



Snapshot of Today's Philanthropic Landscape

Helping Extraordinary People Champion Inspirational Causes

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CCS Worldwide

www.ccsfundraising.com

CCS NORTHEAST (CORPORATE HEADQUARTERS)

New York

461 Fifth Avenue
New York, NY 10017
212.695.1175
800.223.6733
212.967.6451 Fax
ccsnewyork@ccsfundraising.com

CCS NEW ENGLAND

Boston

10 High Street, Suite 503
Boston, MA 02110
617.292.2666
888.553.9693
617.292.3339 Fax
ccsboston@ccsfundraising.com

CCS MIDATLANTIC

Baltimore/Capital Area

100 East Pratt Street, Suite 1520
Baltimore, MD 21202
410.337.2612
800.249.2680
410.337.2616 Fax
ccsbaltimore@ccsfundraising.com

Washington

1730 Rhode Island Avenue NW
Washington, DC 20036
202.628.4402
888.451.4080
202.628.4403 Fax
ccswashington@ccsfundraising.com

CCS MIDWEST

Chicago

155 N. Wacker, Suite 1790
Chicago, IL 60606
312.596.9300
800.832.3214
312.596.9253 Fax
ccschicago@ccsfundraising.com

St. Louis

231 S. Bemiston Avenue, Suite 800
St. Louis, MO 63105
314.854.1350
314.854.1349 Fax
ccsstlouis@ccsfundraising.com

CCS WEST

San Francisco

300 Montgomery Street, Suite 925
San Francisco, CA 94104
415.392.5395
800.227.3834
415.392.0391 Fax
ccssanfrancisco@ccsfundraising.com

Southern California

8001 Irvine Center Drive – Suite 1430
Irvine, CA 92618
949.954.5252
949.788.0377 Fax
socal@ccsfundraising.com

Seattle

800 5th Avenue, Suite 4100
Seattle, WA 98104
206.447.1310
800.227.3834
206.770.6487 – eFax
ccsseattle@ccsfundraising.com

CCS CANADA

Toronto

10 Bay Street, Suite 801
Toronto, Ontario M5J 2R8
416.368.5902
ccstoronto@ccsfundraising.com

CCS EUROPE

London

Bedford House
3 Bedford Street, 3rd Floor
London, WC2E 9HD
+44 (0) 20 7240 3822
ccslondon@ccsfundraising.com



<http://www.facebook.com/ccsfundraising>



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Contents

Philanthropy...

1. altruistic concern for human welfare and advancement, usually manifested by donations of money, property, or work to needy persons, by endowment of institutions of learning and hospitals, and by generosity to other socially useful purposes.

2. the activity of donating to such persons or purposes in this way: to devote one's later years to philanthropy.

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Snapshot of Today's Philanthropic Landscape



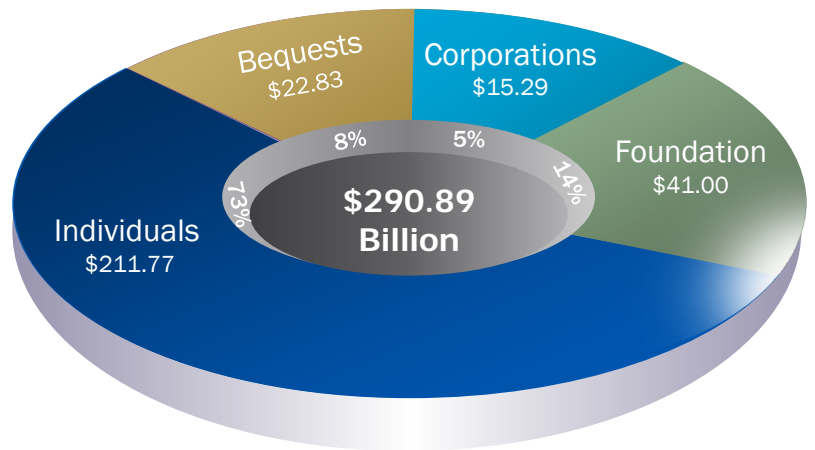
Robert Kissane
CCS President
rkissane@ccsfundraising.com

- This *Snapshot of Today's Philanthropic Landscape* is intended to serve as a guidebook for navigating the philanthropic terrain in the United States.
- In this report, we synthesize the most up-to-date data and statistics from the nation's top institutions and publications into eleven sections. Topics include an overview of giving in America; details about our nation's largest givers; a snapshot of corporate, foundation and individual giving; ePhilanthropy, online giving and social media; volunteerism; trends in planned giving and bequests; and details about the top 400 charities.
- CCS, a strategic consulting and fundraising management company working with leading non-profits worldwide, is well-positioned to spot trends in philanthropy and analyze their importance. Each year the members of our firm collectively speak to thousands of non-profit leaders and major donors through our work on campaigns, assessments, feasibility studies and with Boards. Translating these trends into effective strategies is essential to all leading non-profits. We hope that this *Snapshot* will help to guide you and your colleagues.

A handwritten signature in black ink, appearing to read "Robert Kissane". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Philanthropy in America

American Generosity



Source: Giving USA Foundation (Giving USA 2011)

- With average growth, Americans are expected to give \$4 trillion in philanthropy over the next 10 years. (Source: Giving USA 2008)
- 89% of American households give and 55% of Americans volunteer. (Source: Independent Sector)
- Proximity matters: Americans give more than 75% of their philanthropy within 25 miles of their homes. (Source: Bank of America 2010 Study of High Net Worth Philanthropy, The Center on Philanthropy at Indiana University)

Philanthropy in America

Where it Went: Most Popular Causes for American Support

Total charitable giving by type of recipient is estimated to have increased by 3.8% in 2010.

The relative ranking of recipient types remained the same in 2010 compared with 2009.

As has been the case for 56 years, the religion subsector received the largest share of charitable dollars, with an estimated 35% of the total in 2010.



(\$ in billions – all figures are rounded)

* = Estimate developed jointly by the Foundation Center and Giving USA

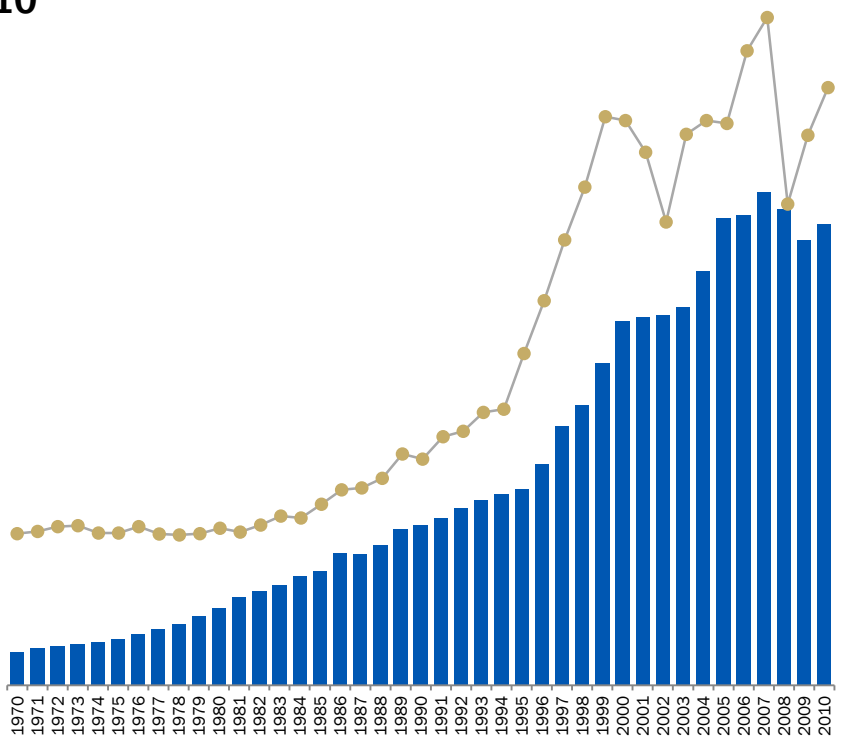
Source: Giving USA Foundation (Giving USA 2011)

Philanthropy in America

Total Giving: 1970 to 2010

Revised Giving USA estimates show that total charitable giving has increased in current dollars in every year since tracking began in 1967 with the exception of three: 1987, 2008 and 2009.

The increase of 1.5% (in current dollars) previously estimated for 2008 in Giving USA 2010 was eliminated with this edition after final figures for itemized charitable contributions in 2008 were released by the IRS.



- Giving grows more slowly—or declines adjusted for inflation—in recession years.
- In 2008, total giving fell 7% adjusted for inflation. This is the steepest decline since tracking began in 1967; 2009 follows with a decline in total giving of 6.2%, adjusted for inflation.
- 2010's inflation-adjusted increase of 2.1% is promising but does little to address the overall drop of approximately 13% in giving (adjusted for inflation) over the years of the current recession.
- History suggests giving will increase as the economy stabilizes.

● = Dow Jones

Source: Giving USA Foundation (Giving USA 2011)

Philanthropy in America

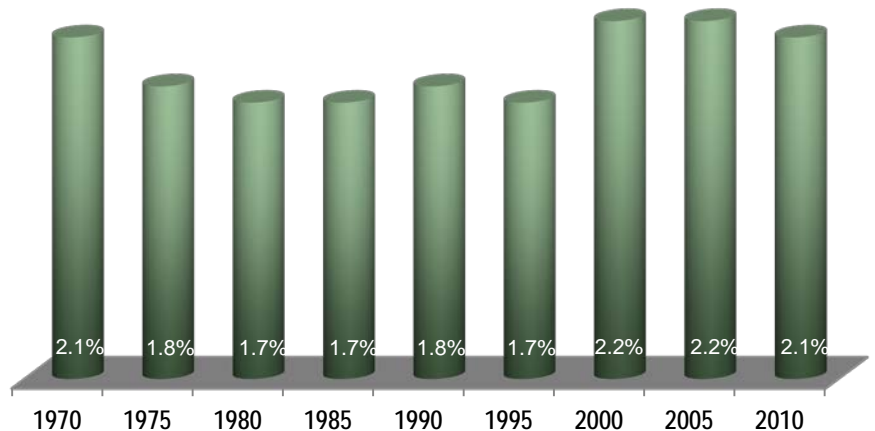
Total Giving as a Percentage of Gross Domestic Product, 1970-2010

FOR 2010 GIVING IS AN ESTIMATED 2% OF GDP



With 14 years above the 2% threshold, charitable giving will need to be sustained at similar levels for several more years to match the duration of the period from 1956 through 1972, when charitable giving was also consistently above 2% of GDP.

