




Joy Cometh from Giving:

(and yes, that includes financially)




About Your Presenter



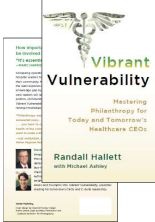

Randall Hallett
CEO and Founder, Hallett Philanthropy

- 25+ years in the philanthropy field
- 18+ years as a Chief Development Officer
- Fundraised in both education and healthcare
- Consulted with the largest health and education systems in the United States, Canada, and Australia
- Has educated 10,000's of physicians, 1,000's of gift officers, 100's of executives, and countless Boards on best practice philanthropy
- Has led \$100M+ campaigns
- *Around with Randall* host, weekly 20-minute podcast
- Author of *Vibrant Vulnerability: Mastering Philanthropy for Today and Tomorrow's Healthcare CEOs*



Advocating for Life-Long Learning

- Weekly 15–20-minute Podcast (*more than 150 of them!*)
- Subjects (*examples*)
 - > 4-part Series on the Donor Cycle, Campaigns, Planned Giving
 - > Program (*not capital*) funding
 - > MGO ROI
 - > The Art of Productivity
 - > Understanding Generational Giving
 - > Understanding the Value of Smaller Portfolio Sizes
 - > History of Philanthropy
 - > Donor Advised Funds
 - > Attention to Detail
 - > 2022 Non-Profit Predictions
 - > Leading and Lagging Indicators
 - > Artificial Intelligence in Non-Profit Work
 - > Managing Up
 - > New Board Member Orientation
 - > Great Philanthropists

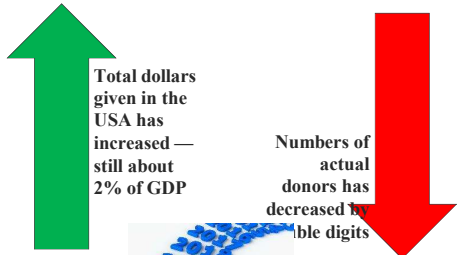



Philanthropy Today (Overall)



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PHILANTHROPY
Serving Clients. Full Circle.

Understanding the Numbers




Total dollars given in the USA has increased — still about 2% of GDP

Numbers of actual donors has decreased by double digits

2020

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Understanding the Numbers



Percentages of Households Giving to Philanthropy

Year	Percentage
2000	66%
2002	68%
2004	67%
2006	66%
2008	66%
2010	62%
2012	59%
2014	56%
2016	53%
2018	50%

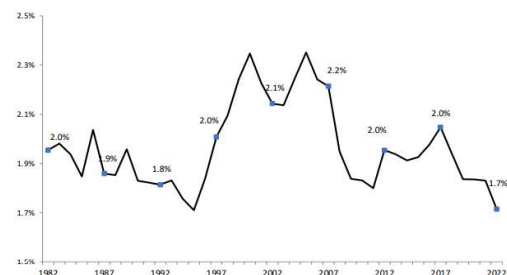
HALLETT
PHILANTHROPY
Serving Clients. Full Circle.

Understanding the Numbers

- Since 2003, people making \$250k or less have **decreased by 34%**
- Since 2005, small/mid-level donors have **decreased by 25%**
- Since 2003, people making \$500k or more (top 1% earners) have increased their giving by 57%
- Since 2003, people making \$10M or more have increased their giving by 104%



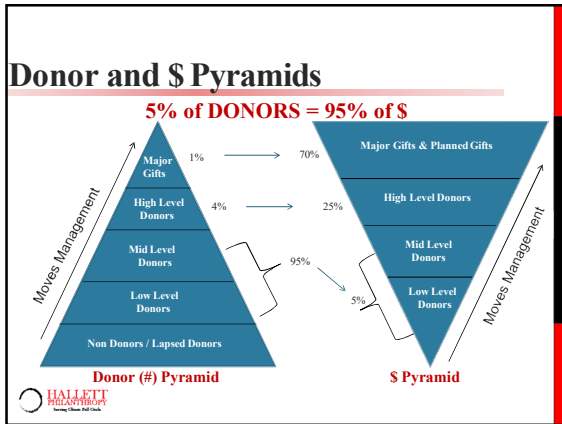
Giving As A Percentage of Income



Giving To Religion

- In 2022, grew 5.2%
 - BUT, with inflation (8.0%), giving DECREASED by 2.6%
 - Overall, religious giving accounts for 27% of all charitable dollars in the USA
 - Easily the largest sector of nonprofit giving





