOURN

Next Meeting: WED 6 MAR 2024, 5:30PM

Adjourned at 7:07

LCS BOD MEETING AGENDA ITEM COVER SHEET

Agenda Item:	Resolution to Clarify and Simplify Board Service Eligibility Policy 2.5
Purpose:	Clarify Eligibility and Simplify Election
Submitted by:	Todd Arndorfer

BACKGROUND-

In December of 2022 Policy 2.5 was amended to clarify when existing BOD members were no longer eligible to serve on the BOD due to disenrollment of their last student. During the time since then two additional considerations have arisen:

1. The ASCENT program is being added as an option for students to take an additional year of college classes (following their high school senior year) at FRCC, AIMS or MSU with tuition, books and fees paid by PSD. Should parents of these students still be considered Liberty parents for board eligibility?
2. When a BOD member's last student graduates in May, they become ineligible to continue serving on the BOD, but their resignation occurs after the April BOD election. This timing necessitates declaring a vacancy, calling for new candidates and ultimately appointing a candidate to the remaining term for that seat. This process requires much extra effort and leaves that seat open for 4-5 months.

RECOMMENDATION-

The recommendation is for the BOD to approve the change to policy 2.5 shown below to remedy both considerations noted above.

Text in black is existing text that is not being modified, shown for context. Text in **red** is language being added to the policy.

2.5. Board Governance

BOD members may not be teachers or other paid employees of the school or immediate family members of employees of the school, except as provided in the Conflict of Interests Policy. Only one member of an immediate family may serve on the BOD at one time.

A board member must be a parent/grandparent/legal guardian of a student currently enrolled in **grades K-12 of** the school. Once a board member no longer meets ~~this~~ **these** criteria, that shall constitute an automatic resignation by the board member, and a vacancy shall be declared. **However, if a board member will no longer meet these criteria due to graduation of their last Liberty student, their seat shall be part of the April election the month prior to graduation, and the candidate receiving**

the fewest votes of those elected will assume the graduating parent's term and be seated along with other elected board members after the June board meeting.

Funded Pupil Count Report, February 2024

Graduation Year	Grade	Headcount First Day of School	Oct. 1st FPC 2023-2024	Oct. 1st FPC 2022-2023	Current Enrollment Headcount	Net Variance from First Day		Priority List	Lottery	Eligible Lottery (Reside in-State)
2024	12th	78	78	80	77	-1		0	0	0
2025	11th	93	93	85	84	-9		0	0	0
2026	10th	86	86	95	82	-4		0	8	7
2027	9th	102	100	96	94	-8		2	12	12
2028	8th	92	93	90	92	0		10	46	40
2029	7th	94	94	93	94	0		9	43	39
2030	Plato 6th	87	87	85	86	-1		26	73	66
2030	Aristotle 6th	0	0	0	0	0				
2031	Plato 5th	87	87	89	85	-2		17	106	98
2031	Aristotle 5th	50	51	0	50	0				
2032	Plato 4th	89	89	87	89	0		8	86	74
2032	Aristotle 4th	50	49	41	51	1				
2033	Plato 3rd	86	86	89	86	0		8	90	76
2033	Aristotle 3rd	46	45	36	44	-2				
2034	Plato 2nd	87	87	87	85	-2		15	86	79
2034	Aristotle 2nd	52	51	38	51	-1				
2035	Plato 1st	84	84	87	86	2		6	36	29
2035	Aristotle 1st	51	52	47	50	-1				
2036	Plato Half Time	36	36	35	36	0		8	112	103
2036	Aristotle Halftime	28	28	1	29	1				
2036	Plato Full Time	52	52	49	52	0		0		
2036	Aristotle Full Time	48	47	49	47	-1				
2037	Plato Prospective K				85				92	90
2037	Aristotle Prospective K				68					

Percent Change from First Day= 0.020
 PPR with Half-Time Kindergarten Multiplier= 1423
 1448



libertycommon.org | @libertycommon

Advancement Committee

Monthly Report

Brett Harkey—Director of Advancement

February 8, 2024

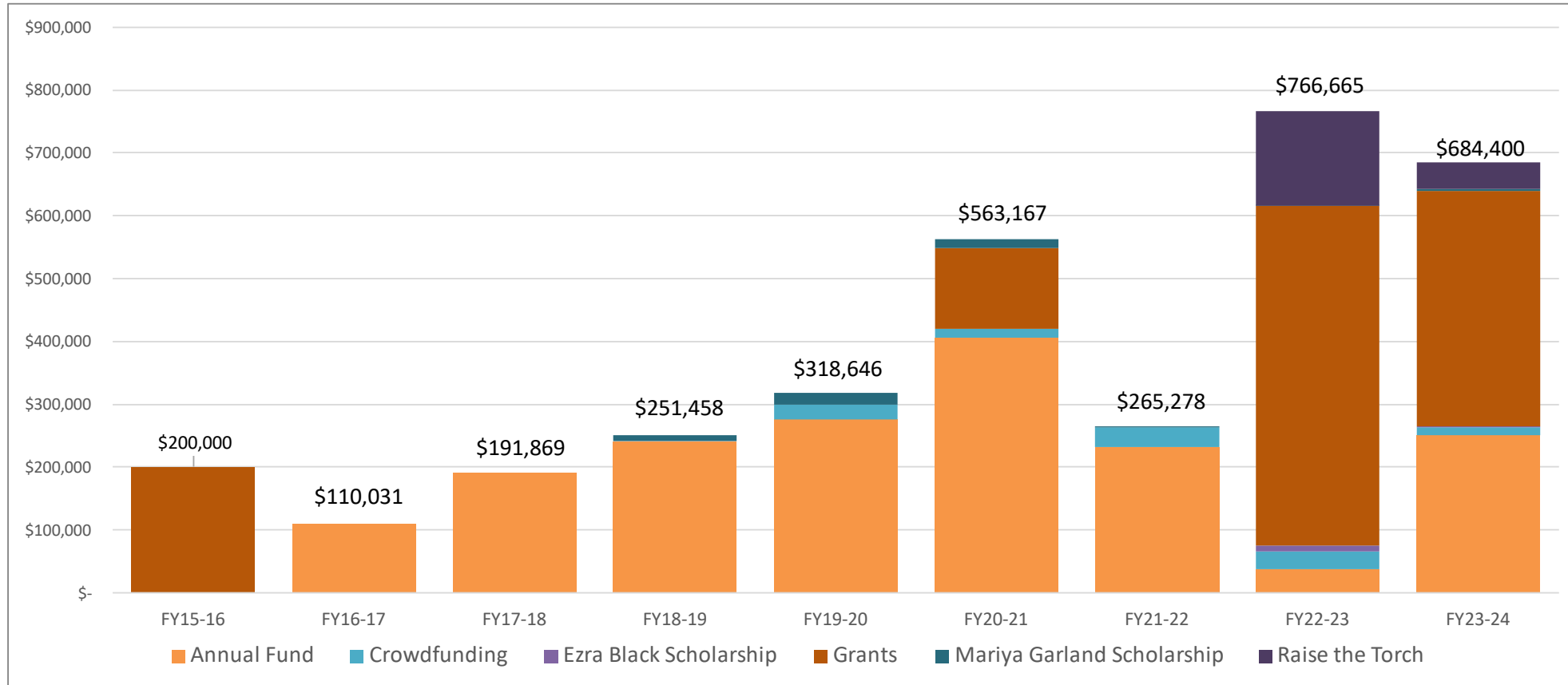
Fundraising Summary (23-24)

Description	Amount
Total RECEIVED (as of 1/31/24)	\$684,400 (+\$41,119)
Total PLEDGED to Date (as of 1/31/24)	\$467,329 (grants)
In-Kind Gifts (as of 1/31/24)	\$18,114
TOTAL 23-24	\$1,169,843

LIBERTY COMMON SCHOOL

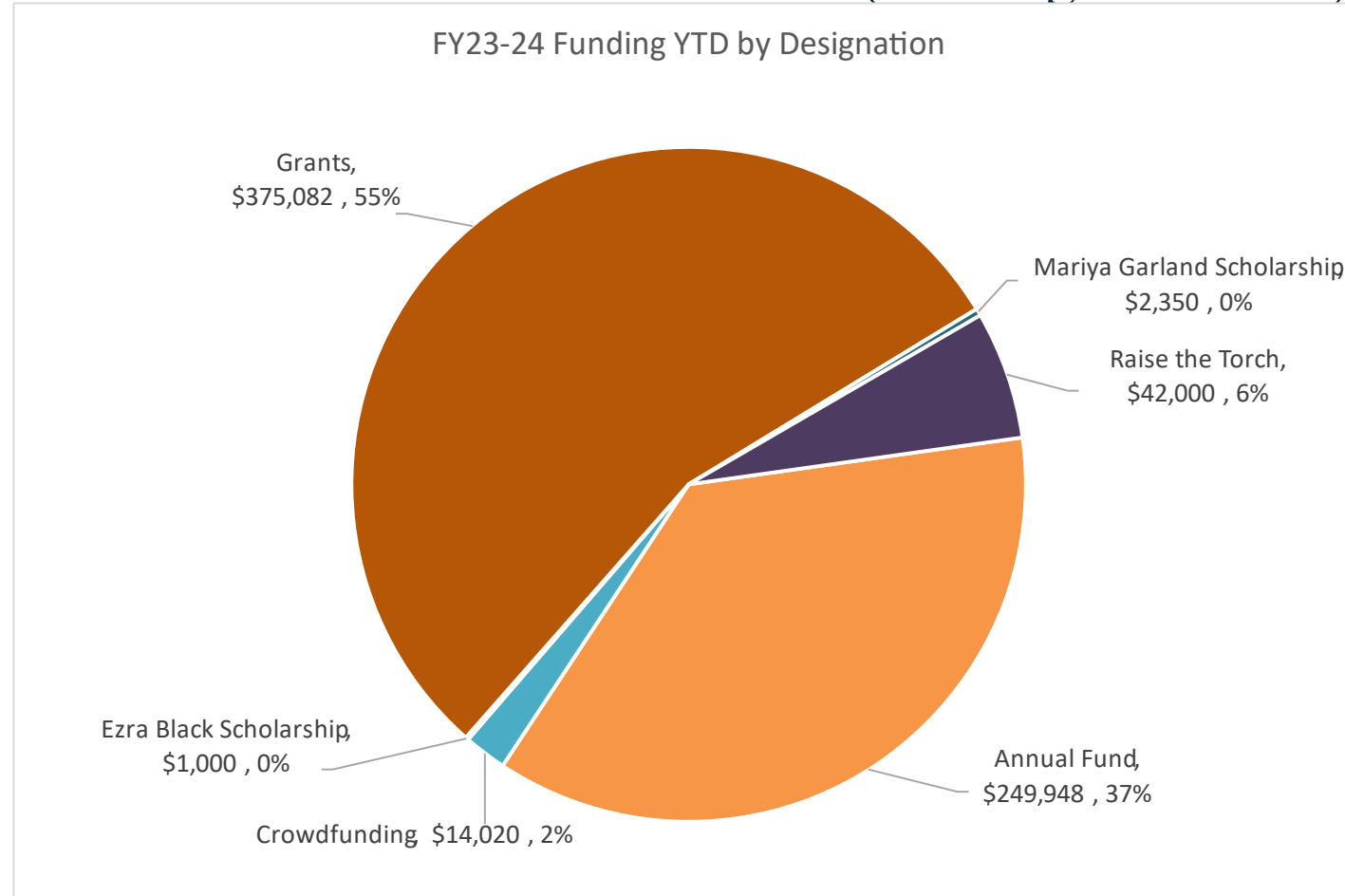
FORT COLLINS, COLORADO

Total Funds Received (through 1/31/24)



LIBERTY COMMON SCHOOL
FORT COLLINS, COLORADO

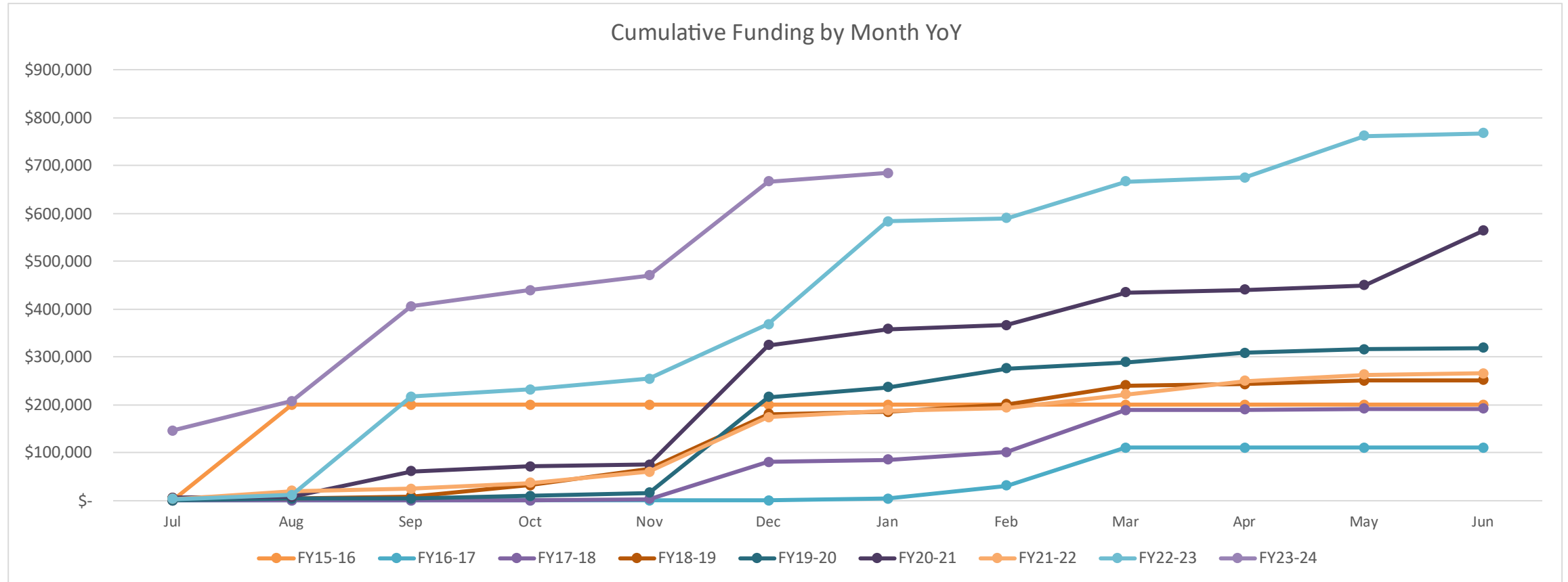
Designation Breakdown (through 1/31/24)



LIBERTY COMMON SCHOOL

FORT COLLINS, COLORADO

Cumulative Funding by Month (through 1/31/24)



LIBERTY COMMON SCHOOL
FORT COLLINS, COLORADO



RAISE THE TORCH

THE CAMPAIGN FOR LIBERTY COMMON SCHOOL

- Phase 1: Feasibility Study (Complete)
- Phase 2: Quiet Phase
 - Total received (as of 1/31/24): \$193,108

LIBERTY COMMON SCHOOL

FORT COLLINS, COLORADO

Grants Report

- **CCSP**
 - Year 2 spending, training, reporting underway
 - Year 3 (Performance Incentive Year) budget planning begun
- **SSD**
 - Spending underway
 - 23-24 Grant Cycle: application submitted
- **School Nurse Professional Development Grant**
 - Spending underway
- **BEST**
 - '24 grant cycle not possible due to timing issues

LIBERTY COMMON SCHOOL

FORT COLLINS, COLORADO

Year-End Appeal

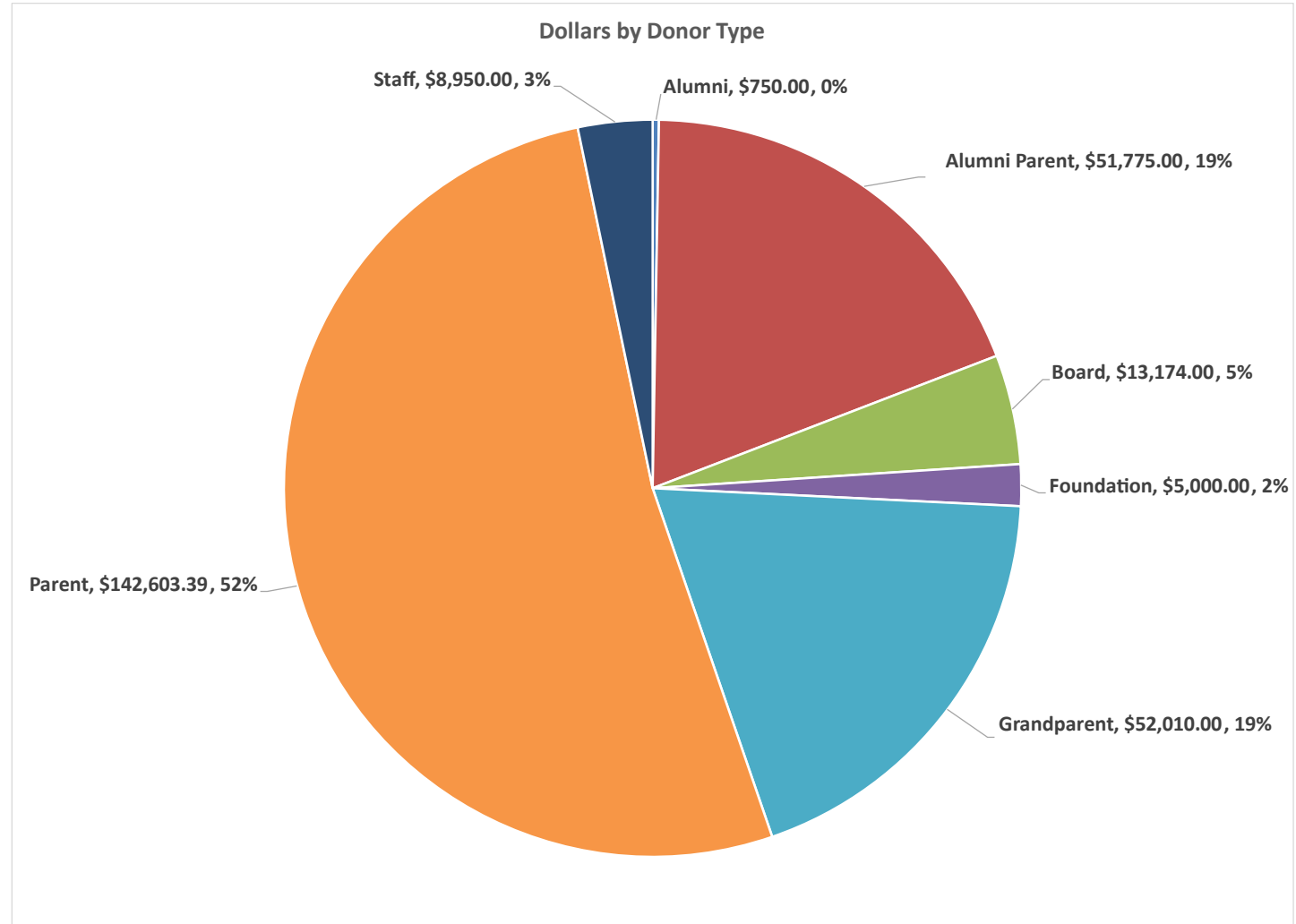
- Total: \$223,063
- # of gifts: 214
- Average gift: \$1,042.35
- Gifts of \$1,000+: 89 (42% of all gifts)
 - Prior Year: 41 gifts (24% of all gifts)
- Largest gift: \$15k
- Gifts over \$10K: 4
- New donors: 66
- Cost per dollar raised: \$.035
- ROI: 2,756%

