



The Philanthropic Landscape

LED BY



**Greater Good
Greenville**

FULL REPORT

September 2024



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INTRODUCTION

Greenville County and its nonprofit organizations and philanthropic practices are evolving. There are notable changes with new nonprofits, donors, and grantmakers, as well as an influx of new residents with philanthropic capacity. At the same time, traditional giving through workplaces and worship places has declined.

The local challenges of affordable housing, transportation, and gentrification, combined with national economic issues like income inequality and wage stagnation, make it harder for nonprofits to serve the community. Some key philanthropic organizations now focus on "root causes" and "systems change," potentially leaving crucial nonprofits underfunded.

Greater Good Greenville, along with a collaboration of funders and nonprofits, conducted a Philanthropic Landscape Study to understand the scope of philanthropic investment in Greenville County, contextualize funders' giving strategies, and facilitate collective planning for future needs.



SPECIAL THANKS

Sponsors

The Community Foundation of Greenville, the Hathaway Family Foundation, Hollingsworth Funds, and the Jolley Foundation generously funded the Philanthropic Landscape Study.

Research Team

The Research Team included the Community Research Group and ISI Consulting.

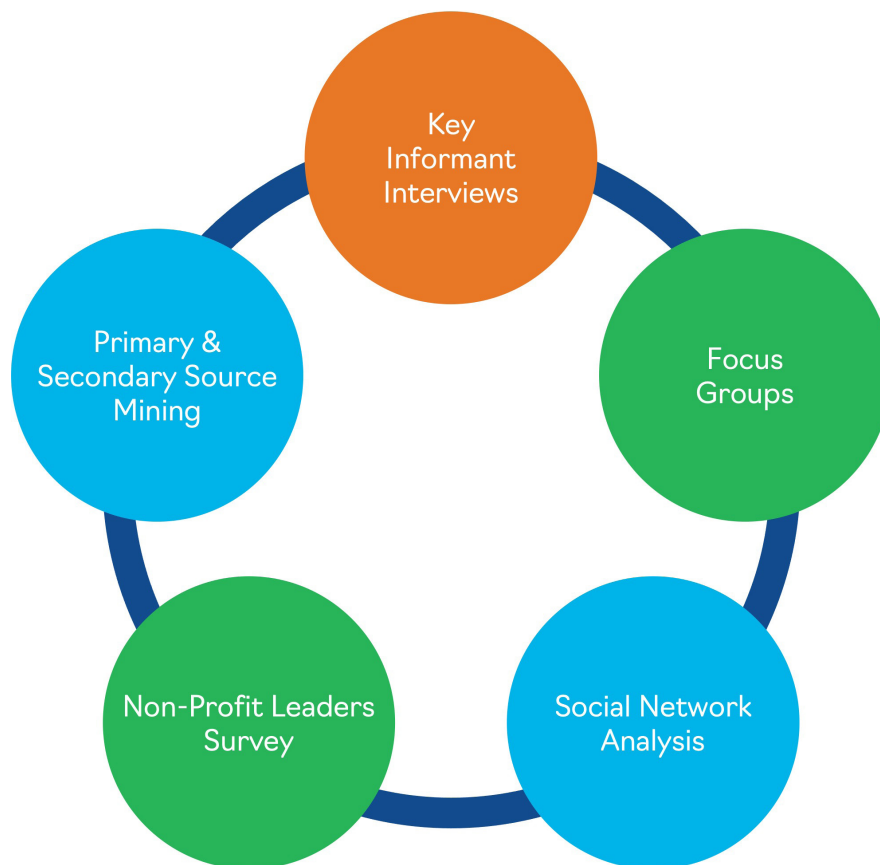
Steering Committee

The project's Steering Committee included Meliah Bowers Jefferson with the Jolley Foundation, Lynn Mann with Fluor, Bob Morris with the Community Foundation of Greenville, Andrew Ross with Hathaway Family Foundation, and Katy Sides with Hollingsworth Funds.

DATA MECHANISMS

The Philanthropic Landscape Study sourced data from:

- Five key informant interviews
- Two funder focus groups
- Three nonprofit focus groups
- 51 nonprofit surveys
- Social network analysis
- 20 funder surveys
- Secondary data sourced from the IRS, Giving USA, and other sources



Initial findings were shared with separate convenings of 70 nonprofit leaders and 40 philanthropic funders. These groups offered interpretations, sought additional information, and drafted suggested courses of action to respond. This report synthesizes the findings, data points, and recommendations.

FINDINGS

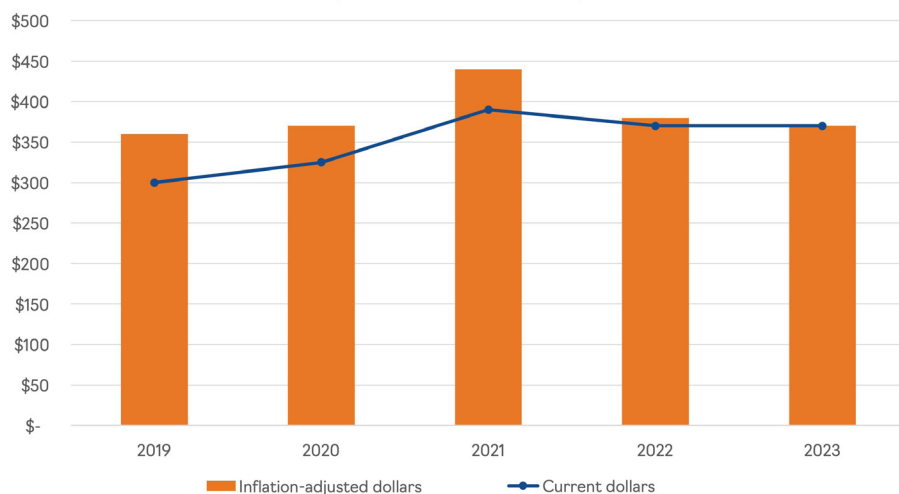
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Charitable Giving has not kept up with inflation.

Giving USA¹ released its 2023 findings illustrating that although total charitable giving in the United States hit more than \$557 billion, when adjusted for inflation, giving declined 2.1% from the previous year.

