

Snapshot of Today's Philanthropic Landscape

Helping Extraordinary People Champion Inspirational Causes

2nd EDITION | © 2013 CCS



Fundraising • Development Services • Strategic Consulting

Content

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.

■ Letter from CCS President Robert Kissane	3
■ Introduction	4
■ Individual Giving In America	
– Overall Giving	10
– High Net Worth Giving	13
– Ultra Affluent Giving	18
■ Bequests	31
■ Foundation Giving	35
■ Corporate Giving	39
■ Non-Profit Review	
– Leading Non-Profits	46
– Board Giving	48
– Online Giving	49
– Social Media Giving	51
– Millennial Giving	52
– Volunteerism	53
– Tax Code Changes	54

Source: Random House Dictionary

Snapshot of Today's Philanthropic Landscape



Robert Kissane
CCS President

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This second edition of CCS's *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 five sections. Topics include an overview of giving in America; details about our nation's largest givers; a snapshot of corporate and foundation giving and bequests; online and social media giving; millennial giving; volunteerism; and details about the top 400 charities.

As members of a strategic consulting and fundraising management company working with leading non-profits worldwide, we spot trends in philanthropy, analyze their importance, and translate these trends into effective strategies for non-profits. This past year, members of our firm collectively spoke with over 6,200 non-profit leaders and major donors through our work on campaigns, assessments, feasibility studies, and with Boards.

We've developed this digest as a reference and encourage you to respond with feedback, suggestions and dialogue as we continue this conversation on philanthropy in America. 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 at the end.

Philanthropy In America

AMERICANS GAVE

\$316.23 Billion IN 2012...



72%

WAS GIVEN BY
INDIVIDUALS

Individuals

\$228.93 (72%)

Bequests

\$23.41 (7%)

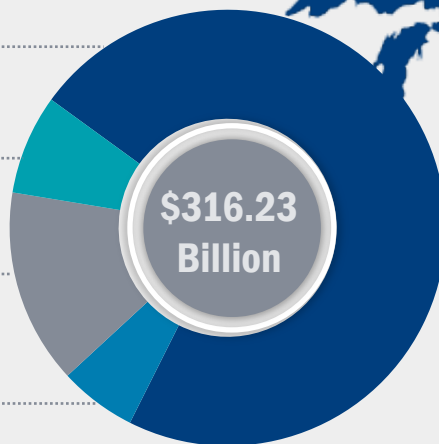
Foundations

\$45.74 (15%)

Corporations

\$18.15 (6%)