(Source: Giving USA 2011)



- Many economic factors relate to growth and declines in personal wealth or income—the most important influences on how much donors give to charity. (Source: J. Downes and J. E. Goodman (Eds.), Dictionary of Finance and Investment Terms, 8th Edition, 2010 Barron's Educational Series, Inc.)
- Real (or inflation-adjusted) GDP increased 2.9% from calendar year 2009 to calendar year 2010, and total estimated giving for 2010 is 2.1% of GDP.
- In comparison, real GDP declined 2.6% from calendar year 2008 to calendar year 2009. In 2009, total estimated giving was also 2% of the GDP. This suggests that giving slowed relative to the GDP between 2009 and 2010. (Source: Gross Domestic Product: Fourth Quarter and Annual 2010, Bureau of Economic Analysis, Jan. 8, 2010)

Philanthropy in America

Changes in Giving by Recipient Organization Type

In a tough economy, many donors are challenged alongside the poor people that **religious charities** traditionally help.

However, supporters' devotion to faith-fueled values has helped prevent a deeper slide in donations.



Charitable giving to the **religious** subsector remained relatively flat in 2010, rising an estimated 0.8%. This change is compared with a decline of 1.6% between 2008 and 2009.



Charitable giving to the **education** subsector increased by an estimated 5.2% in 2010. This follows a drop of 5.6% in 2009.



Giving to **human service** organizations is estimated to have held steady in 2010. In 2009, these organizations experienced an increase in donations of 2.3%.



Health organizations realized a small increase in charitable donations of 1.3% in 2010. This compares with growth of 4.1% in 2009.



Public-society benefit organizations realized an estimated increase of 6.2% in charitable donations in 2010. Charitable gifts to public-society benefit organizations in 2009 realized a decline of 4.4%.



Arts, culture and humanities organizations received an estimated 5.7% more in 2010 than in 2009.



International affairs organizations experienced an estimated 15.3% increase in charitable donations in 2010. This follows an increase of 2.9% in 2009.



Environmental and animal organizations are estimated to have held steady in 2010, realizing an estimated decrease in donations of 0.7% from 2009. This follows growth of 2% in 2009.

Source: Giving USA Foundation (Giving USA 2011)

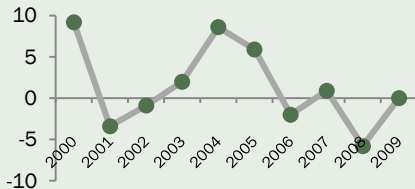
Household/Individual Giving

Giving by Individuals: 1970 - 2010

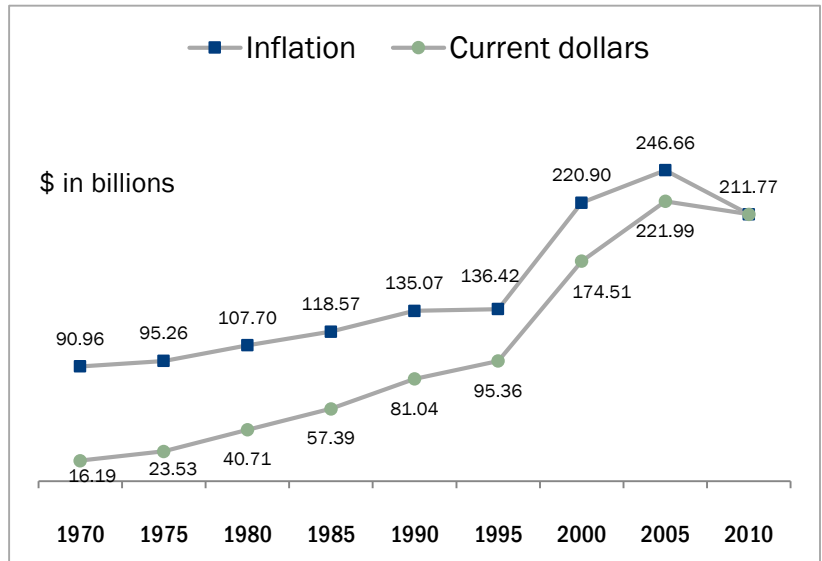
\$211.71 BILLION



% Change: 2000-2009



55% of those planning to give less in 2009 cited the economic downturn as the main reason for their decision.



- Charitable giving by individuals is estimated to be \$211.77 billion in 2010, an increase of 2.7% from the revised estimate of \$206.16 billion for 2009 (in current dollars).
- Individual giving is closely linked with income and wealth. As the economy slowed beginning in 2007, so did individual giving.
- Most donors, however, continue to give even when income or wealth falls. They may give less, but they do not stop giving.

Planned to give the same amount or increase

52.3%

Planned to give less

17.5%

Too early to tell

\$?

Source:
Giving USA Foundation (Giving USA 2010)

Household/Individual Giving

Percentage of Giving by Household in Each Income Group



High net worth households gave, on average, between **8%** and **16.5%** of their income to charity in 2009.

		2005	2007	2009
High Net Worth Household Giving Range	<\$200,000	6.5%	6.0%	16.5%
	\$200,000 to \$500,000	7.8%	9.3%	8.8%
	\$500,000 to \$2 million	6.9%	9.9%	8.0%
	\$2 million+	17.3%	16.1%	8.7%
		% of Giving per Household		

Wealthy Donors (High Net Worth Individuals)

What is a High Net Worth Individual (HNWI)?

A HNWI IS DEFINED AS ONE WITH LIQUID ASSETS OF \$1 MILLION+

98.2% of high net worth households donated to charity in 2009.

60% of all U.S. philanthropy comes from HNWI, who represent just **3%** of the total population.

80% of HNWI surveyed said they are most likely to make contributions to education organizations, with religions (**72%**) and health organizations (**70%**) following in popularity.

HIGH NET-WORTH HOUSEHOLDS CONTINUE TO GIVE...



Wealthy Donors (High Net Worth Individuals)

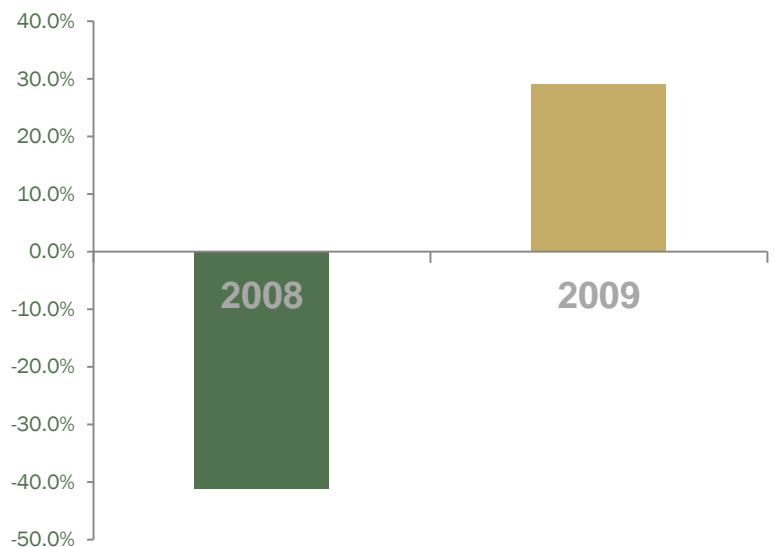
HNWI in America: A Snapshot

North America remains the single largest home to HNWIs, with its 3.1 million HNWIs accounting for 31% of the global HNWI population.

The HNWI population in North America, which shrank 19% in 2008, recovered somewhat, gaining 16.6% in 2009, while HNWI wealth similarly rose 17.8% to \$10.7 trillion.



U.S. MARKET CAPITALIZATION ROSE **29.9%** IN 2009, AFTER A DROP OF **41.1%** IN 2008.



Source: Capgemini and Merrill Lynch, "World Wealth Report 2010"

Wealthy Donors (High Net Worth Individuals)

Reasons Why Donors Stopped Giving



- For households who stopped giving to at least one organization in 2009, 35.4% of donors stopped supporting a charitable organization, with more than one-quarter of those surveyed (26.6%) discontinuing support for at least two organizations.
 - The top three reasons why donors reported they stopped giving to a particular charity is because they were too frequently solicited or asked for an inappropriate amount (58.9%), they decided to support other causes (34.2%), and because their household circumstances changed (29.4%).
 - Very few donors, however, said that they stopped giving to an organization because they were no longer involved with the organization (11.7%), the program/purpose was completed (11.4%), or because the organization kept inaccurate records of information (10.4%).

Wealthy Donors (High Net Worth Individuals)

Where They Give

WEALTHY HOUSEHOLDS GAVE A SUBSTANTIAL AMOUNT, ON AVERAGE IN 2009, TO...
EDUCATION



2007	% change	2009	
\$17,635	-43.4%	\$9,985	Religious
\$71,200	-34.2%	\$46,852	Secular
\$62,680	21.0%	\$75,887	Giving Vehicle
\$9,352	-44.0%	\$5,240	Combination
\$3,702	-20.1%	\$2,959	Basic Needs
\$9,103	-16.1%	\$7,641	Youth/Family Services
\$12,430	-63.7%	\$4,511	Health
\$28,329	-55.0%	\$12,759	Education
\$4,958	11.6%	\$5,531	Arts
\$3,281	3.9%	\$3,410	Environment/Animal Care
\$4,203	9.1%	\$4,587	International
\$11,557	-45.2%	\$6,328	Other
\$83,034	-34.9%	\$54,016	

- High net worth households gave \$54,016 on average to charity in 2009. This is a 34.9% decrease from 2007 (\$83,034), after adjusting for inflation. Average giving to religious causes dropped in 2009 to \$9,985 from \$17,635 in 2007, a decrease of 43.4%.
- Average total giving to secular causes was also down in 2009 to \$46,852 from \$71,200 in 2007, a decrease of 34.2%. High net worth households gave the highest average amount to foundations, funds and trusts in 2009 (\$75,867), an increase of 21% from 2007.

Charitable giving for 2007 was adjusted for inflation to 2009 dollars
Note: Average giving includes no outliers. Please see Methodology section for more information. Combined organizations include United Way, United Jewish Appeal, or Catholic Charities. "Giving Vehicle" represents gifts to a private foundation, charitable trust, and donor-advised funds.

America's Largest Givers

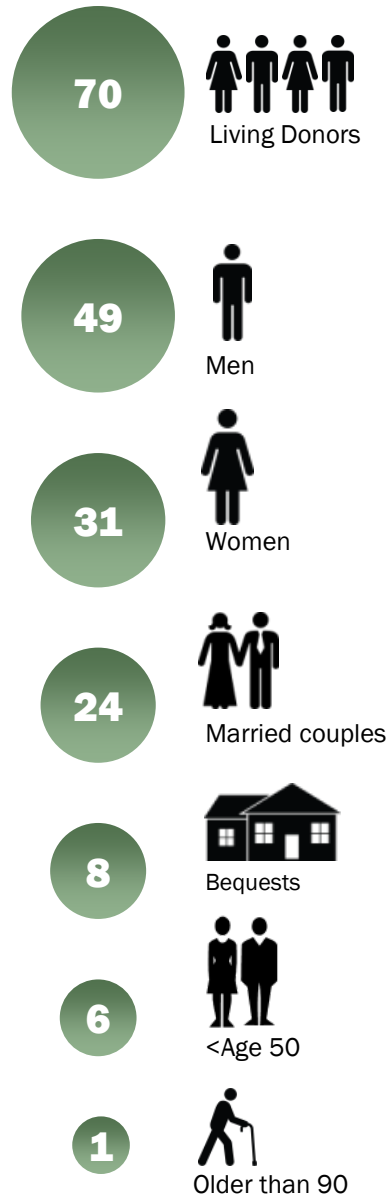
The Philanthropy 50 of 2010: A Portrait

SOURCES OF WEALTH

THE LARGEST DONORS IN THE U.S. IN 2010 DERIVED THEIR WEALTH FROM FINANCE AND INVESTMENT BANKING.