Individual Giving

Giving by individuals, 2019-2023
(in billions of dollars)



Source: Giving USA 2024, National

1

Locally, nearly half of nonprofits saw their revenues lag behind inflation. The study examined the 990 tax returns of 75 Greenville County nonprofits and discovered that 44% of them had revenue changes from 2018 to 2022 that were less than cumulative price increases over the same period, and 31% saw a decline in their revenues, bringing in less in 2022 than they did in 2018—even as prices increased almost 17%.

¹Giving USA 2024: The Annual Report on Philanthropy for the Year 2023, a publication of Giving USA Foundation, 2024, researched and written by the Indiana University Lilly Family School of Philanthropy. Available online at www.givingusa.org

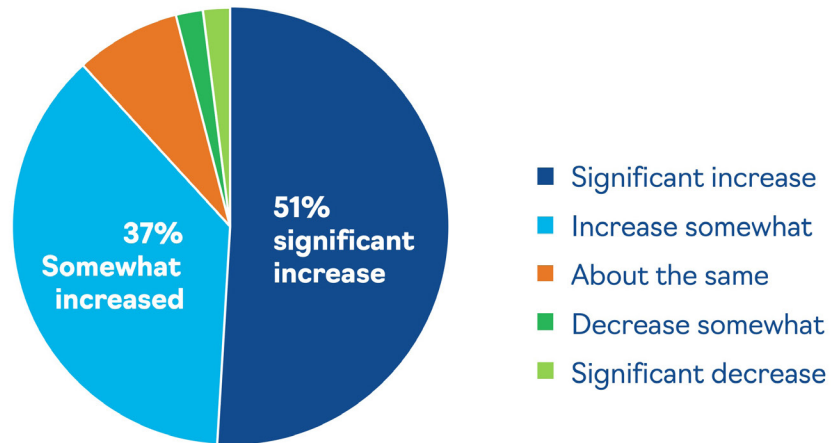
FINDINGS

Local Impacts of Inflation

In step with the nation as a whole, Greenville County nonprofits are struggling to keep up with inflation. 88% of Greenville nonprofits reported increased operating costs from 2018 to their most recent fiscal year, with 51% experiencing significant cost hikes.

Greenville County Nonprofit Expenses

Greenville County nonprofit operating costs changes
FY2018 to most recent FY



Source: 2024 Greenville nonprofit leader survey, Local

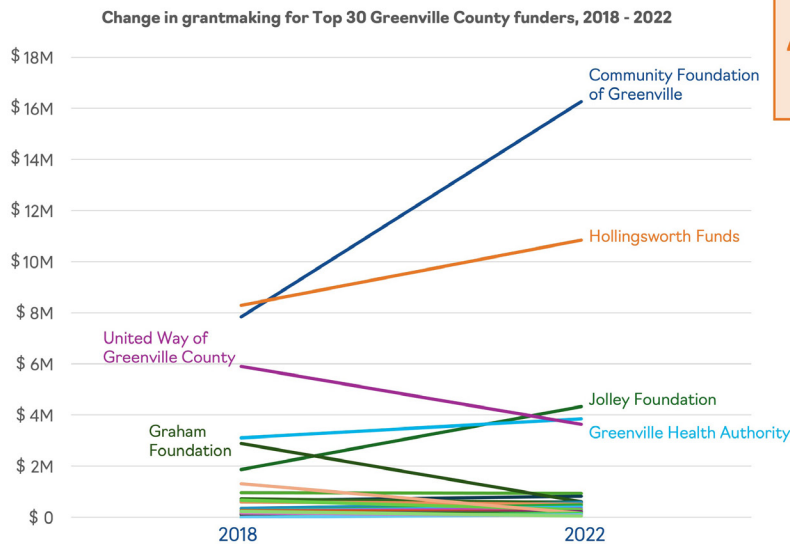
Changing Roles of Grantmakers

Grantmakers in Greenville County played a varied role during that same period. Researchers examined giving to Greenville County-based nonprofits based on the tax returns and public records of the top 30 grantmakers and corporate sponsors to Greenville County for 2018 and 2022.

Total giving to Greenville County nonprofits from top Greenville County-based foundations and corporate donors increased 27% from 2018 to 2022. But this overall growth doesn't necessarily mean that nonprofits saw similar increases to their budgets. Significant growth in grantmaking by the Community Foundation through its donor advised funds was a big driver of the overall percentage change. Hollingsworth Funds increased grantmaking by almost 31% as it sold and developed real estate, creating more liquidity to push into grantmaking. The Jolley Foundation more than doubled its grantmaking over the period, and Greenville Health Authority entered the market, along with newcomers such as the Hathaway Family Foundation and the Helga Marston Foundation.

FINDINGS

Foundation and Corporate Giving



Average increase
27%

Source: Foundation Maps, Candid, 2018 and 2022, National



However, more than half of the top funders giving in Greenville County decreased their funding from 2018 to 2022. These changes had varying impact on nonprofits; if a nonprofit's mission and work aligned with a funder whose giving increased, they had the potential for new or increased grant dollars. On the other hand, and obviously, other nonprofits saw decreases or losses of funds where missions or giving changed.

