

FUNDRAISING

2026 Philanthropic Landscape

15TH EDITION

Welcome to the 2026 *Philanthropic Landscape*

For 15 years, the *Philanthropic Landscape* has examined the trends, data, and forces shaping charitable giving in the United States. Produced annually by CCS Fundraising, this report helps nonprofit leaders understand a changing philanthropic environment and consider what it means for your organizations.

This edition pairs the latest giving data with perspective on the forces influencing philanthropy today – from evolving donor expectations and demographic shifts to advances in technology and new approaches to fundraising. Together, these insights offer nonprofits context to assess what is changing, consider the implications for their organizations, and make informed decisions about what comes next.

CCS is a strategic fundraising solutions firm partnering with nonprofits to understand their donor landscape, financial goals, organizational context,and opportunities for growth.

With nearly 80 years of expertise, we are ready to help your organization amplify its impact. Get in touch with us by visiting ccsfundraising.com.

We are honored that the 14th edition of the *Philanthropic Landscape* received a Silver Stevie® Award for Best White Paper or Research Report from the American Business Awards®, recognizing our continued commitment to rigorous research and actionable insights for the nonprofit sector.



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Introduction

Every year, nonprofit leaders face an important question: what should we be paying attention to now?

The answer is rarely found in a single headline, economic indicator, or fundraising trend. Philanthropy is shaped by a collection of forces that influence how donors think, how organizations operate, and how generosity takes shape across communities. Some are longstanding. Others are emerging. Increasingly, they are interconnected.

That reality inspired this year's *Philanthropic Landscape*.

As we developed the 15th edition of this report, one theme surfaced repeatedly in conversations with nonprofit partners, philanthropists, and colleagues across CCS: the most important developments in philanthropy are not occurring in isolation. Donor expectations, wealth concentration, technology, economic conditions, institutional trust, and organizational capacity all influence where the philanthropic landscape is headed—and what nonprofits should consider as they prepare for the future.

This report brings together Giving USA data, external research, CCS proprietary insights, and perspectives from our work with organizations across sectors and geographies. Our goal is not simply to report what has happened, but to also help leaders understand what is changing, why it matters, and what it may mean for their organizations.

In the pages that follow, you'll notice several themes. Generosity remains strong, even as donors become increasingly selective. Organizations are strengthening donor pipelines while adapting to changing expectations. Technology, data, and AI are creating new opportunities, while putting greater emphasis on the systems, strategies, and organizational readiness required to use them effectively. And across the sector, leaders are considering how to position their organizations for long-term success in a changing giving environment.

For fifteen years, the *Philanthropic Landscape* has helped organizations understand the broader environment influencing charitable giving. We hope this edition provides the data and perspective to help you identify opportunities, navigate change, and make informed decisions about what should come next.

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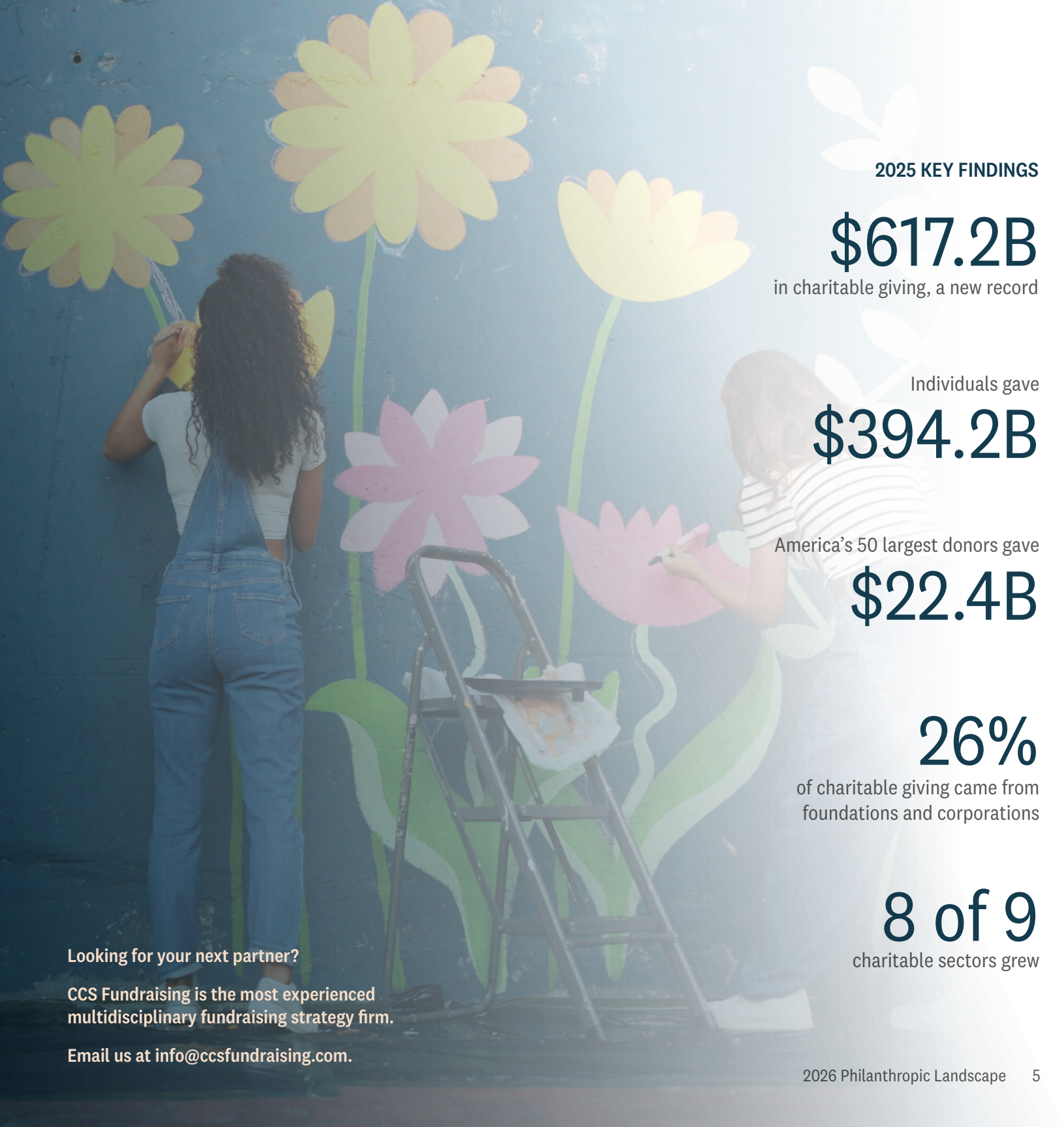

2025 KEY FINDINGS

$617.2B
in charitable giving, a new record

Individuals gave
$394.2B

America's 50 largest donors gave
$22.4B

26%
of charitable giving came from foundations and corporations

8 of 9
charitable sectors grew

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01

The Forces Shaping Philanthropy

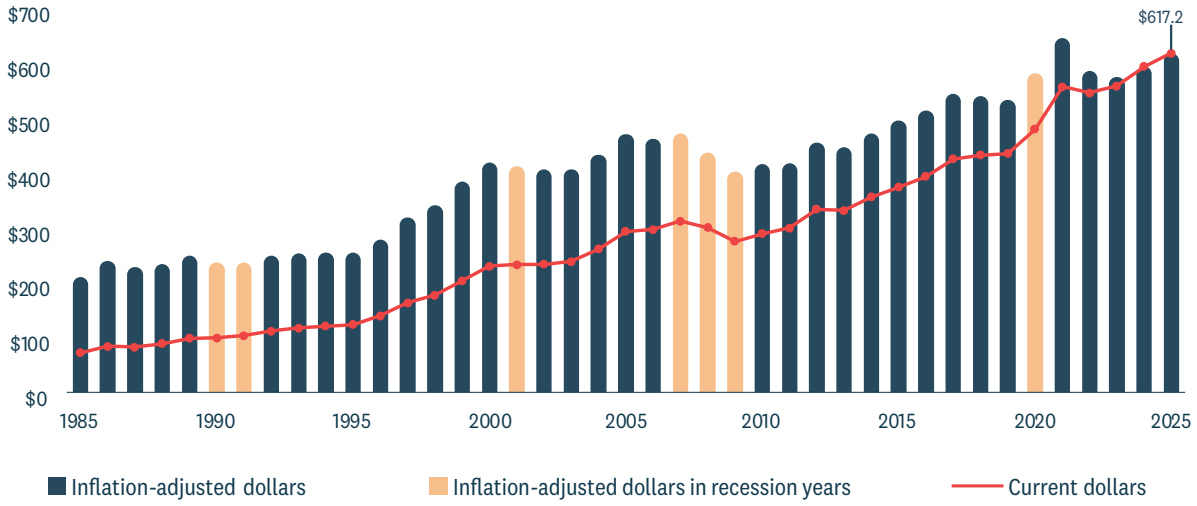
THE FORCES SHAPING PHILANTHROPY

Americans gave more to charity in 2025 than in any year on record, with contributions surpassing $600 billion for the first time.[1] But a record total does not guarantee success for every nonprofit, and beneath the headline numbers, who gives, how donors decide, and which nonprofits earn their support are all changing.

Nonprofits are working harder for every dollar in a fundraising environment that looks markedly different than it did in previous years. Wealth and giving are concentrating among fewer donors. Donors are weighing a wider and less predictable mix of financial, personal, and institutional considerations. And whether nonprofits capture that support increasingly depends on whether their operations can navigate growing complexity.

Together, three forces—the increasing concentration of wealth, the complexity of donor decision-making, and the rising operational demands of giving—are reshaping the conditions for fundraising success. As wealth and giving concentrate, the mechanics of giving place greater demands on organizations and success depends on identifying where philanthropic potential is greatest, understanding what move individual donors to act, and building the capacity to translate that understanding into sustained support.

Total Giving 1985-2025 (In Billions of Dollars)

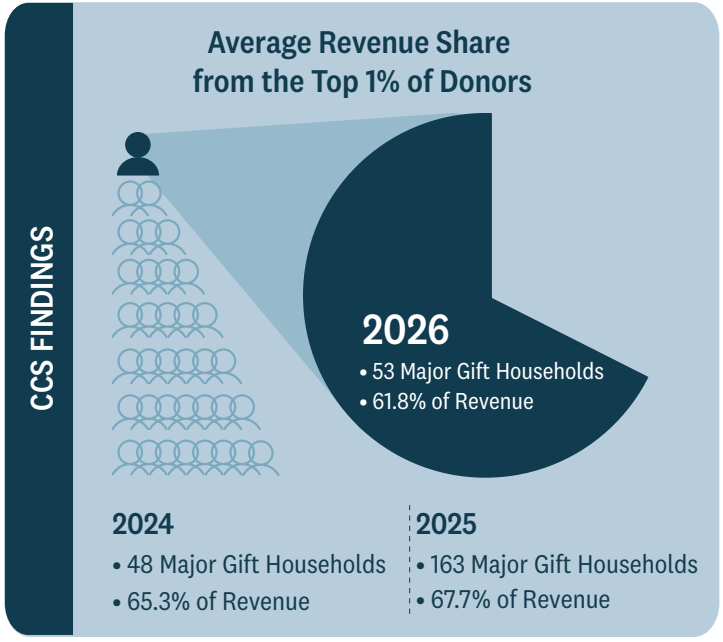


FORCE 1

The Increasing Concentration of Wealth

Wealth in America is concentrating, and charitable giving is concentrating with it. At the end of 2005, the top 1% of U.S. households held 27.3% of wealth.[2] That share rose to 30.6% in 2015 and 31.8% by the end of 2025.[2] The bottom half of households held just 2.5% at the end of 2025.[2]

Consequently, fewer donors are driving more of the growth. Major donors drove nearly all of the increase in charitable dollars in 2025—even as the total number of donors fell an estimated 3.6% in 2025—the fifth consecutive year of decline.[3] Across CCS client engagements, we see the same theme: the top 1% of donors have accounted for roughly two-thirds of revenue over the past decade.



At the same time, a larger nonprofit field gives donors more choices and increases the importance of differentiation and relevance. The number of registered nonprofits in the U.S. grew approximately 46% between 2004 and 2024, from nearly 1.4 million to more than 2 million.[4,5] Not every nonprofit appeals to the same donors, but organizations with overlapping missions, constituencies, or geographic reach need to make clear why their work is relevant to the high-capacity prospects they hope to engage.