- Finance—13
- Investments—12
- Family wealth—8
- Real estate—6
- Technology—6
- Media & entertainment—3
- Oil—3
- Pharmaceuticals—3
- Retail—3
- Agriculture—1
- Biotechnology—1
- Construction—1
- Industry—1
- Insurance—1
- Law—1
- Manufacturing—1
- Marketing—1
- Telecommunications—1

Age Distribution



Source: The Chronicle of Philanthropy

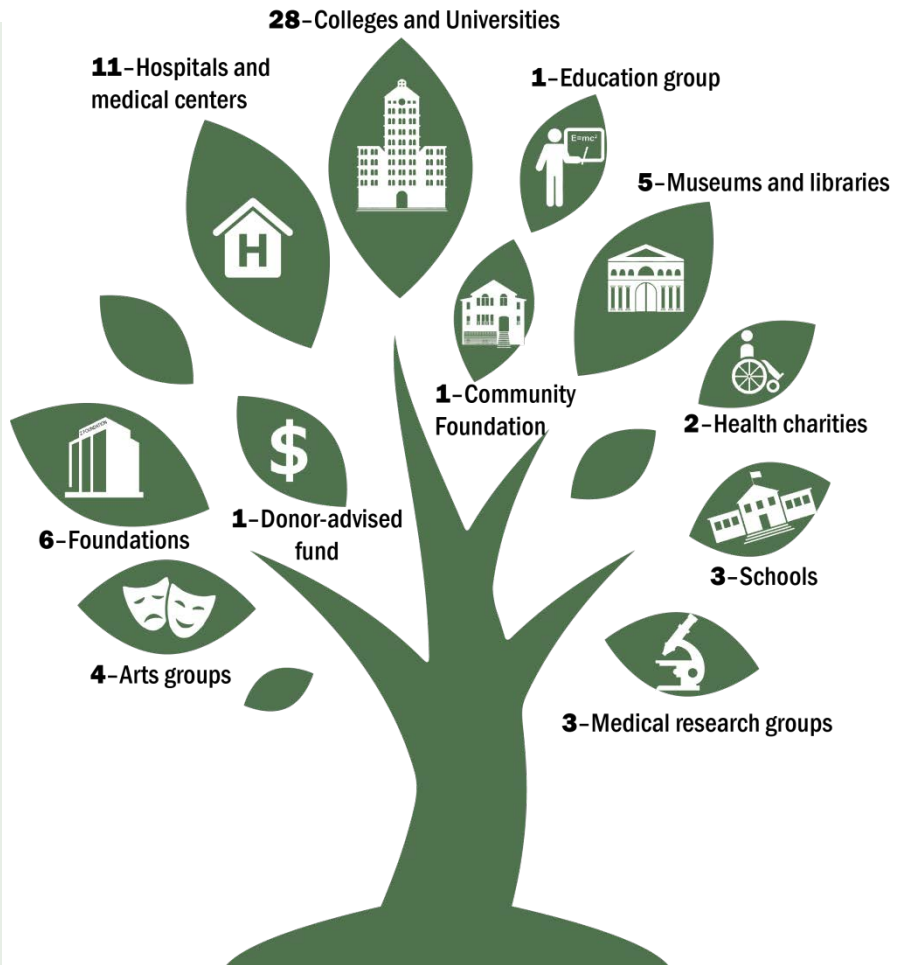
America's Largest Givers

The Philanthropy 50 of 2010: Where the Big Gifts Went

Human Rights Watch
\$100 Million
George Soros

University of California At San Francisco Children's Hospital
\$100 Million
Marc and Lynne Benioff

Ohio University
\$28 Million
Violet Patton



Source: The Chronicle of Philanthropy

America's Largest Givers

America's 100 Largest Givers: Aggregate Giving from 2005-2010

#	Donor	Source of Wealth	Giving Pledge*	Total \$ Committed
1	Warren E. Buffett	Investments	Yes	\$43.5 Billion
2	Leona M. Helmsley †	Family wealth, Hotels	No	\$5.2 Billion
3	James LeVoy Sorenson	Invention, Investments	No	\$4.5 Billion
4	Michael R. Bloomberg	Media and entertainment	Yes	\$1.2 Billion
5	Herbert M. and Marion O. Sandler	Finance, Investments	Yes	\$ 1.2 Billion
6	George Soros	Finance	No	\$1.2 Billion
7	William Barron Hilton	Family wealth, Hotels	Yes	\$1.2 Billion
8	Peter G. Peterson and Joan Ganz Cooney	Finance	Yes	\$1.0 Billion
9	Eli and Edythe Broad	Finance, real estate	Yes	\$937.1 Million
10	T. Denny Sanford	Finance	Yes	\$866.9 Million
11	Jon M. Huntsman Sr.	Chemicals, manufacturing	Yes	\$750.0 Million
12	Bernard A. and Barbro Osher	Finance, Investments	Yes	\$723.2 Million
13	Stanley F. and Fiona B. Druckenmiller	Finance	No	\$705.0 Million
14	William H. (Bill) III and Melinda F. Gates	Technology	Yes	\$670.0 Million

Source: The Chronicle of Philanthropy

†Deceased

* See page 25

America's Largest Givers

America's 100 Largest Givers: Aggregate Giving from 2005-2010

#	Donor	Source of Wealth	Giving Pledge*	Total \$ Committed
15	David Rockefeller	Family wealth, Finance	Yes	\$614.8 Million
16	John M. Templeton †	Finance	No	\$573.0 Million
17	Leon Levy	Finance	No	\$550.0 Million
18	Jim Joseph	Real estate	No	\$500.0 Million
19	T. Boone Pickens	Investments, oil	Yes	\$473.3 Million
20	Pierre and Pam Omidyar	Technology	Yes	\$451.7 Million
21	Lawrence J. Ellison	Technology	No	\$424.3 Million
22	Cordelia Scaife May	Family wealth	No	\$404.0 Million
23	John W. Kluge †	Media and entertainment	No	\$400.0 Million
24	Sanford I. and Joan H. Weill	Finance	Yes	\$392.1 Million
25	Harold Alfond†	Manufacturing, Retail	No	\$360.0 Million
26	Lorry I. Lokey	Media and entertainment	Yes	\$349.3 Million
27	Donald B. and Dorothy L. Stabler	Construction, Real estate	No	\$334.2 Million
28	Paul G. Allen	Technology	Yes	\$320.9 Million
29	David H. Koch	Oil	No	\$306.0 Million
30	David G. and Suzanne Deal Booth	Finance	No	\$300.0 Million
31	Theodore (Ted) and Vada Stanley	Marketing	No	\$295.1 Million
32	Frank C. Doble	Energy	No	\$272.0 Million
33	Hector Guy and Doris Di Stefano	Family wealth, Investments	No	\$264.0 Million
34	Irwin and Joan Jacobs	Telecommunications	Yes	\$255.2 Million
35	H. F. (Gerry) and Marguerite B. Lenfest	Media and entertainment	Yes	\$250.5 Million

Source: The Chronicle of Philanthropy

†Deceased

* See page 25

America's Largest Givers

America's 100 Largest Givers: Aggregate Giving from 2005-2010

#	Donor	Source of Wealth	Giving Pledge*	Total \$ Committed
36	Robert L. and Catherine H. McDevitt	Investments	No	\$250.0 Million
37	John P. and Tashia F. Morgridge	Technology	Yes	\$235.0 Million
38	Jon L. Stryker	Family wealth	No	\$232.8 Million
39	Boone Pickens	Investments, oil	No	\$229.2 Million
40	Dorothy Clarke Patterson	Family wealth	No	\$225.0 Million
41	Mary Joan Palevsky	Family wealth, Investments	No	\$212.8 Million
42	Thomas M. and Stacey Siebel	Technology	No	\$212.4 Million
43	Oprah Winfrey	Media and entertainment	No	\$201.7 Million
44	Philip H. and Penelope Knight	Manufacturing	No	\$200.0 Million
45	Robert Day	Finance	No	\$200 Million
46	Peter B. Lewis	Insurance	No	\$199.6 Million
47	Dan L. and Jan Duncan and family	Energy	No	\$189.4 Million
48	Robert W. Wilson	Finance	No	\$187.2 Million
49	Louise Dieterle Nippert	Family wealth, Investments	No	\$185.0 Million
50	Harold C. and Annette C. Simmons	Investments	Yes	\$178.1 Million
51	Richard W. Weiland	Technology	No	\$174.3 Million
52	Helen L. Kimmel	Real estate	No	\$156.5 Million
53	Ronald P. Stanton	Chemicals	No	\$150.0 Million
54	Jeffrey S. Skoll	Technology	Yes	\$144.1 Million
55	Arthur Zankel	Finance, Investments	No	\$141.0 Million
56	Jan T. and Marica F. Vilcek	Pharmaceuticals	No	\$132.0 Million
57	Barbara Dodd Anderson	Family wealth, Investments	No	\$128.5 Million

Source: The Chronicle of Philanthropy
* See page 25

America's Largest Givers

America's 100 Largest Givers: Aggregate Giving from 2005-2010

#	Donor	Source of Wealth	Giving Pledge*	Total \$ Committed
58	Ronald O. Perelman	Finance, Investments	Yes	\$124.3 Million
59	Ira A. and Mary Lou Fulton	Real estate	No	\$122.0 Million
60	Leonard Blavatnik	Investments	No	\$117.2 Million
61	Joseph Neubauer	Food and beverage, Industry	No	\$114.6 Million
62	Sheldon G. and Miriam Adelson	Hotels	No	\$111.3 Million
63	Frances Lasker Brody	Family wealth, real estate	No	\$110.0 Million
64	Ann Lurie	Investments, Real estate	No	\$107.6 Million
65	Warren Alpert	Marketing, Oil	No	\$106.6 Million
66	Stephen A. Schwarzman	Investments	No	\$105.0 Million
67	Philip H. Knight	Manufacturing	No	\$105.0 Million
68	J. Ronald and Frances Terwilliger	Real estate	No	\$102.0 Million
69	Meyer and Renee Luskin	Manufacturing	No	\$100.5 Million
70	Mark Zuckerberg	Technology	Yes	\$100.0 Million
71	Marc R. and Lynne Benioff	Technology	No	\$100.0 Million
72	William P. Clements Jr.	Oil	No	\$100.0 Million
73	Gerhard R. Andlinger	Finance	No	\$100.0 Million
74	Kenneth G. and Elaine A. Langone	Retail	Yes	\$100.0 Million
75	Frank Batten Sr.	Media and entertainment	No	\$100.0 Million
76	Rupert H. Johnson Jr.	Finance	No	\$100.0 Million
77	Robert C. and Jeannette Powell	Real estate	No	\$100.0 Million
78	John Arrillaga	Real estate	No	\$100.0 Million
79	Mortimer B. Zuckerman	Media and entertainment, Real estate	No	\$100.0 Million