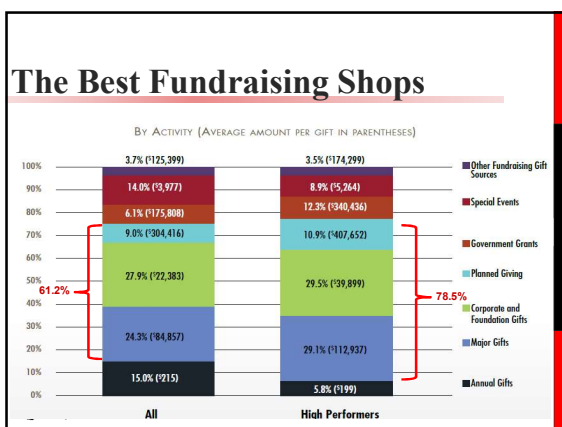
Giving Pyramid

Fdn Annual Goal \$5,000,000

Gift Level Low Level	Gift Level High Level	Number of Gifts Needed	Number of Prospects/ Proposals	Average Gift in Level	Dollars Raised in Level	Total Raised From This and Higher Levels
\$1,750,000	\$2,500,000	1	3	\$1,750,000	\$1,750,000	\$1,750,000
\$1,000,000	\$1,750,000	1	3	\$1,000,000	\$1,000,000	\$2,750,000
\$625,000	\$1,000,000	1	3	\$625,000	\$625,000	\$3,375,000
\$375,000	\$625,000	1	3	\$375,000	\$375,000	\$3,750,000
\$250,000	\$375,000	2	6	\$250,000	\$500,000	\$4,250,000
\$125,000	\$250,000	3	9	\$125,000	\$375,000	\$4,625,000
\$50,000	\$125,000	3	12	\$50,000	\$200,000	\$4,825,000
\$12,500	\$50,000	5	15	\$12,500	\$62,500	\$4,887,500
All Below	All Below	Many	Many	---	---	---
Total		18	54		\$4,887,500	

9 donors and 27 Solicitations = 95%

HALLETT
Fundraising Solutions
Strong. Smart. Not Greedy.



Generational Wealth Transfer

- Cerulli Research Reports projects that wealth transferred through 2045 will total \$84.4 trillion—with \$72.6 trillion in assets transferred to heirs, while \$11.9 trillion will be donated to charities.



A Smart Man Once Said...

Billionaire investor Warren Buffet famously told Fortune in 1986 that he would give his children *“enough money so that they would feel they could do anything, but not so much that they could do nothing.”*



That First Intent

- First planned gift intent is at 53
- People that write the 1st will AFTER 40 are more likely to create a charitable interest in the will
- Once in their estate planning, it is more likely than not that the charity will not be removed



Stelter, 2021

Four Classes of Vehicles

- Give it outright
- Give it later (*after donor is deceased*)
- Give the asset now, keep the income
- Give the income now, keep the asset



Understanding Donors



Understanding Donors



Mega Gifts



Understanding Donors

What non-profit leaders thought:

- Community Responsibility, Pride
- Have money
- Belief in the mission
- Interest in a special project
- Involved in the campaign
- Service on board, committee
- Memorial opportunity
- Respect for institution in community



Understanding Donors

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- **Belief in the mission**
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- *Memorial opportunity*
- **Respect for institution in community**

What givers said:

- **Believing that their gift can make a difference**
- **Experiencing personal satisfaction, enjoyment or fulfillment**
- **Belief in the mission**
- *Regard for staff leadership*
- *Fiscal stability*
- **Respect for institution in community**
- *Regard for volunteer leadership*
- *Involved with organization (board, volunteer)*
- *Respect for institution in a wider circle*



Understanding Donors

The Point Is ...



