

Philanthropy Southwest

CEO Fly-In

July 2026



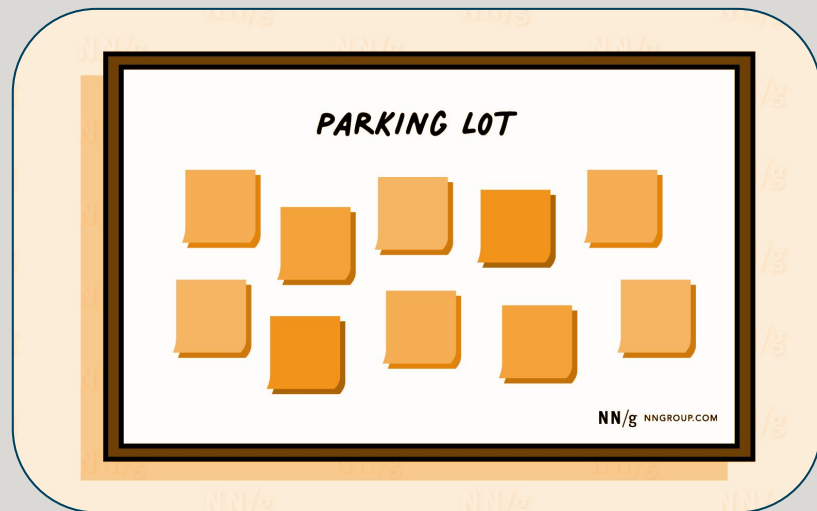
Agenda for Our Time Together

<i>9:30 - 9:50</i>	Welcome, Group Norms & Trends in Philanthropy
<i>9:50 - 10:50</i>	Breakouts by Foundation Type
<i>10:50 - 11:00</i>	Break
<i>11:00 - 11:20</i>	Full-Group Themes & Debrief
<i>11:20 - 11:30</i>	Closing & Reflection



Group Agreements

- Maintain Confidentiality
- Assume Best Intent
- Share Openly
- Listen Actively
- Lean In and Out of Conversation
- Be Present (No Electronics)
- Utilize the Parking Lot



Purpose of Discussion

As Foundation Leaders, you may be experiencing:

- Current climate and demands of the philanthropic sector
- Potential crises of identities
- Shifting donor intent and strategies
- Changing business models
- Increasing demands for visibility
- Evolving roles in the community



Philanthropy Trends | The Nonprofit Sector

- [Center for Effective Philanthropy \(CEP\)](#):
 - Nonprofit CEOs report more difficulty obtaining foundation funding than in previous years
 - **46%** of 600 nonprofit and foundation leaders surveyed by CEP were concerned that their organization could close or merge
 - **69%** of nonprofits experienced funding cuts in 2025
- Organizations like the [Southern Poverty Law Center \(SPLC\)](#) currently face a federal criminal case while continuing its civil rights advocacy. There are real implications for DAF-sponsoring organizations. *How should philanthropy adapt when organizations are navigating increased public scrutiny?*
- Tax policy and changes in government funding continue to impact nonprofit revenues in ways that are hard to predict and plan for | [Dorothy A. Johnson Center for Philanthropy](#)
- *How do you lead in a time of crisis? How do you speak to the community's needs when there is so much in flux?*



Philanthropy Trends | Charitable Giving

Giving USA 2025: Annual Report

- U.S. charitable giving rose to **\$617.20 billion** in 2025, surpassing the **\$600 billion mark** for the first time
- Individuals contributed the largest share of donations, totaling an estimated **\$394.2 billion**
- Giving by foundations grew **5.7%** to **\$117.15 billion**
- Giving by corporations increased **3.1%** to **\$43.67 billion**
- Bequest giving rose nearly **20%** over 2024, the largest increase of any of the four sources of giving in 2025
- Education, public-society benefit, and environment/animals saw more than **10%** growth in current dollars



Break Out by Foundation Type

Private & Institutional Foundations

Join
Darcy Addison

Family Foundations

Join
Kaky Grant

Community & Health Foundations

Join
Olivia Zale



High-Level Themes & Discussion Debrief



Silent Reflection

What are 2-3 action items at the top of your list coming out of this retreat?



grant

PHILANTHROPIC
ADVISORS

Connect with purpose.