Source: The Chronicle of Philanthropy
* See page 25

America's Largest Givers

America's 100 Largest Givers: Aggregate Giving from 2005-2010

#	Donor	Source of Wealth	Giving Pledge*	Total \$ Committed
80	Henry M. and Wendy J. Paulson	Finance	No	\$99.9 Million
81	David and Cheryl Duffield	Technology	No	\$95.0 Million
82	Fritz J. and Dolores H. Russ	Technology	No	\$94.8 Million
83	Frank Sr. and Jane Batten	Media and entertainment	No	\$93.0 Million
84	Josephine F. Ford	Family wealth, transportation	No	\$90.8 Million
85	Terrence M. and Kim Pegula	Oil	No	\$88.0 Million
86	Tim and Bernadette Marquez	Oil	No	\$85.0 Million
87	Juanita Kious Waugh	Agriculture, family wealth	No	\$83.7 Million
88	Jesse H. and Beulah C. Cox	Manufacturing	No	\$83.5 Million
89	David R. and Patricia D. Atkinson	Finance	No	\$80.0 Million
90	Harvey E. Najim	Technology	No	\$76.8 Million
91	Raymond A. Rich	Finance, Oil	No	\$76.8 Million
92	Stewart A. and Lynda R. Resnick	Agriculture, Food and beverage	No	\$76.3 Million
93	Alfred M. and Mary Swain Wood	Marketing, Pharmaceuticals	No	\$75.8 Million
94	Henry R. and Marie-Josée Kravis	Finance	No	\$75.0 Million
95	Jerry Yang and Akiko Yamazaki	Technology	No	\$75.0 Million
96	Robert Edward (Ted) Turner	Media and entertainment	Yes	\$70.6 Million
97	Green family	Retail	Yes	\$70.0 Million
98	Sydell L. Miller and family	Manufacturing	No	\$70.0 Million
99	Henry C. Jr. and Jane C. Woods	Family wealth, investments	No	\$67.0 Million
100	Gary C. and Frances Comer	Retail	No	\$67.0 Million

Source: The Chronicle of Philanthropy

* See page 25

America's Largest Givers

2010 Forbes 400 List: Summary and Analysis

FORBES 400 AGE DISTRIBUTIONS

BILLIONAIRES

156

Above 70

Assets are firmly established, and estate planning is key



237

Between 40-70

Assets are being built or stabilized



7

Below 40

Unrealistic to expect an established philanthropic history



- According to *Forbes* magazine, the net worth of the 400 richest Americans increased by 8% in 2010, to \$1.37 trillion, in the year ending August 25.
- The wealth level to gain admittance to the *Forbes* 400 club rose this year back to \$1 billion—after falling last year to \$950 million as the super-rich suffered, in their own particular way, the effects of the financial collapse of 2008.
- Year-to-year changes aside, the 2010 list registers a longer-term accumulation of wealth that has been underway for three decades. When *Forbes* first published the *Forbes* 400 list in 1982, there were 12 billionaires in the U.S., and the richest American, shipbuilding tycoon Daniel Ludwig, had net wealth estimated at \$2 billion. Adjusting for inflation, Ludwig would wind up 58th on today's list.

The following sources have been used: Business Week, Forbes 400, Slate 60 lists, The Chronicle of Philanthropy, The Center on Philanthropy

America's Largest Givers

2010 Forbes 400 List: Summary and Analysis

I'm not doing my philanthropic work out of any kind of guilt, or any need to create good public relations. I'm doing it because I can afford to do it, and I believe in it.

– **George Soros**

- The richest individual in America for the 17th year in a row is Microsoft founder Bill Gates, with a personal fortune estimated at \$54 billion (\$24 billion in 1982 dollars and 12 times the value of Ludwig's empire that year).
- Gates is followed once again by Warren Buffett, net worth \$50 billion. Buffett has made the list every year since 1982, when he had estimated resources of about \$250 million.
- As in other recent editions of the Forbes list, the virtual absence of billionaires whose fortunes are derived from manufacturing is striking. One exception is 85-year-old William Ford, Sr., whose net worth of \$1 billion brought him back on the list for the first time in several years.

The following sources have been used: Business Week, Forbes 400, Slate 60 lists, The Chronicle of Philanthropy, The Center on Philanthropy

America's Largest Givers

The Giving Pledge: Summary

- The Giving Pledge is an effort made public in June 2010 by the two wealthiest men in the United States, billionaires **Warren Buffett** and **Bill Gates**, to help address society's most pressing problems by inviting the wealthiest American families and individuals to commit to giving more than one-half of their wealth to philanthropy or charitable causes.
- The pledge is a moral commitment to give, not a legal contract, and it does not involve pooling money or supporting a particular set of causes or organizations. While it is specifically focused on billionaires or those who would be billionaires if not for their giving, the idea takes its inspiration from other efforts that encourage and recognize givers of all financial means and backgrounds.
- In August 2010, 40 of the wealthiest families and individuals in the United States committed to returning the majority of their wealth to charitable causes by taking the Giving Pledge. The announcement of this first group was made by Warren Buffett approximately six weeks after kicking off the long-term charitable project with Bill and Melinda Gates. In May 2011, 17 more of America's wealthiest families signed the Pledge.
- Both Buffett and Gates have begun conversations with billionaires from other countries to learn about their philanthropy efforts and what has worked in their countries.

America's Largest Givers

The Giving Pledge: Number of Participants by State



In August 2010, 40 of the wealthiest families and individuals in the United States committed to returning the majority of their wealth to charitable causes by taking the **GIVING PLEDGE**.



Source: <http://givingpledge.org>

America's Largest Givers

The Giving Pledge: Participants by State

	Giving State	Giving Participant
19	California	Eli and Edythe Broad Michele Chan and Patrick Soon-Shiong John Paul DeJoria Ann and John Doerr Larry Ellison Barron Hilton Joan and Irwin Jacobs Vinod and Neeru Khosla Lorry I. Lokey George Lucas Alfred E. Mann Michael and Lori Milken Dustin Moskovitz Tashia and John Morgridge Bernard and Barbra Osher Herb and Marion Sandler Jeff Skoll Tom Steyer and Kat Taylor Mark Zuckerberg
1	Florida	Phillip and Patricia Frost
2	Georgia	Bernie and Billi Marcus Ted Turner
1	Hawaii	Pierre and Pam Omidyar
1	Illinois	Joe and Rika Mansuet
2	Washington, DC/Maryland	David M. Rubenstein Vicki and Roger Sant
1	Massachusetts	Joyce and Bill Cummings
1	Michigan	Thomas S. Monaghan
1	Missouri	Jim and Virginia Stowers
2	Nebraska	Warren Buffet Walter Scott, Jr.

America's Largest Givers

The Giving Pledge: Participants by State

	Giving State	Giving Participant
2	New Jersey	Lee and Toby Cooperman Duncan and Nancy MacMillian
17	New York	Nicolas Berggruen Michael R. Bloomberg Ted Forstmann Ray and Barbara Dalio Barry Diller and Diane von Furstenberg Carl Icahn Sidney Kimmel Elaine and Ken Langone Ronald O. Perelman Peter G. Peterson Julian H. Robertson, Jr. David Rockefeller Tom and Cindy Secunda Jim and Marilyn Simons Sanford and Joan Weill Shelby White Charles Zegar and Merryl Snow Zegar
4	Oklahoma	David and Barbara Green George B. Kaiser Harold and Sue Ann Hamm Lynn Schusterman
1	Pennsylvania	Gerry and Marguerite Lenfest
1	South Dakota	Denny Sanford
7	Texas	Laura and John Arnold Lyda Hill Rich and Nancy Kinder George P. Mitchell T. Boone Pickens Edward W. and Deedie Potter Rose Annette and Harold Simmons
1	Utah	Jon and Karen Huntsman
1	Virginia	Jean and Steve Case
2	Washington	Paul G. Allen Bill and Melinda Gates

America's Most Generous Corporations

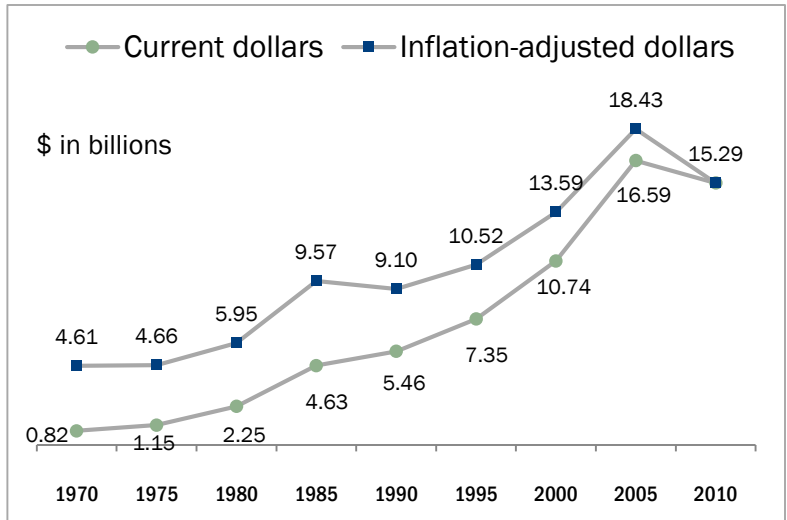
Giving by Corporations: 1970-2010

\$15.29 BILLION



CORPORATIONS GIVE MOST OFTEN TO EDUCATION and HUMAN SERVICE

Overall corporate giving in 2010 was likely significantly bolstered by an increase of in-kind donations by pharmaceutical companies.