IN SUMMARY

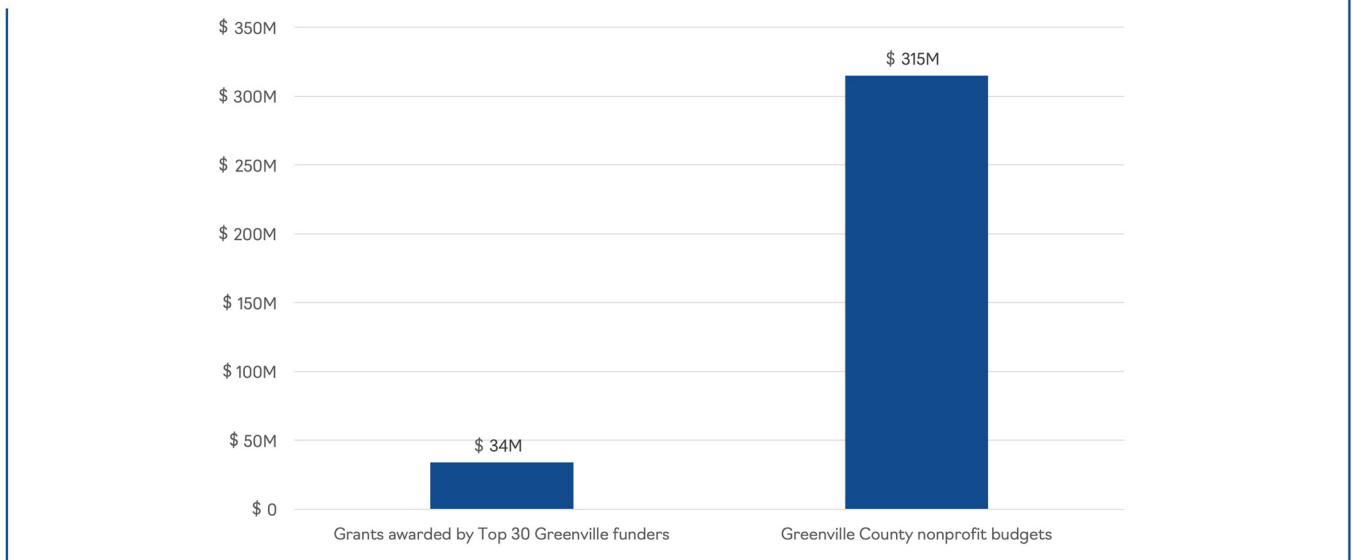
During 2018 and 2022, while some nonprofits were thriving financially, and some funders were maintaining or increasing their giving, almost a third of Greenville nonprofits had less revenue, and more than half of organizational funders were giving less to Greenville County.

2

Local foundations and funding organizations provide just a fraction of nonprofit budgets.

In spite of the foundation and corporate giving changes mentioned above, all things considered, organizational donors such as foundations and corporations have far less capacity to give than is collectively needed by Greenville County's nonprofits. The 990 tax returns from the data set of 75 nonprofits showed total expenses for 2022 of \$315 million. The top 30 funders together gave just over \$34 million to Greenville County-based nonprofit organizations in 2022, or 11% of the total expenditures noted. Dropping the largest nonprofits - those with budgets over \$10 million - and including the full list of Greenville County foundations for 2022 result in foundation Greenville-based giving covering 40% of the "smaller" budget nonprofits.

Local Funding vs. Nonprofit Budgets



Source: 990 tax returns via ProPublica, Foundation Center maps, Candid, National and Local



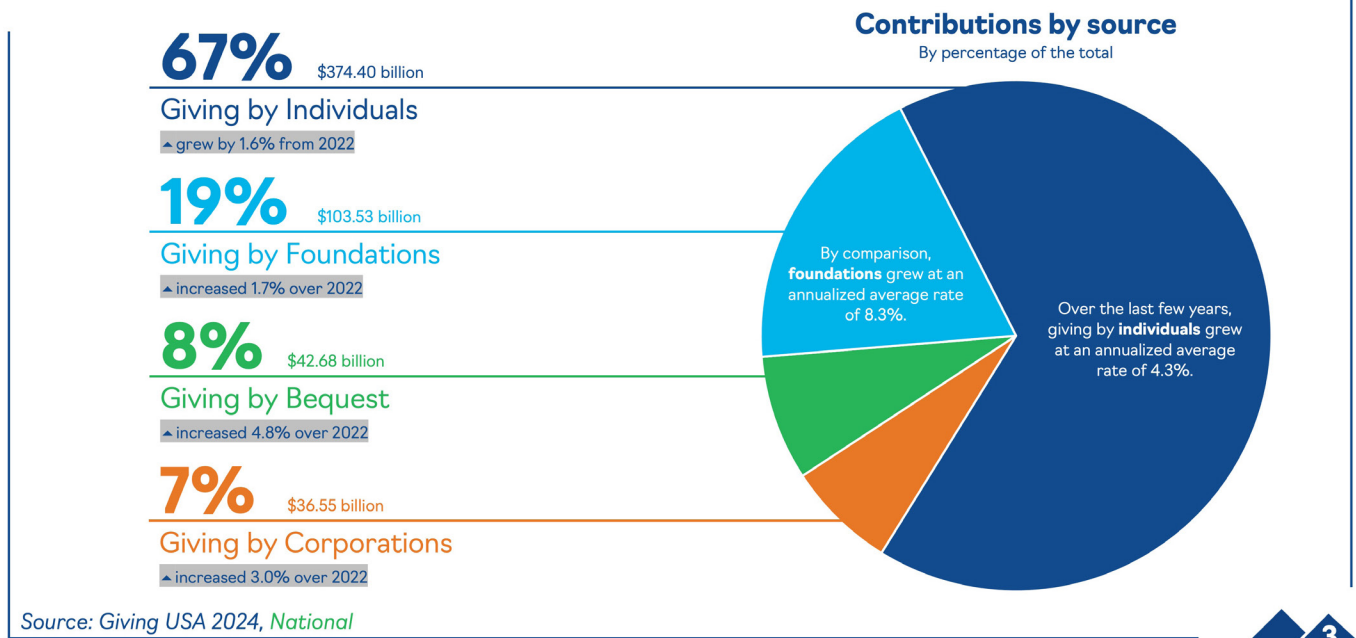
FINDINGS

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Individual giving presents the greatest opportunity for nonprofits.

Individual donors are consistently the top source of contributed revenue for nonprofits nationwide—individuals made 67% of charitable gifts in the US last year.

