- Case Study: Generating insights for the not-for-profit sector

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Our Perpetual Wealth Management division's Philanthropy Snapshot Report assists philanthropists and not-for-profits to face into sector challenges and take advantage of the opportunities available to them. Philanthropists can play a crucial role in providing practical support for not-for-profits to overcome immediate challenges, build resilience and adopt a more strategic approach.

The findings from the FY24 report, which was based on conversations with not-for profit organisations, sector leaders and data collected through IPAP, show that increasing costs and rising demand have continued to impact the sector. Inflation and higher living costs are straining not-for-profit organisations' ability to maintain current operations whilst also investing in strategy to create long-term sustainable impact.

To assist philanthropists and donors with their giving strategy, we use our Philanthropy Toolkit, which we developed previously alongside Stanford University. The toolkit helps philanthropists assess not-for-profits, identify the ones that are best aligned to the causes that matter most to them and to keep track of their giving.