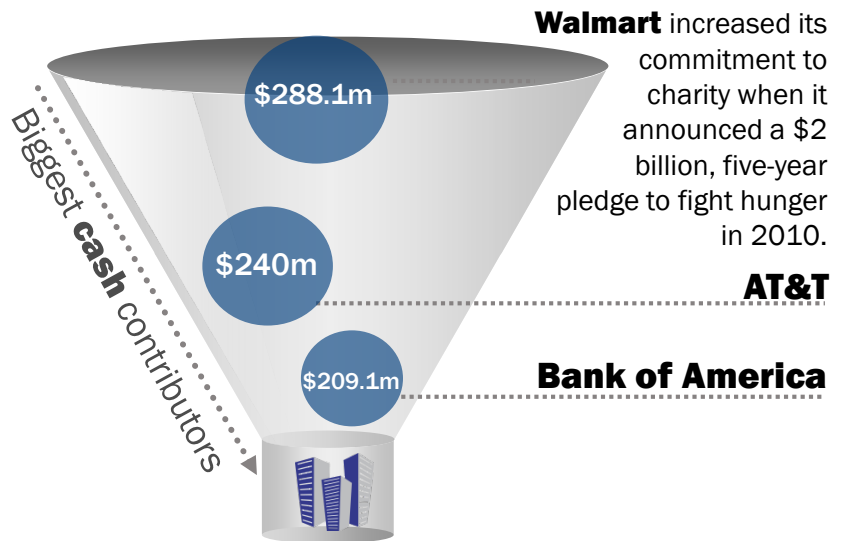
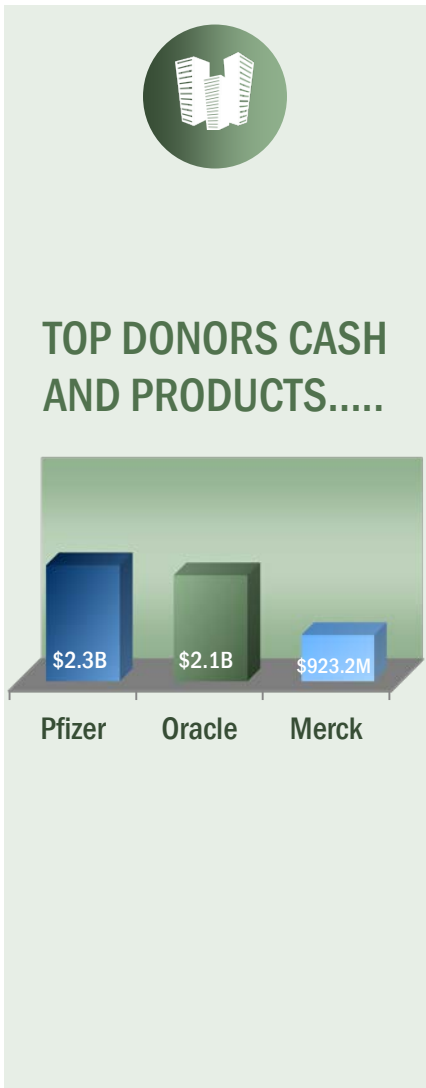


- Giving by corporations is estimated to have increased 10.6% (in current dollars) in 2010 from 2009, totaling \$15.29 billion.
- Corporate giving includes gifts of cash and in-kind gifts made through corporate giving programs, as well as grants and gifts made by corporate foundations.
- Inflation-adjusted giving by corporations is estimated to have climbed 8.8% in 2010. This increase is within the positive end of the range of giving in post-recessionary years since the recessions of the early 1980s.
- Corporate foundation grantmaking is estimated to have stayed level with 2009, with an estimated \$4.7 billion in funded grants in 2010. This figure is the highest level recorded for grantmaking by corporate foundations since tracking began by the Foundation Center.
 - An estimated 69% (or \$10.59 billion) of corporations' charitable dollars came directly from corporate giving programs in 2010.

Source: Giving USA Foundation (Giving USA 2011)

America's Most Generous Corporations

Corporate Contribution Survey



- Many of the nation's most profitable businesses do not provide information about their giving, making it difficult to know if they engage in any philanthropy. Amazon, Apple and Google were among dozens of companies that declined repeated requests to respond to *The Chronicle's* survey, which was conducted in collaboration with *USA Today*. For those companies that did respond, some of the survey's most significant findings include:
 - Companies gave a median of 1.2% of their 2008 profits away to charity in 2009, though the link between a company's profits and its philanthropy is often less direct.
 - Eleven companies gave more than 5% of their profits.

Source: The Chronicle of Philanthropy and USA Today

America's Most Generous Corporations

America's 50 Biggest Corporate Foundations

Due to the economic crisis, corporate foundation giving estimates were relatively depressed during reporting period for the Foundation Center's 2010 Outlook for Corporate Foundation Giving.

At the time of this publication, revised figures on individual corporate foundation giving were not yet available through the Foundation Center; however, the Giving USA 2011 estimates for corporate philanthropy indicated a 10% increase in 2010 corporate giving overall. This increase has stayed within the observed trends in corporate giving immediately following a recession (Giving USA 2011).

Furthermore, the Committee Encouraging Corporate Philanthropy's year-over-year data, released in 2010, maintains that changes in corporate pretax profits will affect corporate giving levels in the following year. The rise of corporate profits beyond 2006 levels, as observed in the third quarter of 2011, may bode well for further increases in corporate giving in 2012.

Rank	Name/State	Total Giving	Total Revenue (2010)	As of Fiscal Year End Date
1	Sanofi-Aventis Patient Assistance Foundation, NJ	\$321.4 Million	\$44.4 Billion	2009
2	The Wal-Mart Foundation, Inc., AR	\$205.0 Million	\$405 Billion	2010
3	The Bank of America Charitable Foundation, Inc., NC	\$186.1 Million	\$111.4 Billion	2009
4	GE Foundation, CT	\$103.6 Million	\$150.2 Billion	2009
5	The Wachovia Wells Fargo Foundation, Inc., NC	\$99,435,085	\$85.8 Billion	2009
6	JPMorgan Chase Foundation, NY	\$81.4 Million	\$104.8 Billion	2009
7	ExxonMobil Foundation, TX	\$73.5 Million	\$383.2 Billion	2009
8	Wells Fargo Foundation, CA	\$68.4 Million	\$85.8 Billion	2009
9	Citi Foundation, NY	\$66.5 Million	\$86.6 Billion	2009
10	Verizon Foundation, NJ	\$56.3 Million	\$106.6 Billion	2009
11	Johnson & Johnson Family of Companies Contribution Fund, NJ	\$49.6 Million	\$61.6 Billion	2009
12	The Pfizer Foundation, Inc., NY	\$43.9 Million	\$67.8 Billion	2010
13	The Merck Company Foundation, NJ	\$42.2 Million	\$46.0 Billion	2009
14	The Coca-Cola Foundation, Inc., GA	\$41.0 Million	\$35.1 Billion	2009
15	Intel Foundation, OR	\$40.5 Million	\$43.6 Billion	2009
16	MetLife Foundation, NY	\$39.5 Million	\$53.1 Billion	2009

Source: The Foundation Center, December 16, 2010

America's Most Generous Corporations

America's 50 Biggest Corporate Foundations



The Wal-Mart Foundation established in 1979 in Arkansas, directs special emphasis toward programs in education and offers several scholarships. It also supports workforce development and economic opportunity, health and wellness, and environmental sustainability.



Rank	Name/State	Total Giving	Total Revenue (2010)	As of Fiscal Year End Date
17	The UPS Foundation, GA	\$38.9 Million	\$49.5 Billion	2009
18	AT&T Foundation, TX	\$38.2 Million	\$124.3 Billion	2009
19	BP Foundation, Inc., TX	\$37.2 Million	\$297.1 Billion	2009
20	Blue Shield of California Foundation, CA	\$34.7 Million	\$9.9 Billion	2009
21	Abbott Fund, IL	\$33.2 Million	\$35.2 Billion	2009
22	Caterpillar Foundation, IL	\$31.2 Million	\$42.6 Billion	2009
23	Eli Lilly and Company Foundation, IN	\$30.3 Million	\$23.1 Billion	2009
24	The PNC Foundation, PA	\$29.7 Million	\$15.2 Billion	2009
25	Nationwide Foundation, OH	\$28.0 Million	\$20.3 Billion	2009
26	The PepsiCo Foundation, Inc., NY	\$27.6 Million	\$57.8 Billion	2009
27	The Medtronic Foundation, MN	\$26.6 Million	\$15.9 Billion	2010
28	Lucasfilm Foundation, CA	\$26.4 Million	Undisclosed	2009
29	Valero Energy Foundation, TX	\$25.7 Million	\$82.2 Billion	2009
30	General Mills Foundation, MN	\$22.4 Million	\$14.8 Billion	2010
31	The Prudential Foundation, NJ	\$21.9 Million	\$31.0 Billion	2009
32	State Farm Companies Foundation, IL	\$21.6 Million	\$61.2 Billion	2009

Source: The Foundation Center, December 16, 2010

America's Most Generous Corporations

America's 50 Biggest Corporate Foundations



The Bank of America Foundation supports many local community-based organizations that work in hunger relief, such as Feeding America and Meals on Wheels. In 2009 it invested \$20 million in its Neighborhood Excellence Initiative, which focuses on community development.



Rank	Name/State	Total Giving	Total Company Revenue (2010)	As of Fiscal Year End Date
33	3M Foundation, MN	\$21.5 Million	\$26.7 Billion	2009
34	The Bristol-Myers Squibb Foundation, Inc., NY	\$20.7 Million	\$19.5 Billion	2009
35	Newman's Own Foundation, CT	\$20.3 Million	Undisclosed	2009
36	The Dow Chemical Company Foundation, MI	\$20.1 Million	\$53.7 Billion	2009
37	Emerson Charitable Trust, MO	\$20.1 Million	\$21.0 Billion	2009
38	U.S. Bancorp Foundation, Inc., MN	\$20.0 Million	\$18.1 Billion	2009
39	Ford Motor Company Fund, MI	\$20.0 Million	\$111.2 Billion	2009
40	Macy's Foundation, OH	\$19.8 Million	\$25.0 Billion	2010
41	Dominion Foundation, PA	\$18.9 Million	\$15.1 Billion	2009
42	The Allstate Foundation, IL	\$18.3 Million	\$26.0 Billion	2009
43	Citizens Charitable Foundation, MA	\$17.7 Million	\$53.8 Billion	2009
44	Amgen Foundation, Inc., CA	\$16.8 Million	\$15.1 Billion	2009
45	Alcoa Foundation, PA	\$16.2 Million	\$21.0 Billion	2009
46	Nike Foundation	\$16.1 Million	\$19.0 Billion	2010
47	Fidelity Foundation, MA	\$16.0 Million	\$5.3 Billion	2009
48	Thrivent Financial for Lutherans Foundation, WI	\$15.8 Million	\$7.5 Billion	2009
49	The Capital Group Companies Charitable Foundation, CA	\$15.7 Million	Undisclosed	2010
50	WellPoint Foundation, Inc., IN	\$14.7 Million	\$57.8 Billion	2009

Source: The Foundation Center, December 16, 2010

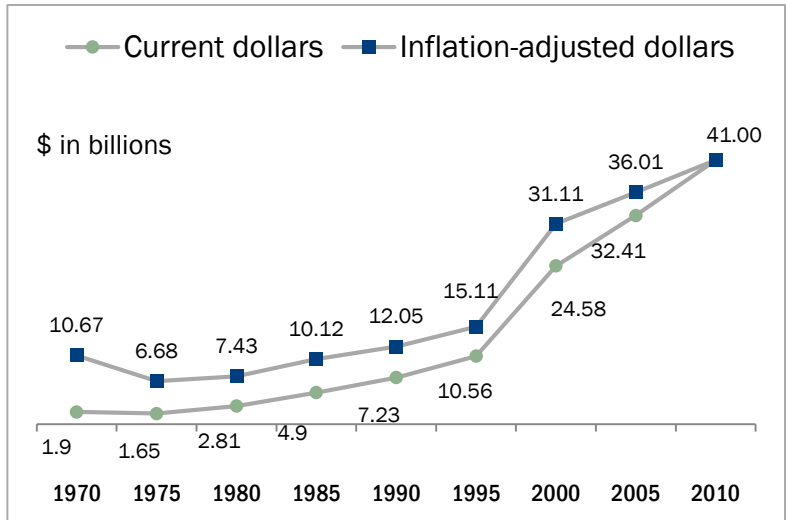
America's Emerging Foundations

Giving by Foundations: 1970 – 2010

\$41.00 BILLION



The Foundation Center estimated \$41 billion in giving by independent, community and operating foundations in 2010 (not including corporate foundations).