LIBERTY COMMON SCHOOL

FORT COLLINS, COLORADO

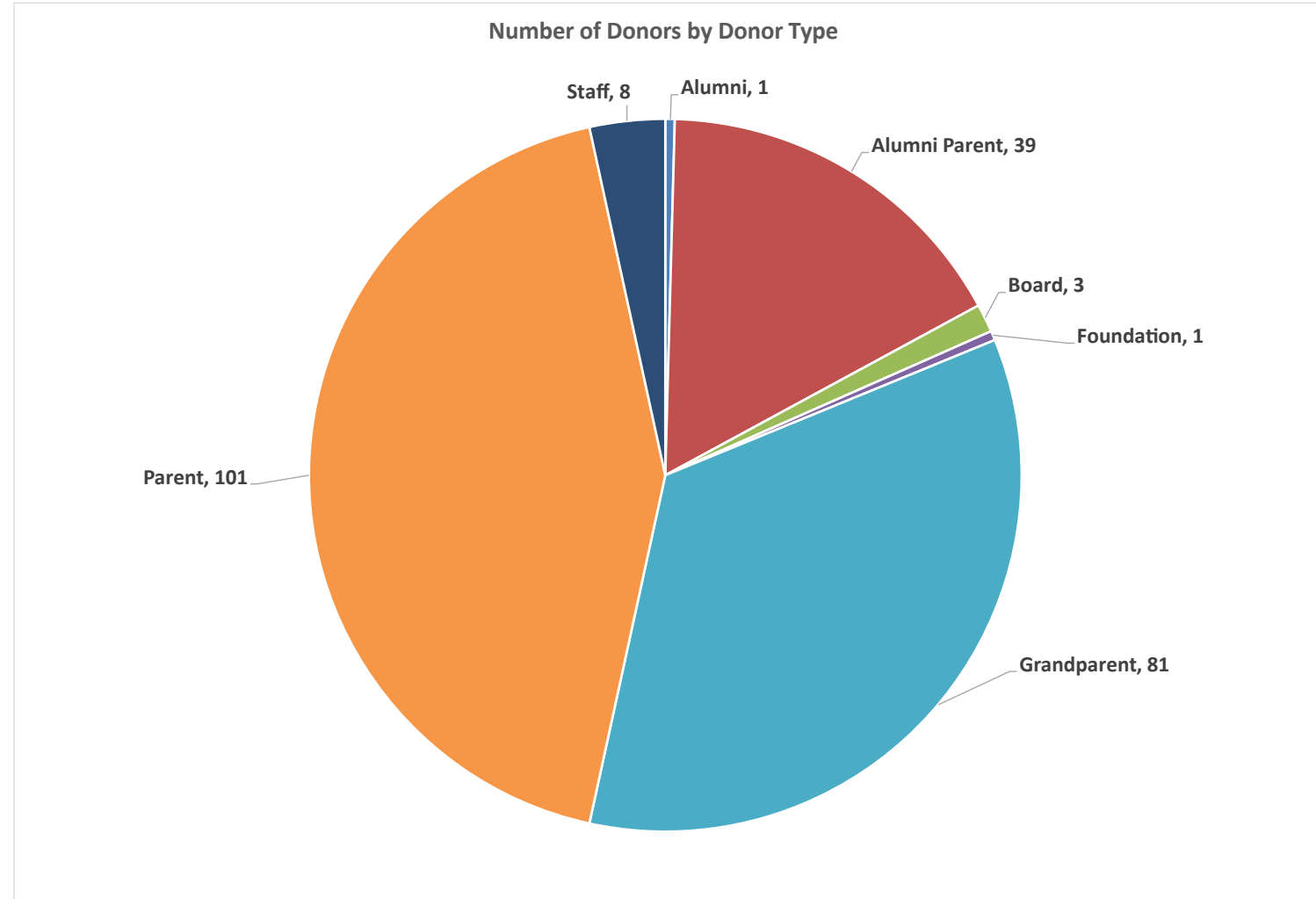
Year-End Appeal

LIBERTY COMMON SCHOOL
FORT COLLINS, COLORADO



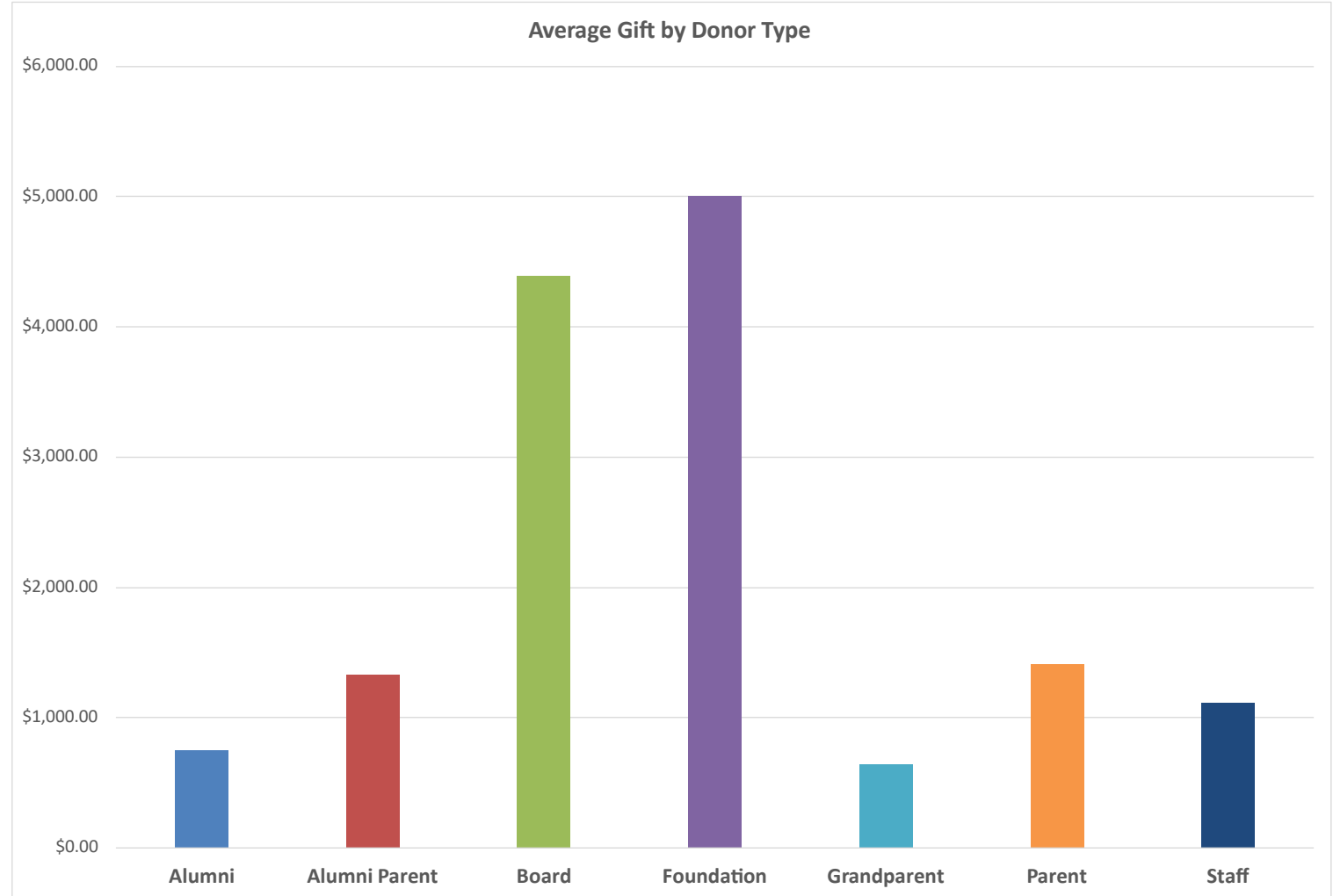
Year-End Appeal

LIBERTY COMMON SCHOOL
FORT COLLINS, COLORADO



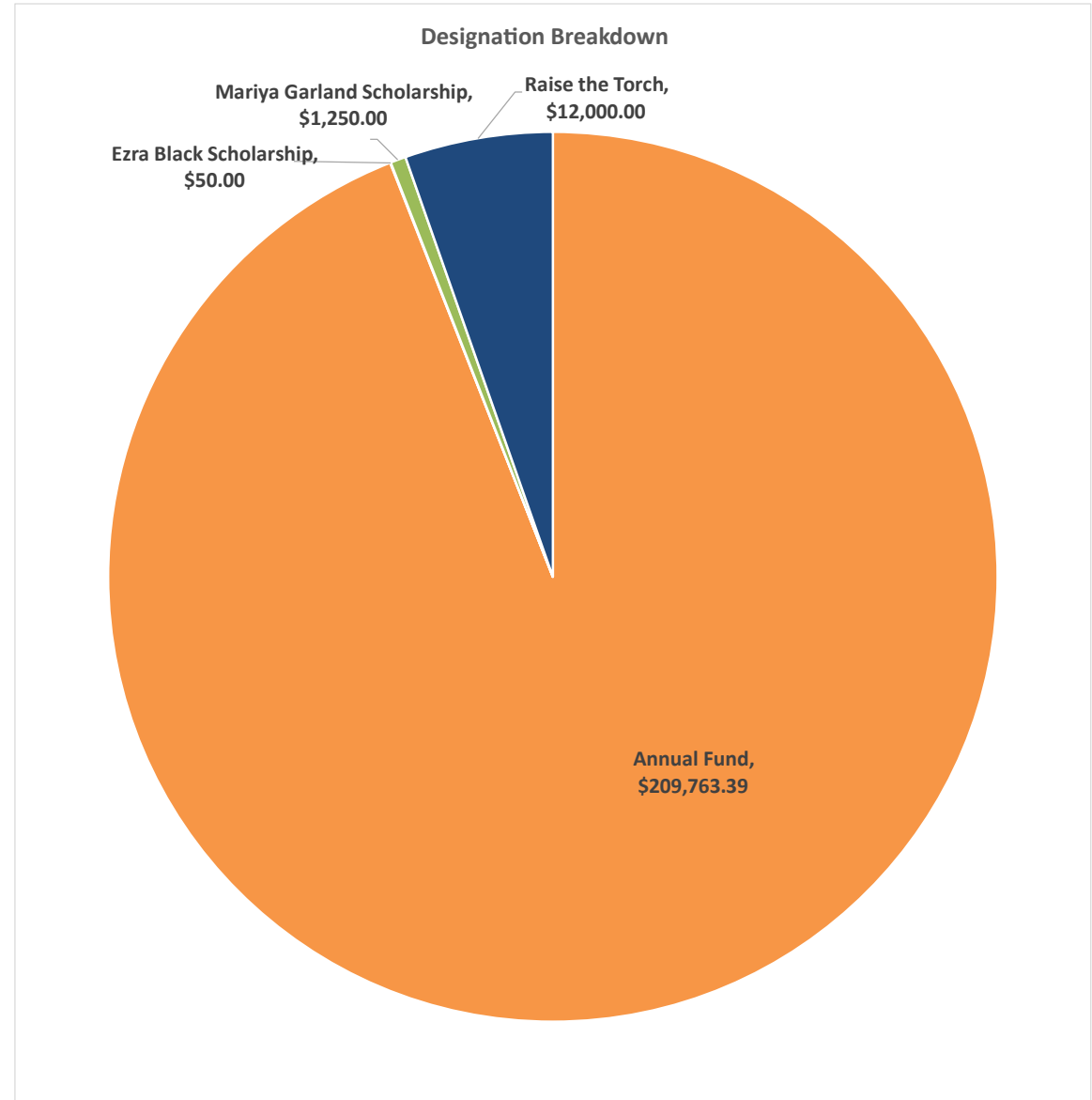
Year-End Appeal

LIBERTY COMMON SCHOOL
FORT COLLINS, COLORADO



Year-End Appeal

LIBERTY COMMON SCHOOL
FORT COLLINS, COLORADO



Year-End Appeal – year over year comparison



LIBERTY COMMON SCHOOL

FORT COLLINS, COLORADO

2023 PHILANTHROPIC LANDSCAPE

12TH EDITION

CCS
FUNDRAISING



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INTRODUCTION

Welcome to the *2023 Philanthropic Landscape, 12th Edition*, produced by CCS Fundraising. This report compiles and analyzes annual data from Giving USA and other industry research to provide an in-depth look at the current state of US philanthropy and reveal key trends.

The pandemic era and racial justice movement in 2020 and 2021 spurred record giving levels nationwide, and we saw a revised giving total of \$516.65 billion in 2021—the largest yet on record. Considering these historic levels, a flattening of US charitable giving was to be expected in 2022.

This readjustment—coupled with economic fluctuations—undeniably affected philanthropy. Giving USA’s initial 2023 data reveals charitable giving appears to have decreased by 3.4% in 2022 to \$499.33 billion. However, philanthropy has steadily grown in recent years when accounting for inflation activity and factoring in additional data. Donors continue giving, and we see extraordinary support for various causes in our everyday work with clients.

We are also seeing our client partners facilitate in-depth reassessments of decision-making processes, in response to social reckoning and evolving legislative policies, because diversity, equity, and inclusion (DEI) efforts reflect what it means to belong. At CCS, we do not see DEI as a stand-alone service but one woven into our values and client partnerships. For this reason, we have chosen to intentionally present 2022’s philanthropic data through this DEI-focused lens.

This year, we have also included a new chapter, “Innovations in Data and Technology for Philanthropy,” which closely examines the dynamic world of data, analytics, and the emerging impact of artificial intelligence. We uncover how they intersect in our increasingly technology-reliant world and how they will continue to impact philanthropy.

While the current philanthropic landscape is nuanced and complex, we are confident donors will continue rising to the occasion with their giving, and nonprofit organizations will continue expanding their reach. The field of philanthropy is ever evolving, and it is an exciting time to be part of the advancements bettering our world.

We are proud of the impact our clients make on the nonprofit sector, reflected in this year’s report. We hope you find the insights included in this edition informative as you look to your organization’s future.

Thank you,

Ruyi Lu, Senior Vice President
Philanthropic Landscape Co-chair

Lindsay Marciniak, Managing Director
Philanthropic Landscape Co-chair

Tom Kissane, Vice Chairman
Philanthropic Landscape Executive Sponsor

KEY FINDINGS IN THE 2023 PHILANTHROPIC LANDSCAPE REPORT

Individuals, foundations, and corporations donated \$499.33 billion in 2022.¹

Read more in the “Snapshot of Giving” chapter on [page 7](#).

Giving in six out of ten charitable sectors saw an increase in current dollars from 2021 to 2022.¹

Read more in the “Snapshot of Giving” chapter on [page 8](#).

Individuals were the largest drivers of US philanthropy in 2022, giving \$319.04 billion in 2022.¹

Read more in the “Individual Giving” chapter on [page 12](#).

The total amount donated by individuals and the number of donors both decreased in 2022.²

Read more in the “Individual Giving” chapter on [page 12](#).

Foundation giving grew by 2.5%, to an estimated \$105.21 billion in 2022.¹

Read more in the “Foundation Giving” chapter on [page 40](#).

Corporate philanthropy as a giving source increased by 3.4% in 2022 to \$21.08 billion.¹

Read more in the “Corporate Giving” chapter on [page 49](#).

Bequest giving increased by 2.3% over 2021 to \$45.60 billion in 2022.¹

Read more in the “Gift Planning” chapter on [page 67](#).

Grants from DAFs increased by 9% to \$11.2 billion in 2022.¹

Read more in the “Gift Planning” chapter on [page 71](#).

SNAPSHOT OF GIVING

Despite a challenging economy, social and political unrest, and international crises, Americans continue donating generously to the causes that matter to them. While 2022's philanthropic trends may include some declines from the previous year, overall, philanthropy consistently rises to address new demands within our communities and across the globe.



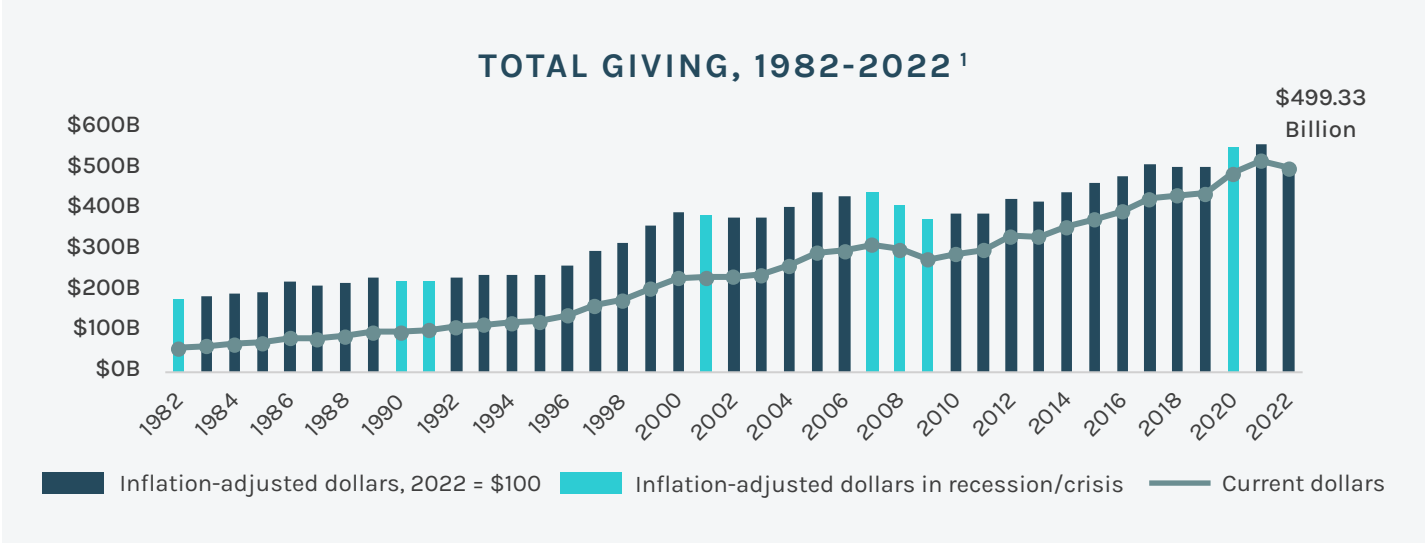
US CHARITABLE GIVING RETURNED TO PRE-PANDEMIC VOLUME, LEVELING OUT AFTER HISTORIC SPIKES

Charitable giving in 2022 has initially been reported to total \$499.33 billion, which would represent a decrease of \$17.32 billion from 2021's record-setting year. This amounts to a 3.4% decline in current dollars and a 10.5% decline when adjusted for inflation, notable in that 2022 is only the fourth current dollar decrease in philanthropy since Giving USA began tracking this trend in 1956. The three preceding occurrences of real-dollar decreases were directly tied to significant economic disturbances. In 1987, the decline in giving was tied to the single largest drop in the stock market in history, and in 2008 and 2009 the country experienced the Great Recession.¹

A complex combination of factors and dynamics may have influenced the initial appearance of a decrease in 2022. The S&P 500 declined by 25.4% in inflation-adjusted

dollars between 2021 and 2022, which historically tends to impact giving, particularly from wealthy donors and large foundations that rely on their endowment investment performance. In addition, inflation reached a 40-year high of 8% in 2022, and the additional economic uncertainty and burden on American households further contributed to giving declines.

However, steady growth in philanthropy over the past several years can be seen following adjustments made for inflation activity and the availability of additional giving data. When comparing 2022's first giving total of \$499 billion to 2021's pre-adjusted, initially reported giving total of \$484 billion, charitable giving appears to have actually increased by 3%.



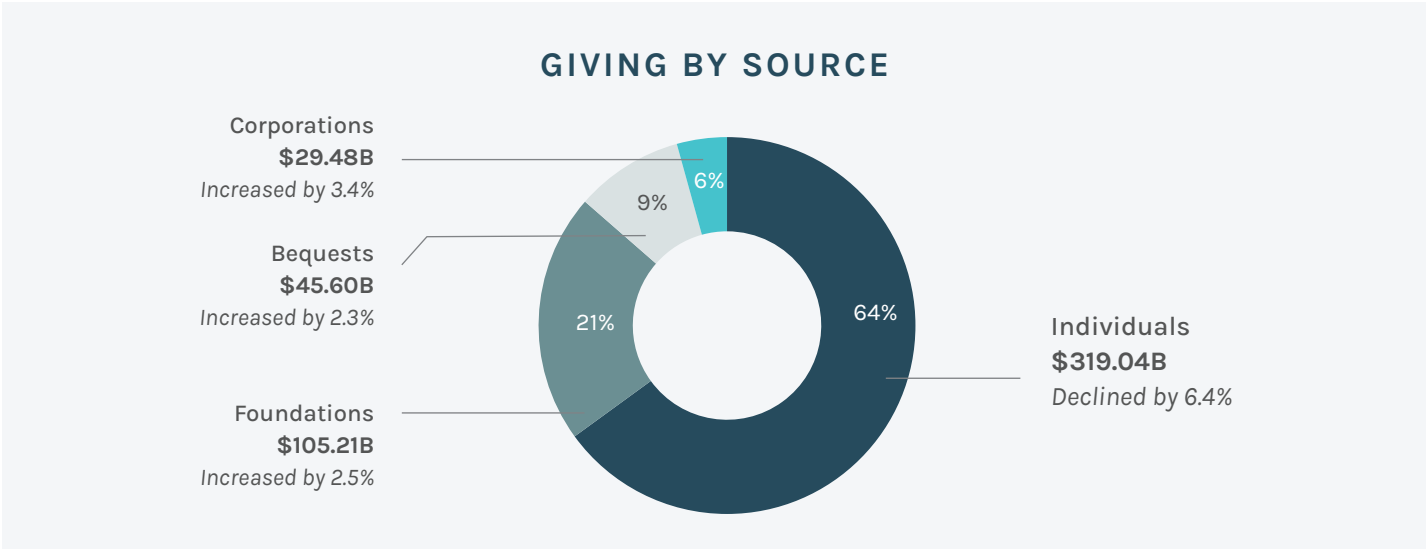
It is critical to consider giving trends in the context of the once-in-a-generation events of 2020 and 2021, with a global pandemic and racial and social justice movements igniting the highest philanthropic giving on

record. Giving levels in 2022 may also be indicative of a recalibration after these two unprecedented years and shifting philanthropic priorities as donors continue to look forward.

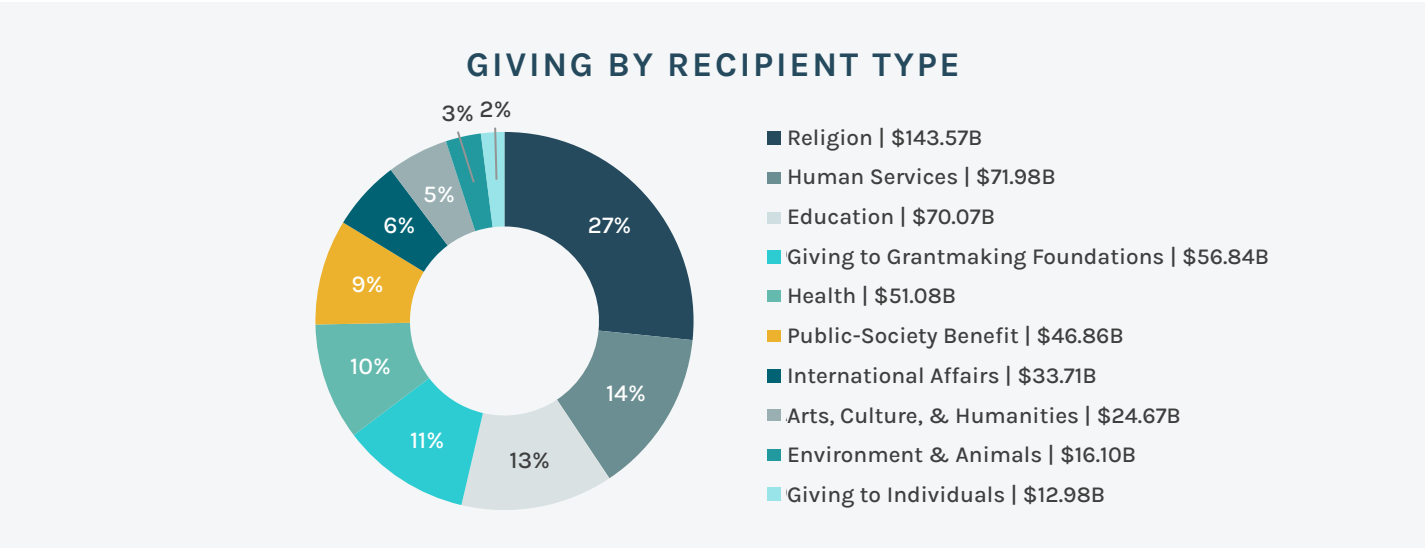
CORPORATE, BEQUEST, AND FOUNDATION GIVING INCREASED

In 2022, there was an increase in giving by corporations, bequests, and foundations in current dollars, though these increases did not keep pace with inflation. Individuals remained the most significant source of funds, donating

64% of philanthropic dollars. When combined with giving via bequests, this key demographic represented nearly three-quarters of all charitable giving.