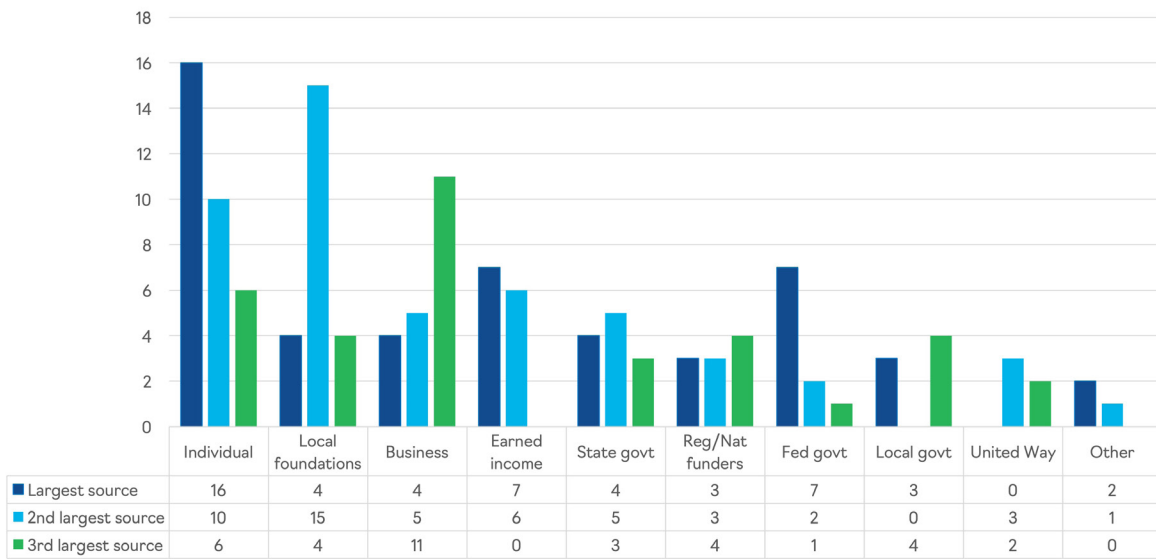
Where Did the Generosity Come From?



FINDINGS

This is mirrored in local data. In Greenville County, individual donors were the top source of revenue for 62.7% of nonprofit survey respondents, followed by local foundations and corporations. Nonprofit CEOs also reported seeing the most significant increases in giving from 2018 to their most recent fiscal year from individuals and major gifts.

Top Sources of Revenue



Source: Greenville nonprofit leader survey, *Local*



FINDINGS

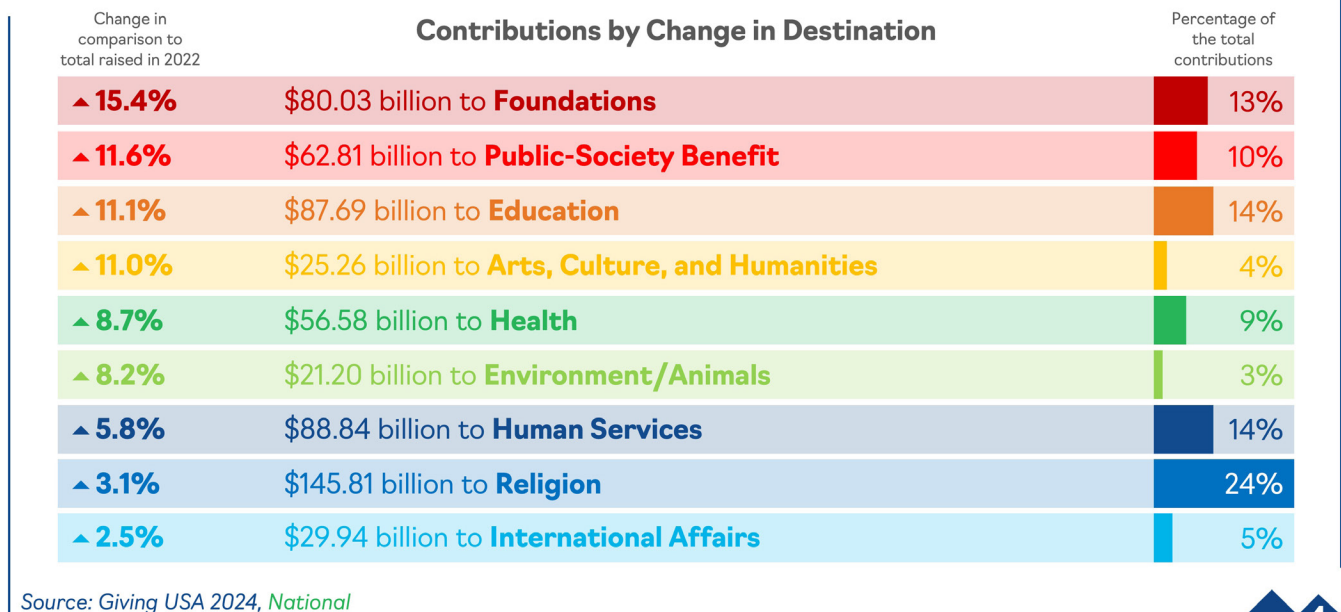
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Individual giving has changed dramatically in the last five years.

Individual giving is consolidating globally and locally, with fewer people making more significant donations. In 2022, just 400,000 people around the globe contributed 38% of all the world's charitable gifts. Their giving increased by 25% from 2018, which is good news, but it means that more than one-third of the world's charitable giving was made by a group smaller than the population of Greenville County.²

In addition, wealthy people increasingly use mechanisms like family foundations and DAFs for charitable giving. Nationally, giving to DAFs and foundations rose more than any other giving category in 2023—more than organizations focused on education, arts, health, human services, or religion.³

How is Charitable Giving Changing?