- Operating foundations realized growth of 6% in 2010, while community foundations experienced a small decline of 2.1%. Giving by independent foundations remained stable, declining less than 1%.

Many funders cut operating expenses to maintain grantmaking



Some funders increased grantmaking by drawing on reserves



Estate gifts in 2008 bolstered the assets of some new and existing foundations, thereby allowing them to pay out more in grants



Source: Giving USA Foundation (Giving USA 2011)

America's Emerging Foundations

Top 35 U.S. Foundations by Total Giving



The Bill & Melinda Gates Foundation (BMGF or the Gates Foundation) is the largest transparently operated private foundation in the world, founded by Bill and Melinda Gates.

The foundation is "driven by the interests and passions of the Gates family." The primary aims of the foundation are, globally, to enhance healthcare and reduce extreme poverty, and in America, to expand educational opportunities and access to information technology.

Rank	Name/state	Total Giving	As of Fiscal Year End Date	Assets
1	Bill & Melinda Gates Foundation, WA	\$2.6 Billion	2010	\$37.4 Billion
2	Ford Foundation, NY	\$468.3 Million	2010	\$10.8 Billion
3	Walton Family Foundation, Inc., AR	\$360.4 Million	2009	\$2.2 Billion
4	The William and Flora Hewlett Foundation, CA	\$358.1 Million	2010	\$7.0 Billion
5	The Robert Wood Johnson Foundation, NJ	\$358.0 Million	2010	\$8.8 Billion
6	Lilly Endowment, Inc., IN	\$276.1 Million	2009	\$4.7 Billion
7	W. K. Kellogg Foundation, MI	\$270.0 Million	2010	\$7.2 Billion
8	The David and Lucile Packard Foundation, CA	\$260.6 Million	2010	\$5.9 Billion
9	The Susan Thompson Buffett Foundation, NE	\$247.9 Million	2010	\$2.5 Billion
10	Gordon E. and Betty Moore Foundation, CA	\$247.0 Million	2010	\$5.0 Billion
11	The Andrew W. Mellon Foundation, NY	\$245.8 Million	2010	\$5.2 Billion
12	The John D. and Catherine T. MacArthur Foundation, IL	\$220.8 Million	2010	\$5.6 Billion
13	The Wal-Mart Foundation, Inc., AR	\$204.9 Million	2010	\$36.1 Million
14	Greater Kansas City Community Foundation, MO	\$183.4 Million	2009	\$1.1 Billion
15	Silicon Valley Community Foundation, CA	\$154.2 Million	2009	\$1.7 Billion
16	The Simons Foundation, NY	\$149.6 Million	2009	\$1.5 Billion
17	The Community Foundation for Greater Atlanta, Inc., GA	\$142.1 Million	2009	\$650.6 Million

Source: The Foundation Center, February 22, 2011

America's Emerging Foundations

Top 35 U.S. Foundations by Total Giving



MacArthur is one of the nation's largest independent foundations. Through the support it provides, the Foundation fosters the development of knowledge, nurtures individual creativity, strengthens institutions, helps improve public policy and provides information to the public, primarily through support for public interest media.

Rank	Name/state	Total Giving	As of Fiscal Year End Date	Assets
18	The California Endowment, CA	\$140.4 Million	2009	\$3.0 Billion
19	Foundation To Promote Open Society, NY	\$140.0 Million	2009	\$2.2 Billion
20	The Rockefeller Foundation, NY	\$136.0 Million	2010	\$3.3 Billion
21	The Kresge Foundation, MI	\$133.3 Million	2010	\$3.0 Billion
22	The Starr Foundation, NY	\$132.3 Million	2009	\$1.2 Billion
23	California Community Foundation, CA	\$129.2 Million	2010	\$1.1 Billion
24	The Annenberg Foundation, CA	\$125.0 Million	2010	\$1.6 Billion
25	The New York Community Trust, NY	\$123.4 Million	2009	\$1.7 Billion
26	The Annie E. Casey Foundation, MD	\$122.7 Million	2010	\$2.7 Billion
27	Donald W. Reynolds Foundation, NV	\$120.3 Million	2009	\$663.9 Million
28	Eli & Edythe Broad Foundation, CA	\$120.0 Million	2010	\$1.6 Billion
29	Tulsa Community Foundation, OK	\$117.6 Million	2009	\$4.4 Billion
30	The Chicago Community Trust (IL)	\$110.6 Million	2009	\$1.5 Billion
31	The Duke Endowment (NC)	\$110.4 Million	2010	\$2.6 Billion
32	The American Art Foundation, Inc. (NY)	\$107.8 Million	2009	\$30.6 Million
33	The Michael and Susan Dell Foundation (TX)	\$107.1 Million	2009	\$981.4 Million
34	Charles Stewart Mott Foundation (MI)	\$107.0 Million	2010	\$2.2 Billion
35	Robert W. Woodruff Foundation, Inc. (GA)	\$98.1 Million	2010	\$2.6 Billion

Source: The Foundation Center, February 22, 2011

Online Giving in 2010

Did You Know?...

- 60% of big charities said Internet fundraising was stronger in 2010 than in 2009, according to the latest *Chronicle* survey.
- 6 of every 10 charities say they raised more money online in 2010 than they did in 2009.
- 2010 was a good year for online giving, as donations rose 34% for the nation's biggest charities.

- The 140 large non-profit groups that provided data for the past two years to *The Chronicle* raised a combined \$1.2 billion in online donations in 2010, compared with \$887 million in 2009.
- 20 groups in *The Chronicle's* survey saw their online donations more than double from 2009, largely as a result of giving for Haiti relief and recovery efforts. If giving to the 32 groups that raised money for Haiti are included in the tally, giving rose by more than 50%.
- 9 charities in *The Chronicle's* survey reported that they received individual gifts of \$100,000 or more online—and one of those was to Vanderbilt University for \$500,000.
 - Vanderbilt University, in Nashville, reported the largest online gift of any organization in the survey: \$500,000. It was part of a four-year, \$2 million pledge, but in 2011, the donor decided it was easier to make the payment online.
- The Leukemia & Lymphoma Society, in White Plains, N.Y. collected one-third of all its donations raised last year via the Internet.
 - The Leukemia & Lymphoma Society raised nearly \$79 million online, more than any other group, except the American Red Cross and United Way Worldwide, according to *The Chronicle's* survey.
- The slow economy has prompted many charities to focus their online solicitations on smaller gifts. In 2010 the average online gift was \$136, compared with \$146 in 2009.
 - Charities say they are attracting bigger numbers of donations as a result of the push for small donations, and they are benefiting from increased promotion of monthly gifts that donors can automatically charge to their checking account or credit card.

Online Giving

Top 20 Organizations by Amount Raised Online in 2010

	Organization	Sector	Amount Raised Online in 2010
1	United Way Worldwide	Social Service	\$359.8 Million
2	American Red Cross	Social Service	\$188.6 Million
3	Leukemia & Lymphoma Society	Health	\$78.9 Million
4	National Multiple Sclerosis Society	Health	\$73.4 Million
5	Doctors Without Borders USA	International	\$51.4 Million
6	American Heart Association	Health	\$36.9 Million
7	World Vision	International	\$36.9 Million
8	Samaritan's Purse	International	\$33.2 Million
9	United States Fund for UNICEF	International	\$32.5 Million
10	Partners in Health	Health	\$28.0 Million
11	Salvation Army	Social Service	\$27.04 Million
12	Alzheimer's Association	Health	\$22.5 Million
13	Catholic Relief Services	International	\$21.2 Million
14	Cystic Fibrosis Foundation	Health	\$16.3 Million
15	Autism Speaks	Health	\$15.2 Million
16	Islamic Relief USA	International	\$14.3 Million
17	Save the Children	International	\$14.0 Million
18	Young Life	Religious	\$13.4 Million
19	Dana-Farber Cancer Institute	Health	\$11.9 Million
20	Mercy Corps	International	\$11.1 Million

Source: The Chronicle of Philanthropy

Social Media for Non-Profits

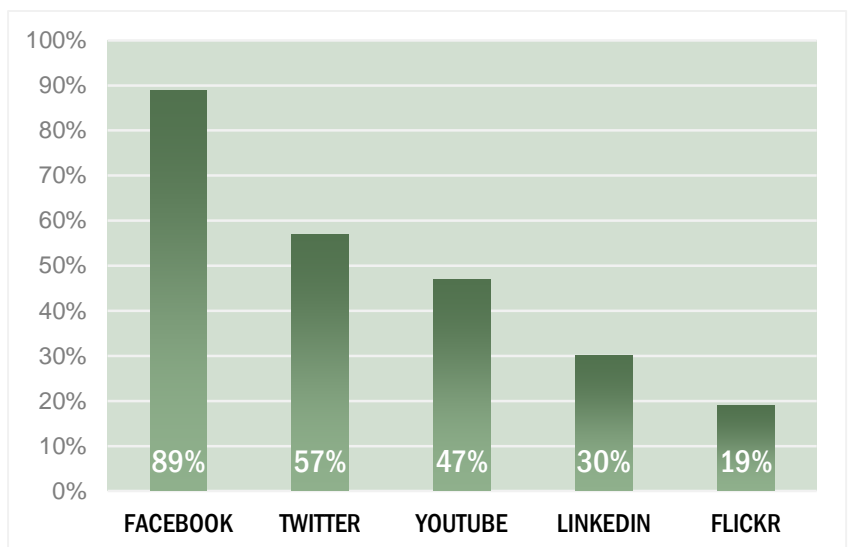
Social Media Implications for Non-Profits

SOCIAL MEDIA BEST PRACTICES



- Brand your social media
- Integrate, interact and engage
- Post regularly
- Make it easy to share
- Take advantage of management tools

- In 2009, social networking use surpassed email use.
- Social media provides opportunities for marketing, engagement, education, and advocacy.
- The number of organizations raising \$100,000 or more per year on social networks doubled in 2010, from 0.2% to 0.4%, but obviously this still represents a critically thin slice of the sector.