MOST SECTOR INCREASES COULD NOT OUTPACE RECORD INFLATION



SOURCE	AMOUNT <i>Adjusted for Inflation</i>	CHANGE SINCE 2021	% OF TOTAL
Religion	\$143.57B	Decreased 2.6%	27%
Human Services	\$71.98B	Decreased 8%	14%
Education	\$70.07B	Decreased 10.7%	13%
Giving to Grantmaking Foundations	\$56.84B	Increased 1.9%	11%
Health	\$51.08B	Decreased 2.6%	10%
Public-Society Benefit	\$46.86B	Decreased 15.2%	9%
International Affairs	\$33.71B	Increased 2.7%	6%
Arts, Culture, & Humanities	\$24.67B	Decreased 4.7%	5%
Environment & Animals	\$16.01B	Decreased 8.9%	3%
Giving to Individuals	\$12.98B	Decreased 6.8%	2%

Although giving across six sectors of philanthropy grew in current dollars, only two—international affairs and foundations—outpaced inflation. The spike in giving to international affairs can likely be explained by major global events, such as the war in Ukraine and floods in Pakistan, inspiring increased philanthropic interest across giving levels.¹

The increase in giving to foundations is attributed to significant donations by high net worth individuals. In fact, of the \$16 billion donated by the US's top 50 philanthropists in total, \$8 billion went to foundations, with \$5 billion to the Bill & Melinda Gates Foundation, specifically.²

GIVING TO BIPOC AND LGBTQ+ COMMUNITIES GREW

Despite reported declines in giving, there are several positive trends. Research institutions point to an increase in giving, especially in critically-needed operational funding, to historically overlooked organizations serving—and often headed by leaders within—underserved BIPOC and LGBTQ+ communities.

³ Although not ubiquitous, these increases may indicate that donors take note of drastic disparities between white- and Black-led nonprofits, with the latter maintaining 76% less unrestricted net assets. Further, endowments of BIPOC-led organizations are nearly four times smaller than those of white-led organizations.^{3,4} While there is still a long way to go to reach funding parity for these institutions, these trends suggest giving is headed in a positive direction.

Notably, over the past few years, donors of color are outpacing white donors on several metrics, including likelihood to give to new organizations, donate goods, and volunteer their time. Increased public awareness of engaged donors of color and funding discrepancies for Black-led nonprofits, coupled with a population diversifying at an exponential rate, means it is imperative for nonprofits to not only deeply understand but also embrace and seek increased participation from underrepresented communities across organizational leadership, donor communities, and service areas.⁵



RESULTS WERE MIXED AMONG GIVING TRENDS

Other 2022 trends show growth in the areas of gift planning, digital giving, and technology in fundraising. Bequest giving decreased by 5.3% but grants by DAFs grew to \$11.2 billion giving. Meanwhile, online giving dropped by 4% but remained the preferred method of giving for donors, and emerging technologies such as AI offered data-driven solutions to better engage donors for enhanced fundraising.

CCS INSIGHT

Nonprofits are fostering some common approaches to advance their DEI efforts, including:

- Continually educating fundraising staff and board members about the importance of DEI efforts and equitable representation;
- Raising funds for new projects/programs related to diversity, equity, and/or inclusion;
- Modifying donor messaging and client cases for support, using asset-based language to best respect those featured in client impact stories;
- And developing more culturally competent donor cultivation/solicitation approaches.

Learn more about how organizations are incorporating DEI into their fundraising and operations in the [2023 CCS Philanthropy Pulse Report](#).

INDIVIDUAL GIVING

Giving by individuals remains the largest source of philanthropy in the US, even as it leveled out in 2022 after two record fundraising years. With decreases in both donations raised and the number of donors in 2022, it is critical to understand shifts in donor patterns, behaviors, and motivators to maximize individual giving and inspire donors at every level.



DOLLARS AND DONORS DOWN BUT INDIVIDUALS REMAINED LARGEST SHARE OF CHARITABLE GIVERS

In 2022, individuals remained the largest share of donors, representing 64% (\$319.04 billion) of all US giving (\$499.33 billion). However, individual giving decreased by 13.4% in inflation-adjusted dollars from the previous year, making it the greatest decline in individual contributions when accounting for inflation since 2008.¹ In addition to a decline in dollars contributed, the number of individual donors also declined in 2022, continuing a trend seen in recent years²

Changes in available cash to households likely contributed to 2022's downward shift in individual giving. These factors include poor stock market performance (the Nasdaq Composite was down by 33.1%, S&P 500 by 19.4%, and Dow Jones Industrial by 8.8%) and a 7.5% decrease in inflation-adjusted disposable personal income.^{1,3}

Gross Domestic Product (GDP) also critically links to individual giving patterns. The 1.1% increase (9.2% without adjusting for inflation) in GDP in 2022 may correlate with a less severe decline in individual giving.¹ In addition

\$319.04 Billion

Amount given by
individuals in 2022

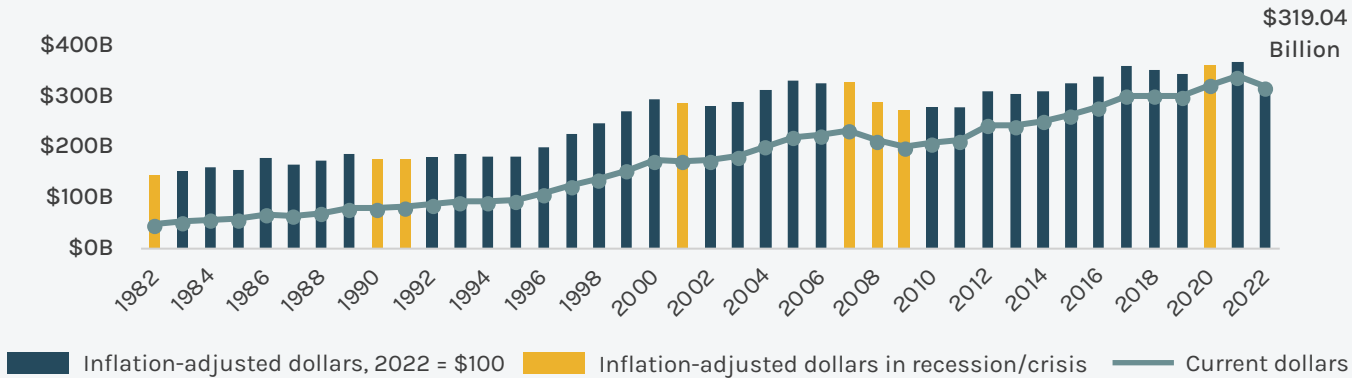
-6.4%

Decrease in individual
giving from 2021 to 2022

64%

Percent of all charitable
giving by individuals¹

TOTAL GIVING, 1982-2022¹



to economic instability, multi-decade trends may also explain this year's decline. Over the long-term, individual giving has decreased as high net worth individuals increasingly choose alternative avenues for charitable contributions, including family foundations and donor-advised funds.²⁰

It is important to consider individual giving patterns and behavior to understand the full individual giving landscape. This chapter explores increased attention on donor acquisition and retention; a rise in giving through donor-advised funds; the value of an omnichannel direct response strategy; the importance of cultivating the next generation of philanthropists; individuals' focus on diversity, equity, and inclusion; and growth in women's wealth and philanthropy.

INDIVIDUAL GIVING REMAINED TOP-HEAVY DESPITE OVERALL DECLINES

According to the Fundraising Effectiveness Project's (FEP) estimates, the total number of donors declined by 10% in 2022.²² However, charitable giving remains concentrated among wealthier donors, who show more moderate decreases in charitable giving.¹

According to the FEP, decreased donor participation was driven by declines in contributor engagement resulting from insufficient acquisition rates and retention.

YEAR-OVER-YEAR DECLINES IN TOTAL AMOUNT DONATED BY DONOR SIZE:²⁴

- 15% Donors contributing under \$100
- 8% Donors contributing \$101-\$500
- 5% Donors contributing \$500-\$5,000
- 3% Donors contributing \$5,000-\$50,000
- 2% Donors contributing over \$50,000



GIVING FROM YOUNGER GENERATIONS CONTINUES TO RISE

With the Great Wealth Transfer in motion and many Americans over 55 years old opting to pass down some of their estates while living, the younger generation’s wealth and philanthropic capacity are on the rise.¹²

Between 2016 and 2022, the average Millennial household annual giving increased by 40% from \$942 to \$1,323, contrasting the decrease in average annual giving from Generation X (-4%) and Boomers (-12%) during this same period.¹³

With younger generations increasing their philanthropic giving, nonprofits continue to focus on understanding their preferences and motives. Having a compelling mission and opportunities for deep organizational engagement have proven critical for nonprofits to capture this growing donor base, as younger generations report being part of something bigger than themselves as a significant driver of their philanthropy.^{9, 14} Sudden

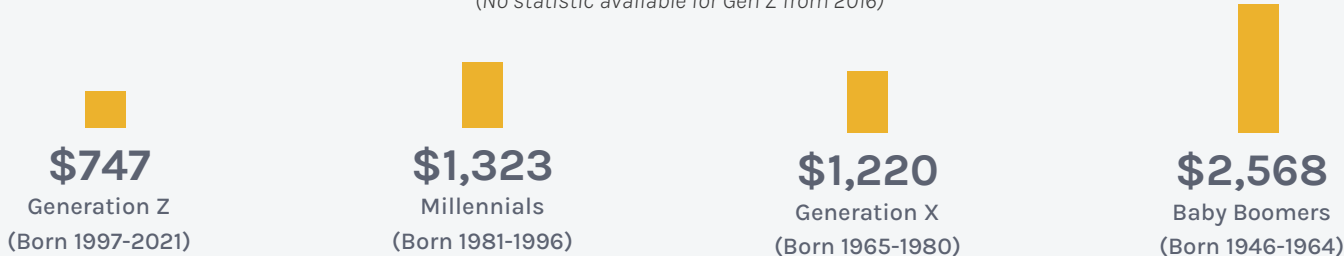
CCS INSIGHT

As younger generations increase their giving and philanthropic involvement, it is important to tailor cultivation, solicitation, and stewardship strategies by generation. Nonprofits should engage in frequent, transparent, and impact-driven multi-channel communication with younger constituents and leverage Generation Z and Millennials as strong advocates for their mission and philanthropy efforts.

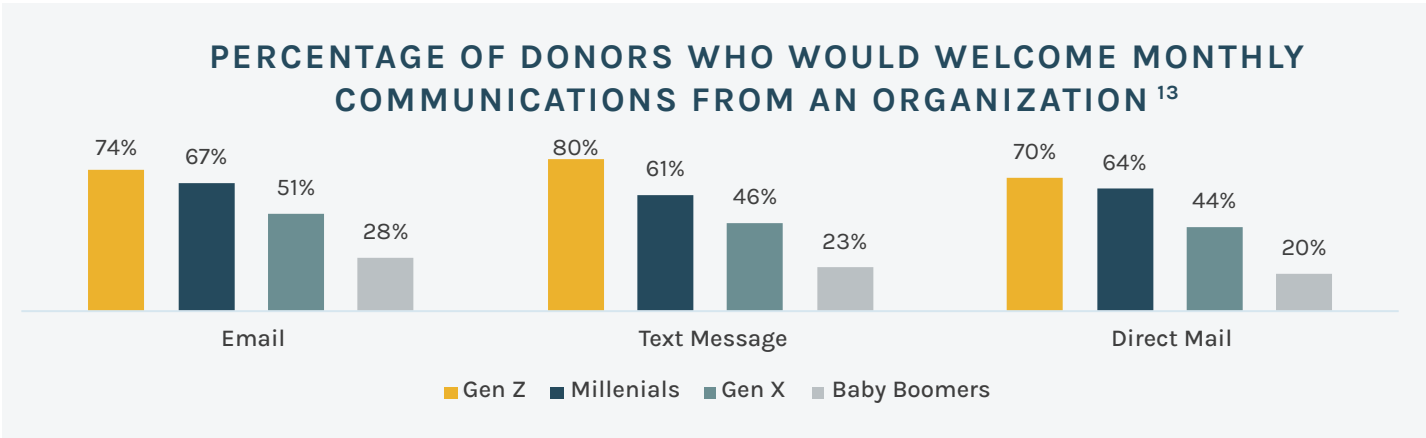
calls to action or disaster relief requests, as seen over the past two years, are more likely to motivate Generation Z and Millennials to donate compared to Generation X and Boomers.^{15, 16} Generation Z and Millennials are also three times more likely to advocate for an organization than older generations.¹⁵ Communication and transparency about measurable results and donation impact are also

AVERAGE ANNUAL HOUSEHOLD GIVING BY GENERATION ¹³

(No statistic available for Gen Z from 2016)

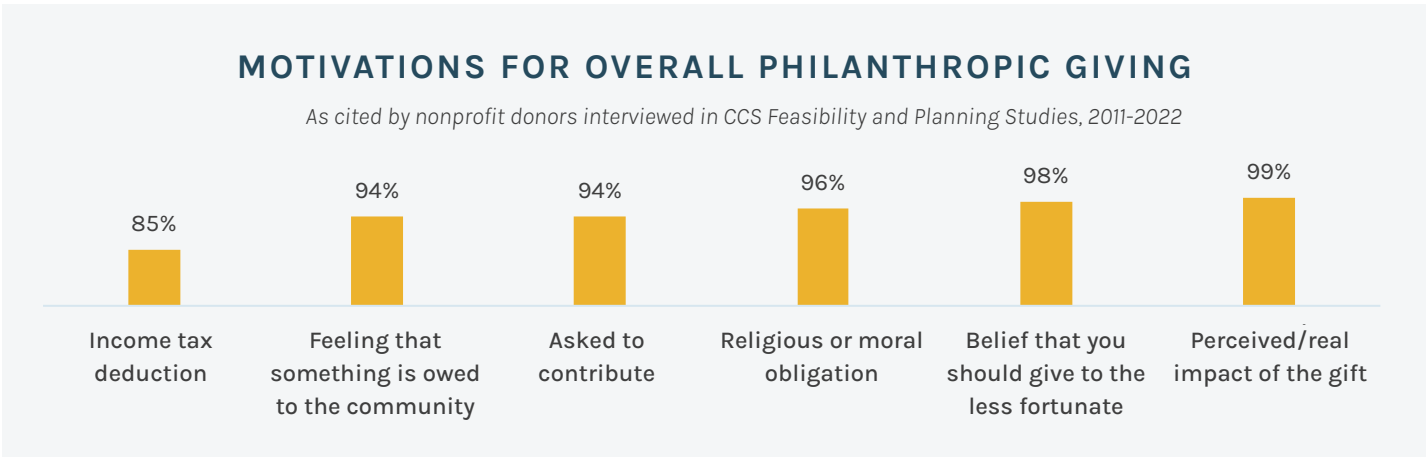


critical for younger generations.^{14,15} Most Generation Z and Millennial donors cite a desire for a direct mail letter, email, and text message at least monthly compared to a smaller percentage of Generation X and Boomer donors.¹⁴



DONORS GIVE TO CHARITY TO MAKE AN IMPACT

Altruistic factors represent a primary driver of donor giving, and donors believe that their contribution can create a meaningful impact. In a recent global analysis of nearly 2,000 donors, two main explanations of donor motivation were discovered: self (donations explained in relation to one’s own identity) and other oriented (charitable action explained in relation to a beneficiary’s identity).²¹ Most frequently, donors stated their charity preference was driven by other-centered themes, including factors such as beneficiary need and identity. Donor motivation is also impacted by factors such as the sector to which the donor is giving, the cause of the organization, and the identity of the beneficiaries.



DONOR ACQUISITION REMAINS A TOP CONCERN FOR NONPROFITS

Retained donors give over 60% of total dollars, followed by new donors (19%), recaptured donors (13%), and newly retained donors (8%).²³ However, according to a study conducted by CCS of over 1,200 nonprofits, acquiring and retaining individual donors remained the top two challenges for organizations in 2022.⁴

Changing donor demographics impacted this issue, as did a decline in the overall number of donors, despite 60% of surveyed organizations reporting an increased number of donors to their organization in 2022.⁴ The Fundraising Effectiveness Project reported a 10% donor loss in 2022, most of whom contributed \$500 or less in 2021.²

RECURRING REVENUE GREW

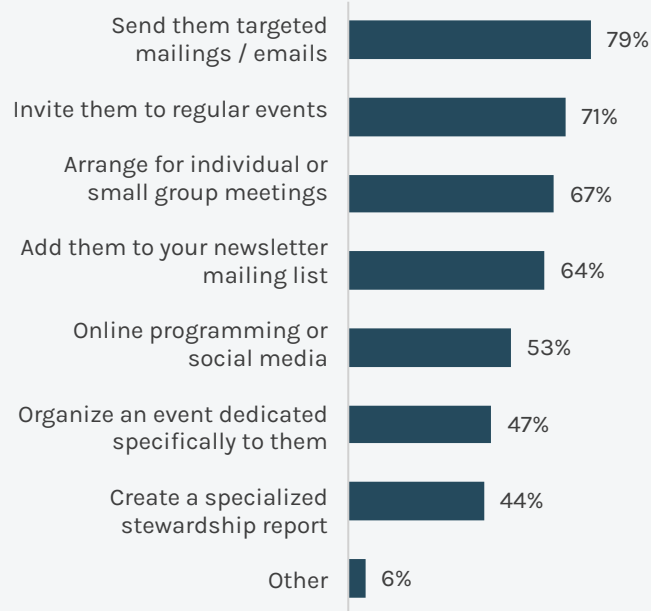
Despite acquisition challenges, monthly/recurring giving grew in 2022, increasing by 11% from 2021 and accounting for 28% of all 2022 online revenue.⁵ This is an important area for organizations to prioritize, as recurring donors contribute more than one-time, annual donors (\$287 average annual total from monthly donors in 2022 versus \$192 average annual total for donors who make one-time gifts).⁵

Promoting recurring giving can also yield higher retention rates among donors and increase fundraising revenue for organizations.

CCS INSIGHT

Nonprofits should invest in targeted, multi-channel communication approaches and a strong monthly giving program to acquire and renew moderate to mid-level donors. As retention rates of donors from year one to year two decreased significantly in 2022, nonprofits should prioritize developing personalized retention strategies for newly acquired donors (e.g., a new donor welcome email series).²

HOW ORGANIZATIONS RETAIN NEW DONORS



\$192 AVERAGE ANNUAL REVENUE FROM DONORS WHO MAKE ONE-TIME GIFTS

\$287 AVERAGE ANNUAL REVENUE FROM MONTHLY DONORS

10% DROP IN DONORS IN 2022



ORGANIZATIONS USED OMNICHANNEL DIRECT RESPONSE STRATEGIES TO ENGAGE DONORS

Organizations continued to maximize reach and revenue by communicating with donors through various direct response channels. Over half (59%) of the organizations represented in the [2023 CCS Philanthropy Pulse](#) report stated they are continuing to focus on enhanced personalized communications (23% increase from previous year) and 65% of organizations say they are continuing to focus on enhanced social media presence (16% increase from previous year).⁴

DIGITAL (ONLINE, ADS, EMAIL)

In 2022, nonprofits continued to invest in bolstering their digital presence. Nonprofit Tech for Good reported that 53% of charities leveraged social media ads for fundraising, and 68% sent email appeals.⁶ Nonprofits utilizing digital ads for fundraising in 2022 found the highest return in search ads—almost 3:1.⁵ However,

online revenue for nonprofits declined by about 4% in 2022, according to M+R Benchmarks, and while email revenue also decreased by approximately 4%, it secured 14% of all online gift income.⁵

DIRECT MAIL

Direct mail remained an important revenue driver for nonprofits. Postalalytics found that direct mail generated a 4.4% response rate, substantially more than the average 0.12% return from email appeals.⁷

Direct mail is considered a “high trust” channel by a portion of donors across all generations, and while more expensive to produce than digital appeals, it remains a valued fundraising vehicle.⁷



CASE STUDY

With nearly half a million visitors annually, the Portland Art Museum is the oldest art museum on the West Coast. In the middle of an existing campaign in 2019, its capital and endowment needs increased. The museum engaged CCS to provide a mid-campaign assessment, predictive modeling analysis, and a series of campaign-focused board retreats to support the campaign's evolution and significantly increase fundraising. These efforts, campaign management, and additional capacity-building support resulted in unprecedented success. Raising a record \$141 million, \$67 million of which has come from individuals, corporations, and charitable foundations, the Connection Campaign has become the largest and most successful campaign in the museum's 129-year history.