2024 | 2.0M REGISTERED NONPROFITS

46% INCREASE ↑

2004 | 1.4M REGISTERED NONPROFITS

The need for differentiation will become even more consequential as the much-anticipated Great Wealth Transfer puts charitable giving in new hands. Cerulli projects that $124 trillion will transfer to the next generation of donors through 2048, including approximately $18 trillion to charitable causes.[6] Nearly $100 trillion will come from Baby Boomers and older generations.[6] The donors who ultimately receive this wealth may support different causes and give in different ways than the generation before them.



WHERE DO WE GO FROM HERE?

As giving concentrates, organizations must become more deliberate about where they invest time and attention. Broad-based giving is still important, both as a revenue source and as a pipeline for future major donors. But leaders also need to identify donors with the greatest capacity and inclination to give, understand what motivates them, and build intentional relationships that connect those motivations to a compelling case for deeper support.

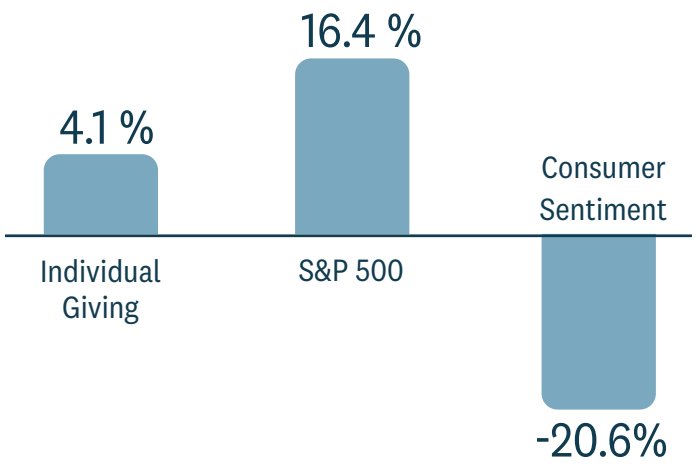
FORCE 2

The Complexity of Donor Decision-Making

Fundraisers have long looked to economic conditions for clues about how charitable giving may change. But no single economic indicator can reliably predict how an individual donor will respond. While economic conditions provide important context for planning, they do not determine what any one donor will choose to do. That decision rests on a donor's own circumstances and priorities, and on the relationship that donor has with the organization making the ask.

In 2025, the University of Michigan's Index of Consumer Sentiment averaged 20.6% below its 2024 level, reaching its lowest annual average on record.[7] Yet charitable giving rose 5.7% in current dollars, while the S&P 500 gained 16.4% over the same period.[1,8]

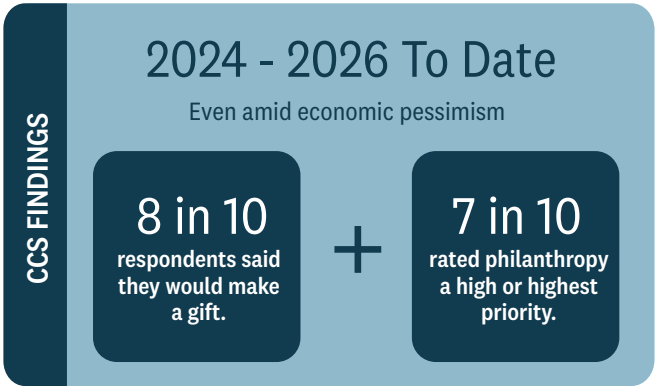
2024-2025 Growth Rates



Consumers felt pessimistic even as markets rose and charitable giving reached a record high. That contrast shows the limits of relying on economic headlines alone. Donors also tend to weigh their own finances, values, family priorities, tax considerations, and confidence in the organization asking for support.

The unique expectations of donors reflected the same tension. In 2025, most said they could meet their financial obligations without difficulty. Even so, 40% expected the economy to weaken in 2026, and 24% planned to give less, which is up from 16% the year before.[9] Among those who planned to reduce their giving, concern about the broader economy rose from 14% to 27%, while concern about inflation fell from 18% to 9%.[9]

National sentiment is no substitute for what an organization knows about its own donors. CCS feasibility study data show that pessimism about the economy did not carry into willingness to give among donors, board members, and other stakeholders already connected to an organization. From 2024 through 2026 to date, at least eight in 10 respondents said they would make a gift, while roughly seven in 10 or more rated philanthropy as their high or highest priority.



WHERE DO WE GO FROM HERE?

Macroeconomic sentiment can inform planning, but it cannot reliably predict a donor's willingness to give. Organizations that lower their expectations because of negative headlines may unintentionally cap their results by failing to invite donors to give at their true capacity. Leaders who understand how their donors make decisions, and tailor engagement to match, will capture opportunities that broad economic assumptions miss.

FORCE 3

Rising Operational Demands of Giving

Organizations cannot control the distribution of wealth or how donors make decisions, but they can control how well-prepared they are to respond. As donor expectations tighten and the mechanics of giving grow more complex, organizations must strengthen the operations that support their donor relationships.

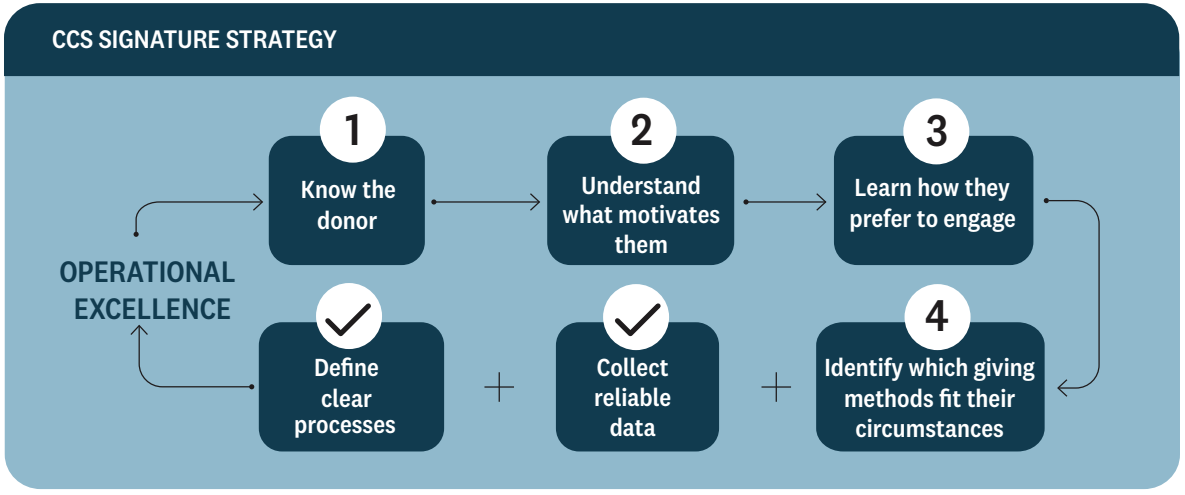
Nonprofits now must engage four generations of donors, each with different expectations of the giving experience. Among Gen Z donors, 51% identified simplicity as the most important element of a positive giving experience, while 48% of Baby Boomers prioritized reassurance that their payment information was secure.[9] Nearly 40% of Gen Z and Millennial donors wanted clearer information about what their gifts would support and how the funds would be used.[9]



The way donors structure their giving has grown more sophisticated. Donors increasingly use strategic vehicles: giving through donor-advised funds, contributing appreciated assets, or arranging bequests and other planned gifts.[1] These gifts can require additional expertise, coordination, and preparation. Organizations need systems that can accept these diverse giving vehicles, staff who know how to process them, and consistent follow-through to steward the donor relationship.

At the same time, nonprofits are collecting more donor information than they may be able to use. More than one-third cite leveraging data for decision-making as a top fundraising challenge, and roughly one-third point to data management and CRM issues.[10]

Turning information into coordinated action takes systems, expertise, and discipline—a capability CCS calls operational excellence.[11] In practice, it means knowing who donors are, what motivates them, how they prefer to engage, and which giving methods fit their unique circumstances. It also requires reliable data and clear processes, so nonprofits can act on data-informed knowledge rather than rely on instinct



Technology alone will not create the operational excellence needed for nonprofits to succeed. Neither will simply increasing fundraising activity. Organizations need people, processes, and systems working together so donor opportunities do not get lost in incomplete records, poor handoffs, or inconsistent follow-through.[11]

WHERE DO WE GO FROM HERE?

As the demands of giving have grown, operational excellence has shifted from a competitive advantage to a prerequisite for fundraising success. Leaders need reliable data, clear prospect-management practices, and systems built so that when a donor is ready, the organization is too. Nonprofits that build this foundation will be best positioned to respond to donor opportunities with greater consistency and intention.

LEVERAGING THE FORCES SHAPING PHILANTHROPY

Even as the mechanisms of giving continue to evolve, philanthropy remains fundamentally human. No two organizations will experience these forces the same way. How they affect an organization will vary by mission, geography, constituency, and fundraising model. But understanding how these forces intersect within an organization's own environment is essential to making informed strategic decisions.

The chapters that follow examine how these forces are influencing individual, high-net-worth, institutional, corporate, and sector-specific giving. While the context may differ, the underlying question remains the same: How can organizations better position themselves to succeed in this changing philanthropic landscape?

CCS FINDINGS





02

Individual Giving

INDIVIDUAL GIVING

In 2025, individuals gave $394.2 billion, representing 64% of all charitable dollars and nearly double the $223.0 billion given by foundations, bequests, and corporations combined.[1] Individuals increased their giving by 4.1% in current dollars, or 1.4% after inflation, and they remain, as they have for decades, the largest source of American philanthropy.[1]

Yet beneath those encouraging figures is a longer-term shift. Four decades ago, individuals accounted for roughly 80% of all charitable giving.[1] Today, that share has fallen to about 65% over the most recent five-year period.[1] This change, though, does not suggest Americans are becoming less generous.

Part of the shift reflects how national totals classify giving that originates with individuals but reaches nonprofits through other vehicles. National categories track how dollars move, not necessarily who made the decision to give them. Individual philanthropy remains as vital as ever, but the path their dollars take is becoming more sophisticated and deliberate. Nonprofits that look past the giving vehicle to the donor behind it can deepen the relationship and grow future support.



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to begin the conversation.**

Individual Giving is Evolving, Not Declining

Today, donors have more ways to decide when, where, and how they give. A single donor might contribute directly to a nonprofit, establish a family foundation, create a donor-advised fund, donate appreciated stock, or arrange a planned gift through an estate. Some of those vehicles, particularly family foundations and bequests, appear in national totals outside the individual-giving category.

Family foundations, for example, are established and directed by individuals, yet Giving USA counts them as independent foundations. Their grants appear in foundation giving alongside community and operating foundations.[1] Bequests also appear as a separate source, even though each one originates with an individual donor. If viewed together, individuals and bequests represented 87% of all giving from 1986–1990 and 75% from 2021–2025.