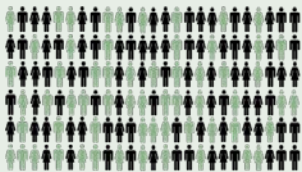


Volunteerism Today

Number of Volunteers in Millions of People 2002 - 2008

The Corporation for National and Community Services estimated that...

62 MILLION



ADULTS VOLUNTEERED IN 2008

...This is a tremendous resource for non-profit organizations!



- The Independent Sector estimates that volunteers provided approximately 8.1 billion hours of service in 2009.
- At \$20.85 per volunteer hour, the total value of volunteer time to non-profit institutions is approximated at \$169 billion.

Volunteerism Today

Percent of Volunteers in Millions of People 2002 - 2008



Throughout my life, I've seen the difference that volunteering efforts can make in people's lives. I know the personal value of service as a local volunteer.

–Jimmy Carter



- The number of volunteers has increased in recent years as the population above age 18 has increased. However, the rate of people volunteering as a percentage of all adults declined slightly in 2008 (the most recent data available).
- Media and organization-level reports about 2009 volunteering suggest that many of the millions of people whose work hours were reduced or who lost their jobs during the recession volunteered.

Volunteerism Today

The Wealthy as Volunteers

**IN 2009 HIGH NET WORTH
INDIVIDUALS
VOLUNTEERED
MORE THAN.....**



200 HOURS = \$75,662

- ***Higher levels of volunteering by high net-worth households are associated with higher total giving levels.*** High net worth individuals who volunteered more than 200 hours a year gave the most on average to charity (\$75,662). In 2009, high net worth individuals who volunteered more than 200 hours gave on average \$75,662, whereas in 2007 these high frequency volunteers gave on average \$136,906.
- ***More than three-quarters of high net worth individuals volunteered in 2009.*** This represents an increase of 3.8% from 2007. This was not found to be statistically significant. That is, 63.4 million Americans gave 8.1 billion hours of volunteer service. Based on an estimated dollar value of \$20.85 per hour for 2009, Americans gave \$169 billion of donated time in 2009.
- ***On average, high net worth individuals volunteered 307 hours in 2009.*** The median number of hours volunteered was 200 hours. The largest share of high net worth individuals (39.3%) volunteered more than 200 hours.

Volunteerism Today

The Wealthy as Volunteers

**43.5% HIGH NET WORTH
INDIVIDUALS
VOLUNTEERED FOR...**

**EDUCATION and
YOUTH SERVICE**



- **High net worth individuals were most likely to volunteer for educational or youth service organizations in 2009 (43.5%).**
- Nearly 39% of high net worth individuals volunteered for social/community service organizations, civic/political/international organizations, and religious organizations in 2009 (38.7%, 38.6% and 38.6%, respectively)
- More than 21% of high net worth individuals volunteered for health organizations.
- Environmental and animal care organizations and public safety organizations received the lowest percentage of volunteers (11.4% and 2.3%, respectively).
- **When high net worth individuals volunteered for sports/hobby/arts and culture organizations, they volunteered an average of 130 hours a year.**
- Wealthy volunteers spent an average of 125 hours volunteering for religious organizations. They spent, on average, 115 hours volunteering for social/community service organizations and civic/political organizations and 94 hours for environment and animal care organizations.

Death and Taxes

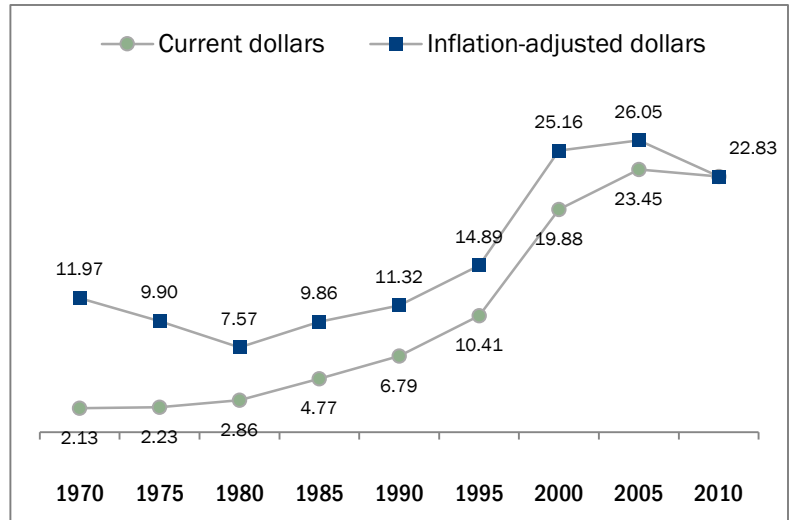
Giving by Bequest: 1970 - 2010

\$22.83 BILLION



MAJORITY OF PLANNED GIFTS ARE TO PRIVATE FOUNDATIONS

BEQUESTS COMPRISE 80% OF ALL PLANNED GIFTS



- Charitable bequests reached an estimated \$22.83 billion in 2010, an 18.8% increase from the revised giving estimate of \$19.22 billion for 2009.
- Throughout the last decade, an average of 45% of the amount contributed by bequest went to foundations, according to IRS estate tax returns. The balance is divided among all other types of charities. Assuming this pattern continues to hold true, an estimated \$12.56 billion was bequeathed to charities other than foundations in 2010.
- Affected annually by changing scope of tax legislation:
 - The 2001 reduction in capital gains tax resulted in an increase of bequests.
 - For 2010 and 2011 the estate tax exemption is \$5 million and the highest rate is 35%.

Source: Giving USA Foundation (Giving USA 2011)

Death and Taxes

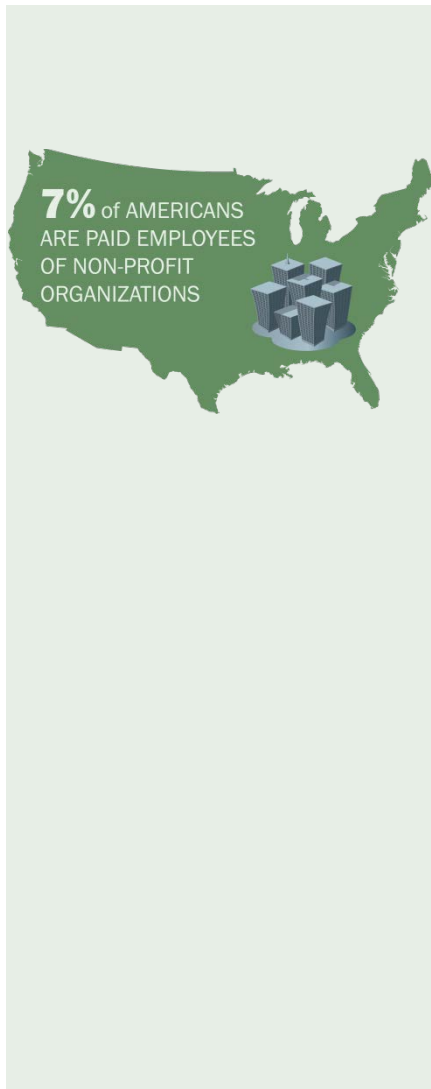
Taxes and Philanthropic Giving 2009



- According to the *2010 Study of High Net Worth Philanthropy* by Bank of America, 67% of wealthy households would somewhat or dramatically decrease their charitable contributions if they received zero income tax deductions for their donations. This compares to 47% in the *2008 Study*.
- In 2009, 43% of wealthy households would somewhat or dramatically increase the amount they leave to charity in an estate plan if the estate tax were repealed; compared to 36.1% in 2008.

Leading Non-Profits

Snapshot of Charitable Organizations



EDUCATION



ARTS/CULTURE/HUMANITIES



HUMAN SERVICE



HEALTHCARE



ENVIRONMENTAL



- According to the National Center for Charitable Statistics, there are 1,032,579 registered 501(c)(3) public charities in the U.S. (*National Center for Charitable Statistics*)
- The largest sources of non-profits revenue and support are comprised of Dues, Fees and Charges (37.5%); Government Support (31.3%); Private Contributions (19.9%); and Miscellaneous Revenue (11.4%). (*Internal Revenue Service*)
- The non-profit sector employs 10.2 million people, accounting for 6.9% of the total U.S workforce. (*National Center for Charitable Statistics*)

Leading Non-Profits

Types of Organizations on the 2010 Philanthropy 400



Source: The Chronicle of Philanthropy

Leading Non-Profits

Top Charities and What They Raised in 2010

Rank (2010)	Charity	Private Dollars Raised	Type of Charity
1	United Way Worldwide, Alexandria, VA	\$3.8 Billion	Social Service
2	Salvation Army, Alexandria, VA	\$1.7 Billion	Social Service- Humanitarian Relief
3	AmeriCares Foundation, Stamford, CT	\$1.1 Billion	International-Refugee Relief
4	Feed the Children, Oklahoma City	\$1.1 Billion	International Hunger Relief
5	Food for the Poor, Coconut Creek, FL	\$1.0 Billion	International-Worldwide Relief to Poor
6	Fidelity Charitable Gift Fund, Boston, MA	\$952.6 Million	Donor-Advised Funds
7	American Cancer Society, Atlanta, GA	\$897.6 Million	Health
8	World Vision, Federal Way, WA	\$870.4 Million	International-Children's Relief
9	Catholic Charities USA, Alexandria, VA	\$811.6 Million	Religious-Social Service
10	The Y, Chicago, IL	\$774.7 Million	Social Service