PEER-TO-PEER FUNDRAISING

Some nonprofits experienced a boost in new donors by adopting peer-to-peer fundraising strategies.⁸ Organizations that utilized volunteers to solicit gifts from their personal networks in 2022 saw a gift increase of 18% through this type of approach, growth that will likely continue, as younger generations are most interested in making a gift when invited to by a trusted individual.^{9, 10}

CCS INSIGHT

Because each direct response channel's return on investment (ROI) fluctuates yearly, and audiences have unique communication preferences, nonprofits should deploy an omnichannel fundraising approach and communicate with constituents through their preferred method. Tailored messaging meets donors where they are, whether by email, peers, mailbox, or social media (by far the most used communication tool, with 302.35 million Americans, or 90% of the nation's population, as active users).¹¹

WOMEN LEAD STRATEGIC CHANGE IN INDIVIDUAL CHARITABLE GIVING

Women's wealth and influence have grown significantly, as they are now estimated to hold approximately 33% of the world's wealth. By 2030, American women are expected to control as much as \$30 trillion in financial assets as Boomers transfer their wealth due to age and other circumstances.¹⁷ Women increasingly lead philanthropic decisions that drive positive change in organizations' approach to inclusive philanthropy. Female donors are highly motivated by impact giving, meaningful relationships across an organization, and clearly identified long-term goals.¹⁸ Primarily, women's charitable giving is targeted toward organizations rooted in social justice change and dedicated to breaking down unequal systems.¹⁸

CCS INSIGHT

Strategically engaging and partnering with women donors is essential to ensuring significant support. Organizations should tailor cultivation and stewardship communications for female donors to include measurable long-term impact and social change-focused messaging.



CASE STUDY

Spelman College, located in Atlanta, Georgia, is a privately endowed women's liberal arts institution with a historic focus on Black education. CCS partnered with college leaders to plan and help implement the Spelman Ascends effort, the largest campaign in Spelman's 142-year history. Together, we raised over \$339 million on a \$250 million goal to support scholarship funding, invest in staff and faculty, promote academic excellence, grow its annual giving program, and establish a new center for arts and innovation.

DEI REMAINS A CLEAR FOCUS FOR INDIVIDUAL DONORS

DEI remained a strong motivation for individuals when making philanthropic decisions in 2022.¹⁹ While more long-term data is needed to demonstrate a fundamental shift in increased charitable support for racial equality, key donors—younger generations, people of color, and LGBTQ+ constituents—demand meaningful organizational change in DEI policies. Based on information gathered in the [2023 CCS *Philanthropy Pulse*](#) report, a higher proportion (10%) of organizations that rated DEI as “very important” or “important” in the development of their strategic plans saw greater growth than those that did not.⁴

This rising and influential group of donors (Millennials and Generation Z, people of color, and LGBTQ+) report that having a diverse, equitable, and inclusive board and staff has positive effects on how trustworthy the organization is and directly reflects on how well the organization serves its constituents and community. In fact, 64% of Millennials versus 47.3% of Gen X and Boomers report DEI positively correlates to a charity’s trustworthiness, while 61.7% of Black constituents versus 50.8% of white donors assume that DEI positively impacts how well a charity serves its community.¹⁹ Notable representation has become a standard donor expectation to ensure organizations can address systemic inequalities and ensure their work is inclusive and equitable.



CASE STUDY

Fairhill School empowers students with learning differences through a student-centered curriculum focused on differentiation and intervention for individualized learning needs. A small school with a lean staff, Fairhill faced an urgent need to rebuild its campus and support mission and growth-centered initiatives. In partnership with CCS, Fairhill is mobilizing its committed board and dedicated parent base to launch a first-of-its-kind campaign. Though Fairhill's leadership team and board began with limited fundraising experience, the campaign has established early momentum with above-average gift sizes from leadership commitments—including a family whose four children were all impacted by Fairhill's exceptional Learning Different education; this family was able to double their already six-figure gift commitment through a company matching program.

"CCS invested time to get to know the heart of our mission and impact. They affirmed that our strength is in our people and our story" said Carla Stanford, Fairhill School Executive Director. "Having served my entire career here, I knew this was true for the well-being of our students, but I did not know that it would also make us strong fundraisers. Through CCS's effective approach, we are leveraging the relationships that are already the core of who we are as a Fairhill family and inspiring a community-wide effort to advance our school into a new era."

HIGH NET WORTH GIVING

The US is home to many high net worth individuals who make key prospect donors for nonprofit organizations. Although there were fewer donors in 2022, the total giving by these wealthy individuals did not change, indicating philanthropy is still a focus for this group. Despite economic uncertainty and political divide, high net worth individuals donated almost \$14 billion in 2022.¹



HIGH NET WORTH DONORS GREW BUT TOTAL US FORTUNE FELL

In 2022, the US added the most new billionaires to worldwide totals, with 51 minted. ² The much larger population of high net worth individuals (HNWIs), or those with investable assets of \$1 million or more (excluding real estate), grew to \$5.3 million in the US in 2022. ¹ Although these increases are significant, the total US fortune dropped by \$500 billion—more than the reported total of charitable giving from all sources—in 2022. ²⁰

5 FASTEST GROWING MILLIONAIRE POPULATED US CITIES ³				
	HNWI GROWTH OVER 2021	HNWIS	CENTI-MILLION- AIRES (\$100M+)	BILLIONAIRES
New York	40%	340,000	724	58
Bay Area	68%	285,000	629	63
Los Angeles	35%	205,400	480	42
Chicago	24%	124,000	295	24
Houston	65%	985,000	280	20

A bright spot in a year of change: charitable giving as a percentage of wealth rose slightly among the Forbes 400 overall, and nine members gave more than 20% of their net worth in 2022. ²

GIVING TOTAL BY TOP PHILANTHROPISTS RETURNED TO PRE-PANDEMIC LEVELS

While giving from individuals declined year-over-year in 2022, HNWI's accounted for 5% of the individual giving figure, mirroring their percentage from 2021. This donor group made significant gifts even as the amount given by other donors decreased.⁴ Mega gifts, defined as commitments of \$450 million or more, totaled \$13.96 billion in 2022.¹

Changing economic conditions, such as high interest rates, market volatility, and falling discretionary income, contributed to more stagnant giving by high net worth households in 2022 than in the previous two years.⁴ While HNWI donors are still generous, they appear to be returning to pre-pandemic giving levels and supporting causes related to their personal missions after two years of buoyed markets and emergency giving.

“THE PHILANTHROPY 50” LIST REVEALED NEW DONORS AND SUPPORTED CAUSES

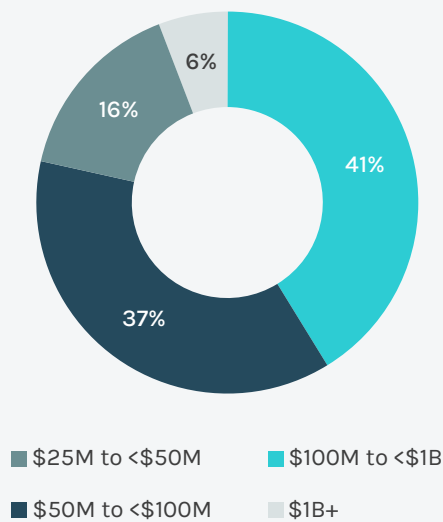
Each year, The Chronicle of Philanthropy releases “The Philanthropy 50,” a list of America’s 50 individuals/families who gave the most through publicly announced gifts in that year. In 2022, all 50 donors combined contributed over \$16 billion to the charitable landscape.⁵ This total is comparable to 2019’s \$15.8 billion, after peak highs in 2020 and 2021 (\$24.7 billion and \$33.4 billion, respectively)¹

This year’s top five donors—Bill Gates, Elon Musk, Michael Bloomberg, Warren Buffett, Jacklyn and Miguel Bezos—cumulatively gave more than \$8.5 billion.⁵ Jacklyn and Miguel Bezos, early investors in Amazon, are new to the list, debuting at number five with a gift of \$710.5 million to cancer research; they join 25 other newcomers, 19 of whom gave to scholarship programs, schools, or colleges.⁵ Lower-profile list newcomers include Ph.D. in meat science Gordon Davis (#45) and Utah’s Bastian Family (#49), ranchers who gave 100 acres (worth an estimated \$41 million) to Utah State University. Of all 50, there is only one BIPOC donor: Jen-Hsun Huang, founder of Nvidia, born in Taiwan. New to the list, he and his wife Lori (#41) gave \$50 million to the Oregon State University Foundation for a new research center to apply artificial intelligence to climate science.⁵

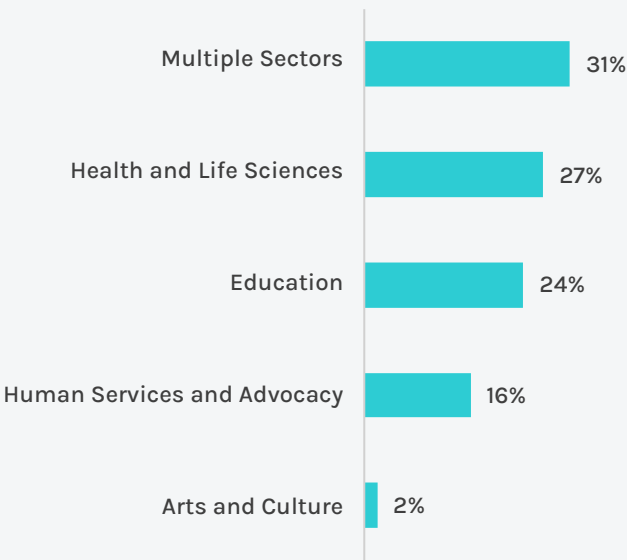
Of gifts over \$1 million, \$8.1 billion was awarded to the donor’s own foundation or donor-advised fund in 2022, with colleges and universities, medical centers, and medical research representing the other top causes donors supported.⁵ Interestingly, although some receiving organizations are faith-based (Catholic Inner City Schools Education Foundation and the Jewish Community Foundation of San Diego, among others), houses of worship received none of the public gifts from the top 50 donors.⁵ This is a marked difference from larger giving trends in the US, with 27% of charitable

gifts given to religion in 2022.¹ At least three of last year's most significant donors do not appear on the top 50 list. MacKenzie Scott and Melinda French Gates declined to provide information to The Chronicle of Philanthropy on giving totals. Also missing are Ann and John Doerr, who gave \$1.1 billion to Stanford University in 2022 to launch its School of Innovation.⁵

TOP 50 PHILANTHROPISTS' PUBLICLY ANNOUNCED GIFTS



PHILANTHROPY 50 MEMBERS' TOP SECTORS SUPPORTED



CCS INSIGHT

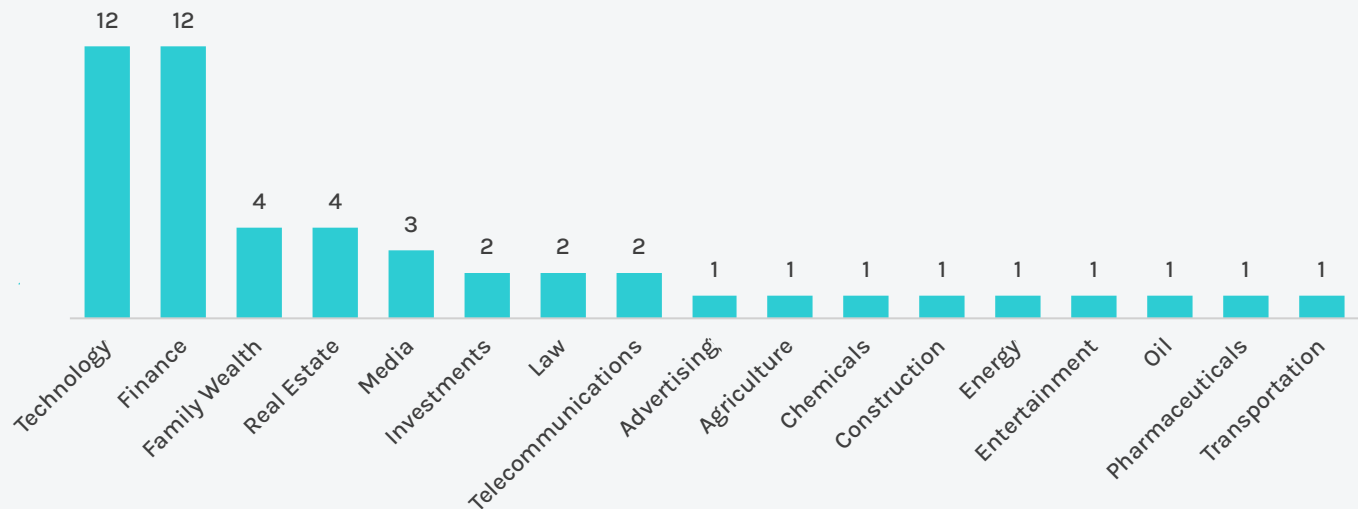
With increasingly more mega-wealthy choosing to give quietly or via donor-advised funds, uncovering prospects with significant potential to make a philanthropic difference can be challenging. Predictive modeling can find the donors in your database who are most likely to make larger gifts in the future by building custom profiles from your own data. Results tell you which donors have an affinity for your nonprofit; the outcome is tailored portfolios of unmanaged potential that, when paired with wealth screenings and other research, could include prospects with significant capacity.



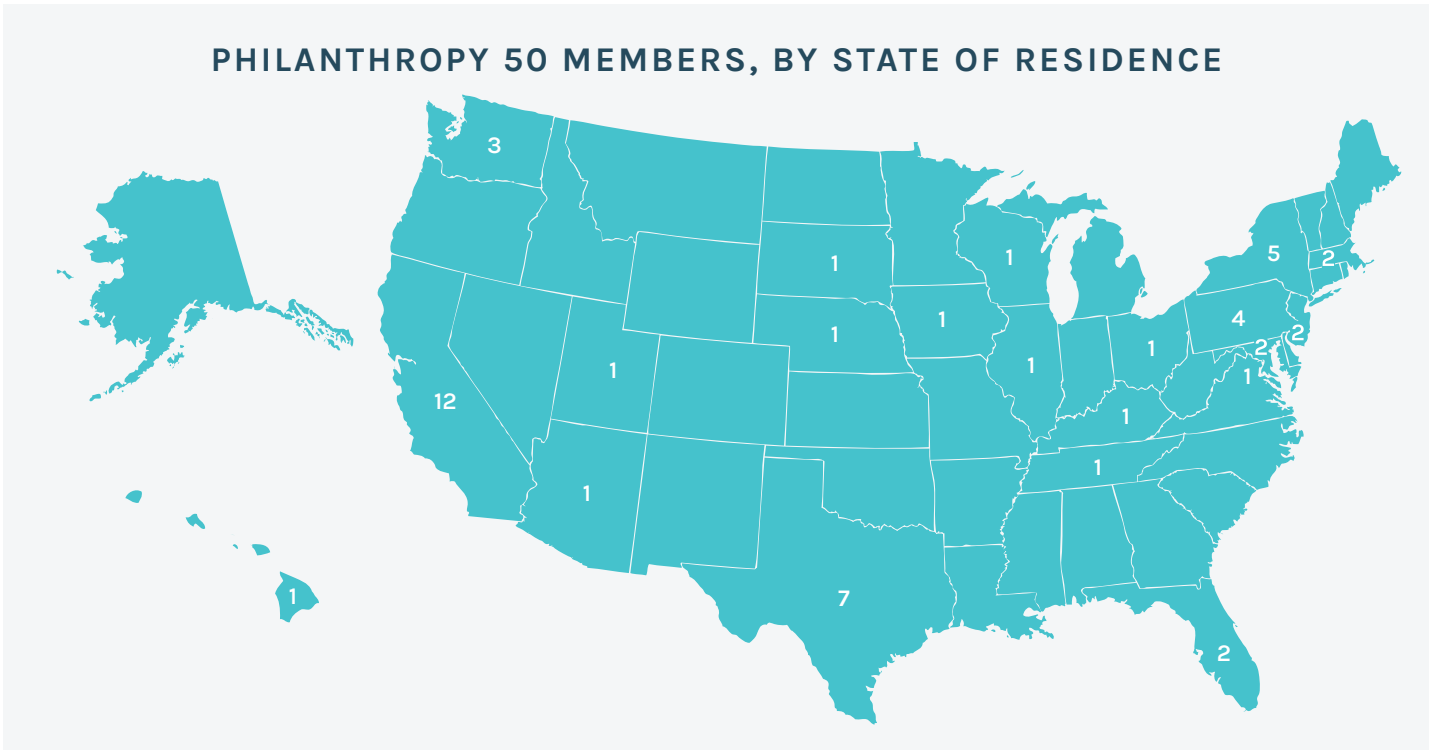
FINANCE AND TECHNOLOGY REMAINED GREATEST INDUSTRY SOURCES OF WEALTH FOR THE PHILANTHROPY 50

Nearly half of “The Philanthropy 50” list members gained wealth from technology and finance, with 48% equally distributed between the two industries. Real estate and family wealth are the next largest sources, cumulatively making up 16% of the members’ origins of wealth. While the dominant sources have remained steady recently, the variety of represented sectors has evolved—20 years ago, in 2002, four list members made their fortunes in retail; none are on this year’s list.⁵

PHILANTHROPY 50 MEMBERS, BY SOURCES OF WEALTH



The 50 donors are distributed across 20 states. California is by far the most well-represented state, with 12 members residing there; Texas and New York follow, with 13 members collectively residing in these states. Recipient organizations are distributed across 22 states and Washington, DC, with the top three being California, New York, and Florida.⁵



HIGH NET WORTH INDIVIDUALS WERE HESITANT TO PUBLICLY COMMIT TO PHILANTHROPY

In 2022, only five individuals or couples joined the Giving Pledge, “a movement of philanthropists who commit to give the majority of their wealth to charitable causes, either during their lifetimes or in their wills.”⁶ This is the smallest group of signers since the pledge began in 2010, with 14 joining in 2021 and 12 in 2020. This decrease in pledges mirrors the trepidation noted by individual givers across the country in 2022.⁶ Although he has not signed the Giving Pledge, Jeff Bezos announced in 2022 that he intends to donate the majority of his wealth during his lifetime. He declined to share details or set a target amount but indicated he is considering how to effectively invest in causes he deems important. This announcement comes after his landmark \$10 billion gift to combat climate change, of which \$1.6 billion has already been granted.⁷



CASE STUDY

In June of 2022, Loyola University Chicago announced its largest individual gift: \$100 million from John and Kathy Schreiber to support scholarships for historically underrepresented populations in higher education. The Schreibers were motivated to provide access to education because they believed in Loyola Chicago's Jesuit mission. Financial aid is one of the year's most funded areas through "The Philanthropy 50," and this gift represents an incredible donor journey with dozens of years of impactful giving to Loyola University Chicago in advance of this generous commitment.

THE NEW 2022 GIVING PLEDGE SIGNATORIES INCLUDE: ⁶

- Mala Gaonkar, head of SurgoCap Partners, motivated by the equal intrinsic value of other people's lives
- Michael Krasny, founder and former chief executive officer of CDW Corporation, motivated to provide an opportunity for individuals to live a healthy and productive life
- Mark Pincus, founder of Zynga, motivated to give others the chance to partner with their future selves to fix problems in their own communities
- Urs Wietlisbach, co-founder of Partners Group, and Simone Wietlisbach, motivated to have a lasting impact on improving the world
- Anne Wojcicki, CEO of 23andMe, motivations not disclosed

**Sam Bankman-Fried also signed in 2022 but was later removed from the Giving Pledge website after the collapse of his cryptocurrency business and his indictment.*

GIVING PREFERENCES ARE CHANGING AMONG UPCOMING GENERATIONS OF GIVERS

Each generation makes giving its own. Two of “The Philanthropy 50” in 2022 were Millennials, born between 1981 and 1996: co-founders of Airbnb Brian Chesky and Joe Gebbia. Additionally, seven of the Giving Pledge signatories are in their thirties. There are many reasons to adopt mechanisms for attracting mega-gifts with upcoming generations in mind.

Eighty-four trillion dollars will pass from one generation to the next through 2045.⁸ Generation X will potentially inherit the greatest amount of these assets, an estimated \$8.9 trillion in the next 10 years, and a total of \$29.6 trillion over the next 25 years.⁸ With a shift in the generation holding the most wealth, personal factors of age, gender, racial identity, and wealth journey underscore the importance of bespoke donor engagement.

Millennials are the largest cohort of living Americans, beginning to come into their own from a philanthropic standpoint. Twenty-five percent of Millennial households earn at least \$100,000 annually, which only stands to increase as careers and opportunities deepen.⁹ Their passions often vary fundamentally from the giving interests of their parents, though generally, people of color are more likely to say their family's legacy is an important factor in their giving. Engaging Millennials in meaningful ways will be pivotal for nonprofits to capture new donors.¹

Younger HNWIs are twice as likely to give through a structured vehicle such as a donor-advised fund (DAF), a charitable trust, or a family foundation.¹⁰ Methods of preferred giving and conversations with families who have generational wealth are changing.

Young HNWIs feel confident in their ability to support philanthropic causes meaningfully.¹⁰ Nonprofits have the opportunity to meet and expand upon this enthusiasm.

Millennials expect to be engaged via numerous in-person engagements and communication channels and are more likely to be donors if they volunteer. Nonprofits should continue to focus on offering engagement opportunities to their pipeline of donors coming into the organization.⁹

Many family foundations are also incorporating second and third generations into their internal and external decision-making processes. Walmart founders, the Waltons, are a perennial example of increasing familial involvement, with Lukas Walton announcing in 2022 that 90% of the foundation's endowment would go into impact investments.¹¹ California's Sobrato family shares wealth between generations, with John A. Sobrato owning only 40% of his company while his children and grandchildren own about 60%. Further, all family members are eligible to

join the board when they become adults.¹² No matter the generation, the good news is that philanthropy remains a priority for most HNWIs.¹⁰

HIGH NET WORTH INDIVIDUALS DISRUPTED THE GIVING LANDSCAPE

As noted previously, the US's top donors in 2022 gave more than half of their total donations to donor-advised funds or their own/family's foundation. For example, all four of the biggest gifts Warren Buffett (#4 in the table on page 37) made were to his four family foundations, totaling \$758.8 million.⁵ This approach is not new but reflects an ever-increasing shift toward these types of giving recipients, in giving to intermediary organizations rather than to direct end-users.¹³ Giving in this way offers many advantages to the donor: immediate income and estate tax benefits, increased control over timelines for philanthropic investment rather than in the bounds of a tax year, and, in the case of DAFs, enhanced privacy and advisors suited to recommend organizations matching

CCS INSIGHT

With the Great Wealth Transfer underway, nonprofits must be thoughtful in engaging HNW families. Consider conducting family stewardship visits or group briefings where appropriate, and evaluate leadership opportunities for subsequent generations. Ask current donors if it would be meaningful for their children or grandchildren to join them for the next conversation; if organizations open the conversation, donors may share information about giving interests across the family.



