



## BYRNE PELOFSKY + ASSOCIATES, LLC

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Byrne Pelofsky was recently created through a merger of two of the most highly respected and trusted Kansas City-based fundraising consulting firms: Jeffrey Byrne + Associates, Inc. and Pelofsky & Associates. Both firms enjoyed strong reputations in resource development and major gift, capital and endowment campaigns. Our new affiliation results in a powerful combination of experience, expertise and deep community connections.

We bring more than a combined 60 years of nonprofit fundraising and public sector experience. We have partnered with more than 500 nonprofit organizations to raise more than \$2,500,000,000. We have successfully guided hundreds of organizations through the planning and implementation of capital campaigns, while helping them secure major philanthropic gifts as well as government funding and appropriations such as tax credits and Community Development Block Grants.

Byrne Pelofsky has a stellar track record: our clients enjoy a 95% success rate in achieving their fundraising goals when implementing our campaign planning recommendations and hiring us as campaign counsel.

Byrne Pelofsky, with its comprehensive and complete set of tools for fundraising success, will help you master the art of the ask and will partner with you to achieve your resource development goals through our deep community connections and hands-on approach.

#### SERVICES

- Feasibility and Campaign Planning Studies
- Campaign Organization + Management
- Resource Development / Capacity Building Consulting
- Planned Giving Program Development
- Grant Writing
- Donor Prospect Identification, Research and Appraisals
- Board/Volunteer/Staff Fundraising Training
- Strategic Planning
- Executive Searches
- Special Event Management

We are committed to nonprofit fundraising success. Contact Byrne Pelofsky at 816.237.1999 or [info@ByrnePelofsky.com](mailto:info@ByrnePelofsky.com) and visit our website at [www.ByrnePelofsky.com](http://www.ByrnePelofsky.com).

## BANK OF AMERICA PRIVATE BANK

Bank of America Private Bank's Institutional Investment & Philanthropic Solutions (II&PS) group offers a comprehensive suite of nonprofit services, including investment advisory, that are tailored to help nonprofit organizations pursue their unique missions. Our investment management services include investment policy analysis; portfolio construction and rebalancing; and the evaluation, selection, and monitoring of equity, fixed income and alternative investment managers. We offer our investments on an institutional custodial platform, detailed account reporting, ad hoc online reporting, and comprehensive performance analysis including detailed quarterly investment reviews with manager commentary and benchmark return comparisons. All of these services are integrated through your dedicated service team.

Beyond investment management, clients of Bank of America II&PS group can benefit from our in-depth understanding of the needs of nonprofit institutions, gained through more than 150 years of experience and our resources, intellectual capital, and long-standing philanthropic commitment.

Contact Bank of America Private Bank at 816.292.4356 or visit [www.privatebank.bankofamerica.com](http://www.privatebank.bankofamerica.com)

## INDIANA UNIVERSITY LILLY FAMILY SCHOOL OF PHILANTHROPY



Globally recognized as the first of its kind, the **Indiana University Lilly Family School of Philanthropy** is dedicated to improving philanthropy to improve the world by training and empowering students and professionals to be innovators and leaders who create positive and lasting change. The School offers a comprehensive approach to philanthropy through its academic, research and international programs and through The Fund Raising School, Lake Institute on Faith & Giving and the Women's Philanthropy Institute.

Learn more at [www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu).

## NONPROFIT CONNECT

**Nonprofit Connect** is a membership organization that links the nonprofit community to education, resources and networking so organizations can more effectively achieve their missions. We provide close to 100 educational programs annually on topics including fundraising, operations, marketing, governance and volunteer management. We work to connect nonprofit professionals, board members and volunteers at all levels and roles for networking and peer to peer support. In addition to exclusive programming, Nonprofit Connect members enjoy access to best practice resources, product and service discounts, funding opportunities and sector research. Nonprofit Connect offers the region's premier online nonprofit job board and regularly serves over 6,000 nonprofit professionals in the Kansas City region. Distinctively, we unite nonprofits, foundations, and business leaders in a way that's rare across the country so that together we can strengthen our community.

Learn more at [www.npconnect.org](http://www.npconnect.org).