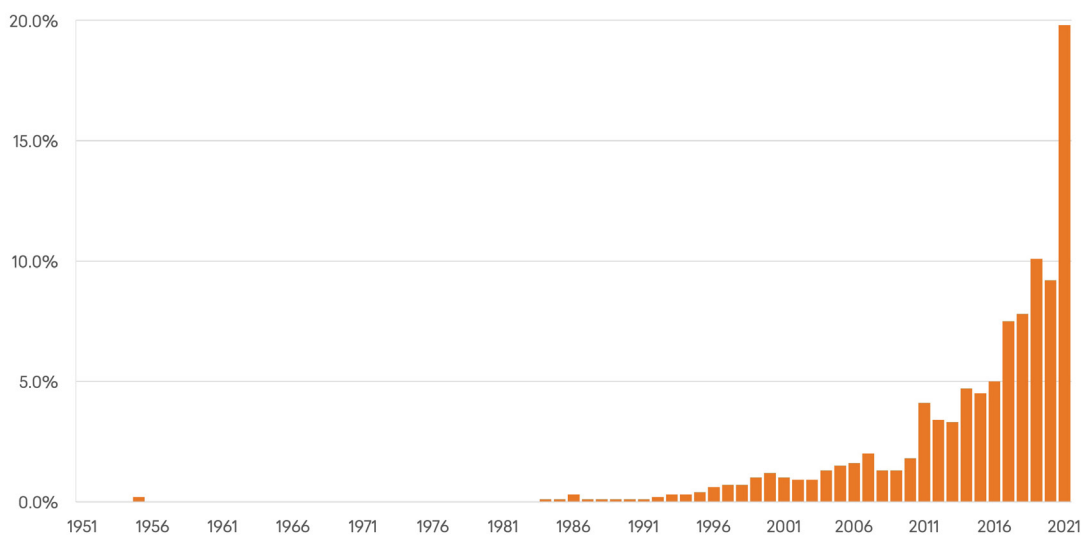


²Ultra High Net Worth Philanthropy 2024, Altrata + Wealth-X. Available at www.altrata.com
³Giving USA 2024.

FINDINGS

A recent national study by the DAF Research Collaborative examined more than 58,000 DAFs held by 111 DAF sponsors in 2024, from community foundations to groups like Fidelity and Schwab to ones managed by religious institutions. It found huge growth, with over a quarter of these funds established in the last four years.⁴

National DAF Growth



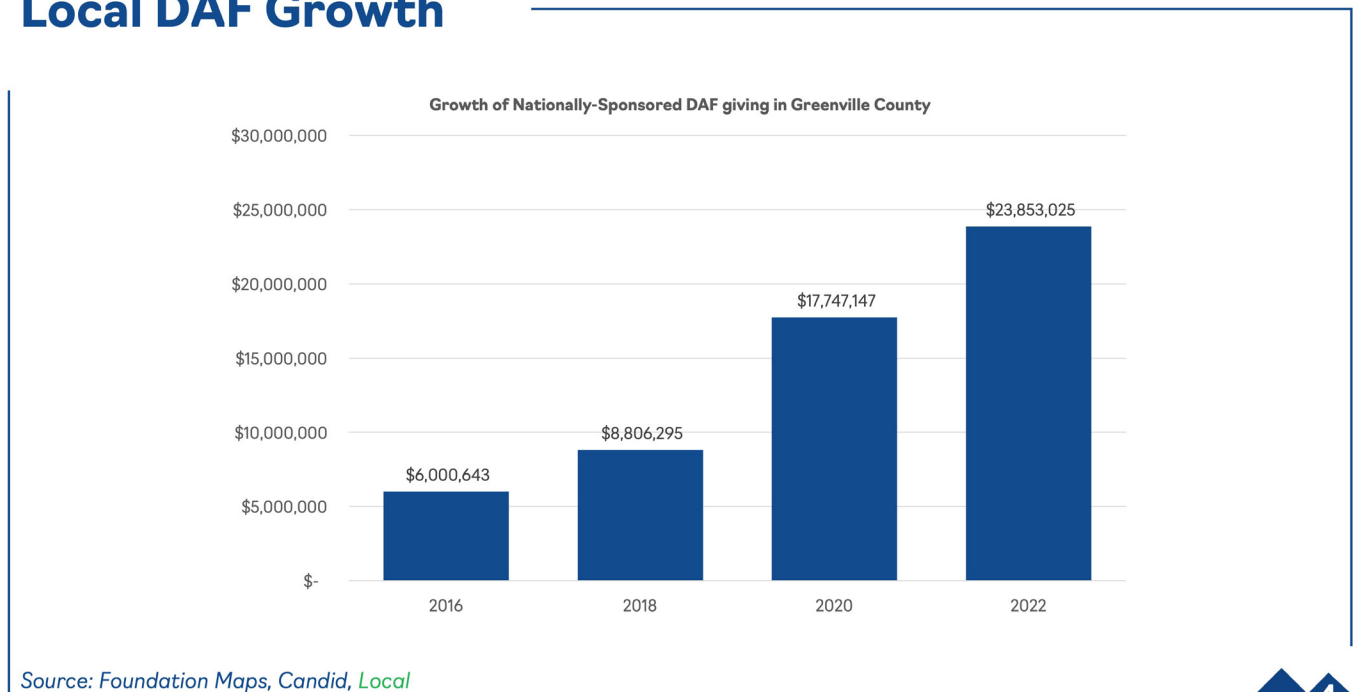
Source: DAF Research Collaborative 2024 National Study on Donor Advised Funds, *National*

⁴The National Study on Donor Advised Funds, 2024, DAF Research Collaborative. Available at www.dafresearchcollaborative.org

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Locally, the trajectory is the same. In 2016, nationally sponsored DAFs (those outside regional community foundations) gave \$6 million to Greenville nonprofits. By 2022, that number grew 300% to nearly \$24 million.⁵ The Community Foundation of Greenville expanded from 161 DAFs in 2018 to 212 in 2022, with assets growing from \$30.1 million to \$51.2 million and distributing 18.7% of year-end DAF assets in 2022.⁶

Local DAF Growth



Summary of DAF Impact

This generosity coming to Greenville-based nonprofits is good news. It just means that the most prominent players in philanthropy are not traditional foundations, corporate funders, and community regrantors. The biggest players are thousands of individuals who may not know Greenville nonprofits and whom nonprofit leaders need to work hard to find while fulfilling their missions.

⁵ Foundation Maps by Candid, 2024 for funders providing funding to Greenville County, SC. Full list in appendix.

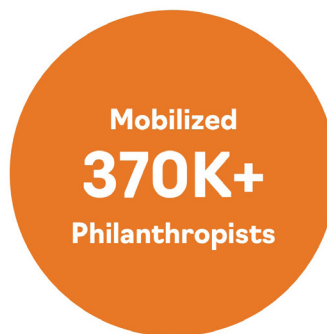
⁶ IRS 990 tax returns for Community Foundation of Greenville for 2018 and 2022.