The Role of Bequests in Individual Giving Has Evolved

THEN

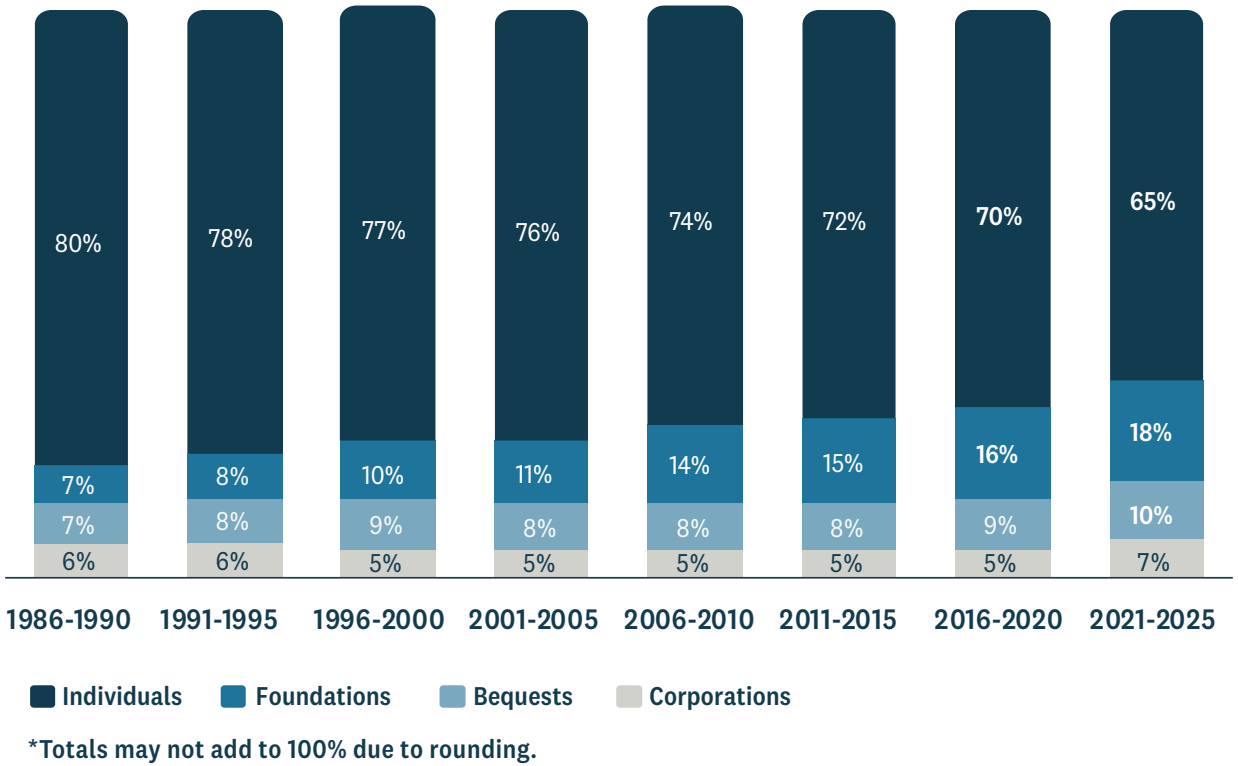
1986–1990: 80% Individuals + 7% Bequests = 87%

NOW

2021–2025: 65% Individuals + 10% Bequests = 75%



Giving by Source: Percentage of the Total in Five-year Spans, 1986-2025*
(In Inflation-adjusted Dollars, 2025=$100)



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

Donor-advised funds (DAFs) are giving vehicles classified within individual giving. When a donor moves money into a DAF, Giving USA counts the gift at that moment. When the DAF later grants that money to a nonprofit, Giving USA treats the DAF as a pass-through, so the same dollars are never tallied twice.[1] As a result, growth in DAF giving does not shift dollars out of the individual-giving category, but family foundation grants, for example, can.

Individual generosity is also extending into channels that national totals do not fully capture, such as crowdfunding campaigns and mutual-aid networks. The period between January 2025 and January 2026 demonstrated this giving when more than one million donors contributed over $265 million through GoFundMe to support individuals and communities affected by the Los Angeles wildfires.[2] The response made January 10 the platform's most generous day worldwide in 2025.[2]

WHERE DO WE GO FROM HERE?

National categories describe how dollars are counted, not how relationships are built. Leaders should look past the vehicle to understand the donor behind it, including what motivates their giving, how they prefer to give, and how those decisions are made within a family or household. An organization's own donor data, not the national totals, should shape its strategy.

The Donor Behind the Gift

Donor counts fell again in 2025, though the rate of decline has eased each year since 2022.[3] Even so, Americans continued to give a stable share of their income. Disposable personal income rose 4.4% in 2025, while individual giving increased at a similar rate. Giving also held flat at 1.7% as a share of disposable income for the third consecutive year.[1] At the aggregate level, fewer donors are sustaining a similar level of giving relative to income.

Individual Giving as a Share of Disposable Personal Income, 1985–2025 (In Current Dollars)



Source: Giving USA 2026; p. 50

Donors giving $1 to $100 declined 7.9%, while those giving $101 to $500 fell 2.8%.[4] Together, those groups represent roughly 80% of all donors. Mid-size donors giving $501 to $5,000 declined a more modest 1.5%, while major donors giving $5,000 to $50,000 increased 1% and supersize donors giving $50,000 or more increased 2.4%.[4]

A new federal tax provision, passed as part of H.R. 1 in July 2025, could broaden the donor pipeline. Beginning in 2026, the charitable deduction for non-itemizers is projected to increase annual giving by approximately $4.4 billion and bring between 6.0 million and 8.7 million new households into charitable giving.[5]

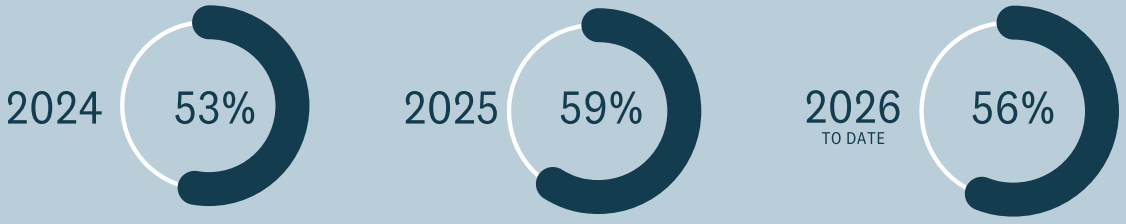
At the same time, many organizations already have significant growth potential within their existing donor base. Giving history can reveal which relationships are deepening and where donors may be ready for greater engagement. In a five-year analysis of nearly 100,000 donors whose annual giving totaled $5,000 or less, those who gave in all five years represented less than 12% of donors but accounted for 45% of all funds raised.[6] Five-year donors gave an average of $606.9 annually, approximately 224% more than the $187.3 average among one-year donors.[6]

Although every organization defines mid-level giving differently, a donor's history of consistent or increasing support can reveal growing commitment in ways that wealth screening alone cannot capture. CCS feasibility study data reinforce the fundraising potential within an organization's existing network. Among respondents who indicated a potential campaign gift, more than half suggested a gift of $50,000 or more in each of the last three years; adjusting from 53% in 2024 to 59% in 2025 and 56% in 2026 to date.

CCS FINDINGS - Existing Networks Hold Significant Campaign Potential

CCS feasibility study respondents who indicated a

POTENTIAL CAMPAIGN GIFT OF $50,000 OR MORE



Major-gift trajectories show why organizations should pay attention to giving history early in the donor stewardship process. CCS analysis finds that a median 22% of major donors made their first gift below $250, and a median 20% of those donors reached major-gift level within three years.

CCS FINDINGS - Major Gift Trajectories

WITHIN 3 YEARS

$250

MEDIAN 22%

of major donors made their first gift below $250

$10K+

MEDIAN 20%

of those donors reached major-gift level within three years



WHERE DO WE GO FROM HERE?

Acquisition remains essential to building the future donor pipeline. But in a slower-growth environment, organizations also need to recognize signals of commitment within the donor base and intentionally help those relationships deepen over time. Organizations that bring new donors into the pipeline while helping existing supporters progress toward deeper levels of engagement and giving will be best positioned for sustainable growth.

CCS PARTNER:

Park Hill United Methodist Church

SUCCESS STORY

Key Elements

- Park Hill secured more than $1 million from 25 donors before entering its active fundraising phase, exceeding 30% of its campaign goal.
- Early cultivation reengaged longtime members and brought new lay leaders into the campaign.
- The campaign expanded support beyond church membership, including a six-figure leadership gift from a community leader who was not a member.

> *CCS Fundraising was not only our strategists, but our loudest cheerleaders. They partnered with us to recruit passionate campaign leaders, and personally customized each training and campaign meeting to our group's needs.*
>
> *Pastor Genevieve Rohret-Navin, Executive Pastor*

Client Challenge & CCS Solution

Park Hill United Methodist Church had not conducted a major capital campaign in 40 years. As church leaders prepared for a new campaign, they saw an opportunity to build stronger relationships with individual donors and expand support beyond the members who had historically given to the church.

Following a feasibility study, CCS helped Park Hill develop a mission-centered case for support, train campaign volunteers, establish prospect management and stewardship practices, and strengthen donor cultivation. As a result, Park Hill reconnected with legacy members, engaged new lay leadership, and expanded support beyond its membership. The church also built the infrastructure to manage multiyear gifts and steward donor relationships over time.

SECTOR

Faith

LOCATION

Bloomfield, NJ,
Northeast, United States



How Donors Are Using DAFs

Even as wealth concentrates among fewer households, giving vehicles once associated primarily with affluent individuals are reaching a broader range of donors. Donor-advised funds, in particular, are becoming a more common part of charitable planning across donor segments. But the growth of DAFs does not signal a change in the underlying opportunity for nonprofits: most grants from DAFs still go to organizations contributing donors already know and support.

In 2025, the nation's three largest sponsors—Fidelity Charitable, DAFgiving360 (formerly Schwab Charitable), and Vanguard Charitable—each reported double-digit growth in grantmaking.[7,8,9] At Fidelity Charitable, nearly half of Giving Accounts held less than $25,000 at the end of 2025, evidence that DAFs are no longer limited to donors with exceptionally large charitable accounts.[7]

Most DAF grants are also built on relationships that already exist. At DAFgiving360, 85% of grants in 2025 went to charities donors had supported before.[8] Fidelity Charitable reported a similar pattern, with 77% of grants directed to organizations donors had already supported.[7]

For nonprofits, DAFs have now become a routine part of individual giving. In CCS's 2026 Philanthropy Pulse survey, 85% of organizations indicated that they either actively solicited DAF gifts or received them without specifically targeting DAF donors.[10] Among nonprofits with budgets above $1 million, 11% to 15% reported that DAFs accounted for at least one-fifth of their charitable revenue.[10]

WHERE DO WE GO FROM HERE?

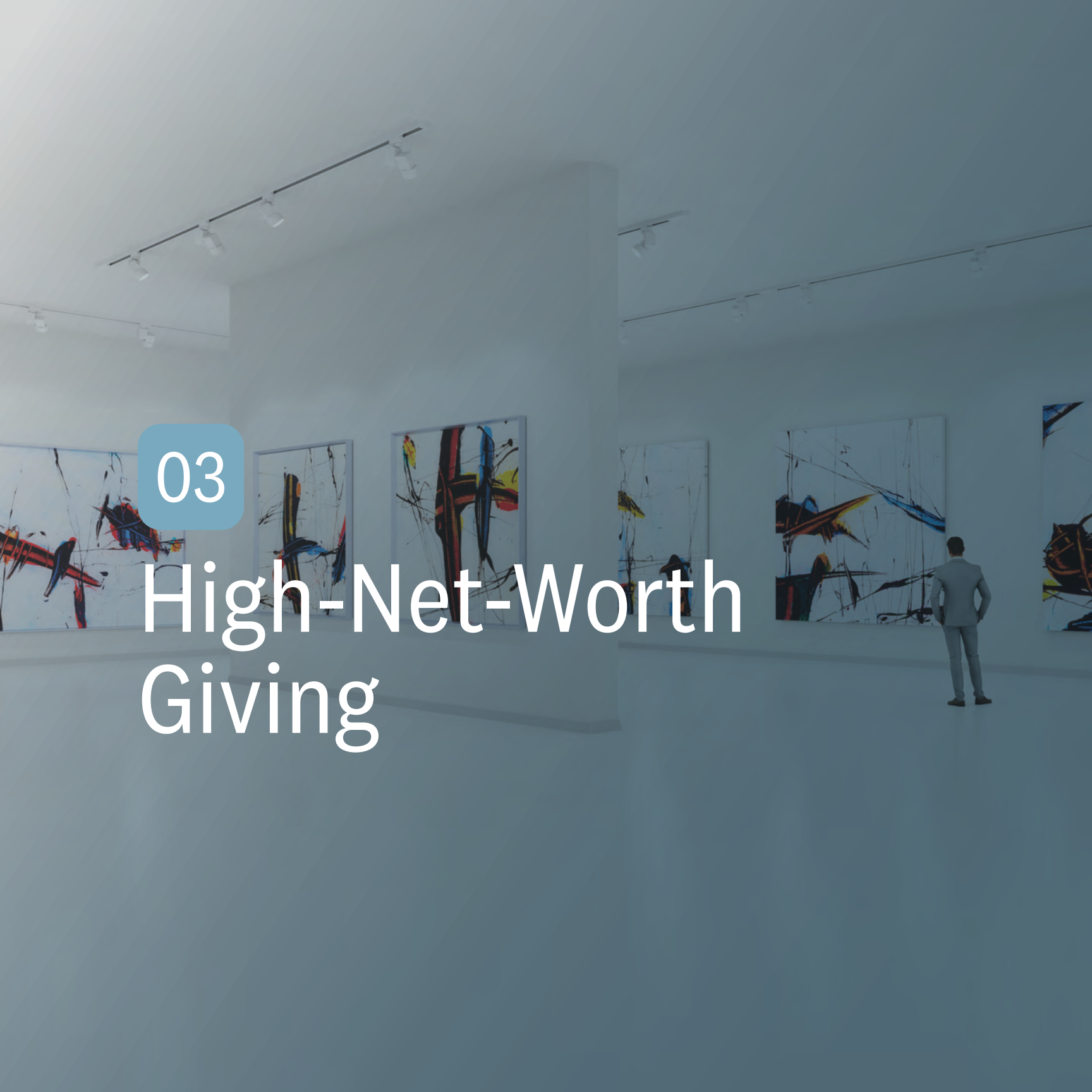
Nonprofits should treat DAF giving as an extension of their individual donor relationships. Today's DAF donor may be a longtime annual supporter, a parent at an independent school, a community foundation participant, or a mid-level donor whose philanthropy is growing. A DAF is one way donors structure their philanthropy and can indicate that they plan to invest in nonprofits and see value in managing their giving strategically. Where possible, organizations should identify and steward the donor behind each gift, track DAF activity, build relationships with sponsoring organizations, and incorporate DAF giving into annual, mid-level, and major-gift strategies.