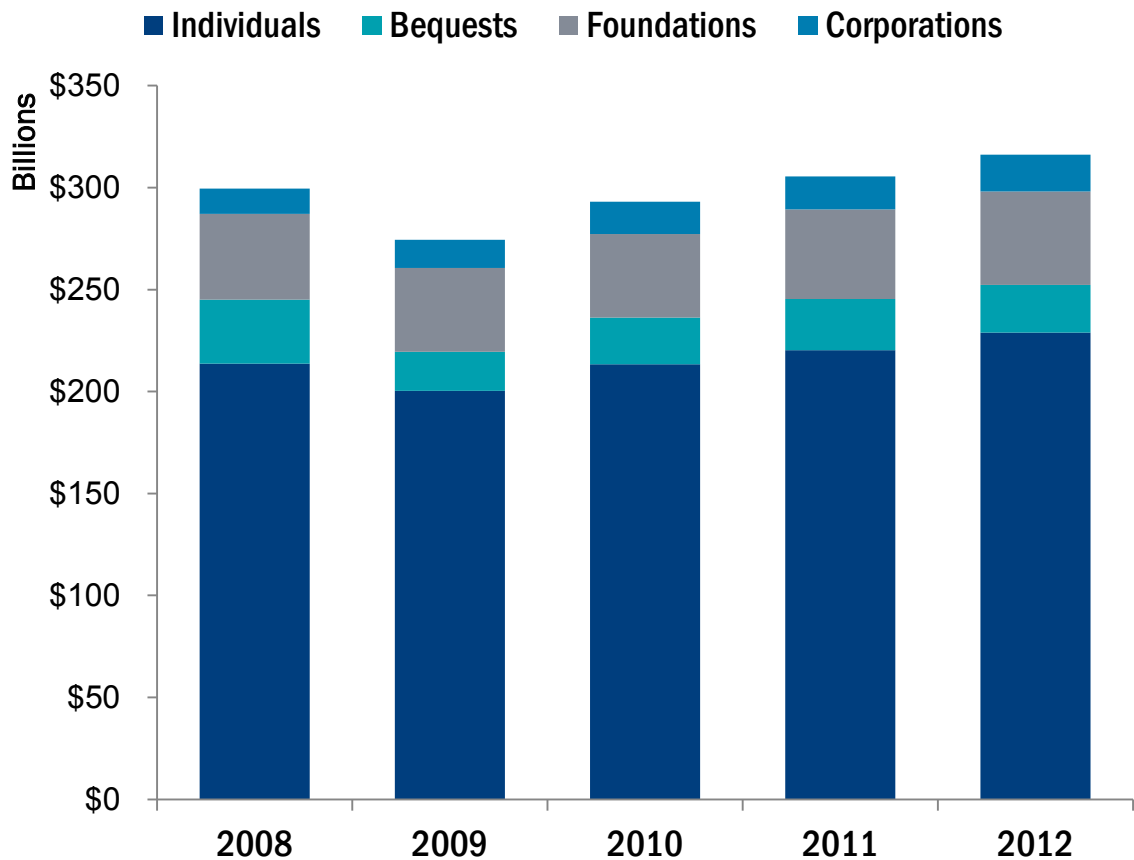
**\$316.23
Billion**



Philanthropy In America 2008-2012

Where The Money Came From Over The Last 5 Years

In 2012, the \$316.23 billion Americans gave reflects a 3.5% increase from 2011



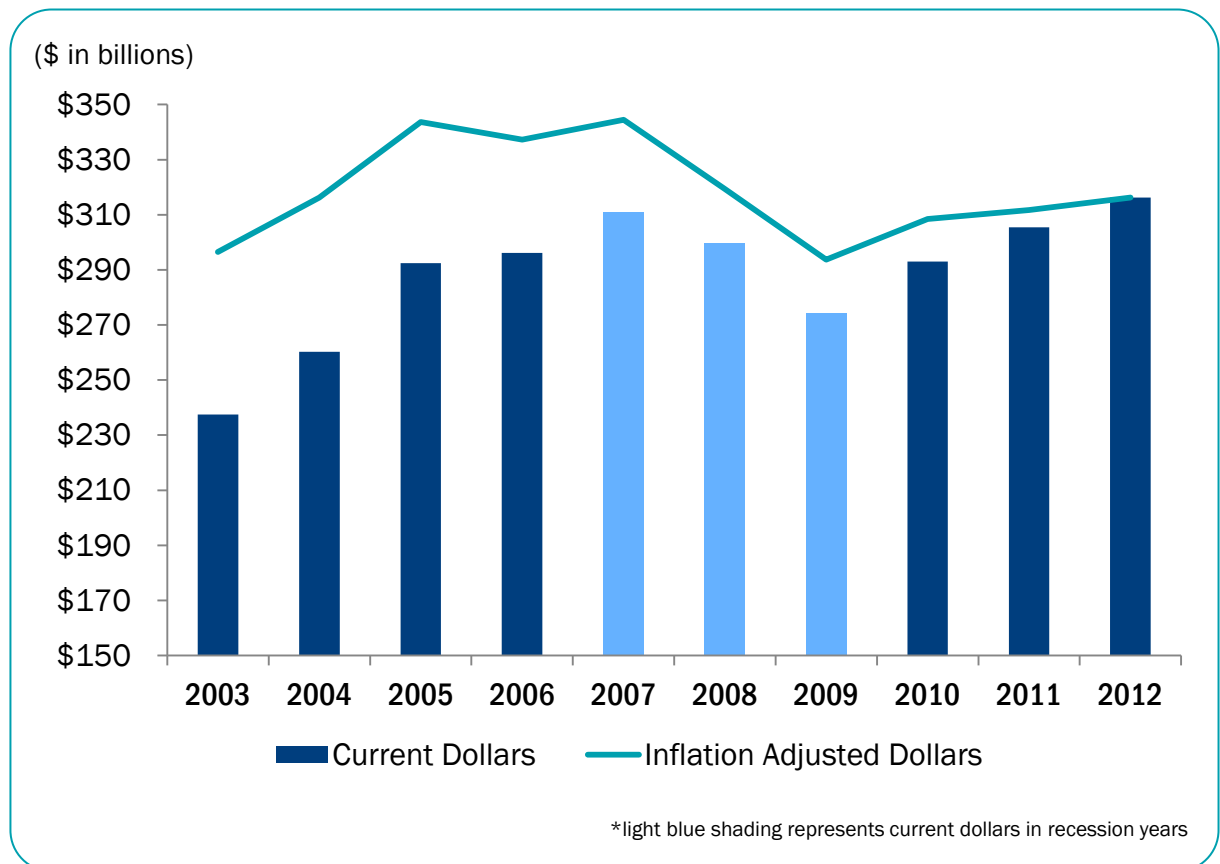
Years	Individuals	Bequests	Foundations	Corporations	Total
2008	\$213,760,000,000	\$31,240,000,000	\$42,210,000,000	\$12,400,000,000	\$299,610,000,000
2009	\$200,370,000,000	\$19,120,000,000	\$41,090,000,000	\$13,790,000,000	\$274,370,000,000
2010	\$213,300,000,000	\$22,970,000,000	\$40,950,000,000	\$15,820,000,000	\$293,040,000,000
2011	\$220,260,000,000	\$25,180,000,000	\$43,830,000,000	\$16,180,000,000	\$305,450,000,000
2012	\$228,930,000,000	\$23,410,000,000	\$45,740,000,000	\$18,150,000,000	\$316,230,000,000