Collective Giving Models

A second way that giving is changing is in collective giving models. In recent years, more than 4,000 collective giving groups around the globe have mobilized 370,000 philanthropists to donate more than \$3.1 billion.⁷ Greenville Women Giving (GWG) is a local example of collective giving, run almost entirely by volunteer members. In 2006, GWG awarded \$185,000 in their inaugural grant cycle, surpassing \$8.5 million in total grantmaking with more than \$500,000 awarded this year.

Collective Giving

Between 2017 and 2023



Source: *In Abundance: An Analysis of the Thriving Landscape of Collective Giving*

⁷ In Abundance: An Analysis of the Thriving Landscape of Collective Giving in the U.S., Johnson Center, Colmena-Consulting, and Philanthropy Together, 2023. Available at www.johnsoncenter.org

Giving by the Generations

The older and wealthier donors who use foundations and DAFs hold tremendous potential for nonprofits but so do younger donors who may have less wealth but are eager to give in new ways.

Millennials report giving and volunteering at rates on par or higher than their parents and grandparents. Although Gen Z is more financially constrained, these youngest donors made more gifts and were three times more likely to advocate or volunteer than other generations. Gen Z donors are especially interested in giving in ways that “fit in the flow of their daily lives, such as donating at checkout, at events, and via social media,” according to new research by the Blackbaud Institute. Almost half of them say their engagement is most likely to be spontaneous.⁸

Regardless of their age, Greenville County’s newcomers offer tremendous potential. As the area median income of Greenville County and the rest of the state grows, nonprofits should be able to find new donors to support their work. From 2022 to 2023, South Carolina was the fastest-growing state, and Greenville was the tenth-fastest-growing county.⁹ The age, race, and ethnic demographics of these newcomers to Greenville County mirror those of current residents, so there is an opportunity to make connections like nonprofits do with current donors.

But are newcomers and nonprofits finding each other?

Survey respondents, focus group members, and key informant interviews frequently asked this question. They asked, “How can we welcome newcomers to Greenville County and ensure they aren’t just consumers who want to enjoy our downtowns, parks, and affordability—but that they are actively contributing to what makes the community so appealing?”

⁸ Gen Z at the Table: A Special Edition of the Next Generation of Giving, Blackbaud Institute, 2024. Available at institute.blackbaud.com/resources

⁹ US Census Vintage 2023 Data Estimates, US Census Bureau.

5

More nonprofits are finding ways to earn revenue through mission-aligned business opportunities.

Earned revenue from sales and services has been an area of growth, with 37.5% of nonprofits reporting increased earned revenue from 2018 to 2022, according to the nonprofit leaders survey. However, successful implementation of earned revenue models requires significant human and financial resources and alignment with the nonprofit's mission.

Examples of revenue earners in Greenville County are thrift stores like those of Goodwill, Habitat, or Safe Harbor; the Jasmine Kitchen social enterprise of Jasmine Road; Soteria's woodworking shop; or fees charged for summer camps, classes, or performances at arts or youth-serving organizations.

Even though earned revenue is an area of potential growth, it takes careful strategy, consideration, and investment. Just like any new line of business, adding an earned revenue model to a nonprofit requires human and financial resources. Earned revenue has tremendous potential as it allows nonprofits freedom from shifts in philanthropy, but it is not as easy as setting up a lemonade stand.

37.2% of respondents indicated a growth in Earned Income revenue.

Greenville County earned revenue model examples:



Jasmine Kitchen



Soteria House



South Carolina Children's Theatre

Source: Greenville nonprofit leader survey, [Local](#)

FINDINGS

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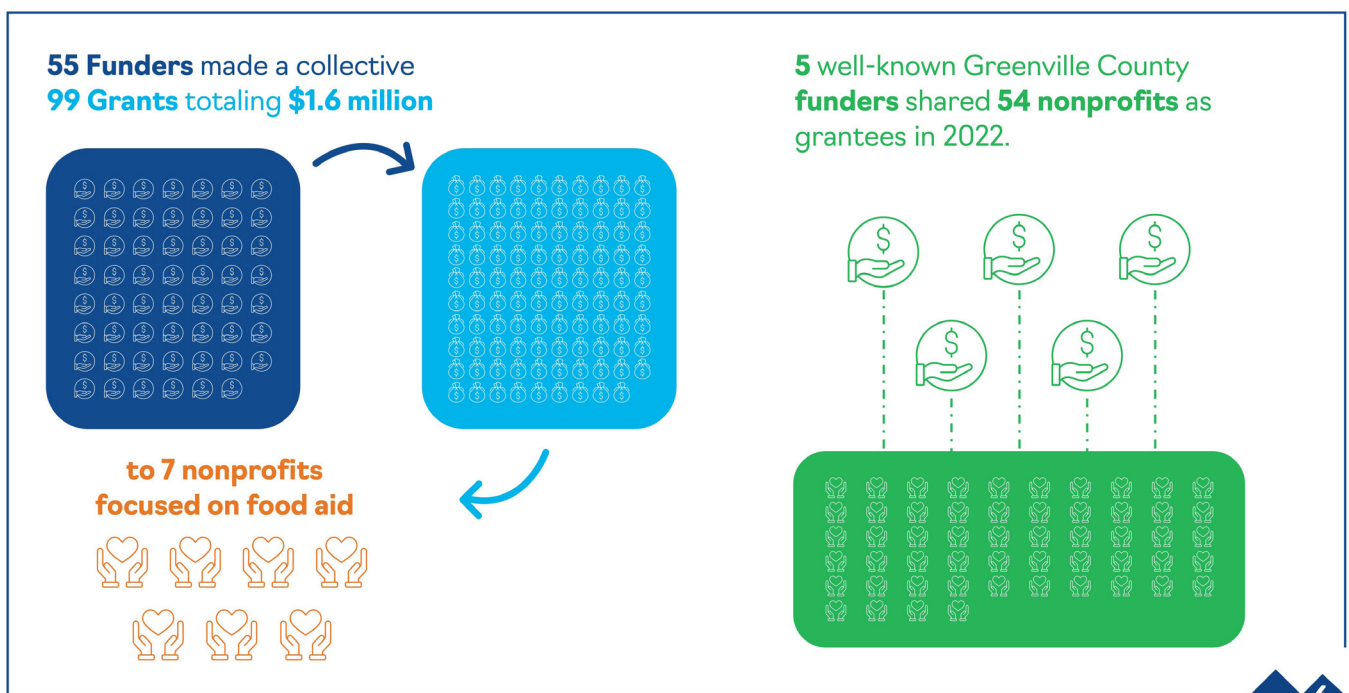
Grantmaking and grantseeking can be time-consuming, and funders and nonprofits can make it easier on each other.