THE SOURCE OF GIVING HAS NOT CHANGED

Giving vehicles have multiplied, channels through which to donate have shifted, and donor dollars have concentrated, but the source of giving has stayed the same. Behind DAFs, family foundations, bequests, and online gifts are individuals making personal decisions about where their generosity will go.

Nonprofits can more easily earn a gift from donors who already know the organization. The greatest opportunities for most nonprofits already sits within their own donor base: supporters they can identify, relationships they can deepen, and the case they can make for increased giving.





03

High-Net-Worth Giving

HIGH-NET-WORTH GIVING

The largest gifts in American philanthropy often go to organizations donors have known and supported for years. In 2025, more than two-thirds of the 50 largest donors in the U.S. made their largest gifts to charities with which they had long-term relationships, often spanning five to 10 years or more.[1] Those 50 donors gave a combined $22.4 billion last year, and the four largest gifts each exceeded $1 billion.[2]

Not every nonprofit will receive a nine-figure commitment, but every organization has its own top tier of donors. For some, that tier may begin at $10,000. For others, it may be $1 million. High-impact donors at every level, though, require thoughtful cultivation, personalized stewardship, and a compelling reason to deepen their support.

Among affluent households that did not give to charity in 2024, one-quarter said they lacked a personal connection to an organization.[3] Wealth alone does not guarantee an affinity for transformational giving. Organizations need to develop relationships that reveal what motivates the donor, build the institutional readiness that inspires confidence, and act when their capacity to give and timing align.

2025 Top Five High-Net-Worth Donors

1. ***Michael Bloomberg***
   $4.3 Billion
   Arts, Education, and Public health

2. ***Bill Gates***
   $3.7 Billion
   The Gates Foundation

3. ***Paul Allen***
   $3.1 Billion Bequest
   Fund for Science and Technology

4. ***Warren Buffet***
   $1.3 Billion
   Across Four Family Foundations

5. ***Michael and Susan Dell***
   $974 Million
   Michael & Susan Dell Foundation and Donor-Advised Funds



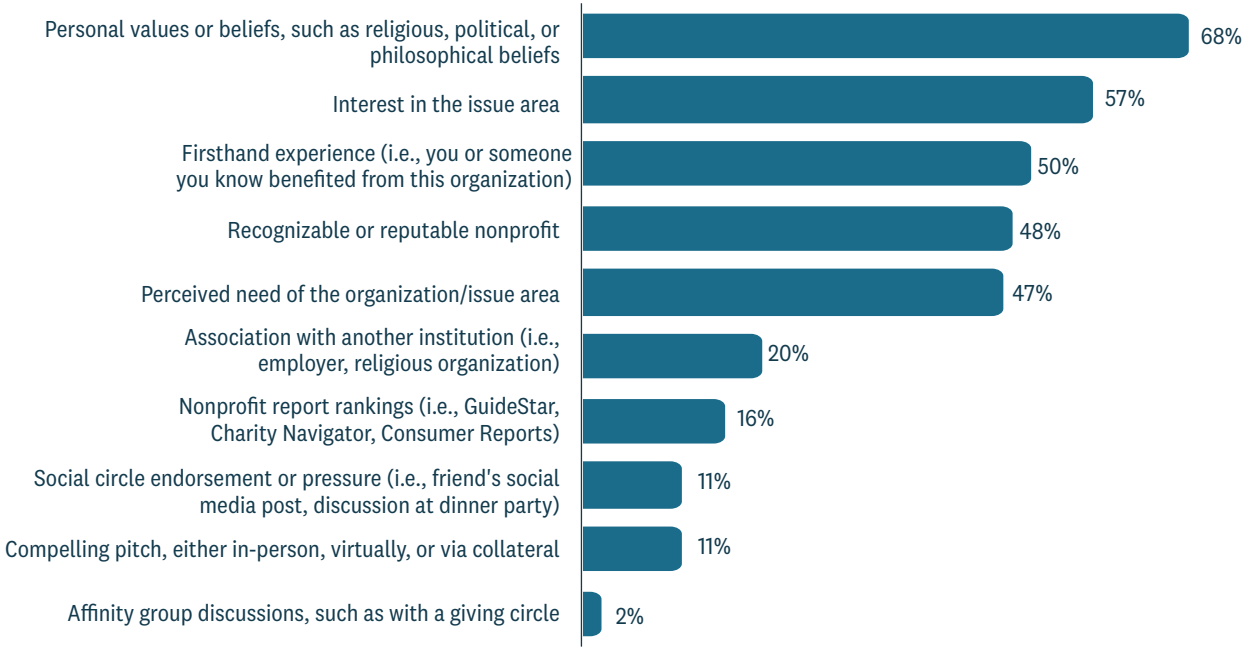
Growing Capacity Does Not Guarantee Giving

Wealth has grown faster than giving. Lifetime charitable contributions across the Forbes 400 (the publication's annual ranking of the wealthiest individuals in the U.S.) rose by $32 billion in 2025, reaching $319 billion.[4] Over the same period, the group's combined net worth increased by $1.2 trillion to a record $6.6 trillion.[5] Measured against wealth, though, the group's lifetime giving fell from 5% to 4.6%, and three-quarters have given away less than 5% of their fortunes.[4]

Giving participation is also narrowing below the billionaire tier. In 2017, 90% of affluent households gave to charity. That share fell to 88% in 2020, 85% in 2022, and 81% in 2024.[3] Affluent households that continue to give, however, are contributing considerably more. Total contributions from affluent donors rose 30% between 2015 and 2024, even as the share of affluent households that gave declined.[6]

Wealth screening is a valuable tool for identifying a donor's capacity to give, but capacity alone does not create a major-gift opportunity. Organizations still need to understand the affinity, motivation, and relationship that can turn capacity into philanthropic support. Nearly 70% of affluent individuals said their personal values or beliefs led them to give to one organization over another, 57% cited interest in the nonprofit's issue area, and 50% pointed to firsthand experience, meaning they or someone they knew had benefited from the organization. Conversely, a compelling pitch ranked near the bottom, at 11%.[3]

How Affluent Donors Choose a Cause or Organization to Support



Source: Bank of America Study of Philanthropy

WHERE DO WE GO FROM HERE?

CCS analysis of donor behavior following top 1% gifts finds that 60% of those donors are still giving to the organization five years later. The strongest opportunity in most nonprofits is not a wealthy stranger to whom they can pitch, but rather a current supporter with both the capacity and demonstrated interest to give more. Leaders should use their data to identify these donors, deepen the relationship, and make a specific case for greater support based on what motivates them.



Major Donors Assess the Organization, Not Just its Cause

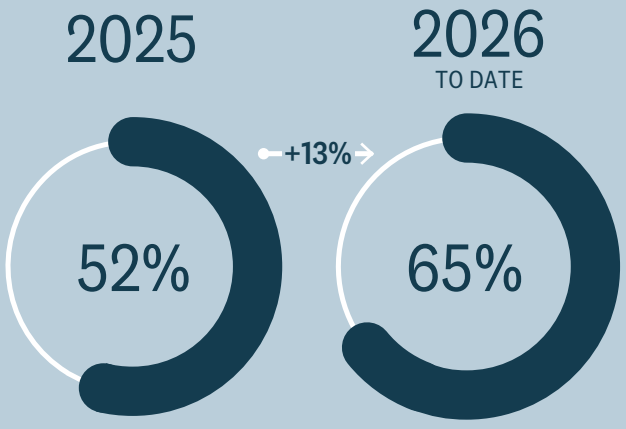
Donors increasingly want evidence that their support for an organization will be turned into meaningful results. In CCS feasibility studies, the impact of a gift was the most frequently cited reason to give in 2025 (52%) and again in 2026 (65%). Similarly, nearly 40% of Gen Z and Millennial donors want clearer information about what their gifts support, how organizations use the funds, and what different gift amounts can accomplish.[7] Affluent donors are no different. Nearly 59% of affluent donors track whether their giving achieves its intention, and their focus on outcome intensifies with capacity. [3]

After making a gift, donors are increasingly looking for signs that nonprofits will manage their support responsibly. More than 60% of affluent donors say keeping administrative and fundraising expenses reasonable is very important, while 57% place the same importance on sound business and operational practices, including full disclosure of financial statements.[3] Detailed information about the specific impact of a gift ranks lower, with only 15% calling it very important and 49% citing it as somewhat important.[3]

That does not mean impact is unimportant. Affluent donors use several sources to assess whether their giving is having its intended effect. Among those who monitor impact, 36% rely on direct communication from the organizations they support, 27% on their own engagement—including volunteering—21% on testimonials from beneficiaries, and 19% on in-person site visits.[3]

CCS FINDINGS - Impact Remains #1

CCS feasibility study findings show **THE IMPACT OF THE GIFT WAS THE MOST FREQUENTLY CITED REASON TO GIVE**



WHERE DO WE GO FROM HERE?

A compelling mission can open up conversations, but major donors also need confidence in the nonprofit itself. Donors weigh financial discipline and operational soundness alongside the outcomes an organization promises. Major donors increasingly expect personalized, high-touch stewardship. Gift officers should explain what a gift will support, how the organization will use it, and how leaders will measure progress. Written reports can also reinforce the conversation, but they cannot replace it.

CCS PARTNER:

West Virginia State University

SUCCESS STORY

Key Elements

- WVSU launched a $25 million comprehensive campaign supporting student scholarships, capital projects, and long-term growth.
- CCS used wealth screening and predictive modeling to uncover major and planned giving prospects. Of 64 campaign donors, 12 prospects were identified through analytics.
- Among donors screened and later engaged, gifts averaged 57% of estimated capacity.

Client Challenge & CCS Solution

West Virginia State University wanted a clearer understanding of the major-gift potential within its constituent base. Following a comprehensive feasibility study, CCS used wealth screening and predictive modeling to identify prospective donors with significant capacity to give and help the advancement team determine where to focus its efforts.

WVSU, in partnership with CCS, then translated those insights into prospect qualification and major gift strategy. The university established a top-prospect tracking system, realigned portfolios, refined gift officer assignments, and developed more targeted cultivation and solicitation strategies. Within two years, WVSU raised more than 85% of its goal and incorporated prospect research and portfolio management into its advancement operations.