Source: The Chronicle of Philanthropy

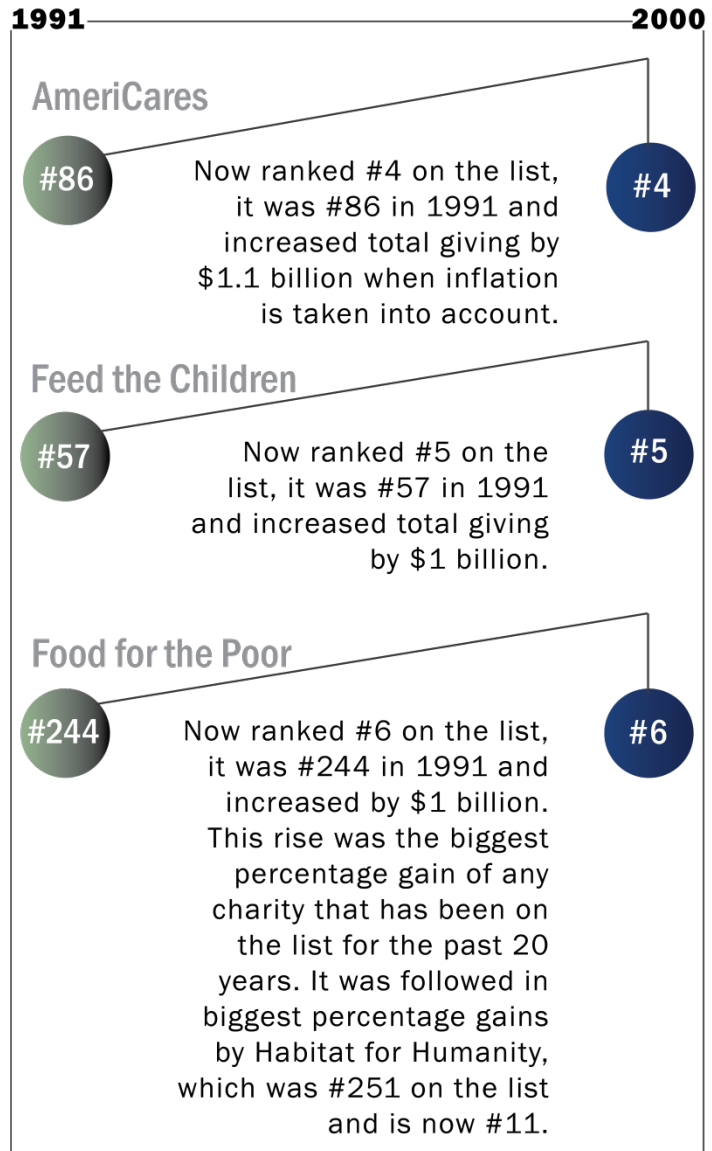
Leading Non-Profits

Fastest-Growing Charities: The Billion-Dollar Club

THE BILLION-DOLLAR CLUB...

Three U.S. organizations that have increased their private donations by \$1 billion or more over the past two decades.

Source: The Chronicle of Philanthropy



Source: The Chronicle of Philanthropy

Leading Non-Profits

Philanthropy 400 at 20: By the Numbers

1991

\$28 Billion

Total amount raised in 1991 by charities on the list (adjusted for inflation)

2000

\$69 Billion

Total amount raised by charities on the 2010 list

\$1 Billion

Amount raised by the top-ranking charity in 1991 (Salvation Army)

\$3.8 Billion

Amount raised by the top-ranking charity in 2010 (United Way Worldwide)

\$43 Million

Median raised in 1991

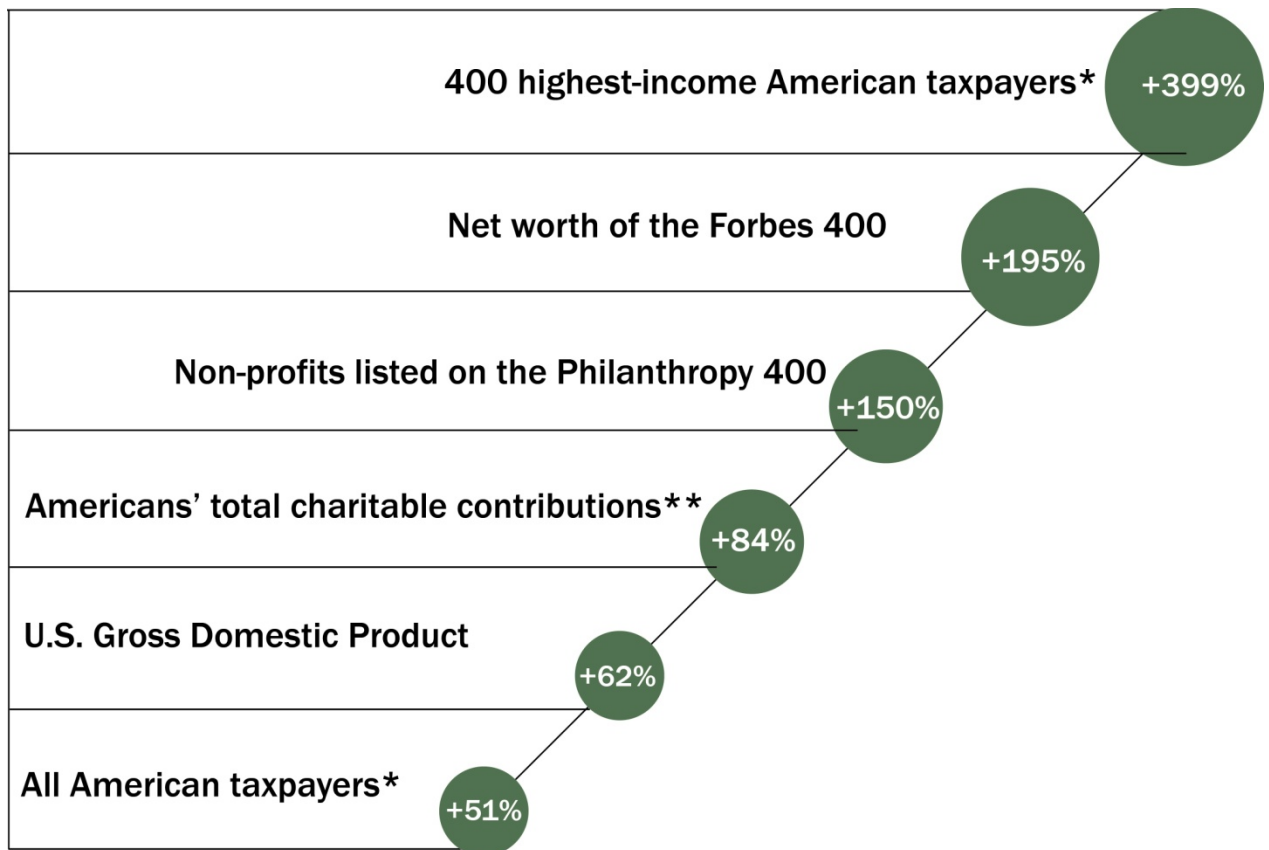
\$99 Million

Median sum raised by the organizations in the 400 in 2010, meaning that half raised more

Source: The Chronicle of Philanthropy

Leading Non-Profits

How Fast are America's Largest Charities Growing?



* from 1992 to 2007

** from 1991 to 2009

Note: Growth for each item has been adjusted for inflation

Thank you

Thank you to the following sources for the data used to compile the *Snapshot of Today's Philanthropic Landscape*:

- Bank of America
- Bureau of Economic Analysis
- Business Week
- Capgemini
- Forbes
- Giving USA Foundation
- Independent Sector
- Internal Revenue Service
- Merrill Lynch
- National Center for Charitable Statistics
- The Center on Philanthropy at Indiana University
- The Chronicle of Philanthropy
- The Foundation Center
- USA Today

About CCS

FUNDRAISING...

The act or process of raising funds, as for non-profit organizations or for a political cause.

- **Who We Are.** Established in 1947, CCS designs and implements successful, transformative development initiatives for leading non-profits across all sectors and throughout the world.
- **Who We Serve.** Our client base spans all recognized non-profit sectors, including education, health, faith-based initiatives, cultural, global initiatives, associations, environment/conservation and social. CCS does not work for political or for-profit organizations.
- **What We Do.** CCS provides campaign design and management, development and strategic planning services to diverse non-profit institutions worldwide. Specific services include feasibility and planning studies; capital and endowment campaign planning and direction; development assessments; prospect engagement programs, research and screening; research analytics, predictive modeling and benchmarking; Board development and training; interim development office management; custom learning; corporate and strategic partnership development; and executive consultation.
- **Our Leadership.** CCS is an independent firm wholly owned by our managing partners. Our leadership team brings a wealth of expertise to every engagement.
- **Our Advantage - Measurable Results.** Trust, innovation and results are the hallmarks of our practice. CCS works in partnership with development staff and organizational leadership to strengthen development capacity. Our focus on sound fundraising principles, combined with strategic and innovative counsel, translates into significant ROI and projects that consistently outperform.
- **In Summary - Global Reach, Personalized Guidance.** Our geographic scope and structure allows us to leverage the full resources of a global consulting firm while also providing personalized, direct guidance and leadership for each client engagement.

CCS Leadership

Robert Kissane
President
rkissane@ccsfundraising.com

Robert C. Happy, Jr.
Executive Vice President and Chief Operating Officer
rchappy@ccsfundraising.com

Joseph F.X. Lee
Chief Administrative Officer
jlee@ccsfundraising.com

Nicole Thigpen
Chief Strategy Officer
nthigpen@ccsfundraising.com

Frederic J. Happy
Senior Vice President and Managing Director
fjhappy@ccsfundraising.com

Raymond P. Happy
Senior Vice President and Managing Director
rhappy@ccsfundraising.com

Thomas Kissane
Senior Vice President and Managing Director
tkissane@ccsfundraising.com

Bernadette Lane
Senior Vice President and Managing Director
blane@ccsfundraising.com

Brian Nevins
Senior Vice President and Managing Director
bnevins@ccsfundraising.com

Robert Rice
Senior Vice President and Managing Director
rrice@ccsfundraising.com

Peter Hoskow
Vice President, Managing Director – Midwest
Operations
phoskow@ccsfundraising.com

Eric Javier
Operational Vice President
ejavier@ccsfundraising.com

Chris Looney
Operational Vice President
clooney@ccsfundraising.com

Charles Michaud, Jr.
Operational Vice President
cmichaud@ccsfundraising.com

Erica Campbell
Regional Vice President
ecampbell@ccsfundraising.com

Luke Driscoll
Regional Vice President
ldriscoll@ccsfundraising.com

Lucille Ferraro
Regional Vice President
lferraro@ccsfundraising.com

Gregory J. Hagin
Regional Vice President
ghagin@ccsfundraising.com

Bridget Keane
Regional Vice President
bkeane@ccsfundraising.com

Steve Manno
Regional Vice President
smanno@ccsfundraising.com

Sevil Miyhandar
Regional Vice President
smiyhandar@ccsfundraising.com

Daniel H. Nisbet
Regional Vice President
dnisbet@ccsfundraising.com

Kathleen O'Connor
Regional Vice President
koconnor@ccsfundraising.com

Chad Peddicord
Regional Vice President
cpeddicord@ccsfundraising.com

Linda Schaefer Cameron
Regional Vice President
lcameron@ccsfundraising.com

Michael Madnick
Senior Consultant, International Philanthropy
mmadnick@ccsfundraising.com

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Fundraising • Development Services • Strategic Consulting

CCS Corporate Headquarters
461 Fifth Avenue, 3rd Floor
New York, NY 10017
212.695.1175 | 800.223.6733
212.967.6451 Fax
www.ccsfundraising.com



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