Local funders give to many of the same nonprofits, and grant-making and seeking continue to be time-consuming. Several nonprofits are working on similar issues with overlapping populations. While it can be additive, it can also be unnecessarily duplicative.

In 2022, 55 funders made a collective 99 grants totaling \$1.6 million to seven nonprofits in support of food aid. Two nonprofits received grants from 15 different Greenville County-based foundations. Five well-known Greenville County funders shared 54 nonprofits as grantees.¹⁰

While this is good news for the diversity of foundation revenue sources that these nonprofits received that year, it indicates ample work for the nonprofit to apply for those funds and for the funders to consider awarding them.

New nonprofits are added to the mix every year; since 2016, 854 new nonprofits were established in Greenville County.¹¹ Funders and nonprofits can find ways to be more efficient and effective.



¹⁰ Foundation Maps by Candid, derived from IRS 990 tax returns from foundations and public records of other funders

¹¹ IRS Pub 78, sorted for formation date from 1/1/16 through 4/30/24.

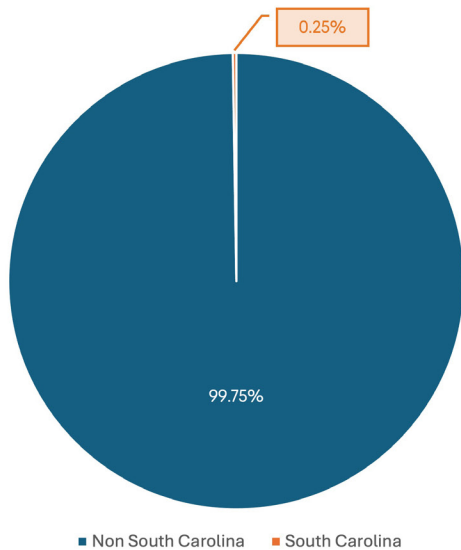
7

Greenville County and South Carolina capture only a small fraction of national grants.

Grants from national funders have the potential to catalyze growth and expand the impact of a nonprofit or a collaboration of organizations. The largest foundations in the nation have made headlines for their significant generosity and seven- and eight-figure grants. But South Carolina has seldom attracted these gifts. Greenville County nonprofits had even less success.

The study examined the 20 largest foundations in the United States that have within their grant guidelines the capacity to give to South Carolina. They made almost 29,000 grants nationwide in 2022, totaling \$15.7 billion. That year, just 42 South Carolina-based nonprofits received grants from those top 20 funders (0.15% of their grantees and 0.31% of their grant dollars).¹²

National Grants to South Carolina



2022 Grantmaking by 20 largest national foundations

- 28,577 grants to organizations throughout U.S. vs. 42 grants to South Carolina.
- \$48.5 billion awarded nationwide vs. \$39 million went to South Carolina.

Source: Foundation Center Maps, *National*

¹² Foundation Maps by Candid, pulled from IRS 990 tax returns and cross referenced with the top foundations' giving guidelines to determine list of top 20 for which South Carolina-based organizations are eligible.

FINDINGS

This isn't to say that national funders are avoiding Greenville County or South Carolina; they can make grants only when they are asked to do so, to things that align with their funding priorities, and to organizations that can manage the funds.

Grants that are nationally competitive are also usually for initiatives that are broad in scope and usually extend beyond the typical missions of individual nonprofit organizations. When Greenville County organizations align around data and a shared mission, they can be more competitive in a request for national funding.

8

Our community lacks sufficient data to make decisions and align efforts.

A widely cited concern by both nonprofits and funders was the lack of community-wide data to inform decisions and around which to align efforts.

While there are bright spots of nonprofit, public, and private entities publishing data on community indicators and using metrics to evaluate their work, there is not widely shared and co-owned data on agreed-upon measures as a rallying point for the community.

However, there were varied opinions on what should be included and how the data should be used.

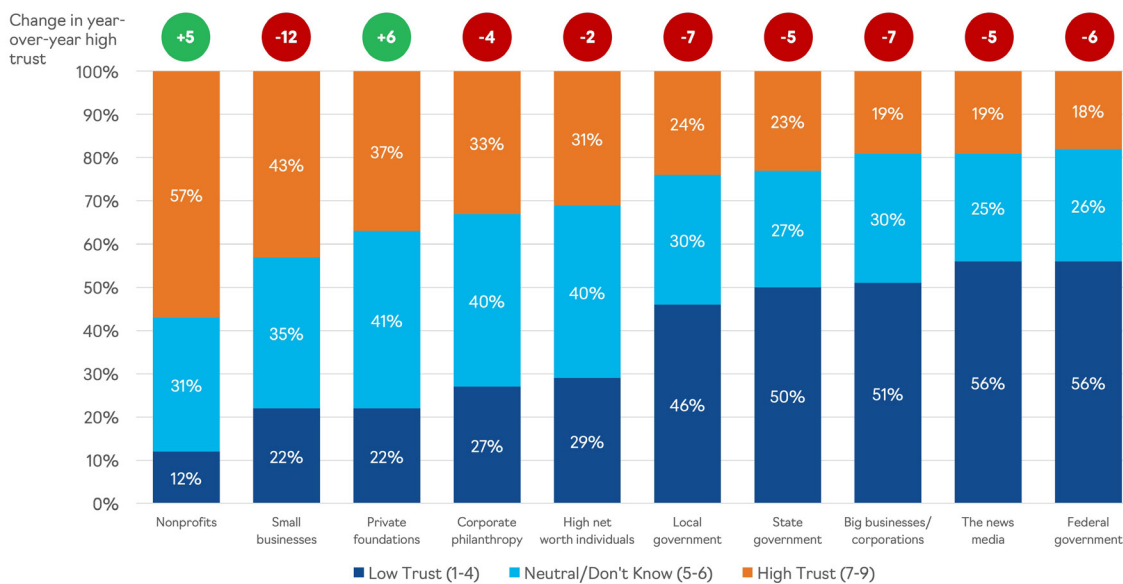
FINDINGS

9

Trust is more important than ever.