CASE STUDY

PeaceHealth received a transformational \$50 million gift from Peter Paulsen in 2022—the largest gift in the organization’s history—dedicated to expanding the PeaceHealth St. Joseph Medical Center in Bellingham, WA. The effort was launched by a \$10 million gift from an anonymous donor. Paulsen is a retired real estate developer who was moved to give because of the organization’s mission and caregivers, as well as the project’s strong existing support from the community. PeaceHealth St. Joseph leadership, and their big vision to invest in the well-being of Whatcom County, inspired trust and deep generosity. The Chronicle of Philanthropy ranked Paulsen’s gift to PeaceHealth in the top 50 largest philanthropic gifts of 2022.



the donor's interests. In a marked departure from this approach, however, one of 2022's top donors gave to their foundation for immediate awards and hand-selected each recipient: Karen and Robert Hale gifted \$52.3 million to their own Fox Rock Foundation and pledged to give \$52 million to 52 nonprofit groups at roughly \$1 million donated per week.¹⁴ There is currently no obligation to distribute funds from a DAF, and only a 5% payout requirement on foundation assets each year, making it often difficult to understand when and to whom charitable dollars will arrive. Many of the 2022 top donors, however, made both significant gifts to and notable distributions from their foundation, or they made recommendations from their DAF last year. Google co-founder Sergey Brin gave \$274.3 million and awarded \$506.9 million from his family foundation, while Craigslist founder Craig Newmark gave \$81 million to his foundation and distributed \$53.2 million from his foundation and a DAF.⁴ These examples illustrate the overall generosity of donors at the top giving levels and are not necessarily reflective of the nationwide critique of family foundations and DAFs warehousing wealth.

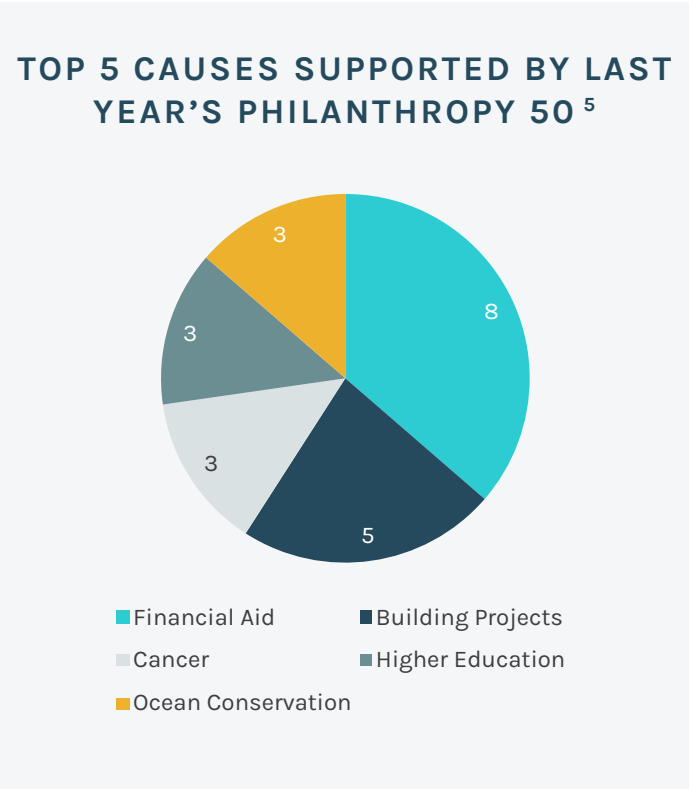
MacKenzie Scott launched her philanthropic website, Yield Giving, in 2020.¹⁵ She recently announced an open-call invitation prompting organizations to send information for consideration rather than the direct-contact process her team used from 2019 forward.¹⁶ Early critiques of Scott's gifts, large unrestricted grants with minimal reporting requirements, included that they would have unintended consequences for the organization, create circumstances allowing for the misuse of funds, or decrease other organizational donors.

CCS INSIGHT

The Scott gifts reflect a significant change in HNWI giving in which donors give in ways that put more trust into organizations to use the funds as needed, mainly through unrestricted or lump-sum gifts. Holding space for honest conversation is critical to understanding donor motivations and goals at this level and to align opportunities and ways of interacting with each family.

However, a report that analyzed initial outcomes of Scott’s giving determined that those concerns are unfounded to date: organizations can contribute to advancing racial equity, increasing institutional stability and credibility, and improving and expanding their work, among other findings.¹⁶ High net worth donors also gave to causes in more non-traditional ways in 2022. Patagonia founder Yvon Chouinard transferred ownership of the company (valued at \$3 billion) to a trust and 501(c)(4) nonprofit to ensure that they could maintain control of the company and that profits would combat climate change.¹⁷ This is an irrevocable gift from the Chouinard family, who have always funneled 1% of Patagonia profits to charity, and one that has little precedent in the US. It is perhaps a harbinger of what will come, with Michael Bloomberg announcing similar plans.¹⁸

Although not yet a mainstream gift vehicle by the ultra-wealthy, some donors also made their gifts via cryptocurrency in 2022. Vitalik Buterin, co-founder of the Ethereum blockchain, continued to give significantly, making a \$9.4 million gift in crypto-asset USD Coin. This gift, the largest processed on the Giving Block platform last year, was designated for medical research at the University of Maryland.¹⁹ When considering donor motivations, it is helpful to reference the top causes supported by last year’s Philanthropy 50:⁵



CCS INSIGHT

Although HNW donors may adjust the timing and means of giving due to economic factors, their willingness to support a cause meaningful to them is generally unwavering. Always having a plan and keeping track of donor engagement as an individual moves through the prospect pipeline is important. True sustainability in a HNW fundraising program will come from an organization’s ability to connect their mission to these donors’ passions. People give to people, and personal engagement matters. Reviewing data, conducting wealth screening research, and diversifying your donor base can help improve resilience even as markets falter.



CASE STUDY

Based in Oregon City, Oregon, Willamette Falls Trust is creating an inter-Tribal public access project at Willamette Falls, the second largest waterfall in North America by volume, designing an inclusive space that welcomes all communities for future generations. By partnering with Native communities, the Trust aims to elevate the Native voice and share the many stories of this special place. This project received two seven-figure pledges—amounting to an eight-figure commitment—from a philanthropist who holds their hometown, Oregon City, dear. This support will enable the Trust to create public access to the Falls for the first time in over 100 years.

	DONOR ⁵	2022 GIVING	LOCATION	WEALTH SOURCE	TOP CAUSE
1	Bill Gates	\$51,112,500,001	Medina, WA	Technology	Various
2	Elon Musk	\$1,949,869,102	Austin, TX	Technology	Various
3	Michael Bloomberg	\$1,700,000,000	New York, NY	Media	Various
4	Warren Buffett	\$758,832,000	Omaha, NE	Finance	Various
5	Jacklyn and Miguel Bezos	\$710,500,000	Coral Gables, FL	Family Wealth	Health & Life Sciences
6	John and Laura Arnold	\$617,000,000	Houston, TX	Finance	Various
7	Ruth DeYoung Kohler II	\$440,000,000	Sheboygan, WI	Family Wealth	Arts & Culture
8	Sergey Brin	\$411,392,043	Mountain View, CA	Technology	Various
9	Denny Sanford	\$333,000,000	Sioux Falls, SD	Finance	Health & Life Sciences
10	Alice Clark	\$321,820,599	Bethesda, MD	Construction	Various
11	Harry and Linda Fath	\$275,293,000	Cincinnati, OH	Real Estate	Education
12	Pam and Pierre Omidyar	\$266,000,000	Honolulu, HI	Technology	Various
13	George Roberts	\$205,000,000	Atherton, CA	Finance	Health & Life Sciences
14	Leonard Lauder	\$188,250,000	New York, NY	Family Wealth	Health & Life Sciences
15	Sobrato Family	\$167,472,819	Cupertino, CA	Real Estate	Various
16	Audrey Steele Burnand	\$165,750,000	Newport Beach, CA	Family Wealth	Health & Life Sciences
17	John and Kathy Schreiber	\$125,000,000	Chicago, IL	Finance	Education

	DONOR ⁵	2022 GIVING	LOCATION	WEALTH SOURCE	TOP CAUSE
18	Jeff Bezos	\$122,149,000	Medina, WA	Technology	Various
19	Irwin and Joan Jacobs	\$105,530,561	La Jolla, CA	Telecommunications	Various
20	Edward Avedisian	\$104,800,000	Boston, MA	Investments	Education
21	Brian Chesky	\$103,300,000	San Francisco, CA	Technology	Education
22	Gerry Lenfest	\$100,000,000	Huntingdon Valley, PA	Media	Health & Life Sciences
22	Marvin Mann	\$100,000,000	Lexington, KY	Industrial Manufacturing	Education
22	John Paulson	\$100,000,000	New York, NY	Finance	Health & Life Sciences
25	Craig Newmark	\$81,000,000	San Francisco, CA	Advertising	Various
26	Molly and Stuart Sloan	\$78,000,000	Seattle, WA	Finance	Health & Life Sciences
27	David Baldwin	\$74,294,640	St. Petersburg, FL	Technology	Human Services & Advocacy
28	Anthony Wood	\$71,473,398	Austin, TX	Technology	Various
29	Eric and Wendy Schmidt	\$68,200,000	Santa Barbara, CA	Technology	Health & Life Sciences
30	Fred Smith	\$650,000,001	Memphis, TN	Transportation	Education
31	Melanie and Richard Lundquist	\$62,750,000	Los Angeles, CA	Real Estate	Education
32	Adrienne Arsht	\$62,372,500	Chevy Chase, MD	Finance	Human Services & Advocacy
33	Lynne and Marc Benioff	\$60,000,000	San Francisco, CA	Technology	Health & Life Sciences
33	Judy and Stewart Colton	\$60,000,000	Short Hills, NJ	Chemicals	Health & Life Sciences

	DONOR ⁵	2022 GIVING	LOCATION	WEALTH SOURCE	TOP CAUSE
35	Joe Gebbia	\$58,633,334	Austin, TX	Technology	Health & Life Sciences
36	Karen and Robert Hale	\$58,552,517	Hingham, MA	Telecommunications	Various
37	Tilman Fertitta	\$55,500,000	Houston, TX	Entertainment	Health & Life Sciences
38	Nancy and Richard Kinder	\$55,368,210	Houston, TX	Energy	Various
39	Jon and Mindy Gray	\$55,000,000	New York, NY	Finance	Health & Life Sciences
39	Diana and Roy Vagelos	\$55,000,000	Far Hills, NJ	Pharmaceuticals	Human Services & Advocacy
41	Jen-Hsun and Lori Huang	\$50,000,000	Santa Clara, CA	Technology	Health & Life Sciences
41	Thomas Kline	\$50,000,000	Philadelphia, PA	Law	Education
41	Peter Paulsen	\$50,000,000	Phoenix, AZ	Real Estate	Human Services & Advocacy
44	Ali Khan and John Metz	\$46,000,000	New York, NY	Investments	Education
45	Gordon and Joyce Davis	\$45,733,155	Lubbock, TX	Media	Health & Life Sciences
46	Harriet Macomber	\$45,000,000	Des Moines, IA	Finance	Various
47	John Martinson	\$44,700,000	Newtown, PA	Finance	Education
48	David and Kathleen La-Cross	\$44,000,000	Lafayette, CA	Finance	Education
49	Bastian Family	\$41,250,000	Salt Lake City, UT	Agriculture	Health & Life Sciences
50	David Frederick and Sophia Lynn	\$40,000,000	Washington, D.C.	Law	Human Services & Advocacy
50	Murry Gerber	\$40,000,000	Pittsburgh, PA	Oil	Education

FOUNDATION GIVING

Since the emergence of the first private foundation in the US, foundations have functioned to address the needs of the present, with foundation giving typically reflecting shifting economic conditions as well as the changes seen more broadly in society. Over the last few years, foundations have adjusted their giving in response to immediate crises and have altered how they interact with their nonprofit partners to be more collaborative. In 2022, giving by and to foundations saw a continued upward trend as their prominence in philanthropy grows.



GIVING BY FOUNDATIONS GREW AS A SHARE OF TOTAL GIVING

Giving by foundations includes gifts from operating, community, and independent or private foundations (including family foundations). Despite record-high inflation rates and stock market declines, giving from foundations increased by 2.5% from 2021 to 2022. This growth amounted to \$105.2 billion in giving, outperforming previous years and constituting 21% of total giving in 2022.¹

The upward trend in foundation giving in 2022 is consistent with the growing importance of foundations in philanthropy over the last few decades. Foundation giving in 2022 also represents a bounce back from a slight decrease of 1.2% in 2021 in giving by foundations as a share of total giving. Giving from foundations encompassed 5% of total giving in 1982, 7% in 1990, 11% in 2000, 14% in 2010, and 20% in 2021.¹ Nonprofits also continued to increase their acceptance of noncash gifts, with family foundations and DAFs being the most popular. Family foundations represented the largest source of noncash gifts or pledges to organizations in 2022 at 83%, a 2% increase over 2021.²



\$105.21 Billion

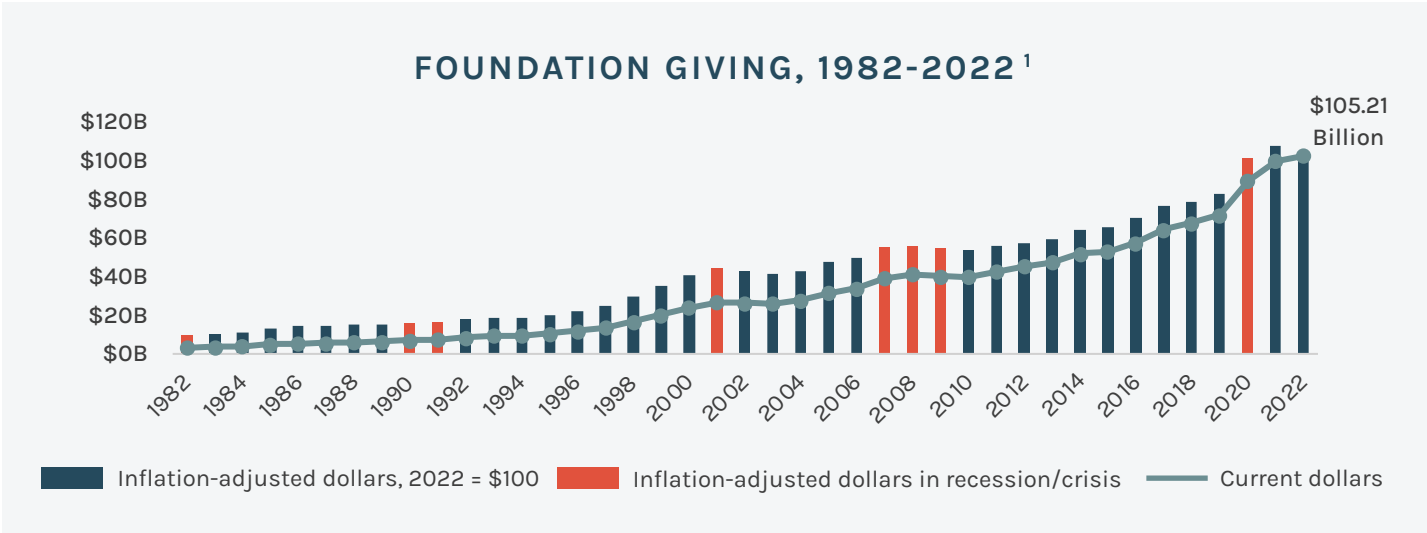
Amount given by foundations in 2022

+2.5%

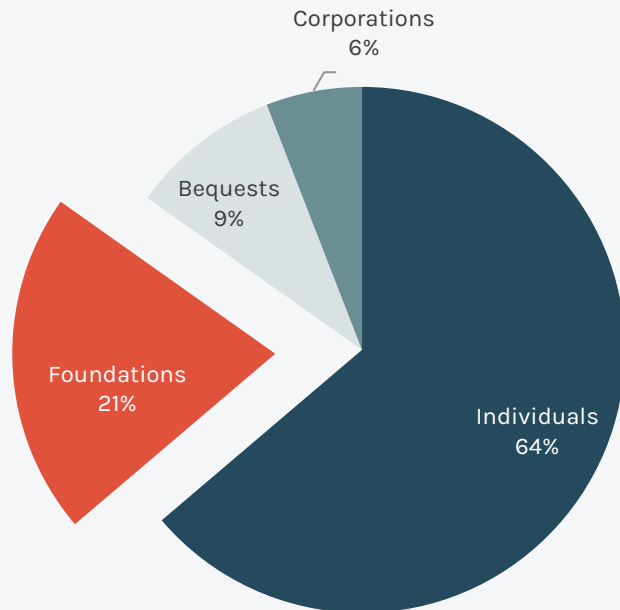
Increase in foundation giving from 2021 to 2022

21%

Percent of all charitable giving by foundations ¹



2022 CONTRIBUTIONS BY SOURCE ¹



To understand these trends, it is important to note there are two types of foundations comprising this charitable segment: private and community foundations.

PRIVATE FOUNDATION

A private foundation is usually created by an individual, family, or other organization through a donation to establish an endowment managed by a board of directors or trustees. Private foundations generate income by investing in their own endowment. These foundations must distribute 5% of the fair market value of their endowment annually for charitable purposes.¹⁵

COMMUNITY FOUNDATION

A community foundation, also known as a grantmaking public charity, is a public charity typically focused on supporting a geographic area, such as the facilitation and pooling of donations used to address community needs and the efforts of local nonprofits. These foundations offer diverse grantmaking programs, encompassing donor-advised funds, endowments, scholarships, field-of-interest funds, giving circles, and other initiatives.⁴

FOUNDATION GIVING IS CLOSELY LINKED TO THE STOCK MARKET'S PERFORMANCE, AS FOUNDATIONS ARE REQUIRED TO GRANT 5% OF THE VALUE OF THEIR ASSETS YEARLY.¹⁵

FOUNDATIONS KEPT INVESTING DESPITE A TUMULTUOUS ECONOMY

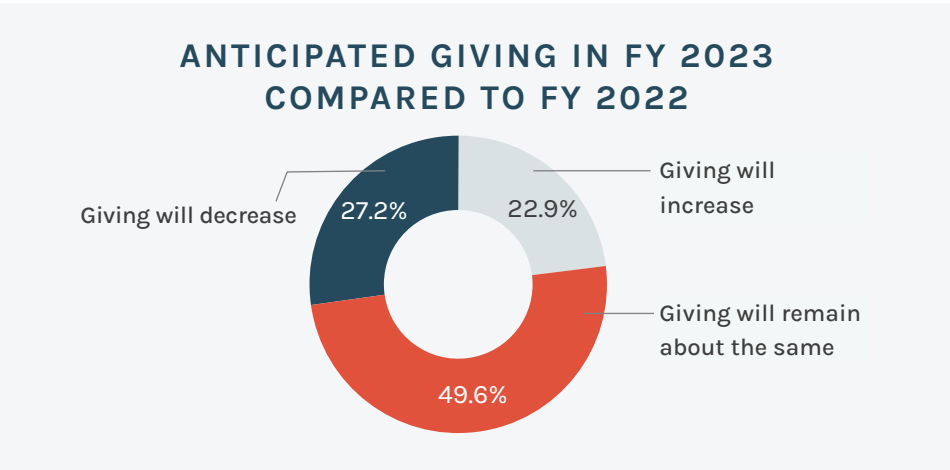
As the nation adjusted to a post-pandemic world in 2022, Americans also grappled with the war in Ukraine, the climate crisis, concerns about productivity in a remote work environment, political divisions, and polarizing government

rulings. High inflation rates and fears of a recession also impacted consumer spending significantly, as prices for daily necessities rose. However, foundations continued investing in programs and nonprofits associated with creating access for everyone and addressing injustice. For nonprofits, increased investments (amid inflation) enabled them to provide essential services, implement new programs, hire staff, develop resource systems, and shore up operations and finances in anticipation of future challenges.

Candid’s review of the funding data of 557 foundations revealed that cumulative giving in 2022 increased by 3%, significantly less than 2021’s 12% increase and 2020’s 24% increase. However, it is essential to note that foundations had to increase giving to meet the 8% inflation rate. According to the same study, the median foundation awarded 4% more in grant dollars.⁵ The real question is, will foundations continue to fund at these levels, or is this a moment in time?

NONPROFITS ANTICIPATE FURTHER DECLINES IN DONOR GIVING

When asked to consider giving in 2023, the proportion of surveyed foundations by Candid in the 2023 Foundation Giving Forecast Survey indicating they anticipate declines in giving (27%) exceeded those expecting increases (23%). Historically, foundations have been far more optimistic about their future giving.⁵ However, they may have a reason for renewed confidence. Of those expecting an increase in giving, a stronger economy, increased assets, organizational budget increases, and multi-year commitments were noted as potential reasons. Further, global stock markets have begun recovering from a turbulent 2022, and grant makers’ assets are thought to have increased 8% during the first half of 2023.⁶



FOUNDATIONS NEED TO REPRESENT ALL

In 2020, institutions worldwide were forced to look inward and adopt practices creating a more diverse and equitable environment for all. For foundations, this assessment also included a review of how grantmaking further creates inequity for nonprofits and the people and communities served.