> *CCS helped us build a campaign rooted in strategy and informed by data. We now have the tools to qualify prospects, engage new donors, and confidently move toward our campaign goals.*
>
> *Trey Jones, Vice President for University Advancement*

SECTOR

Higher Education

LOCATION

Institute, WV, Atlantic, United States



The Timing of Transformational Gifts

The AI boom and a new wave of public offerings are creating large pools of paper wealth, but that wealth may not become available for philanthropy on a nonprofit's timeline. SpaceX went public in June 2026, raising a record $75 billion at a valuation of $1.77 trillion.[8] Other major AI companies have moved toward public offerings of their own.[9]

Nonprofits should not assume that a donor's estimated wealth is immediately available for philanthropy. Capacity can change as markets move, assets mature, investments become liquid, or ownership transfers. For employees, founders, and early investors in newly public companies, lockup agreements create an additional constraint, commonly restricting when shares can be sold for several months or even years.[10]

The value of those shares can also change substantially before restrictions expire. SpaceX shares fell by roughly half from their post-IPO high within six weeks, then recovered part of that ground while restrictions still covered much of the company's insider stock.[11,12]

Noncash giving plays a growing role in philanthropy. At Fidelity Charitable, noncash assets rose from 67% of contributions in 2024 to 69% in 2025.[13,14] Publicly traded securities increased from 57% to 61%, while non-publicly traded assets, including restricted stock, private equity, cryptocurrency, and limited partnership interests, grew from $2.3 billion to $2.6 billion.[14]

A $3.1 Billion Gift Seven Years in the Making

Paul Allen died in 2018. In 2025, his estate directed $3.1 billion to a science and technology research fund he established before his death, the largest bequest recorded that year.[6]

Bequest giving grew 19.7% in current dollars in 2025, reaching $62.2 billion and accounting for 10% of all charitable giving.[6] Estates worth $10 million or more accounted for $37.0 billion of that total.[6]

Nonprofits cannot predict exactly when an estate gift will transfer, but they can build relationships and begin legacy-giving conversations with current donors that make future commitments possible.



WHERE DO WE GO FROM HERE?

Nonprofit leaders need to understand the assets behind a wealth estimate and use that knowledge to shape the size, structure, and timing of a potential gift ask. Gift planning conversations can help an organization distinguish a donor's current liquidity from future capacity and identify when that donor may be positioned to act. Nonprofits considering allowing gifts of privately held stock or other complex assets also need policies and expertise to accept them responsibly. That includes qualified legal and tax guidance and clear coordination between fundraising and finance.



Tax Law is Changing the Cost and Timing of Major Gifts

Beginning in 2026, two provisions in H.R. 1 changed the tax value that caps charitable gifts for a disproportionate share of donors within itemized giving brackets. The law caps the value of itemized deductions, including charitable contributions, at 35% for taxpayers in the 37% top marginal bracket.[15] Researchers estimate the cap could reduce household charitable giving by approximately $6.1 billion annually.[15]

The group affected by the cap is small, but its giving is substantial. Households with adjusted gross income of $500,000 or more accounted for roughly 57% of itemized charitable giving in 2022.[15] Within that group, households with income of $1 million or more accounted for approximately 48% of all itemized giving.[15] This sentence should read Most nonprofits will likely not experience the tax changes evenly across their donor base. Those with significant major gift programs may feel it most by the donors responsible for their largest commitments.

The provisions, in the bill, change not only how much donors give, but when. The law allows taxpayers to deduct only charitable contributions above 0.5% of their adjusted gross income. This means a donor with $2 million in adjusted gross income will not receive any tax deduction benefits for the first $10,000 given in a year. Researchers estimate the floor could reduce charitable giving by approximately $2.4 billion annually, in addition to the estimated $6.1 billion decline associated with the 35% charitable giving cap.[15]

Some high-income donors may respond by bunching several years of giving into one tax year, concentrating deductions in the year of the larger gift and claiming the standard deduction in the others. For nonprofits, that behavior creates larger commitments in selected years and less predictable revenue in between, even when a donor's long-term support minimally changes.[15]

WHERE DO WE GO FROM HERE?

Major donors and their advisers are assessing how the new law may affect their giving. Major gift fundraising increasingly requires enough tax fluency to recognize when tax considerations may shape a donor's gift timing or structure. Gift officers do not need to give tax advice, but they should know when to raise questions and involve a donor's advisers. Nonprofits should identify donors who the new rules may influence, discuss gift timing and structure early, and work alongside advisers as donors make multiyear philanthropy plans.

Some Qualified Charitable Distributions Are Unaffected By Tax Reform

IRA owners age 70½ or older can make a qualified charitable distribution (QCDs) directly to an eligible charity. Because the transfer is excluded from taxable income rather than claimed as an itemized deduction, the new 0.5% floor and 35% cap do not apply.

In 2026, donors may give up to $111,000 per person. For donors subject to required minimum distributions (generally beginning at age 73), a QCD can count toward that annual amount without increasing their adjusted gross income.[6]



PREPARING FOR THE FUTURE OF TRANSFORMATIONAL PHILANTHROPY

Transformational gifts rarely begin with a single ask. They grow through relationships that fundraisers cultivate over time; often with an organization's own volunteers, board members, alumni, grateful patients, families, or long-standing supporters. Nonprofit leaders need to recognize transformational gift potential early, understand what motivates the donor, and prepare to navigate the assets, advisers, and timing that may shape a major commitment.

For many nonprofits, the donor behind a future transformational gift may already be in their database. Recognizing that potential is only the first step. Organizations also need to build the institutional readiness to act when donor giving capacity, confidence, and timing align.





04

Institutional Giving

INSTITUTIONAL GIVING

Foundations and corporations gave a combined $160.8 billion in 2025, comprising more than one-quarter of all charitable giving.[1] However, institutional funders are becoming more deliberate about where they invest, with some expanding support and others concentrating larger commitments among fewer organizations.

While both serve as institutional funders, foundations and corporations make funding decisions in different ways. For example, community, family, and professionally staffed foundations differ in who holds decision-making influence and what reporting they expect before deciding funding.

Companies, conversely, may direct support through corporate foundations, community investment programs, marketing and sponsorship budgets, or individual business units. Each channel can involve different decision-makers and motivations.

For fundraisers, this makes fit more important than volume. Across foundation and corporate giving, alignment, access, and readiness should guide strategy. Leaders need to understand how their work fits within a funder's priorities, who influences funding decisions, and whether the organization has the support, relationships, and internal coordination to pursue the opportunity.



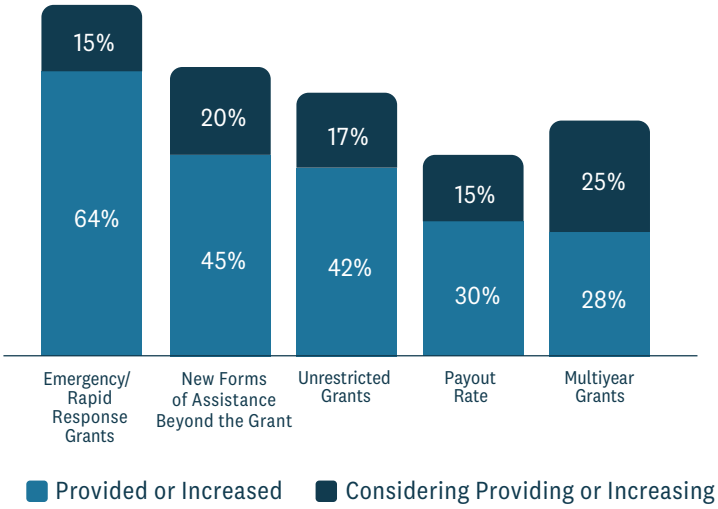
Finding Opportunity with Foundations Inside a Record Year

Foundation giving reached a record $117.2 billion in 2025, rising 5.7% in current dollars and 3.0% after inflation.[1] In addition, it accounted for 19% of all charitable giving and marked the 15th consecutive year of current-dollar growth.[1] Yet this record giving also coincided with a sharp increase in the demands placed on both nonprofits and funders alike.

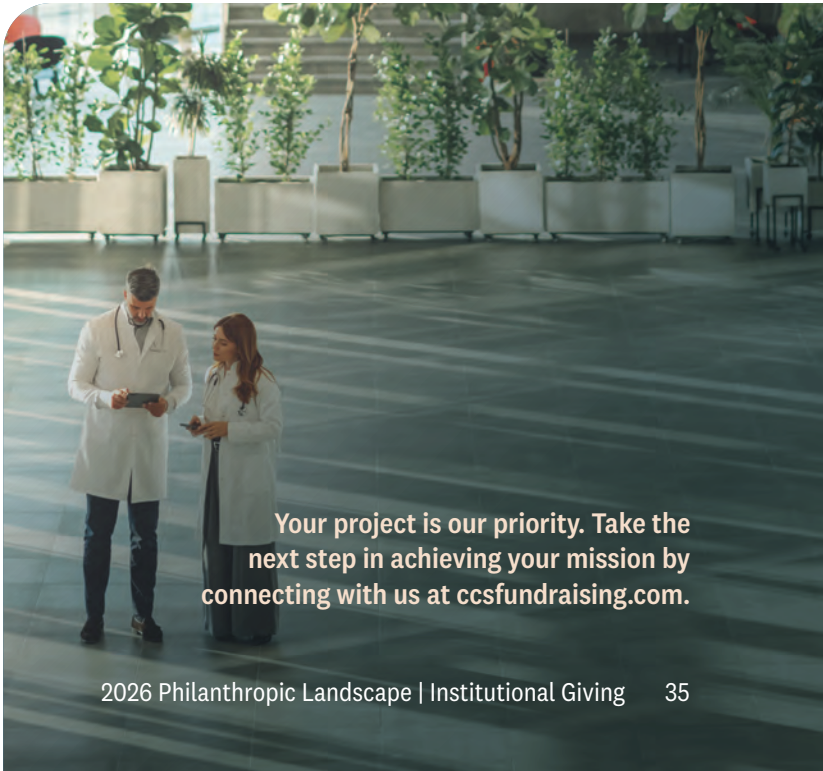
Among nonprofit CEOs surveyed by the Center for Effective Philanthropy (CEP), 73% said their organizations have experienced an increased demand for services since January 2025.[2] At the same time, 36% reported reductions in federal funding, and 34% reported reduced state or local government funding.[2] As nonprofits worked last year to meet growing needs with diminishing public support, they increasingly relied on existing donors and new philanthropic partners, including foundations. Foundations felt this pressure as well, with 87% of surveyed foundation leaders reporting increased funding requests in 2025.[3]

Foundations most often responded to the increase in requests with emergency and rapid-response grants, which 64% of surveyed foundations provided.[4] Another 42% increased the number of unrestricted grants, and 28% expanded multiyear support.[4] Foundations also made more money available, with 30% raising their payout beyond what they had originally planned for in 2025.[4] Many reduced administrative burdens as well, with 39% streamlining application processes and 38% easing reporting requirements.[3]

Changes to Foundation Practices in Response to Current Context (N=216 to 222)



Source: CEP, A Sector in Crisis, p. 19





These efforts made by foundations in response to increased demand, however, did not always translate into better outcomes for nonprofits at large. In 2025, 57% of nonprofit CEOs reported that foundation grants had become harder to secure, and 44% reported reductions in foundation funding.[2] Foundation and nonprofit leaders also assessed the response of foundations differently, as illustrated by 93% of foundation leaders believing their foundations had effectively understood the challenges grantees faced, while only 54% of nonprofit leaders agreed.[4]

Proportion of Leaders Rating Foundation Response to Current Context as Moderately/Very Effective (N=221 to 401)



Source: CEP, A Sector in Crisis, p. 28

Record foundation giving does not mean opportunity is expanding evenly. Foundations allocate grant dollars according to their own priorities, so a rise in total giving does not necessarily translate into broader access for every nonprofit facing greater need. As requests increase, funders can become more selective even while giving more overall. For nonprofit leaders, national growth trends matter less than whether their work aligns with a funder's priorities.

About 40% of foundation leaders expressed concern that philanthropy could not fill the gaps left by government funding cuts, even with a stronger response by foundations.[4] For context, private foundations generally must make qualifying distributions equal to approximately 5% of investment assets, and the median payout among reporting independent foundations has remained at 5% since 2021.[5] When foundations keep payout rates near the same level, a sudden increase in need can leave more organizations competing for grant budgets that do not expand at the same pace.

WHERE DO WE GO FROM HERE?

For many nonprofits, leaders should focus staff time where the organization already aligns with a funder's priorities and has access to a decision-maker. The strongest opportunities may be with those funders who already know the organization and have seen its work. Leaders should track evolving funder preferences, clearly communicate mission results, and begin conversations about renewal and potential funding expansion well before their current grant ends.