10 Year Overview

Total Giving In The U.S. Has Increased By \$78.78 Billion (In Current Dollars) In the Last Decade

- The average rate of increase in charitable giving in current dollars for the 3 years prior to the Great Recession (2008) was 6.3% and in the last 3 years, 4.8%.
- The average rate of increase in charitable giving in inflation-adjusted dollars for the 3 years prior to the Great Recession (2008) was 2.9% and in the last 3 years, 2.6%.
- If charitable giving continues to grow at the current rates, giving will not reach the high of \$344.48 billion in 2007 for at least six years (adjusted for inflation).

10 Year Total Giving



Where Does The \$316.23 Billion Go?

Religious Organizations Receive The Largest Share Of Charitable Dollars 1972-2012

In Billions



32%

WAS RECEIVED
BY RELIGIOUS
ORGANIZATIONS
IN 2012

1	Religion		32%	\$101.54
2	Education		13%	\$41.33
3	Human Services		13%	\$40.40
4	Foundations		10%	\$30.58
5	Health		9%	\$28.12
6	Public Society Benefit		7%	\$21.63
7	International Affairs		6%	\$19.11
8	Arts, Culture & Humanities		5%	\$14.44
9	Individual & Unallocated*		3%	\$10.78
10	Environmental & Animal		3%	\$8.30

(\$ in billions - all figures are rounded)

= Includes gifts to non-grantmaking foundations, deductions carried over, contributions to organizations not classified in a subsector, and other unallocated contributions