A 2021 report by the Center for Effective Philanthropy found “Foundations that have boards with more racial diversity tended to adopt more practices to support grantees and the communities they serve. Yet, nearly half of leaders say that their boards are the biggest impediment to their foundation’s ability to advance racial equity.”⁷

Having diverse staff and boards ensures that foundation leadership reflects the communities they serve. For example, the Ford Foundation, Silicon Valley Community Foundation, and Boston Foundation have diverse boards that showcase their ongoing commitment to DEI and position them for sustainability in the future.

FOUNDATION PLEDGES INCLUDE:

Loosen or eliminate the restrictions on current grants.

Make new grants as unrestricted as possible.

Reduce what is asked of nonprofit partners.

Contribute to community-based emergency response funds.

Communicate proactively and regularly about decision-making.

Commit to listening to communities that are least heard.

“

As funders, we need to reject the impulse to put grantmaking rather than change making at the center of our worldview. Listening, learning, and lifting up voices who are most proximate and essential to unlocking solutions is critical to the type of change making that we seek.

Darren Walker
President, Ford Foundation

CCS INSIGHT

The need expressed in the case for support should focus on overall impact of gifts to the nonprofit rather than a specific programmatic focus. Flexibility in funding enables nonprofits to direct funds toward their greatest need, which as the last few years has shown, is often unpredictable.

TRUST-BASED PHILANTHROPY GREW

Conversations about structural and institutional inequity led to the development of trust-based philanthropy, the process of “redistributing power—systematically, organizationally, and interpersonally—in service of a healthier and more equitable nonprofit sector.”⁹

The practice has since gained momentum in grantmaking to shift the power dynamics between funder and grantee and to position nonprofits as experts in the issues they seek to address and the communities they serve.

In a 2021 interview with the Stanford Social Innovation Review, Philip Li, President and CEO of Robert Sterling Clark Foundation, defined trust-based philanthropy as “[exploring] the notion of power and control through incorporating values, such as equity, humility, curiosity, and collaboration.”¹⁰ Trust-based philanthropy replaces the traditional approach of requiring evidence-based data and results, often called strategic philanthropy. In adopting trust-based philanthropy, the grantmaking process becomes a true partnership between the funder and the grantee.



STEPS FOUNDATIONS CAN TAKE¹⁰

- Examine your portfolio for diversity
- Prioritize transparency of decision-making process
- Ensure timely communication with grantees
- Survey your grantee partners

INTENTIONAL GRANTMAKING LED TO IMPACTFUL GIVING

In a 2022 study of 150 foundations from 30 countries by Rockefeller Philanthropic Advisors, half of the respondents said decisions to accelerate spending, revise philanthropic timelines, and switch to a time-limited philanthropy approach are the results of the global challenges of 2020-2021.¹¹

The study also found foundations are eager to make inroads in addressing some of the nation's most challenging issues and are committed to long-term significant investments to help create change.¹⁰ Recent

investments in multi-million-dollar grants to advance social change prove this new approach. For example, the Bill & Melinda Gates Foundation announced a \$15 billion commitment to tackle climate challenges, and the Ford Foundation launched the Building Institutions and Networks (BUILD) initiative to invest in the resiliency of social justice organizations, announcing a new round of \$1 billion in grants to be dispersed between 2022 and 2026.¹²



GIVING TO FOUNDATIONS SHOWED SLIGHT DECLINES

According to an analysis by FoundationMark, 2022 saw a decline of 15.9% (\$218 billion), the largest year-over-year dollar reduction in foundation assets and the second largest by percentage since the 25% drop following the 2008 stock market crash.¹³ However, foundations also played an essential philanthropic role as a recipient of gifts. Giving to foundations—independent, community, and operating foundations—accounted for 11% of all giving in 2022.¹

CCS INSIGHT

Not all nonprofits have equal access to philanthropic dollars. Black- and Latino-led nonprofits receive only 4% of all charitable giving, while indigenous groups receive only 0.4% of all funding from the largest foundations in the US.¹⁶ LGBTQ+ nonprofits received less than 1% of all philanthropic funding from 2015 to 2019.¹⁴ These organizations, like many that serve marginalized communities, experience an influx of funding like disaster philanthropy. To sustain giving, these groups should focus on the strategies disaster groups employ. Leverage moments these causes are in the news to acquire new donors and share the impact of your organization after the events. Additionally, build a communication plan so these new donors hear from you often and not only during a heavy news cycle. Use existing days of remembrance and celebration as opportunities for regular communication.

CASE STUDY

The Detroit Riverfront Conservancy (DRFC) is transforming Detroit's international riverfront into a beautiful, exciting, safe, accessible, world-class gathering place for all. Celebrating its 20th Anniversary in 2023, the DRFC has developed deep partnerships with leading foundations supporting this vision. In particular, the Ralph C. Wilson, Jr. Foundation has provided catalytic funding to fuel landmark projects, including a \$50 million gift in 2018 to construct and sustain the Ralph C. Wilson, Jr. Centennial Park on the West Riverfront. Five years later and following thoughtful stewardship, the foundation committed another \$35 million to establish a joint endowment for the expanded Riverfront and new Joe Louis Greenway, a nearly 30-mile loop connecting and reinvigorating Detroit neighborhoods. Both gifts celebrate the legacy of Ralph C. Wilson, Jr., the communities he loved, and the foundation's commitment to developing, advancing, and sustaining regional parks and trails.



CORPORATE GIVING

Corporate philanthropy remained steady in 2022 despite a tumultuous economy, the global pandemic's impact, and worldwide crises. GDP growth, a strong labor market, and low unemployment strengthened corporate philanthropy. As the nation grappled with institutional and systemic inequities, US-based corporations affirmed growing commitments to blend business and social impact, building multi-faceted nonprofit partnerships, and amplifying opportunities for the most vulnerable populations.



CORPORATE GIVING GREW EVEN AS OTHER CATEGORIES RETURNED TO PRE-PANDEMIC LEVELS

Corporate philanthropy provided 6% (\$29.48 billion) of the total charitable contributions in 2022 through traditional funding vehicles, including cash, gifts-in-kind, and grants made by corporate foundations.¹ This giving rate sustained the forty-year overall growth trajectory, with a 3.4% increase in current dollars over last year. While this represents a slower pace than last year’s current dollar increase of 18.2%, corporate philanthropy grew by 8.1% over the past two years when adjusted for inflation.¹

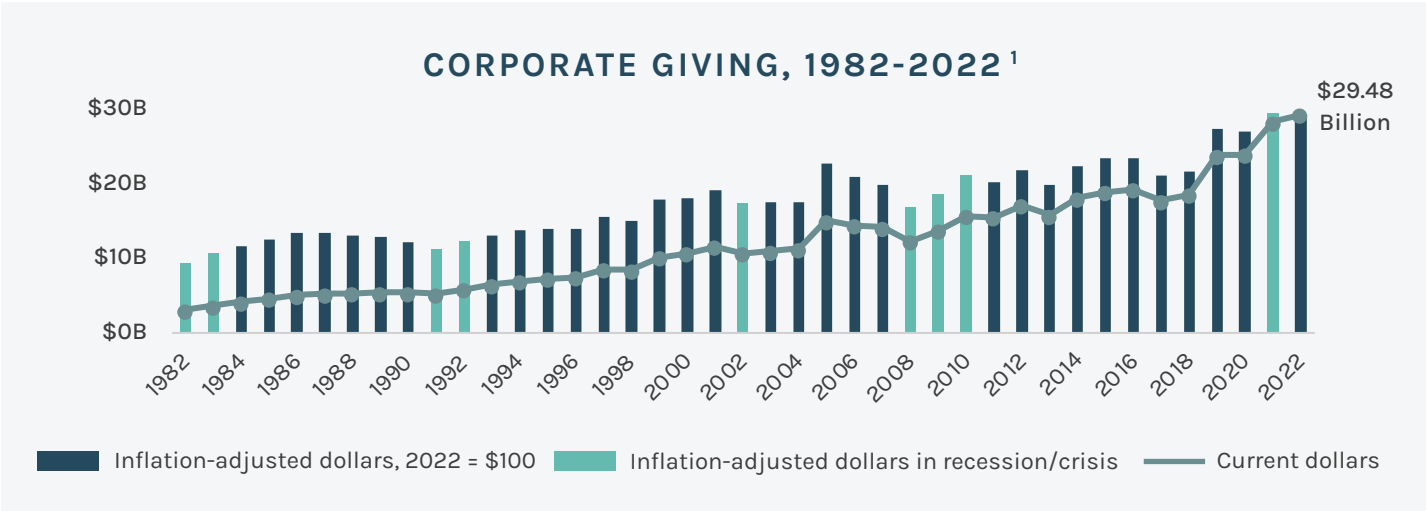
Although total giving grew in current dollars, this amount remains consistent with the pre-tax profit margin that corporations typically allocate to philanthropy. In fact, since 1982, annual corporate philanthropy has averaged less than 2% of pre-tax profits, translating to a steady 5-6% of overall annual philanthropic giving.¹

However, this statistical snapshot does not capture the transformational change shaping how corporations approach philanthropy. In recent years, corporations have increasingly addressed societal and community impact

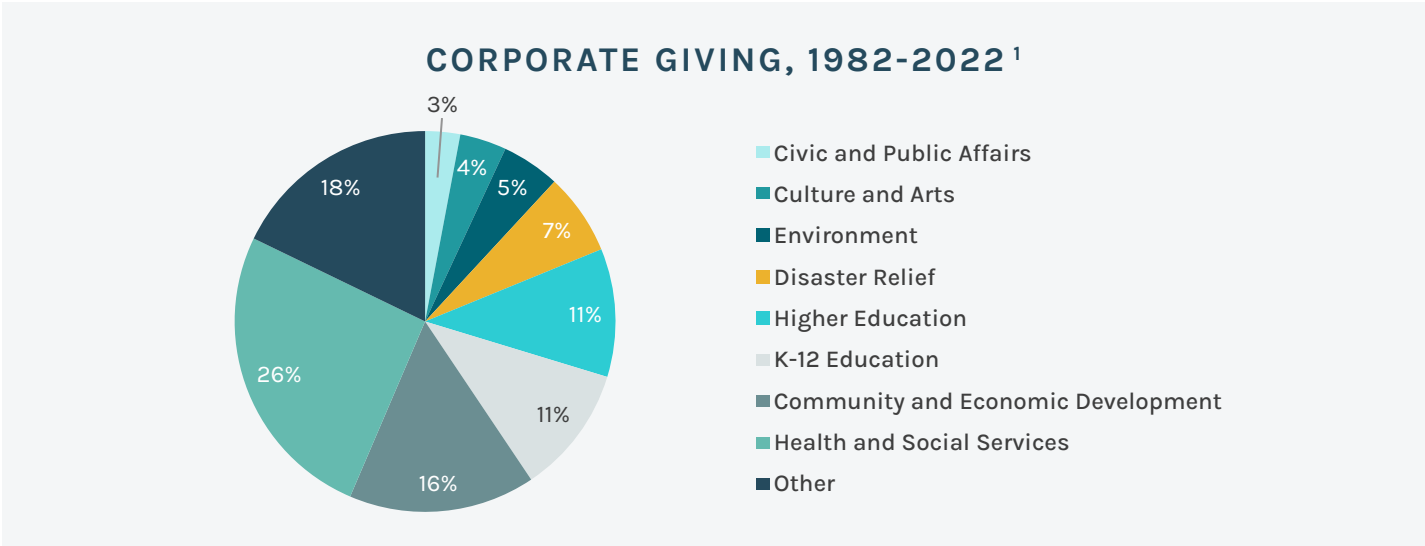
\$29.48 Billion
Amount given by corporations in 2022

+3.4%
Increase in corporate giving from 2021 to 2022

6%
Percent of all charitable giving by corporations ¹



with new philanthropic strategies involving a holistic and inclusive menu of resources. These can include employee engagement through pro bono/low bono expertise and in-kind technical assistance, non-cash community investments, low or no interest loans, impact investing, matching gift funds, and employee-moderated awards, in addition to the more traditional grants and employee-volunteer workdays.



LACK OF STANDARD REPORTING CONTRIBUTED TO CONFLICTING DATA

The Conference Board, a global nonprofit thinktank and business membership organization, identified the need to develop common standards and a universally accepted framework for measuring this new breadth and depth of engagement and impact by corporations. The lack of consistent reporting leads to variable and underrecognized metrics. For example, Giving USA reported that growth in giving by corporations resulted in nearly three-quarters (72.7%) of corporations self-reporting an increase in giving and less than one-quarter (22.7%) reporting a decrease in the amounts given.¹ In contrast, Chief Executives for Corporate Purpose reported that only one-third of corporations increased their total community investments.³

Regardless of varying reports on the overall growth or lack thereof in corporate philanthropy, corporate giving in 2022 focused on programs and services providing significant support for underserved and vulnerable populations. Corporations are investing in DEI resources, with 82% of companies reporting their efforts are on the rise, with a median 24% of community investment budgets allocated to promoting it.³

CORPORATE PHILANTHROPY CONTINUALLY EVOLVES

The concept of corporate philanthropy has evolved over the last three quarters of a century, first emerging in the 1950s as a way corporations could maximize profits with no mission-based purpose or intended community impact, to now being trailblazers like The Body Shop, Ben & Jerry's, and Patagonia, that introduced an approach in the early 2000s blending mission, inclusivity, and innovation.²

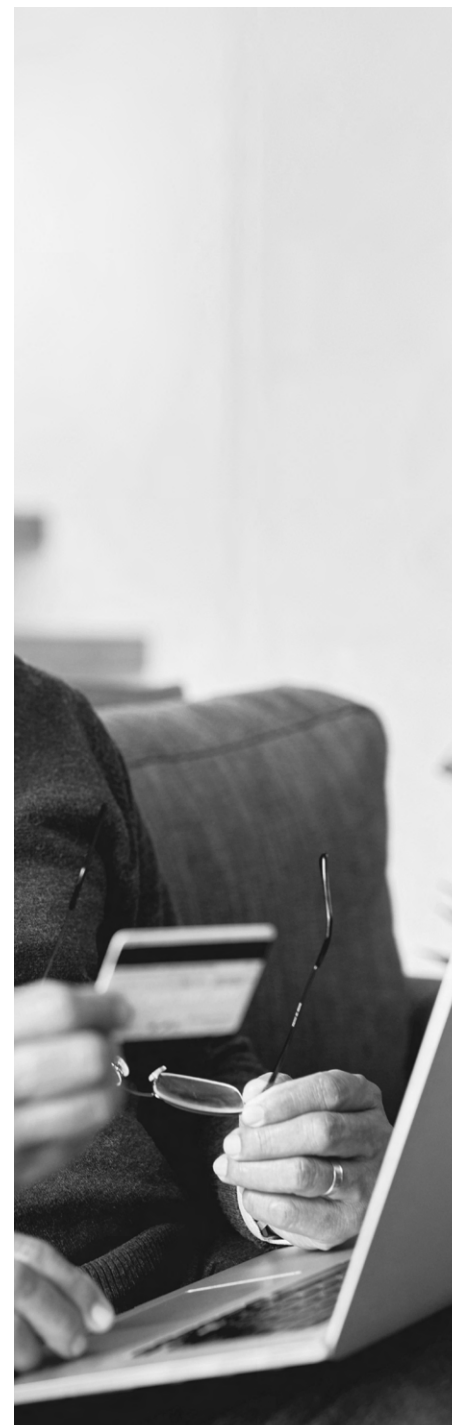
The last year demonstrated that corporate philanthropy has evolved yet again. This new iteration utilizes a strategic approach focusing on shared mission and values-driven community engagement to achieve societal impact.² Shifting the paradigm, corporations have introduced multi-layered, highly nuanced engagement opportunities connecting employees, consumers, and their communities. The most successful and effective corporate philanthropy and nonprofit organization partnerships integrate mission, vision, values, and innovation to make a measurable impact on the nation's underserved and most vulnerable communities.

Investing in community impact initiatives requires a strategic mindset encompassing the motivations for philanthropy. Corporations are rewarded for leaning into their role as drivers for positive community change:

73% of consumers are more likely to shop at or support a business that seeks their input into the business's philanthropic giving strategies.

78% of employees are more likely to work for a business that provides transparency into how they allocate charitable donations.

84% of consumers and 85% of employees say the more a business engages its consumers in charitable giving decisions, the more trust they have in that business.⁵



NEW TRENDS EMERGED IN CORPORATE PHILANTHROPY

In 2022, three definitive trends became increasingly critical for how companies are contributing to this new interpretation of corporate philanthropy.

- **IMPACT INVESTING** – philanthropic support “with the intention to generate positive, measurable social and environmental impact alongside financial return.”⁶
- **CAUSE-BASED GIVING** – philanthropic support as “a type of transaction of buying and selling goods with the added purpose of supporting a charitable cause.”⁷
- **WORKPLACE PHILANTHROPY** – philanthropic support through the investment and activities a company voluntarily undertakes to responsibly manage and account for its impact on society.”⁸

IMPACT INVESTING

In a move away from the traditional approach of funding a wide range of smaller grants to support many nonprofit organizations, leading corporate philanthropy programs are making fewer gifts at more significant levels. This impact investing is designed to affect transformational change.

CAUSE-BASED GIVING

The American Express credit card first introduced the concept of cause-based giving in 1983 with their support of the Statue of Liberty’s Restoration Fund. Amex donated 1 cent every time a consumer used their card, leading to a donation of over \$1.7M and a nearly 30% increase in American Express Card users.⁹ Since that time, cause-based giving plans have increased in popularity and impact.

Red Nose Day is one of the most highly visible and inclusive examples of US cause-based giving. CCS Fundraising partnered with Comic Relief US, presenters of Red Nose Day, to shape their first-ever major gift program. This effort enabled Comic Relief to increase their impact, blending transactional crowd-sourced fundraising with additional



CASE STUDY

In 2023, Acrisure—a global fintech leader—committed \$7.5 million to the Heart Institute at UPMC Children’s. This gift marks the single largest corporate donation made to the hospital to date. Acrisure’s gift will open the door for businesses to expand the way in which they, too, can engage with the community and ensure children and families in need of critical heart care have equitable access and resources no matter their zip code. Greg Williams, Co-Founder, Chairman, and CEO of Acrisure said of the gift, *“Supporting the hospital’s mission of advancing pediatric medicine through groundbreaking research, innovative treatments and compassionate care aligns perfectly with our values. We hope we can be an accelerant to this important work for many years to come.”*

strategic initiatives. The campaign had its most successful year in 2022, raising over \$50 million through individual purchases of red noses at Walgreens, employee-led advocacy, supporters wearing red noses in public, and other forms of point-in-time philanthropy.¹⁴ The organization addresses the focus areas of safe, healthy, educated, and empowered children through a lens of gender and racial equity, centering on the most impacted populations and building resilience.

WORKPLACE PHILANTHROPY

As strategic corporate philanthropy focuses on a multi-layered approach to engagement with and investment in the nonprofit sector, companies are moving beyond the traditional grant and volunteer-service-day models. Using a holistic and integrative approach to workplace philanthropy, they design engagement opportunities that elevate their community impact and build a positive culture for their employees.

CCS INSIGHT

These trends signal the need for a recalibration in corporate philanthropy of commonly accepted best practices for cultivation strategies and reporting standards—the traditional measures of dollars donated for grants or event sponsorships no longer effectively capture the breadth and depth of corporate philanthropic community impact. Although there is not yet a set of common standards or a universally accepted framework, nonprofit organizations seeking to build effective partnerships with corporations should be familiar with and ready to speak to these common themes:

- a) Identify key populations related to the organization's provided services and why they are underserved or vulnerable.
- b) Develop a clear statement outlining the program or project's intended outcome and how it meets the needs of key populations.
- c) Provide a theory of change aligning funding, resources, intended impact, and examples demonstrating the project or program's potential to the key populations.
- d) Define and prioritize the number of key stakeholders who should be served, the anticipated degree of change, and the intended overall community impact.
- e) Build consensus around appropriate, effective, and available measures to chart the project or program's success.



CASE STUDY

Long-time CCS client, the J.F. Shea Therapeutic Riding Center, serves children and adults with disabilities through horse-related therapies, including physical, occupational, speech, and mental health programs. The organization embraced workplace philanthropy to fund enhancements to its mental health therapy services, strengthening relationships with existing corporate sponsors, the most successful being its partnership with an international corporation headquartered in California. This innovative relationship provided a corporate leadership retreat onsite with an experiential therapeutic learning opportunity, served as an R&D test site for a potential product, and utilized various employee-volunteer opportunities. As a result, the company increased its 2023 giving to the Shea Center by more than 4,000%. Robin King, the Shea Center's Corporate Relations Director, stated, *"Our partnership truly proves how important it is to have a well-rounded relationship to build out something much more meaningful for both organizations."*

CORPORATIONS CREATED CHANGE WITH THEIR PHILANTHROPIC GIVING

Impact investing, cause-based giving, and workplace philanthropy are three significant trends anchoring the importance of corporate philanthropy's innovation and impact to address inequity for the nation's underserved and vulnerable populations. Corporations are doing so because it is "the right thing to do" and because it responds to the needs and concerns of their employees, consumers, and their communities.¹⁰

This affirmation of a holistic and strategic corporate philanthropy approach changes how nonprofit organizations and corporations engage, and introduces new opportunities and challenges for these partnerships. Beyond the traditional grant process and stand-alone employee/volunteer service day, successful corporate philanthropic partnerships require opportunities that integrate purpose, connections, activity, and impact. Nonprofit organizations with an agile cultivation style are poised to reap the benefits of this transformational pool of community funding. Nonprofits that cannot adjust their cultivation plans will find it increasingly difficult to access corporate philanthropic funding.