Understanding Foundation Differences Strengthens Nonprofit Positioning

Nonprofits should tailor their approach to the type of foundation they are pursuing. Published priorities show what a foundation supports, but not necessarily how it makes funding decisions. Community, family, and professionally staffed foundations can differ in who makes or influences funding decisions, what information they expect from prospective grantees, and how nonprofits gain access to decision-makers. Those differences should shape which relationships a nonprofit prioritizes and how it prepares its case for support.

Community foundations showed strong growth in 2025. Among community foundations reporting in both 2024 and 2025, median giving rose 14.1%, or 11.2% after inflation.[5] Some of that growth may reflect the expansion of donor-advised funds held at community foundations and donors' increasing use of DAFs, rather than growth in discretionary foundation grantmaking alone. For nonprofits seeking the support of community foundations, they must demonstrate their impact to the local community: show who the organization serves, which partners trust its work, and how it fits alongside other efforts in the region.

Winning the support of family foundations, however, often require an approach closer to individual major giving. In a 2025 survey of leanly staffed family foundations, 51% had boards composed entirely of family members.[6] Among those with paid staff, 42% had a family member serving as the CEO or top administrator.[6] Nonprofits should approach these funders with an individual-giving lens and a multifaceted approach: identify who holds influence within the foundation and build relationships with that person, in addition to building a relationship with the foundation itself.



Professionally staffed foundations often ask for more formal proof of mission results. In a 2025 national study of 765 staffed grantmakers, 80% required grantees to conduct evaluations.[7] Yet 38% required evaluation without providing the funding to cover it, leaving nonprofits to absorb the cost of that work.[7] Nonprofits can engage professional grantmaking foundations more effectively when they have the systems to track outcomes consistently and produce the data required for evaluation.



WHERE DO WE GO FROM HERE?

For every funder, nonprofit leaders should identify who shapes the decision and what success stories the foundation will expect. The next foundation opportunity may depend less on submitting another application and more on closing whatever specific gap stands in the way of success. That may be developing relationships with a decision-maker, the need for a stronger local partnership, or additional reporting that shows results over time.

Corporate Giving Starts With Access and Relevance

Corporate giving reached a record in 2025, even as some companies increased their community investment and others reduced it. Corporate giving totaled $43.7 billion and accounted for 7% of all charitable giving, yet it grew the least of any source in current dollars and just 0.5% after inflation.[1]

Among the same 124 companies tracked by Chief Executives for Corporate Purpose (CECP) from 2023 through 2025, 48% increased inflation-adjusted community investment over the three-year period, while 52% decreased it.[1] Corporate support also increasingly follows defined company priorities. Among companies reporting to CECP in 2024, 87% maintained a corporate purpose statement[8] Of those companies, 91% used that purpose to guide social investment decisions, and 57% connected it to a specific focus area.[8]

For most nonprofits, the strongest corporate giving prospects are not necessarily the largest companies. They are often companies that already have a credible connection to the organization through a local presence, prior partnership, or employee who knows its work. That connection starts the conversation, but mission relevance gives a company reason to partner. Nonprofits should make clear how their work advances a company priority, serves a community the company prioritizes, engages its employees, or reaches an audience it values.

CCS INSIGHTS - Corporate Partnership Impact

A strong corporate proposal shows how a partnership with your nonprofit can advance the company's priorities and clearly explains what the company's support will make possible for your mission. The value proposition will look different for every partnership. A zoo might quantify the number of visitors who will see a corporate partner's brand; an art museum might use donor or patron data to demonstrate how many members of a company's workforce engage with the institution; and a food bank might offer employee volunteer opportunities that advance a company's engagement goals.

Once a nonprofit establishes their merit, the structure of the partnership can create additional value. Consumers responded more favorably when companies made recurring contributions to the organizations they support rather than a single gift of the same total value.[9] Periodic giving also strengthened measures of reputation, customer engagement, and purchase likelihood.[9] Knowing this, nonprofits should discuss multiyear support rather than default to a one-time gift when making a corporate partnership ask. A longer-term commitment can serve the company's objectives while also giving the nonprofit more consistent support.

WHERE DO WE GO FROM HERE?

Corporate prospecting should begin when access and relevance overlap. An existing connection creates an opportunity only when the nonprofit can identify it, share it across teams, and pursue it through a coordinated cultivation process. A corporate employee may open a path to both a personal gift and a corporate investment. Donor and institutional teams should build their strategies around that shared relationship rather than manage the opportunities in silos.



CCS PARTNER:

Inclusive Prosperity Partnership

SUCCESS STORY

Key Elements

- The Inclusive Prosperity Partnership (IPP) launched with a $30 million commitment from the James S. McDonnell Foundation.
- The initiative mobilizes additional investment and creates a structure for sustained collaboration on complex regional challenges.
- Quality Jobs, one of IPP's core priorities, uses a digital platform, navigation, wraparound supports, and employer engagement strategies to open pathways to economic mobility for workers across the region.

$30M

committed by the James S. McDonnell Foundation to launch IPP.

Client Challenge & CCS Solution

The Inclusive Prosperity Partnership, housed at the St. Louis Community Foundation, offers an emerging model for how foundations can leverage their civic leadership beyond traditional grantmaking. Launched with a $30 million commitment from the James S. McDonnell Foundation, IPP brings together philanthropy, business, civic, and community voices around a shared goal of advancing inclusive economic growth in St. Louis.

One of IPP's core priorities is Quality Jobs, an effort focused on expanding access to high-quality employment opportunities that improve job quality, retention, and advancement for people with low incomes. Through a digital platform, navigation, wraparound supports, and related employer engagement strategies, IPP is helping create pathways to economic mobility for workers across the region.

Since its launch, CCS has served as a strategic partner to IPP, helping shape the initiative's fundraising strategy, stakeholder engagement approach, project management, and resource development efforts.

SECTOR

Advocacy

LOCATION

St. Louis, MO,
Central, United States



Corporate Giving May Become Less Predictable

Corporations may adjust the timing and structure of their giving in response to new tax rules. In 2026, a 1% floor on corporate charitable deductions took effect.[10] Corporations can now deduct only the portion of their contributions that exceeds 1% of taxable income.[10] Researchers estimate this floor could reduce corporate giving by roughly $1.6 billion annually, with estimates ranging from $0.9 billion to $2.5 billion.[10]

Less than one-third of companies in the CECP sample gave at least 1% of pre-tax profits, yet those companies accounted for 89.2% of total corporate giving.[10] For companies in the sample that gave below the threshold, the new floor removes the tax incentive for their current level of giving.[10] Still, tax considerations are only one influence on corporate philanthropy. Community relationships and employee engagement may continue to motivate corporate giving even after the deduction changes.[10]

New policies may also change the timing of when companies give. In the CECP survey, 40% of companies anticipated adjusting the timing or structure of their contributions.[10] As previously stated, some companies may combine several years of giving into one year, producing larger payments in some years and little or no support in others.[10] They also may continue their support even as nonprofits find annual payments harder to forecast.

Early data do not yet indicate whether those shifts are underway. Companies with the largest community investment budgets increased those budgets by 11% between 2024 and 2025.[1] That increase could reflect a return to earlier investment levels, frontloading ahead of the tax change, or both. Regardless, nonprofits should prepare for greater variation in the size and timing of corporate payments moving forward.



WHERE DO WE GO FROM HERE?

Nonprofits should discuss corporate budget cycles, payment timing, and approval requirements early with their institutional partners. Where appropriate, they should seek written multiyear commitments that specify payment schedules rather than assume equal annual installments. Organizations that depend heavily on corporate support should also test their budgets against delayed, accelerated, or bunched payments.

INSTITUTIONAL GROWTH STARTS WITH READINESS

A foundation looks for documented reach, outcomes, and responsible use of prior support. A company looks for evidence that a partnership reaches its employees, customers, or a community central to its priorities. By the time either funder asks, the nonprofit should already have the systems, evidence, and internal coordination to make a compelling case for support.

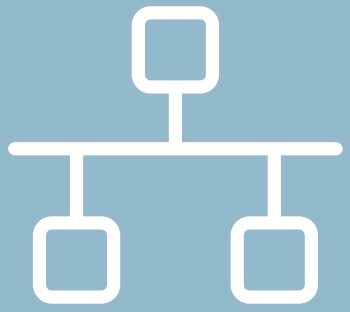
Nonprofit leaders are already prioritizing that groundwork. In CCS's 2026 Philanthropy Pulse, 44% of organizations ranked structural change as their first priority for 2026, and more than half placed hiring shifts or capacity building among their top two priorities.[11] While respondents chose revenue growth more often than any other priority, nearly half of the organizations that chose it ranked it third, suggesting many leaders are prioritizing structural and capacity investments above revenue.[11]

For institutional giving, investments build the capacity for nonprofits to document results, surface valuable relationships already inside the organization, and coordinate cultivation across teams. Alignment identifies the opportunity, access creates a path to the decision-maker, and readiness allows the nonprofit fundraisers to pursue and grow the relationship.

CCS INSIGHTS - 2026 Philanthropy Pulse Findings

44%

of organizations ranked structural change as their first priority for 2026, and more than half placed hiring shifts or capacity building among their top two.[11]





05

Sector Giving

SECTOR GIVING

Eight of the nine philanthropic sectors tracked by Giving USA grew in current dollars in 2025, and seven grew after adjusting for inflation.[1] While these totals may demonstrate what happened nationally, they do not illustrate what any individual organization experienced and they rarely explain what nonprofit leaders do differently to be successful.

Some of the clearest insights that can be derived from national data cross sector lines. Human services nonprofits show how data collected for institutional funders can also strengthen donor communications. Congregations and performing arts organizations demonstrate that participation can open doors to a donor relationship without creating donor progression on its own. Health systems and universities point to the value of clarifying philanthropy's role within a complex funding model. Environment and animals organizations show how public and private funding can work together to extend philanthropy’s reach.

Nonprofit leaders should use these trends as context for their own results. Comparing the national picture with their donor base, funding mix, and fundraising performance can help organizations understand which broader forces are affecting them and which lessons from other sectors could inform fundraising decisions.



Sector	2025 Giving	Current-Dollar Growth	What to Watch
Religion	$151.6B	+2.4%	Still accounts for the largest share of charitable giving, but that share continues to shrink year over year.
Human Services	$99.5B	+5.3%	Donors gave a record amount as many organizations faced higher demand and less government funding.
Education	$92.0B	+11.7%	Giving grew faster than in any other sector, but a small share of donors accounted for most of the giving in higher education.
Foundations	$79.1B	-16.2%	Giving fell from its 2024 record but still ranked among the highest totals on record.
Public-Society Benefit	$72.1B	+11.6%	DAF sponsors are included in this sector, so some growth reflects contributions not yet distributed to operating nonprofits.
Health	$61.4B	+6.1%	Major gifts funded new research capabilities, including work using AI and advanced analytics.
International Affairs	$33.0B	+4.1%	Private funders increased support after U.S. foreign aid cuts, helping sustain critical programs during a major funding shift.
Arts, Culture & Humanities	$27.3B	+7.5%	Donors gave a record amount even as government funding cuts affected many organizations.
Environment & Animals	$24.6B	+11.0%	Giving has grown faster over the past two decades than in any other sector, despite recent widespread cuts in government funding and support.
Individuals	$25.8B	+0.7%	This sector comprises primarily in-kind medication distributed through pharmaceutical patient assistance programs; excludes most direct person-to-person giving.