- People give for their own reasons, not yours
- When asked, most givers cite
 - Make a difference
 - Belief in the cause
 - Personal connections
 - Personally or tangentially involved
- **People give because they enjoy it**
- **People give because they are asked**



Understanding Donors

- The six (6) macro “motives” for giving
 - Trust (*charities do good for public benefit*)
 - Altruism (*moral-compassion for less fortunate*)
 - Social Benefit (*connection to great cause*)
 - Financial Benefit (*their own- e.g., taxes*)
 - Egoism (*elevation of donor in community*)
 - Impact (*seeing/feeling value*)



Creating Joy for Both Sides




Connecting the Dots

Roles of Philanthropy

- Reduces human suffering
- Enhances human potential
- Promotes equality and justice
- Builds community
- Creates human fulfillment
- Supports experimentation and stimulates change
- Fosters pluralism




Connecting the Dots



Benefits to philanthropy (gratitude)


- Better sleep
- More exercise
- Reduced physical pain
- Lower levels of inflammation
- Lower blood pressure
- Less depression
- Better able to deal with stress
- Changes in brain activity

(Glenn Fox, University of Southern California)



Medical Studies Connected to Philanthropy (Gratitude) *(giving and having it received)*

- Makes us **happier** by 10% *(Emmons & McCullough, 2003)*
- Improves our **romantic/friend relationships** *(Algoe, et al, 2011)*
- Makes us **more optimistic** *(Amin, 2014)*
- **Reduces depression** by as much as 35% *(Seligman et al., 2005)*
- **Reduces blood pressure** *(Shipon, 1977)*
- **Improves sleep** *(Jackowska, Brown, Ronaldson, & Steptoe, 2016)*
- **Increases frequency of exercise** *(Emmons & McCullough, 2003)*
- **Improves overall health** *(Hill, Allemann, & Roberts, 2013)*
- **Lowers bad & raises good cholesterol** *(Emmons, 2009)*
- **Lowers blood pressure** *(Emmons, 2009)*
- **Strengthens the immune system** *(Sood, 2009)*
- **Improves Pain Tolerance** *(The Sports & Spinal Group, 2020)*
- **Extends lifespan** *(Boyles, 2009)*



Honing In

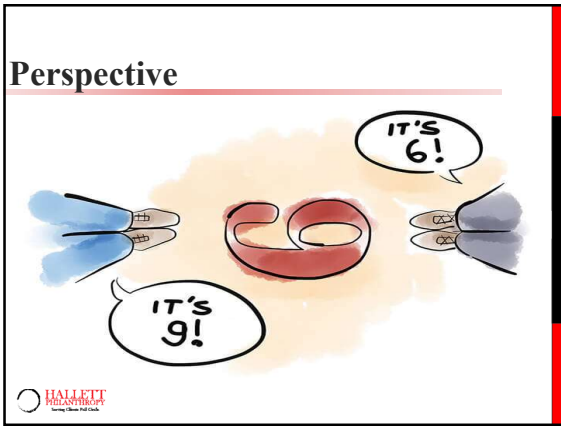
Getting to the Dollars

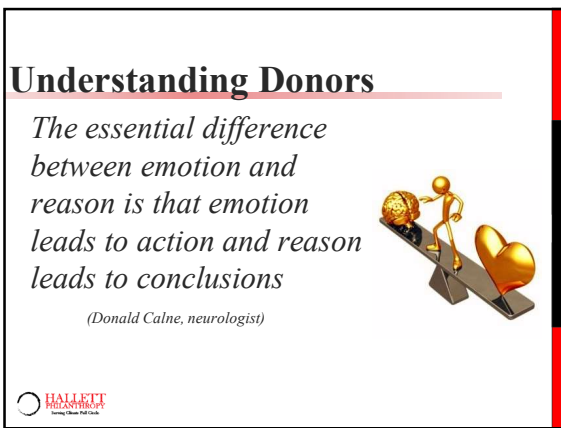


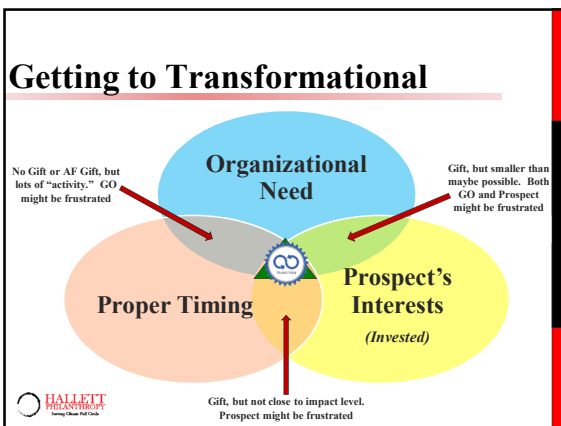




















Questions





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