CCS INSIGHT

Funding for racial equity rose dramatically between 2020 and 2022, according to research by Candid. Since 2020, racial equity funding has grown to an estimated nearly \$17 billion in grant funding and nearly \$12 billion in pledges.¹¹ Corporations also continue increasing their pledges to promote racial equity—McKinsey Institute for Black Economic Mobility found that companies pledged an additional \$141 billion between May 2021 and October 2022.¹² However, tracking disbursement of these pledges has been challenging. One analysis found that in 2021, corporations had disbursed only \$1.7 billion of the \$50 billion originally pledged.¹³ As we continue to analyze trends in giving toward racial and social equity-related causes, the question remains whether this focus in the sector will be a short-term trend or one that endures.



CASE STUDY

In 2022, Fordham University launched an LGBTQ+ Student Wellness Fund, established through a major gift from an LGBTQ alumna and her wife who recently re-engaged with the University after learning about its new focus on DEI. The fund was featured in Fordham's giving day, and out of over 100 options, it was the fourth most supported fund, speaking to donors' interest in fostering an inclusive campus environment. Gifts to the fund will support LGBTQ+ student scholarships, provide emergency housing, and underwrite LGBTQ+ programming and research.

DIGITAL GIVING

Digital giving encompasses all fundraising conducted via a technological device, including gifts made through a nonprofit's website, online campaigns, QR code engagement, and more. It has followed a similar trend to overall philanthropic giving, spiking in 2021 and accounting for 12% of all giving that year.¹ This trend continued in 2022, with online giving declining along with overall giving compared to the previous two years. Despite the downturn, digital giving remains a significant philanthropy component.



ONLINE DONATIONS DECLINED BUT REMAINED A PREFERRED GIVING METHOD

Following two years of extraordinary growth during the pandemic-era, digital giving dropped in 2022, with an M+R report finding that revenues raised by nonprofits through online giving saw a 4% reduction. On the surface, this might suggest a worrisome shift; however, it is likelier a reflection of donor behaviors returning to pre-pandemic patterns.²

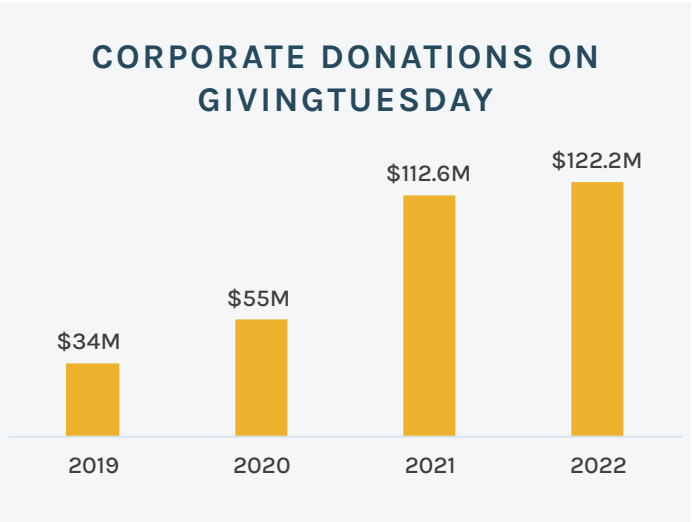
Not all nonprofits experienced the 4% decline equally. For example, poverty and hunger relief-focused organizations saw a sharp drop of 14% in online revenue, having experienced bumper years during the pandemic. Conversely, international aid saw 8% growth. This varying experience likely reflects donors' changing sense of the most urgent needs, shifting away from pandemic-era issues toward emerging crises, such as the war in Ukraine.²

Another factor impacting digital giving is that different generations prefer different giving methods. While online giving has increased across generations, younger generations far prefer giving online. Giving USA's *Giving by Generation* reports that 76% of Generation Z and 81% of Millennial giving occurred online in 2022, compared to 69% for Generation X and 61% for Boomers.³

Social media and influencers are important in younger generations' giving patterns. Generation Z and Millennials are four times more likely than Boomers and Generation X to learn about causes from influencers or celebrities, and a higher percentage of Generation Z (42%) and Millennials

(37%) reported being influenced to give by someone asking them on social media, versus 27% of Generation X and 11% of Boomers.³ Social media represents a unique communication channel for younger generations, but peer-to-peer outreach is still crucial: most generations learn about charitable giving opportunities from friends and family.⁴

A key event in the digital giving calendar for nonprofits is GivingTuesday. Timebound campaigns of this nature often rely heavily on digital communication methods to share multiple donor touchpoints over one day, creating a sense of immediate urgency that often encourages donors to give. There was an increase in amount donated by monthly donors who made digital gifts.⁵ Despite corporate donations on GivingTuesday increasing from 2021 to 2022, revenue generated by email on



GivingTuesday in 2022 dipped by 18%, a significant change given that email is the primary digital channel nonprofits use to generate online giving.² Again, this year-over-year downturn is likely due to donors returning to pre-pandemic habits rather than a trend away from giving via digital means.

The pandemic and racial justice events of 2020 caused nonprofits with missions focused in these areas to experience unprecedented boosts to annual fundraising, and this temporary influx makes direct comparisons of year-to-year trends more challenging. As referenced in the “Individual Giving” chapter, the increased revenue from monthly giving is heartening.

DID YOU KNOW?

In the UK, the Charities Aid Foundation discovered a strong trend toward cashless giving that mirrors patterns in the US.⁶ Twenty-six percent (26%) of all giving was made via a website or app in the UK during 2022. Cash donations have sharply declined from over 50% of all giving in 2019 to less than 30%, underscoring that it is important for nonprofits to engage with donors digitally to provide easy options for online giving.

CCS INSIGHT

Most digital engagement with donors occurs on mobile devices, although donors make most gifts via desktop devices.⁷ Notably, the average gift size made on a desktop device at \$118 is nearly 1.5 times that of mobile devices at \$79.⁷ Nonprofits must prepare concise and compelling messaging formatted for the smaller screen size for quick consumption and create ease of reaction and transition by donors between platforms.

MOBILE DEVICES CONTINUED TO DOMINATE DIGITAL ENGAGEMENT

Research recently found that adults spend almost four hours daily on the internet, three of which are spent on mobile devices.⁸ Coupled with an estimated three year acceleration of digital adoption spurred by the pandemic, transactions and customer engagement are increasingly carried out online. Classy looked at the social media platforms that best drive traffic to online giving campaigns and were most successful in converting engagements to gifts. The results are both revealing and unexpected.⁹









While Facebook (now Meta) may help lift a campaign profile’s visibility, it may not result in as many gifts as does activity shared on LinkedIn. This is a good reminder for nonprofits to consider how donors perceive the reliability of information they receive on different social media platforms. Though findings suggest that Facebook, Instagram, and YouTube are the heavy hitters for digital fundraising, nonprofits that neglect newer social media platforms like TikTok do so to their detriment: it was the most downloaded app globally in 2022.¹⁰

When Double the Donation asked about their giving preferences, donors reported a strong inclination toward completing a gift transaction online using a credit or debit card over any alternative method.⁷ This proved consistent across each age group, though second, third, and fourth choice options varied significantly. Boomers were the only group to include direct mail as a preferred giving route.

CCS INSIGHT

If nonprofits are to compete successfully for donors’ attention in an increasingly digital world, it is critical to have a mobile-friendly digital presence to stand out from the content-rich internet environment. Having a presence on the apps where donors spend their time is essential.

TRAFFIC TO CAMPAIGN VS CONVERSION RATES ⁹

								
Traffic to Campaign	84%	.06%	13%	2%	1%	.09%	.08%	.06%
Conversion Rate	13.4%	.5%	22.7%	17.4%	33%	8.8%	12.7%	9.3%



CASE STUDY

CCS partnered with Lake Forest College, a leading liberal arts institution near Chicago, to support its annual giving and Forester Day efforts. To ensure success on this giving day, we leveraged its digital giving platform, tailored messaging based on audience segmentation, enhanced donor engagement strategies, and activated volunteer leaders. Perhaps most significantly, we reimagined challenge and matching gift strategies to strengthen the college's success, driving a sense of momentum throughout Forester Day that more richly engaged the community. Lake Forest College experienced its most successful Forester Day: the largest total dollar amount ever raised and a 10% increase in overall donor participation year-over-year.

CRYPTOCURRENCIES GAVE A STRONG PERFORMANCE DESPITE A TUMULTUOUS YEAR

The last year was tumultuous for cryptocurrencies, with several prominent exchanges collapsing and the crypto market losing 60%, or \$2 trillion, of its value.¹¹ Despite this, The Giving Block, the leading platform for crypto giving, still reported one of the best years in its history, with total giving cresting \$125 million and the number of nonprofit users of its platform doubling.¹² The Giving Block processed \$50 million in donations during 2022, a decline from the \$68 million in 2021, yet still at a level where crypto giving cannot be disregarded.¹² Cryptocurrencies may have lost significant value, but they have not become obsolete as a giving method and may have even matured to the point where they can withstand market volatility.

Fidelity Charitable accepted \$38 million in crypto assets during 2022, a considerable fall from the \$330 million of 2021 when Bitcoin value peaked, but an increase from the \$28 million of 2020.¹³ Fidelity found that crypto donors are more generous than stock donors, who enjoy the same tax incentives. They also highlight that Millennial investors are most likely to hold crypto assets, come from a more charitable-minded generation, and are more inclined to believe cryptocurrencies are here to stay.¹⁴ Cryptocurrencies can help nonprofits expand their donor base—particularly the tech-savvy or those not typically engaged with traditional fundraising methods—and

CCS INSIGHT

Nonprofits can engage with the trend of giving via mobile devices by including text-to-give campaigns, which benefit nonprofits by providing a convenient and accessible way for supporters to donate. Donors can make their gift with a few clicks from their mobile phones, and nonprofits can send immediate confirmation messages, share updates on campaign progress, and express gratitude in a real-time interaction that strengthens the relationship between the nonprofit and its supporters.

CCS INSIGHT

Not all fundraising platforms enable nonprofits to capture donor contact information, making it difficult to directly connect with and steward these donors. Organizations should confirm whether this functionality exists when deciding on their preferred choice of platform.

create more opportunities to maximize the success of fundraising programs. Given the technical infrastructure and expertise needed to accept, store, and convert cryptocurrency donations securely, coupled with the high volatility and fluctuations in the value of cryptocurrencies, nonprofits looking to the long term may need to adjust their gift acceptance policies and prioritize staff training to remain open to accepting crypto assets now or in the future.

CROWDFUNDING PLATFORMS EMPOWERED CRISIS FUNDRAISING

Platforms like GoFundMe and PayPal, combined with the power of social media, have revolutionized how people seek support for urgent needs, such as medical expenses, disaster relief, education, or basic needs. Crowdsourcing has provided a powerful means to amplify reach, create emotional connections, foster transparency, and enable people to take immediate action, resulting in increased support and successful fundraising campaigns.

ORGANIZATION TYPE	2022 YOY ONLINE GIVING GROWTH
All	Decreased 4%
Cultural	Decreased 13%
Disaster/International Aid	Increased 8%
Environmental	Decreased 4%
Health	Decreased 3%
Hunger/Poverty	Decreased 14%
Public Media	Decreased 5%
Rights	Decreased 6%
Wildlife/Animal Welfare	Increased 8%
Large	Increased 3%
Medium	Decreased 7%
Small	Decreased 5%

CCS INSIGHT

Factors such as socioeconomic disparities, limited social safety nets, and systemic inequalities can contribute to the necessity of emergency fundraising efforts. In 2021, nearly 38 million people in the US lived below the poverty line, and 11.5% were food insecure.^{19, 20} Though inflation is improving, and US economic indicators are considered strong, Americans are still anxious about their ability to pay their bills given the high cost of necessities, like food. These factors, coupled with an increasingly polarized electorate, may increase the use of crowdfunding as a lifeline for those in need.

Online crowdfunding platforms are like digital versions of mutual aid societies, peer support networks that assist members during times of crisis and often have long-term operations. They have existed in the US for centuries, particularly among Black communities that were discriminated against by institutions and individuals.¹⁵ While online fundraisers may not replicate all aspects of traditional mutual aid societies, they share similarities in community support, voluntary contributions, and the spirit of solidarity in helping others. An example of this is the Basic Necessities Cause Fund that GoFundMe launched in the wake of the COVID-19 pandemic to help meet the need for essentials facing many in the US.¹⁶ Fund donors could help people across the country pay for unexpected emergencies through one donation, much like a mutual aid society. Venmo and PayPal have been popular channels for funding movements and organizations that support these types of needs.¹⁷

Recent laws passed by certain state legislatures have led people to crowdfunding platforms for other personal emergencies, such as the case of transgender people seeking funds to relocate to states where they can receive gender-affirming care.¹⁸ Interestingly, crowdfunding is used as a direct peer-to-peer option when people may not trust another organization. This existing reality may affect a households' overall personal disposable income, affecting their ability to give philanthropically.

GIFT PLANNING

Gift planning trends have renewed focus, mainly due to the Great Wealth Transfer, when the Boomer generation will pass down trillions of dollars to heirs and charities.¹ Gift planning culture is a dynamic and lucrative opportunity for nonprofits to focus equally on what they can ask *from* donors as well as what they can do *for* their donors. Modern fundraising programs incorporating planned giving dramatically increase revenue, help donors build and protect multigenerational wealth, and can catalyze giving on an unprecedented scale.



BEQUEST GIVING DECLINED BUT REMAINED A WIDELY USED GIVING VEHICLE

Giving by bequest (through a will or trust) totaled an estimated \$45.60 billion in 2022, representing 9% of overall giving, a decline of 5.3% from 2021 when adjusted for inflation (an increase of 2.3% when unadjusted).² Giving by bequest has captured between 7% and 9% of total giving over the last 40 years:²

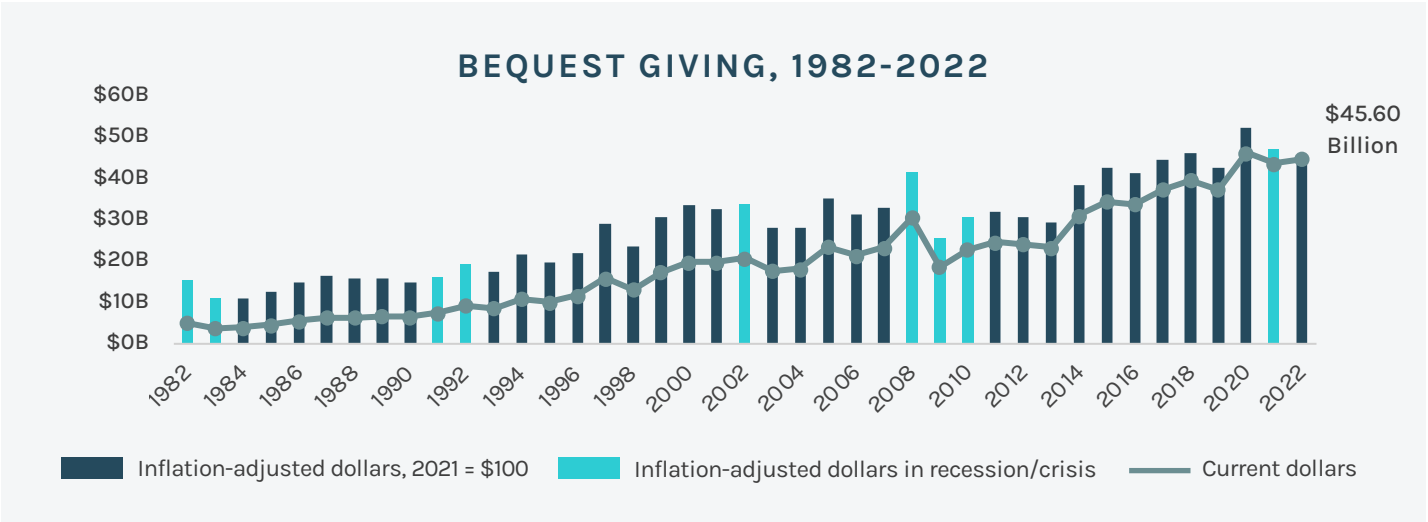
- *Estimated bequest giving from estates \$10 million and above (filing estates) amounted to \$24.27 billion.*
- *Estimated bequest giving from estates between \$1 and \$10 million amounted to \$9.47 billion.*
- *Estimated bequest giving from estates with assets below \$1 million amounted to \$11.86 billion.*

A study conducted by CCS Fundraising found that nearly half of donors first learned about bequest giving from a nonprofit, yet only one-third of US adults have a will.³ There is also a significant discrepancy in the rate of

\$45.60 Billion
Amount given by bequest in 2022

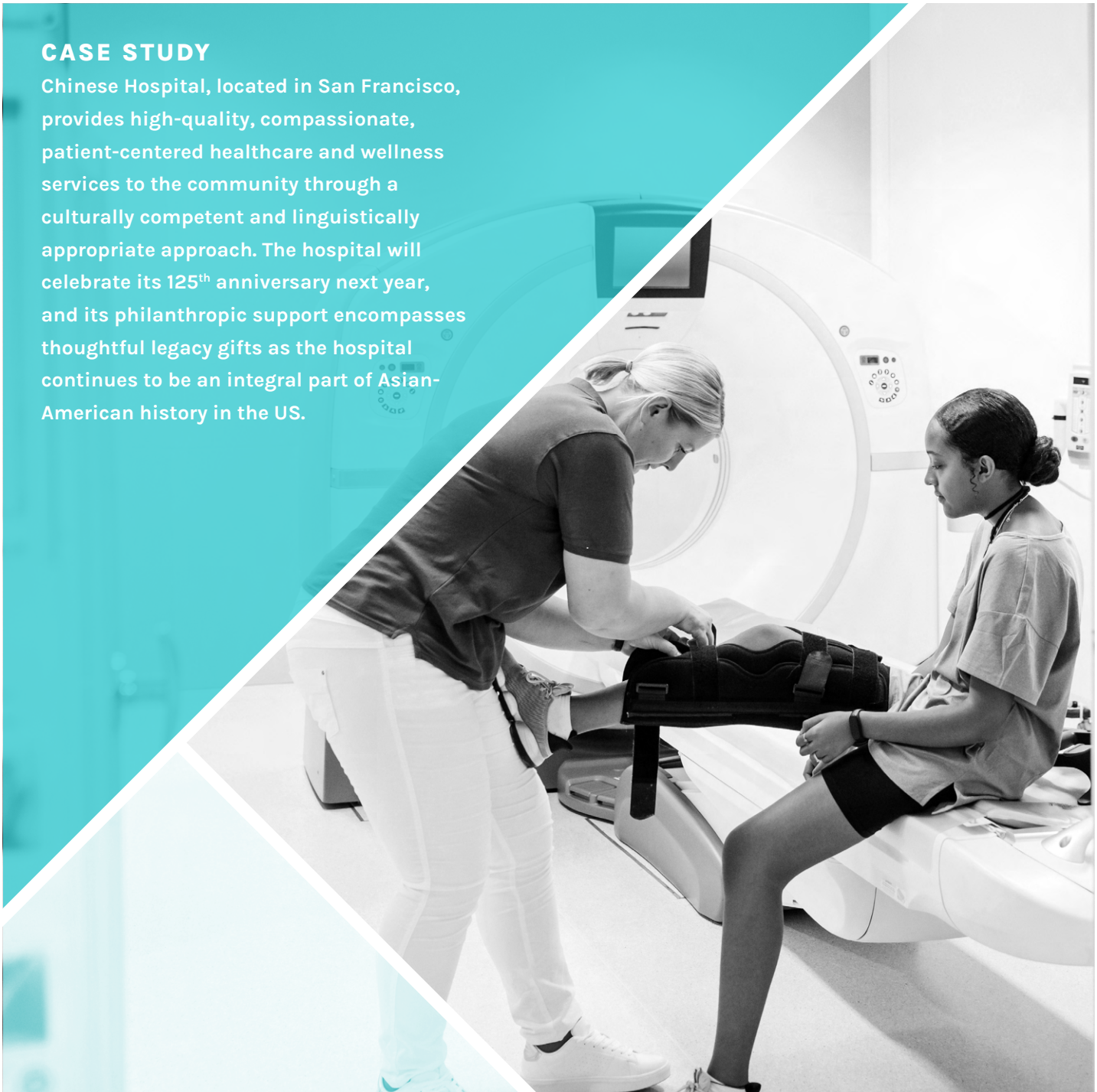
+2.3%
Increase in bequest giving from 2021 to 2022

9%
Percent of all charitable giving by bequest ¹



CASE STUDY

Chinese Hospital, located in San Francisco, provides high-quality, compassionate, patient-centered healthcare and wellness services to the community through a culturally competent and linguistically appropriate approach. The hospital will celebrate its 125th anniversary next year, and its philanthropic support encompasses thoughtful legacy gifts as the hospital continues to be an integral part of Asian-American history in the US.



estate planning between white adults (60-70%), Black adults (20-24%), and Hispanic adults (18-22%). However, once the documentation is in place, the difference in charitable giving by will or trust by race/ethnicity decreases significantly (0% to 7%).⁴ There is an opportunity for nonprofits to leverage advisors' expertise to encourage estate planning among donors and, in tandem, increase their gift planning revenues.