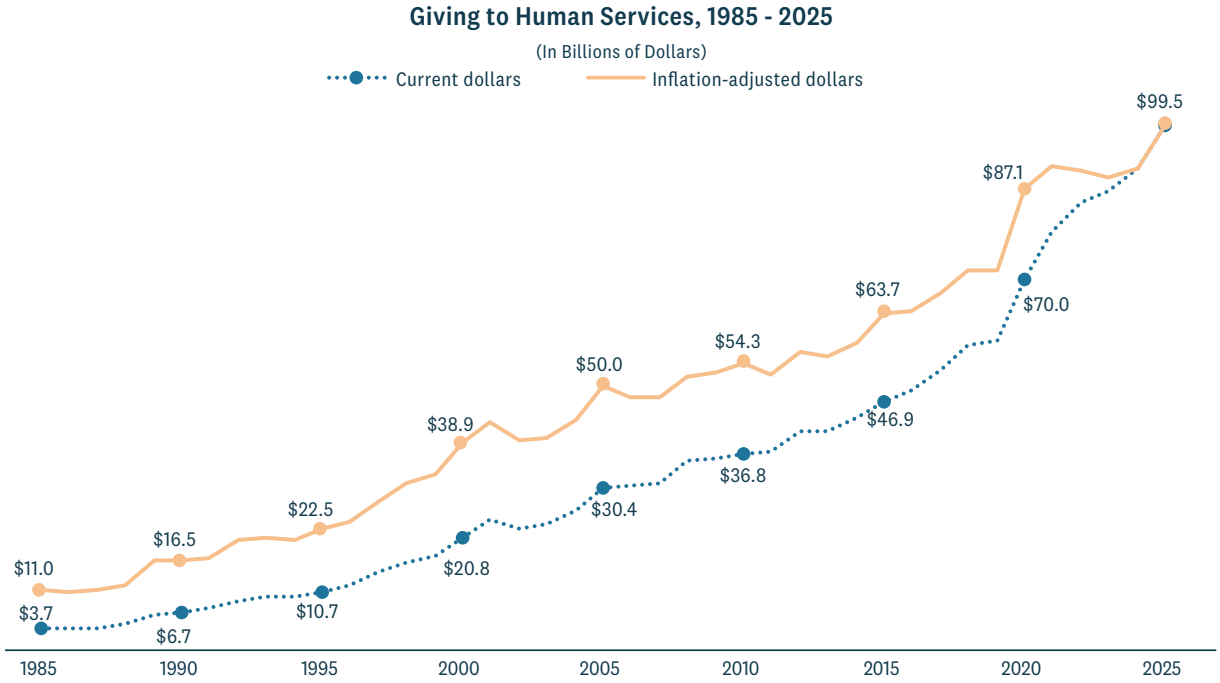
Source: Giving USA 2026; additional context from CCS 2026 Philanthropy Pulse and CASE Insights.

The Advantage of Visible Impact

Across sectors, donors increasingly want to understand what their support accomplished. Government agencies, foundations, and other institutional funders often require success stories of reach and results, and many human services organizations have built systems to produce these impact reports.

Human services organizations often describe their results in concrete terms, from meals provided and families housed to job placements and longer-term outcomes for those they serve. As individual and corporate donors place greater emphasis on specific proof of impact, the human services sector offers a useful example of how nonprofits can bring information already collected for other funders into donor communications and stewardship.

Giving to human services has grown substantially over the past decade, gradually pulling ahead of education after several years of relatively similar giving levels.[2] Both sectors accounted for 14% of charitable giving in 2024, though human services organizations received slightly more dollars.[2] In 2025, the human services sector increased its share to 15%.[1] Adjusted for inflation, giving to the sector rose from $63.7 billion in 2015 to $87.1 billion in 2020 and $99.5 billion in 2025, which places 2025 within a long-term trend rather than a single strong year.[1]



Source: Giving USA 2026, p. 54

Multiple forces shaped the sector's growth in 2025, and no single factor explains it. But human services organizations demonstrate a practice that can apply across sectors: nonprofits that already document outcomes for government grants can translate much of that same information into impact stories for donors.

WHERE DO WE GO FROM HERE?

Organizations across sectors should examine whether the information they already collect for programs, grants, and reporting can do more work in fundraising. Start by identifying the outcome measures they already report to government or institutional funders, and determining which successes would be meaningful to donors. Fundraisers can then build those measures into gift proposals, impact reports, and stewardship so donors can see what their support accomplishes over time.



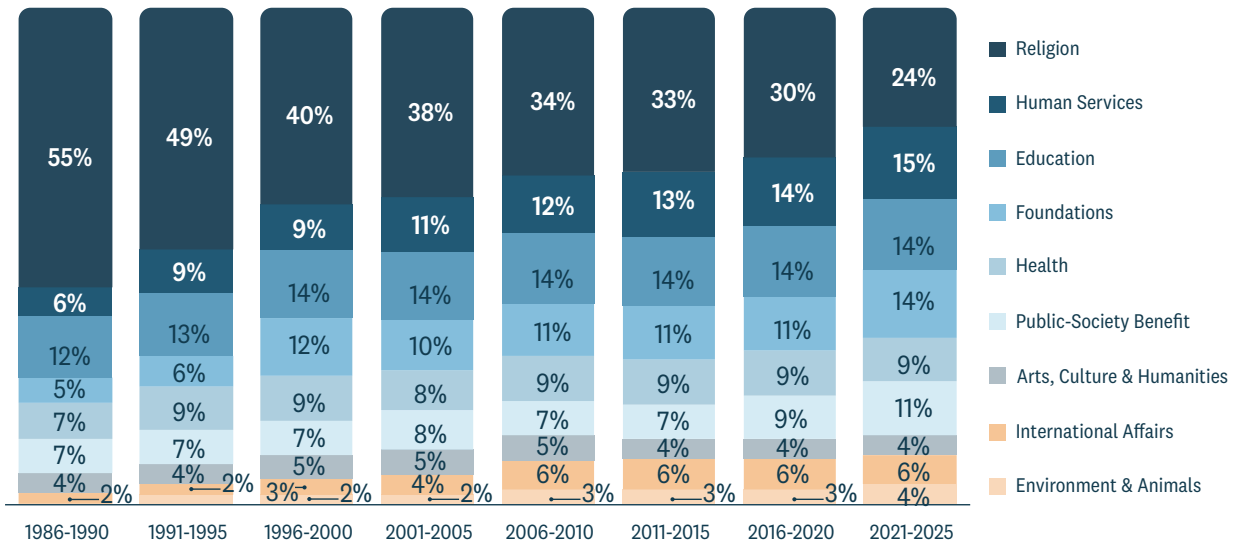
The Limits of Participation as a Path to Giving

For many nonprofits, participation creates an opportunity to build a donor relationship. Museums, performing arts organizations, congregations, and other attendance-based nonprofits often meet supporters first through regular in-person participation. But participation alone does not determine whether that relationship will develop into giving, and organizations within the religion and arts and culture sectors show how those pathways can change over time.

Both sectors have followed relatively flat or declining long-term trajectories as a share of charitable giving. Religion's share of total charitable giving fell from 55% in 1986–1990 to 24% in 2021–2025, while arts, culture, and humanities accounted for 4% in both periods.[1] That long-term shift is especially visible in religion. Adjusted for inflation, giving to religion fell 5% from 2016–2020 to 2021–2025, the only sector to decline between the two periods.[1] However, it still accounted for 24% of giving to recipient organizations, the largest share of any sector.[1]

Giving By Type of Recipient: Percentage of the Total In Five-year Spans, 1986 - 2025*

(Adjusted for Inflation, 2025=$100)



Source: Giving USA 2026, p. 61

Formal religious participation has declined nationally for decades. Membership in a church, synagogue, mosque, or temple fell from 70% of U.S. adults in 1999 to 50% in 2018 and 45% in 2023 according to the latest data analysis.[4] Attendance among religious donors, however, has changed much less. Among religious donors, 40% attended services weekly or nearly weekly in 2016, dropping slightly to 36% in 2022 and rising again to 37% in 2024.

Participation among religious donors also varies considerably by generation. More than 80% of Gen Z and 73% of Millennials attended religious services at least a few times in 2024, compared with 58% of Gen X and 54% of Boomers.[5] Half of Gen Z donors and 43% of Millennial donors attended every week or almost every week, compared with 29% of Gen X and 31% of Boomers.[5] Older adults, meanwhile, are substantially more likely to hold homes, savings, investments, and retirement assets suggesting a greater capacity to give.[6]

Attendance alone, therefore, does not indicate a donor's current giving capacity. But as the Great Wealth Transfer moves assets to younger generations, the relationships congregations are building with younger donors today may take on greater philanthropic significance in the future.

Arts organizations also rely on regular attendance as an entry point to donor relationships. In 2025, fewer organizations reported attendance growth even as giving to the sector increased. Fewer than half reported more visitors, down from 60% the year before, and 19% reported higher subscription sales, compared with 36% in 2024.[7] Even so, 62% saw a revenue increase and 66% acquired new donors.[7]

Many of these nonprofits are focusing on how to sustain participation and keep audiences engaged over time. Three-quarters of arts organizations identified regular in-person events as a leading retention strategy, compared with 59% across all sectors.[7] Some are working to attract younger and more diverse audiences while keeping longtime supporters engaged, balancing familiar programming with new offerings. Others are experimenting with free admission and other ways to bring new audiences through the door.

Heavy reliance on a ticket-buyer-to-annual-fund pipeline can leave arts and culture organizations with fewer opportunities to cultivate new donors. Turning participants into donors takes separate work, including knowing who is participating, understanding how that engagement changes over time, and building a path from attendance to a first gift and longterm deeper support.



WHERE DO WE GO FROM HERE?

Religion and arts and culture do not tell the same story, but both show that participation and attendance do not automatically translate into giving. Nonprofit leaders should distinguish between how deeply supporters engage today and what their giving potential may look like over time. Building donor relationships with attendees requires separate cultivation, while longtime donors may need continued engagement, even as their patterns of participation change.



CCS PARTNER:

Archdiocese of Chicago

Key Elements

- CCS helped reinvigorate the Archdiocese's $350 million *To Teach Who Christ Is* campaign supporting Catholic education, capital needs, and parish needs.
- The campaign ultimately secured more than $420 million in commitments, the most ever pledged in a diocesan campaign.
- It exceeded its original goal by more than $70 million, including more than $145 million in lead gifts.

Client Challenge & CCS Solution

The Archdiocese of Chicago wanted to strengthen a major campaign while building a more sustainable approach to engaging donors and growing philanthropic support across its broader Catholic community.

CCS managed the campaign while evaluating the Annual Catholic Appeal, development staffing and structure, and opportunities for greater collaboration across ministries. This allowed the Archdiocese to address immediate campaign priorities while strengthening its approach to stewardship and development.

After the campaign, CCS continued to support lead gift management, pledge fulfillment, and long-term development planning. The Archdiocese also launched a $30 million scholarship effort to expand access to Catholic education, giving donors another opportunity to support a core institutional priority.

SUCCESS STORY

> ***Our collaboration with CCS has had a transformative effect on the Archdiocese of Chicago. In partnership with them, we were able to achieve record-breaking fundraising results through our* To Teach Who Christ Is *campaign.***
>
> ***Brendan Keating,***
> ***Chief Development Officer,***
> ***Archdiocese of Chicago***

SECTOR
Faith

LOCATION
Chicago, IL,
Central, United States



Communicating What Philanthropy Uniquely Makes Possible

At institutions with many revenue sources, the mission may be easy to understand but the role of a gift can be harder to see. Health systems receive revenue from patient care and insurance reimbursement. Schools and universities draw on tuition, endowment income, grants, and other sources.

For donors, that complexity can obscure where philanthropy helps. As donors become more selective about where they give and more interested in what their support will accomplish, fundraisers in these complex environments can strengthen their case for support by showing what giving can advance beyond what other revenue sources cover.