Visit the Giving USA store at [GivingUSA.org](http://GivingUSA.org).



# STILL GIVING

Giving USA 2019: Annual Report on Philanthropy for the Year 2018



# \$427.71 BILLION

GIVEN TO CHARITY IN 2018

2018 contributions rose .7% over 2017, despite a complicated climate for charitable giving

▲ up 5.4% over 2017  
**5% CORPORATIONS**  
\$20.05 billion

Giving by corporations experienced solid growth and helped bolster overall giving in 2018; this increase is most likely due to a strong economy

— flat from 2017  
**9% BEQUESTS**  
\$39.71 billion

Giving by bequest did not keep pace with inflation and remained flat from 2017

▲ up 7.3% over 2017  
**18% FOUNDATIONS**  
\$75.86 billion

Giving by foundations reached an unprecedented dollar amount and an unprecedented share of total giving

The increase in the maximum charitable deduction increased an incentive to give for high net worth individuals

Total giving as a percentage of GDP was **2.1%**

▼ down 1.1% from 2017  
**68% INDIVIDUALS**  
\$292.09 billion

Giving by individuals decreased as a percentage of total giving (▼ from 70% in 2017) but reached its third-highest total dollar amount when adjusted for inflation

- The standard tax deduction doubled—reducing an incentive for charitable giving
- More than 45 million households itemized deductions in 2016
- It is estimated only 16 to 20 million households itemized in 2018

Many donors experienced new circumstances for their giving – it will take more time to fully understand the impact of these forces and timing

2018 was one of the most complex environments for giving, with changes in tax policy and a volatile stock market that counteracted a relatively strong economy

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Committed to nonprofit fundraising success.  
[www.byrnepelofsky.com](http://www.byrnepelofsky.com)  
816.237.1999

SOURCE: Giving USA Foundation | Giving USA 2019

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Giving USA 2019: Annual Report on Philanthropy for the Year 2018

## \$427.71 BILLION TOTAL 2018 CONTRIBUTIONS

**7% PUBLIC-SOCIETY BENEFIT** ▼ down 3.7% from 2017  
\$31.21 billion

- Freestanding/national/commercial donor-advised funds are counted in public-society benefit
- Giving to public-society benefit decreased for the first time in nine years

**10% HEALTH** — flat: 0.1% over 2017  
\$40.78 billion

Giving to health has comprised between 6% and 10% of total giving over the past 40 years

**12% GRANTMAKING FOUNDATIONS** ▼ down 6.9% from 2017  
\$50.29 billion

The value of giving to foundations was 8% larger than any year besides 2017

**5% INTERNATIONAL AFFAIRS** ▲ up 9.6% over 2017  
\$22.88 billion

Giving to international affairs rebounded in 2018; it was one of two sectors that had substantial growth

**5% ARTS/CULTURE/HUMANITIES** — flat: 0.3% over 2017  
\$19.49 billion

Giving to arts/culture/humanities decreased for the first time in six years; giving to this sector did not keep pace with inflation

**3% ENVIRONMENT/ANIMALS** ▲ up 3.6% over 2017  
\$12.70 billion

Giving to environment/animals has steadily risen over the past five years and was one of two sectors that had substantial growth in 2018

**12% HUMAN SERVICES** — flat: 0.3% over 2017  
\$51.54 billion

Giving to human services stayed relatively flat, with donations to this sector totaling the highest inflation-adjusted amount in 2017

**14% EDUCATION** ▼ down 1.3% from 2017  
\$58.72 billion

Giving to education decreased in 2018, after four consecutive years of growth

**29% RELIGION** ▼ down 1.5% from 2017  
\$124.52 billion

Giving to religion's share of total giving has continued to decline since 1984; this is the first time giving to religion has fallen below 30% of overall giving

**2% TO INDIVIDUALS** ▼ down 2.6% from 2017  
\$9.06 billion

The bulk of gifts to individuals are in-kind gifts of medications from pharmaceutical companies

**2% UNALLOCATED GIVING**  
\$6.53 billion

The difference between giving by source and use

Sectors which saw the largest growth in 2017 also saw the largest decline in 2018 in current dollars

SOURCE:  
Giving USA Foundation  
Giving USA 2019