LEGACY GIVING GREW AND IS A SIGNIFICANT FUTURE CASH OPPORTUNITY

Legacy giving, which has steadily increased from \$15.8 billion to \$45.6 billion in inflation-adjusted dollars over the past 40 years, offers the clearest path for nonprofit fundraising growth.¹ However, most nonprofits approach legacy giving with hesitation and uncertainty, with 14% of fundraising staff reporting they lack knowledge of how to communicate about gift planning.⁵ The fundraising impact of legacy giving is significant, yet only 0.12% of annual and 0.2% of campaign donors engaged in legacy giving.¹ Annual donors are typically the best bequest prospects, but only three sectors—health, social and human services, and higher education—engaged more than 0.2% of their annual donors for legacy giving.⁵ Nonprofits that employ at least one person focused on planned giving experienced a 293% increase in legacy gift revenue over nonprofits with part-time staff, and nonprofits with more than two full-time staff secured nearly double the legacy gifts as nonprofits with only one.⁵

CCS INSIGHT

Economic conditions impact planned giving. During economic uncertainty, donors may be less inclined to make financial commitments that draw on their cash and disposable income, so legacy gifts and major gifts of assets become more attractive. On the other hand, a strong economy can increase charitable giving overall, including planned gifts, so nonprofits should be prepared with all possible giving options for their donors.

LESS THAN 0.3% OF DONORS, ON AVERAGE, ARE ENGAGED IN LEGACY GIVING. LEGACY GIFTS ARE 252X LARGER THAN THE AVERAGE ANNUAL GIFT. THERE IS A 75% INCREASE IN ANNUAL GIVING AFTER COMMITTING TO A LEGACY GIFT.⁵

LESS THAN 1% OF DONORS ARE ENGAGED IN LEGACY GIVING



Legacy gifts are 252x larger than the average annual gift, with an average legacy gift value of more than \$120,000 and a median gift value of \$55,000.⁵ Despite traditional wisdom that a legacy gift is often a donor's last, donors often increase annual giving by 75% on average and are 17% more likely to make a major gift after committing to a legacy gift; nonprofits that do not ask for legacy gifts during a donor's lifetime lose out on immediate annual fundraising revenue and future cash potential.⁵

CCS INSIGHT

Reimagining legacy societies and broadening the criteria to include major gifts of assets in addition to legacy gifts may spur the giving that nonprofits need to see consistent and sustainable revenue growth while also diversifying the donor community. One-third of donors desire membership in a giving society, yet only 10% receive that recognition.⁵

DONOR-ADVISED FUNDS GREW, BUT NATIONAL TRENDS SHOULD BE WATCHED

Fidelity Charitable, the largest grant-maker in the nation, revealed that 2022 marked another exceptional year, with a record-breaking \$11.2 billion in grants distributed by its [donor-advised fund](#) (DAF) holders.^{6,7} This amount represented an increase of 9% compared to the previous year. DAFs serve as charitable investment accounts, enabling individuals to receive immediate tax benefits for their contributions, even if the actual donations are made over an extended period. The most favored beneficiaries in 2022 were Doctors Without Borders USA, St. Jude Children's Research Hospital, and World Central Kitchen.⁸

However, we should take the growth in national DAFs in stride. In 2021, national DAF sponsors received \$2.6 billion in grants from private foundations, a perfectly

legal maneuver (if ethically questionable) because these payouts count toward foundations’ annual 5% charitable distribution requirement.⁶ Due to shifts in reporting requirements and the overdue release of nonprofit tax filings from the IRS, this activity has been ongoing for some time and is increasing rapidly. From 2017-2021, private foundations gave, on average, \$1.4 billion annually to DAFs.⁶ There is a 675% difference in giving to national DAFs versus other nonprofits: \$682,000 versus \$88,000, respectively.⁶ For many private foundations, grants to national DAFs comprised the majority of their giving from 2017 to 2021, during which 477 foundations gave 90-99% of their qualifying charitable distributions to DAFs, and 167 gave 100% of their grants to DAFs.⁶

Some preliminary signs for the year ahead suggest foundations and big donors are slowing their giving or may be giving instead to DAFs, which could also slow charitable gifts to nonprofits. According to an analysis of contributions of \$1 million or more made in the first five months of 2023, nonprofits received 213 gifts worth \$5.2 billion. By comparison, at the same time in 2022, nonprofits received 261 gifts worth \$7.4 billion, a decrease of 48 gifts (-22.5%), totaling \$2.2 billion (-42.3%).⁹

Acknowledging that DAFs are much easier for donors to create and manage, and they benefit from tax deductions immediately, the lack of DAF governance and transparency into DAF giving could have unintended consequences, not least of which is a delay in donations reaching the charities for which are the intended.

CCS INSIGHT

As DAFs proliferate the philanthropic ecosystem, nonprofits should prioritize asking their donors who give by DAF to name their organization as a beneficiary of the DAF while continuing to request annual contributions.

DONOR-ADVISED FUNDS HIT RECORD HIGHS ¹

9%

Percent increase in
Grants from DAFs

\$11.2 B

Grants from DAFs to
charitable organizations

2.2 M

Individual
grants

Gifts from private foundations to national DAFs are increasing rapidly.



CASE STUDY

The Catholic Foundation for Brooklyn and Queens, a nonprofit organization serving the Roman Catholic Diocese of Brooklyn, engaged CCS to conduct a gift planning assessment and accelerate planned giving across the Diocese. CCS audited CFBQ's gift planning policies, collateral, and practices; analyzed its donor database to identify the best planned giving prospects; designed and delivered tailored training sessions to development staff and pastors; and ultimately delivered a 12-month roadmap for implementing a Diocese-wide coordinated planned giving program. Consequently, the CFBQ team has secured noncash gifts of life insurance, stock, and IRA-qualified charitable distribution(s), in addition to bequests, and has several pending real estate gifts. Further, the CFBQ development team now has the specific language and resources needed to educate donors about planned giving benefits, for them as individuals and their beloved parish and Diocese.

NONCASH ASSET WEALTH IS SIZEABLE, BUT NONPROFITS MAY NOT BE PREPARED TO ACCEPT IT

Much has been said about the Great Wealth Transfer. Many nonprofits and fundraisers have eagerly awaited its arrival, and there is growing confidence that an estimated \$16 trillion will be passed from older US adults to their Generation X and Millennial heirs in the next decade.¹ Given that more than 90% of wealth is tied up in noncash assets, and the majority of nonprofits lack the capability to solicit or accept such contributions, the prospect of the nonprofit sector receiving a significant portion of the \$16 trillion or more in the decades to come appears tenuous.¹⁰

Solely prioritizing major gifts is proving unsustainable among traditional fundraising programs, and signs point to prioritizing legacy giving to offset potential decreases in major giving.



GIFTS OF \$500 MILLION OR MORE ACCOUNTED FOR 5% OF ALL GIVING FROM INDIVIDUALS IN 2022.

THREE PERCENT (3%) OF TOTAL GIVING (\$13.96 BILLION) IN 2022 CAME FROM JUST SIX INDIVIDUALS AND COUPLES.⁹

CCS INSIGHT

Overall, donors want more personalized, flexible, and creative planned giving options that allow them to make a meaningful impact on the causes they care about while also meeting their own financial and philanthropic goals. However, most nonprofits have not updated their gift acceptance policies in the last five years or are unsure when their policies were last revised. By comparison, more than one-third of nonprofits have updated their policies since 2020, including creating guidance for legacy gifts and other planned gifts.⁵ Organizations should review their gift acceptance policies at least every five years or when preparing for a large fundraising initiative and consider including a windfall policy.

INNOVATIONS IN PHILANTHROPY

Philanthropy is ever evolving. Innovations emphasize technology-driven solutions that leverage digital platforms and AI-enabled tools to engage a broader donor audience and enhance how we measure impact. Promoting DEI within philanthropic strategies is an increased focus—leading to elevated conversations about data while honoring human connection.



TECHNICAL INNOVATIONS ENHANCE OPERATIONS

The convergence of process automation, machine learning (ML), and artificial intelligence (AI) for content generation is revolutionizing fundraising possibilities. Harnessing these technologies allows nonprofits to streamline their operations, making repetitive tasks more efficient and cost-effective while propelling philanthropy toward greater scalability, effectiveness, and inclusivity.

AI FOR CONTENT GENERATION

The current excitement over AI stems from the advances in Large Language Models (LLMs), such as OpenAI's ChatGPT, Google's Bard, and Anthropic's Claude, and the underlying generative pre-trained transformer (GPT) models. LLMs predict the likelihood of a word's occurrence based on the words before it. Using these underlying technologies, researchers built models to generate images with simple text prompts. These are gaining attention for their ability to generate text, mimic specific tones, and create complete copies of different documents while saving hours of work and marketing dollars. Generative AI could increase the productivity of the marketing function within organizations by an estimated value between 5% and 15% of total marketing spending.¹ Combining auto-generated text, images, and audio for easy and complete video generation is likely the next advancement in this field. While the base models are trained on and built upon publicly available data, these models can be further trained to generate specific content that mimics an organization's style.

PROCESS AUTOMATION

Process automation, sometimes called Robotic Process Automation (RPA), helps nonprofits speed up tedious tasks at a fraction of the cost of hiring professionals, while helping with accuracy and scaling large operations. A process is ripe for automation if it hardly deviates from routine and a computer can perform the process tasks. A prominent

CCS INSIGHT

The most straightforward applications for nonprofits using LLMs are the generation of qualification emails, thank you or stewardship letters, proposals and impact statements, and research profiles. Combining process automation with content generation lets nonprofits offer donors a customized experience.

example includes automating check deposits and gift entries into CRMs using Optical Character Recognition (OCR) and database integration.

Another process to reduce involuntary churn (i.e., loss of a donor) involves automating credit card expiration dates. A payment processor found that about 13% of recurring revenue credit card transactions are declined monthly.² Nonprofits can reduce this error rate by automatically informing donors of their credit card expiration or updating credit cards automatically when newer ones become available. This stewardship benefits both the donors and the organization by positioning nonprofits as a partner to donor needs.

OTHER EXAMPLES OF PROCESS AUTOMATION INCLUDE:

- Dashboard and Key Performance Indicators (KPI) delivery
- Gift receipt generation
- Data intake and transformation
- News alerts of important prospects
- Gift and proposal tracking
- Letters alerting donors of their employer's gift-matching process
- Donation renewal notices

MACHINE LEARNING AND PREDICTIVE MODELING

Machine learning is a subset of artificial intelligence that allows analysts to identify data patterns and predict outcomes. Predictive modeling is the umbrella process covering many predictions, regardless of the underlying mathematical models.

One direct application of ML is the prediction of a donor's likelihood to give. Machine learning algorithms can predict the likelihood of future donations by studying the donation history of a dataset's donors—predictions that can then be used to group donors. For example, consider donation amounts. Individual donors or overall totals can be predicted by studying donors' giving patterns. Nonprofits can then use the donation amount to create groupings of donors, such as lead annual giving or major donors, and allocate resources accordingly.

RESPONSIBLE DATA IMPROVES FUNDRAISING

As technology's role in fundraising strengthens, so does the importance of accurate data collection, particularly as two out of three nonprofits cite bad data as the reason for dissatisfaction with their database.³ Data integrity is often used in conversations about returned mail and inactive CRM records, but this narrow interpretation can prevent data-minded professionals from exploring data integrity from a more creative and inclusive lens. It is challenging for people to recognize inequity within their own organizations; this can also apply to data structures.

It is sometimes difficult for organizations to rethink and innovate on existing operations. The willingness to reconsider relevancy and adopt new standards, such as pronoun options or procedures for “head of household” labeling in a CRM, can create a [more inclusive environment](#) for stewarding donors—the benefits of timesaving for operations teams and more accurate constituent data are additional perks.⁴ Acknowledging and addressing biases, promoting inclusivity, protecting donor privacy, and using responsible data practices contribute to a more just and ethical use of information for decision-making and community impact.

CCS INSIGHT

Focusing on meaningfulness and relevancy to your organization is key to data integrity. In defining success as a nonprofit and a development department, you can think about how you use data to achieve success rather than assume a “one-size-fits-all” data collection and storage style. Nonprofits should move beyond asking, “What can we track?” to “What should we track?”

CCS INSIGHT

Grouping prospects or donors based on similarities such as geography, age, donation history, preferences, college majors, graduation year, and more, allows nonprofits to customize fundraising strategies to better engage and retain donors. Clustering or cluster analysis is a commonly used method to create these segments. Nonprofits can combine the giving likelihood models with segmentation to help with donor retention or upgrades.

AN EFFECTIVE CRM DRIVES CUSTOMIZED DONOR ENGAGEMENT

With the integration of technology, data analytics, and personalized communication, nonprofits are better equipped to understand donor preferences, needs, and motivations. These valuable insights allow for creating more tailored and engaging interactions with donors at every touchpoint of their journey.

PROMOTION AND AWARENESS

As the surge in pandemic-era giving waned in 2022, nonprofits saw total fundraising dollars fall across sectors.⁵ Many nonprofits saw this change in their bottom lines and now look for ways to diversify their funding pipeline and reach new audiences. Simultaneously, online giving is rising, increasing nearly 42% from 2019-2021, as outlined in the “Digital Giving” chapter of this report.⁶ A digital-first fundraising strategy designed to start and exist fully online can capitalize on these online

giving trends.⁷ Software options with APIs that permit for integrated online and CRM platforms are growing, allowing donor and prospective donor information to be recorded with minimal effort. The ability to analyze digital engagement (such as click-through percentages or time spent on webpages) and conclude what content is most appealing can drive fundraiser acquisition efforts to more effective strategies.⁸

Integrating tools such as barcodes on direct mail pieces, using OCR for gift entry, or setting up a webpage with an effective API and connection back to your organization’s CRM can help operational team members move beyond pure data entry functions.

IDENTIFICATION, QUALIFICATION, AND ENGAGEMENT

Donor information collected from online promotion platforms should be applied back to qualification efforts to consider how prospects fit into various donor personas. Sophisticated nonprofits use this analysis to learn what their constituents respond well to and what

CCS INSIGHT

More technology companies are entering the nonprofit market, boasting new AI software to help boost fundraising results. However, AI-generated prompts and communications are only as trustworthy as the data on which they are based. Nonprofit leadership should carefully examine fundraiser strategies and the systems in place for each stage of the donor lifecycle to determine opportunities to optimize existing practices and data expectations before investing in a new software solution.



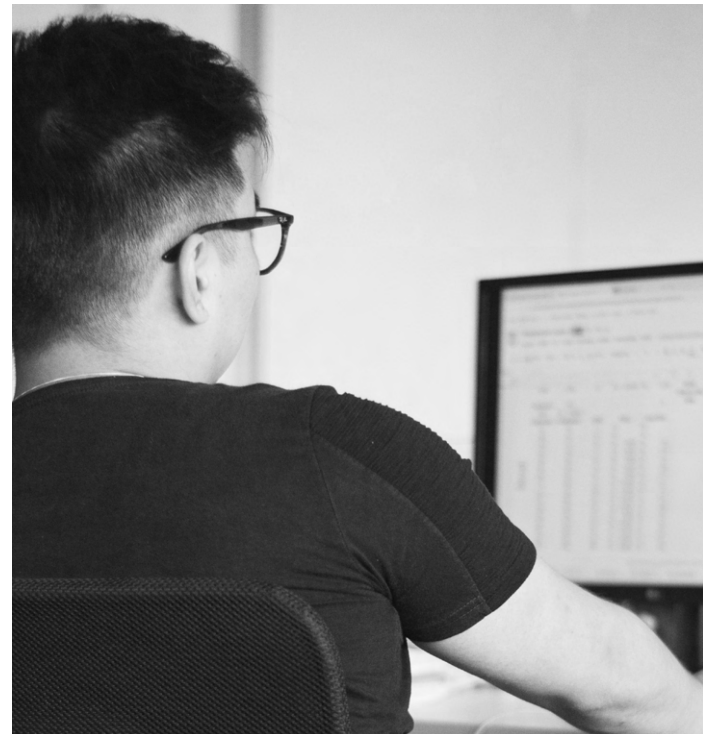
CASE STUDY

Upon celebration of a successful multi-billion-dollar campaign, UNC Health Foundation engaged CCS to develop a five-year strategic plan. With the new strategic plan in place, and as the Foundation acclimates to a new organizational structure, CCS continues to support the Foundation through change management and implementation, including a comprehensive systems assessment and automated technology solution with machine learning to optimize and scale the foundation's prospect development and grateful patient programs. In close partnership with foundation leaders and staff, our process seeks to understand “data in practice” through landscape analysis; design the ideal future state of greater data operating efficiency and impact; and develop strong systems, processes, and automated workflows within a custom CRM to drive strategic fundraising activity.

online content is most successful and act on it. External activity beyond the nonprofit can help to determine fit into a particular persona, such as correlated giving, psychographics, and motivations. Tracking this external information, along with nonprofit engagement, can create data points to help fundraisers focus on priority, high-likelihood-to-give prospects.

STEWARDSHIP

Many CRMs utilize tools to drive stewardship activity through automation, ranging from internal reminders for proactive donor communication, such as a birthday or expiring credit card notifications, to generating highly personalized external communications. Integrating innovative tools to help focus fundraiser attention on what is timely can bolster fundraiser capacity.



MORE INFORMATION

Thank you for reading the CCS 2023 *Philanthropic Landscape*. We hope the information in this year's report proves valuable for your organization and mission.

Please see the following pages for acknowledgments, sources, and more information about CCS Fundraising and our legacy of 76 years partnering with nonprofits for transformational change.



CCS IS COMMITTED TO ELEVATING UNHEARD VOICES

CCS believes that every nonprofit organization has merit, and we are passionate about helping as many as we can to succeed. This is especially true for nonprofits led by people of color or underrepresented communities. To that end, we have created a pro bono partnership program to solidify our commitment to supporting these communities. Our first year behind us, we look forward to supporting even more nonprofits in the future, and we eagerly anticipate a day when every nonprofit has access to the resources they need to achieve their incredible missions.

We also offer a library of free materials and resources through our Fundraising Fundamentals insights page for organizations to learn the basics of fundraising development as they get started.

Visit www.ccsfundraising.com/fundraising-fundamentals for more information.

A SELECTION OF OUR RECENT PARTNERS:

We Are Better Together | www.wab2g.org

We Are Better Together Warren Daniel Hairston Project (WAB2G) connects and heals women and girls affected by homicide and incarceration to prevent the cycles of violence and victimization.

AROSE Foundation | www.arosefoundation.org

AROSE's mission is to bridge the opportunity gap for underserved Black and Brown youth in trauma-prone communities through post-secondary scholarships, support services, and community outreach initiatives.

Good Journey Development Foundation | www.goodjourney.org

Good Journey supports and builds sustainable communities and young leaders who take responsibility for the improvement of our communities, and who promote cultural understanding that contributes to the betterment of society.

ABOUT CCS FUNDRAISING

THE WORLD'S LEADING NONPROFIT CONSULTING FIRM

For more than 75 years, CCS has empowered many of the world's greatest nonprofit organizations to advance some of the most important causes in history. As leading consulting experts in campaign and development strategy, we plan and optimize fundraising initiatives to help organizations make a bigger impact—locally, nationally, and globally. Members of the CCS team are highly experienced and knowledgeable across sectors, disciplines, services, and regions.

Our unique, customized approach provides each nonprofit partner with dedicated professionals who help mission-driven organizations meet their most pressing challenges and achieve their most ambitious goals. While the results of our work are immediate, our impact is enduring. We work with approximately 700 clients in more than 350 cities across 18 countries around the world, with more than \$15 billion in cumulative campaign goals per year.

We partner with nonprofits for transformational change.

200+

Feasibility and
planning studies
conducted

\$15B+

In cumulative
campaign goals
at a time

350

Cities in 18
countries with CCS
partnerships



PLANNED GIVING GLOSSARY

Bequest: A written statement in a donor's will directing that specific assets or a percentage or a remainder of the estate will be transferred to charity after the donor's life has ended.

Charitable Annuity Lead Trust (CLAT): A trust that receives cash or property from a donor and makes fixed payments to charity for a specified period. At the end of the period, it distributes the trust property to a specified beneficiary.

Charitable Gift Annuity (CGA): An agreement where a donor makes a gift of cash or property, and a charity agrees to make fixed payments to the donor for life. The charity then retains the assets after the donor's life has ended.

Charitable Remainder Trust (CRT): A trust that receives cash or property from a donor; makes fixed payments for a life, lifetimes, or term of years; and then distributes the remainder to charity.

Charitable Trust: A trust in which all unexpired interests are devoted to one or more charitable purposes. There are multiple types of charitable trusts, including the two listed below.

Deferred Gift: A planned gift in which a donor decides on the gift now, and the gift is received by the charity in the future, often after the donor's life has ended. Some, but not all, planned gifts are deferred gifts.

Donor-Advised Fund (DAF): As explained by the National Philanthropic Trust, a DAF is "a philanthropic giving vehicle administered by a charitable sponsor. A donor-advised fund allows donors to establish and fund the DAF account by making irrevocable, tax-deductible contributions to the charitable sponsor. Donors then recommend grants from those funds to other charitable organizations. The charitable

sponsor retains legal control over all assets in the DAF, and the donor retains advisory privileges to make non-binding recommendations regarding grants and investments."

Gift Planning: A culture of giving defined by an institutional commitment to donor-centric fundraising with an expanded focus on noncash assets.

Insurance Policy Beneficiary: A donor names a charity as a beneficiary of an existing policy, either fully paid or partially paid, or a new policy. The charity would then receive the policy's benefits after the donor's life has ended. Qualified Charitable Distribution: An otherwise taxable distribution from an IRA (other than an ongoing SEP or SIMPLE IRA) owned by an individual aged 70 ½ or older paid directly from the IRA to a qualified charity. Real Estate: A donor either gifts a piece of property to a charity or sells it to a charity for less than its full fair market value (bargain sale).

Planned Giving: A distinct fundraising strategy utilizing noncash giving. Noncash giving is sometimes referred to as "asset-based giving."

Retirement Plan Beneficiary: A donor names a charity as the beneficiary of a qualified retirement plan (e.g., 401k, 403b, IRA). The charity would then receive the retirement account benefits after the donor's life has ended.

Stock Gift: A donor may donate appreciated assets directly to a charity as a cash-equivalent gift or include stocks in a bequest.

Windfall Policy: This gives nonprofits guidance on unexpected unrestricted gifts, such as legacy gifts, for use in predetermined initiatives rather than immediate needs.

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