Several of 2025's largest health gifts gave institutions the resources needed to build new study capabilities, including work that uses AI and advanced analytics to accelerate biomedical research and discovery.[1] Kinder Foundation gave $150 million to Texas Children's Hospital and The University of Texas MD Anderson Cancer Center to launch a joint children's cancer center. The gift, one of the largest ever made to an American pediatric hospital, will support pediatric cancer research, specialized care, and a new facility.[8]

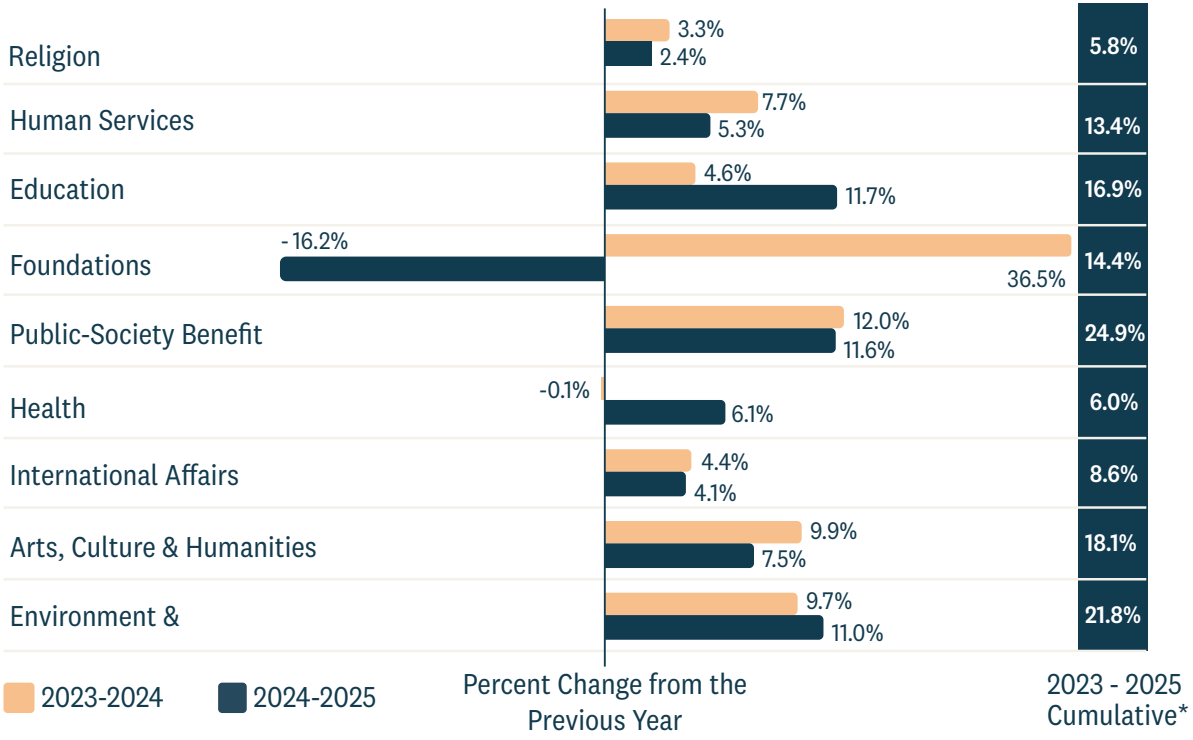
Education donors increasingly directed support toward institutions' current priorities. Giving to education increased 11.7% from 2024 to 2025, faster than any other sector.[1] In higher education, 81% of contributions in 2025 were designated for specific uses, most commonly student success programs, financial aid, and research.[9]

Donors also increased support for current operations by 9.1%, while reducing giving for buildings, endowments, and other long-term investments by 2.5%.[9]

Primary and secondary schools also reported substantial fundraising growth. Nearly three-quarters reported higher overall revenue, the second-highest share among sectors surveyed, and more than 60% reported growth in annual fund revenue, up from 52% in 2024.[10] Schools also directed nearly half of their current campaign efforts toward operating support, compared with 20% toward capital projects and 15% toward endowment growth.[10]



Changes in Giving by Type of Recipient Organization: 2023-2024 and 2024-2025, 2023-2025 Cumulative (In Current Dollars)



Source: Giving USA 2026, p. 34
*The two-year change is calculated separately and is not the sum of the changes in the two years.

WHERE DO WE GO FROM HERE?

Fundraisers can strengthen their case for support by connecting each gift to a specific priority and explaining how philanthropy adds to funding already in place. They should make the role of philanthropy concrete by showing what the gift changes; whether it launches a new research effort, expands a program, or sustains work beyond what other revenue sources currently cover.

Private Support Helps Sustain Select Priorities

Growth in charitable giving did not offset the disruptions nonprofits experienced due to public funding disruptions in 2025. International affairs, human services, health, and arts and culture offer examples of how organizations responded. In several cases, private support helped sustain specific mission delivery even when it could not replace public funding at the same scale.

As of March 2025, USAID had terminated more than $76.5 billion of $159 billion in foreign assistance awards.[11] Private donors and foundations mobilized more than $125 million within eight months, including more than $110 million for 80 programs that former USAID analysts identified as priorities for continued support.[12] Private funding kept selected programs moving even though it could not approach the scale of the public funding that disappeared.

Federal funding changes also had an impact on health research. By November 2025, the National Institutes of Health had frozen or terminated nearly 2,500 research grants with about $2.3 billion in unspent funds.[13] Private philanthropy could not replace federal support at that scale, but some organizations moved to preserve specific parts of the research pipeline. The Cancer Research Institute responded to funding disruptions by committing $2.5 million from its reserves to launch 25 new postdoctoral fellowships and help sustain early-stage cancer research.[14]

Nonprofits in human services and arts and culture show examples, though, of how overall growth can coexist with losses in a specific source of funding. More than one-third of human services organizations experienced at least one government funding disruption during the first four to six months of 2025, and in CCS's 2026 Philanthropy Pulse, 69% reported greater demand for services while 41% reduced their budgets.[15,16] At the same time, 58% of these nonprofits reported higher overall revenue than the previous year. Similarly, more than 60% of arts and culture organizations reported a negative impact from government policies, compared to 47% across all organizations, and 76% of those affected pointed to reduced government funding.[7] Meanwhile, inflation-adjusted giving to arts and culture reached its highest total on record for the second consecutive year.[1,16]





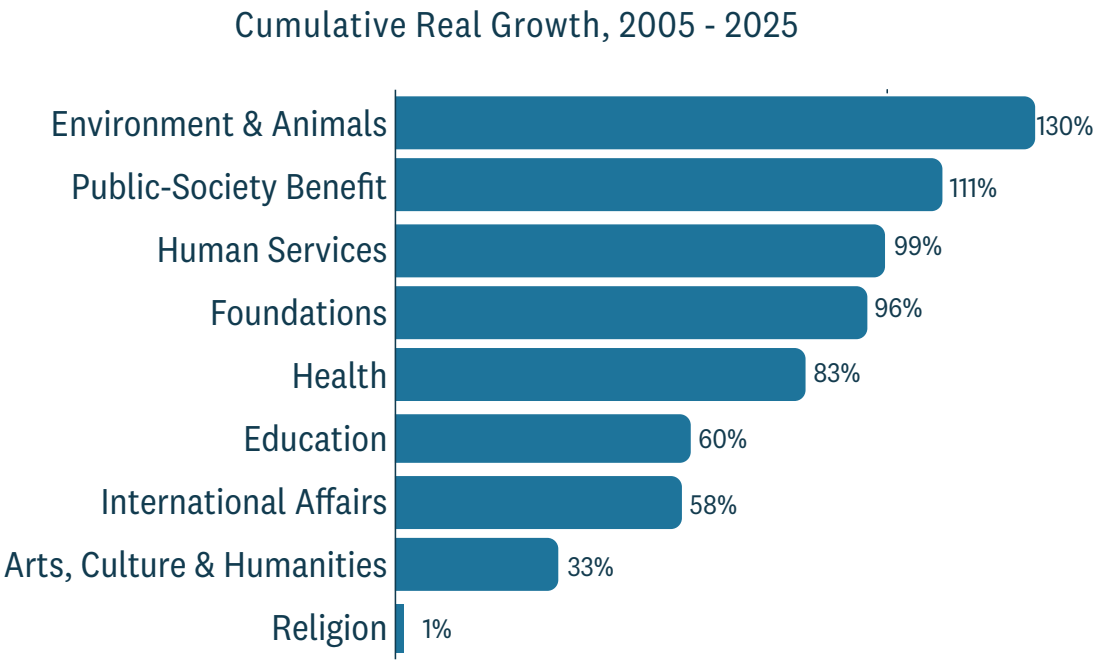
WHERE DO WE GO FROM HERE?

When a major funding source changes, nonprofit leaders should identify which programs or priorities most depended on those dollars and where private support could help sustain mission delivery. Fundraisers can then build their case for support around those specific priorities, showing donors what their gift can help preserve or advance while the organization adjusts its broader funding strategy.

Combining Funding Sources Around Shared Priorities

Over the past two decades, charitable giving to organizations in the environment and animals sector has grown faster than in any other sector. Yet these nonprofits still account for just 4% of all charitable giving.[1] Adjusted for inflation, contributions increased 130% between 2005 and 2025.[1]

The growth in this sector, however, continued in 2025 despite significant policy changes. Giving to environment and animals organizations increased 11.0% from 2024 to 2025, the third-fastest growth of any sector.[1] Among environment nonprofits surveyed by CCS, 67% said government policy had negatively affected their organizations, yet 60% still reported higher revenue.[17]



Source: Giving USA 2026, pgs. 328-331

This specific sector's experience does not necessarily show, though, that any one fundraising approach drove its long-term growth. Recent examples illustrate organizations combining public and private funding and using matching structures to bring in additional support. The Long Island Sound Futures Fund, for example, supported by public and private partners, awarded nearly $12 million, while grantees contributed more than $8 million in matching funds.[18]

Individual philanthropy can create similar opportunities. Memphis Zoo showcased this when it received a $50 million commitment in 2026, the largest philanthropic investment in its history, to launch the first phase of a major campus transformation.[19] In addition, the Smith family agreed to match up to $50 million raised from other donors.[19]



WHERE DO WE GO FROM HERE?

When a nonprofit initiative requires multiple sources of support, fundraisers should structure their asks so initial commitments can help secure additional dollars from other donors, partners, or public sources. Matching funds, matching commitments, and public or private partnerships can extend the reach and impact of philanthropy beyond an initial gift.

BEYOND THE NATIONAL TOTALS

Many of the forces that shaped giving in 2025 originated outside nonprofit organizations. Federal funding shifted, policy changes created cross-sector effects, and long-running changes in participation continued to reshape donor relationships.

At the same time, support continued to grow. Arts organizations added donors even as fewer reported attendance growth, while human services organizations reported revenue growth even as many reduced their budgets. Across sectors, organizations found creative ways to foster support, and those approaches offer lessons for future success beyond their own sectors.

Nonprofits cannot control external forces, but they can examine how philanthropic shifts appear in their own donor base and fundraising results. National trends can show leaders what is changing around them. Their own data tell them what, if anything, should be changed in response.



About CCS Fundraising

Since 1947, CCS Fundraising has partnered with nonprofits around the world to strengthen their fundraising and advance their missions.

As a strategic fundraising solutions firm, CCS partners with nonprofit leaders to understand their donor landscape, financial goals, organizational structure and areas for growth. We apply deep fundraising and data-informed perspective to help organizations assess opportunities, plan and manage campaigns, strengthen fundraising programs along with the teams and systems that support them, and use analytics to guide decision making.

CCS tailors every engagement to the needs and priorities of our nonprofit partners. Our teams work alongside staff and volunteer leaders until the work is done. From planning through project implementation. We help organizations make informed decisions, strengthen donor relationships, and build the capacity to respond and succeed as philanthropy changes.

Our nearly eight decades of fundraising success partnering with of different sizes, missions, and communities gives CCS a broad view of the challenges and opportunities nonprofits face. We use our experience to recognize patterns, identify growth drivers, and shape strategies tailored to each organization's goals. That is why we serve as the trusted partner for over 800 nonprofits every year.

800+
Annual Client Partnerships

70+
Campaigns Managed Raising Over $100M

975+
Projects Managed Annually

16
Offices Around the Globe

$32.4B
In Managed Campaign Goals Annually

600+
Dedicated Team Members

CCS Data Methodology

A SHIFTING LANDSCAPE, CAPTURED IN THE MOMENT

Much of the philanthropic data available tells us what has already happened. CCS proprietary data offers a different perspective, capturing donor priorities, organizational decisions, and fundraising opportunities as they are taking shape.

For decades, CCS has conducted Feasibility Studies as organizations consider significant fundraising efforts. Through conversations with donors, board members, volunteers, community leaders, and nonprofit leaders, CCS explores philanthropic priorities, economic outlook, willingness to give, and the factors shaping potential support.

CCS also draws on Data Analytics work, which uses organizations' own fundraising data to better understand donor behavior and identify opportunities for future giving. Combining multiple years of client data with tools such as wealth screening and predictive modeling, Analytics identifies giving patterns, surfaces prospective donors, assesses future potential, and informs fundraising strategy.

Throughout this report, CCS proprietary data appears alongside Giving USA and other external research. It is not intended to serve as a national benchmark. Rather, it provides a current, practice-based view of how donors and organizations are responding to the forces shaping philanthropy.

National data shows what has changed.
CCS data adds a view into how fundraising decisions are taking shape now.

1,725
Feasibility Study Responses
2025–2026 YTD

Nearly 300
Feasibility Studies Conducted
Across CCS in 2025

65
Client Engagements
Represented 2025–2026 YTD

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