The Independent Sector's 2024 report, *Trust in Nonprofits and Philanthropy* notes that without trust, it's nearly impossible for nonprofits and philanthropic funders to achieve their missions. Fortunately, their study showed that trust in nonprofits is on the rise, with 57% of Americans saying they trust nonprofits to reduce national divisions more than they trust corporations, government, or the media.¹³

Trust by Sector



Source: *Trust in Nonprofits and Philanthropy, The Independent Sector, National*



But creating trust isn't a one-time activity. It's a constant process made more complicated by the larger climate. Locally, survey respondents and focus group participants noted that topics and discussions that were once unemotional and neutral are now fraught with ideology and perceived as "too woke" or "too conservative."

¹³ *Trust in Nonprofits and Philanthropy: Strengths and Challenges in Times of Division*. Independent Sector in partnership with Edelman DXI, 2024.

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Executive Directors shared that staff, volunteers, and donors are bringing perspectives from national news into their roles in local nonprofits and making apples-to-oranges comparisons.

Trust was a big theme in sense-making sessions, with both funders and nonprofits saying how important it is to build trust among and between our sectors.

What might happen if Greenville's funding organizations, nonprofits, and individuals who think strategically about philanthropy and community worked together to build trust and have different conversations about what's possible?

Study participants believed they would find new ways to partner and support each other, such as back-office consolidations, mergers, and common applications. They suggested that this would allow groups to share and use data in new and innovative ways. They also believe that it will help Greenville better collectively focus on larger community issues and opportunities.

COMMUNITY RESPONSE

The Steering Committee for the Greenville Philanthropic Landscape Study worked together to develop a list of tangible recommendations for the community based on surveys, focus groups, and convenings.

- 1. Increase giving and spending by individuals to support nonprofits.** When nonprofits have more reliable revenue streams from individual donors, both because of increased generosity from these givers and more skilled resource development efforts by nonprofits, they will be more financially resilient. Business models that provide earned revenue for nonprofits also have promise.
- 2. Increase effectiveness and efficiency of both nonprofits and funders.** If nonprofits and philanthropic funders and donors have skills to do their work well, they will presumably be more impactful and make the most of their money. But more collaboration, fewer hoops to jump through, and strategic partnerships such as mergers or shared back offices can make a difference too.
- 3. Increase grantmaking and investments in Greenville County and South Carolina by national and regional funders.** South Carolina simply does not have sufficient philanthropic assets to meet community needs. By intentionally recruiting investment from outside of the state, nonprofits and communities will have more money to do their work and can further their work by plugging in to a national network.
- 4. Build trust, connection, and collaboration among those who care about our community, including nonprofits, funders, businesses, government, and the community at large.** It's often said that "change happens at the speed of trust." Trust supports better collaboration and encourages giving. The nonprofit and philanthropic sector can also build trust where there are fractures in the community.
- 5. Align nonprofits, funders, and the public and private sectors around data points as indicators of community well-being and determine a process for collecting, sharing, and using this data.**

GREATER GOOD GREENVILLE COMMITMENT

The Greater Good Greenville (GGG) Board of Directors and the Greenville Philanthropic Landscape Steering Committee are taking action in 2025 based on the findings of this study. 2025 will be a year of scaffolding to further build a foundation of trust and abundance for the future.

1. By Giving Tuesday 2025, GGG will **launch a nonprofit directory** that lets potential donors find and give to Greenville area nonprofits.
2. GGG will **support fundraising coaching for nonprofits in 2025** to ramp up their individual fundraising capacity.
3. GGG will strengthen nonprofit financial resilience with a **program to develop earned revenue** through new lines of business.
4. GGG will facilitate nonprofits and funders in Greenville County in **securing grant dollars and impact investments from regional and national funders.**
5. GGG will **support learning and skill-building** among nonprofits, philanthropic funders, and mission-minded individuals.
6. GGG will **host two summits per year for nonprofit CEOs and philanthropic funders and donors** to learn together, align expectations, foster collaboration, and strengthen trust.
7. GGG will use the first nonprofit/philanthropic funder summit to consider how to **align our community around shared data.**

CONCLUSION

Although this analysis found areas of concern in our community's philanthropic landscape, there are tremendous opportunities for nonprofits, philanthropic funders, and individuals who care about Greenville County's residents.

With changing giving practices, many more new nonprofits, more community challenges, and broader cultural and economic changes within Greenville County and the nation as a whole, the way the local mission sector has approached charitable giving and fundraising and collaborative problem solving will need to change as well.

The study's findings and process give cause for optimism: nonprofits and funders readily participated throughout the study, and many are eager to be a part of problem solving and mapping out the path forward. The generous ideas and suggestions from study participants have already identified what the first steps can be, and there's room for everyone to begin blazing trails.

References

1. Giving USA 2024: The Annual Report on Philanthropy for the Year 2023, a publication of Giving USA Foundation, 2024, researched and written by the Indiana University Lilly Family School of Philanthropy. Available online at www.givingusa.org
2. Ultra High Net Worth Philanthropy 2024, Altrata + Wealth-X. Available at www.altrata.com
3. Giving USA 2024.
4. The National Study on Donor Advised Funds, 2024, DAF Research Collaborative. Available at www.dafresearchcollaborative.org
5. Foundation Maps by Candid, 2024 for funders providing funding to Greenville County, SC.
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11. IRS Pub 78, sorted for formation date from 1/1/16 through 4/30/24.
12. Foundation Maps by Candid, pulled from IRS 990 tax returns and cross referenced with the top foundations' giving guidelines to determine list of top 20 for which South Carolina-based organizations are eligible.
13. *Trust in Nonprofits and Philanthropy: Strengths and Challenges in Times of Division*. Independent Sector in partnership with Edelman DXI, 2024.

Survey Responses

The full set of survey responses referenced throughout this study is provided as a separate attachment for further review and analysis. Please refer to the attached documents for complete details.





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