* Individuals and Unallocated combined

Giving On The Rise Since Recession's End In 2009

Historically, Charitable Giving Rises One-Third As Quickly As The Stock Market

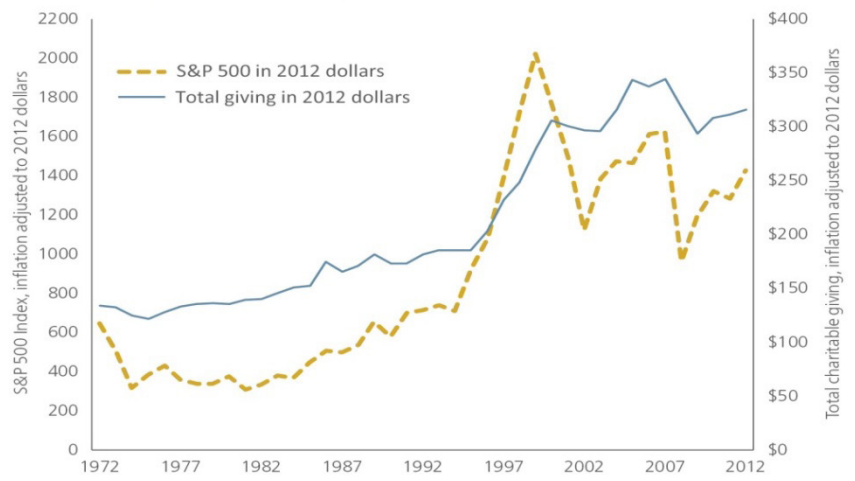
A Decade of Million-Dollar Gifts¹

- ▶ Like the trend in total charitable giving – giving at the million-dollar-plus level declined from 2001 to 2003, and again in 2008 to 2010.
- ▶ A study of several macroeconomic factors, including the S&P and unemployment rate, showed that individual giving at the million-dollar-plus level is directly affected by the economic climate.
- ▶ Foundations, which tend to rely on 3-year rolling averages to determine giving, and corporations, where profits are the main driver of budgeted philanthropic giving, are less influenced by overall macroeconomic conditions.

Total charitable giving has increased every year since 1971 except in 1987 (after the tax reform act) and after 2008, and 2009 (after the economic crisis).²

As the stock market climbs since 2009, and the economy improves, charitable giving is on the rise.

Total charitable giving graphed with the Standard & Poor's 500 Index, 1972–2012
(in inflation-adjusted dollars, 2012 = \$100)



Source: Giving USA Foundation (Giving USA 2013)

Source:

¹ 'A Decade of Million-Dollar Gifts: The Impact of the Economy,' CCS Philanthropy 360 Blog, April 30, 2013

² Giving USA Foundation (Giving USA 2012)

Individual Giving

Individuals Donated \$228.93 Billion In 2012

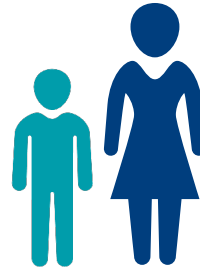


\$228.93
BILLION

IS ESTIMATED FOR
INDIVIDUALS FROM
CHARITABLE GIVING IN
2012¹

84%

of Americans
have donated
money to a
charitable
cause or
organization in
the past 12
months²

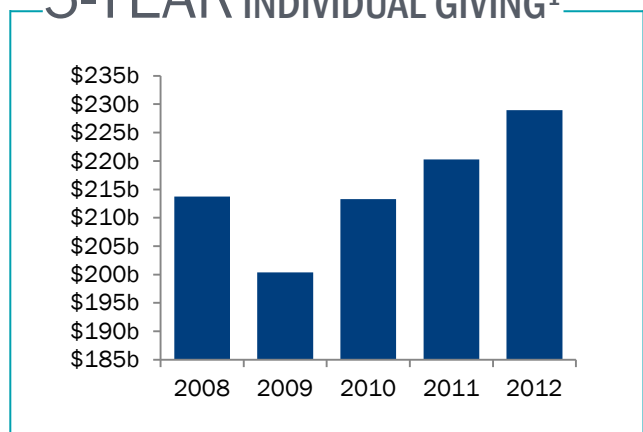


Much of this went to local charities

40%

of surveyed donors have, in the
last five years, shifted more of
their support to non-profits
working locally to benefit their own
communities.³

5-YEAR INDIVIDUAL GIVING¹



Source: ¹Giving USA Foundation (Giving USA 2013)
²Gallup Poll, 2008; ³The Cygnus Donor Survey 2012

Why Do People Give?

Most Donors Give Based On The Impact Of Their Gift

- 1 People are inherently generous
- 2 People give to people
- 3 People respond to a meaningful mission
- 4 People give in relation to the person who asks
- 5 People respond to specific requests for support
- 6 People respond to successful and beneficial programs
- 7 People give in a campaign atmosphere – annual or capital
- 8 Most people want, and all deserve recognition for their gifts
- 9 People relate a gift to a specific need or project
- 10 People give to positive, enthusiastic solicitors
- 11 People give most often to their peers
- 12 People give because *they are asked*



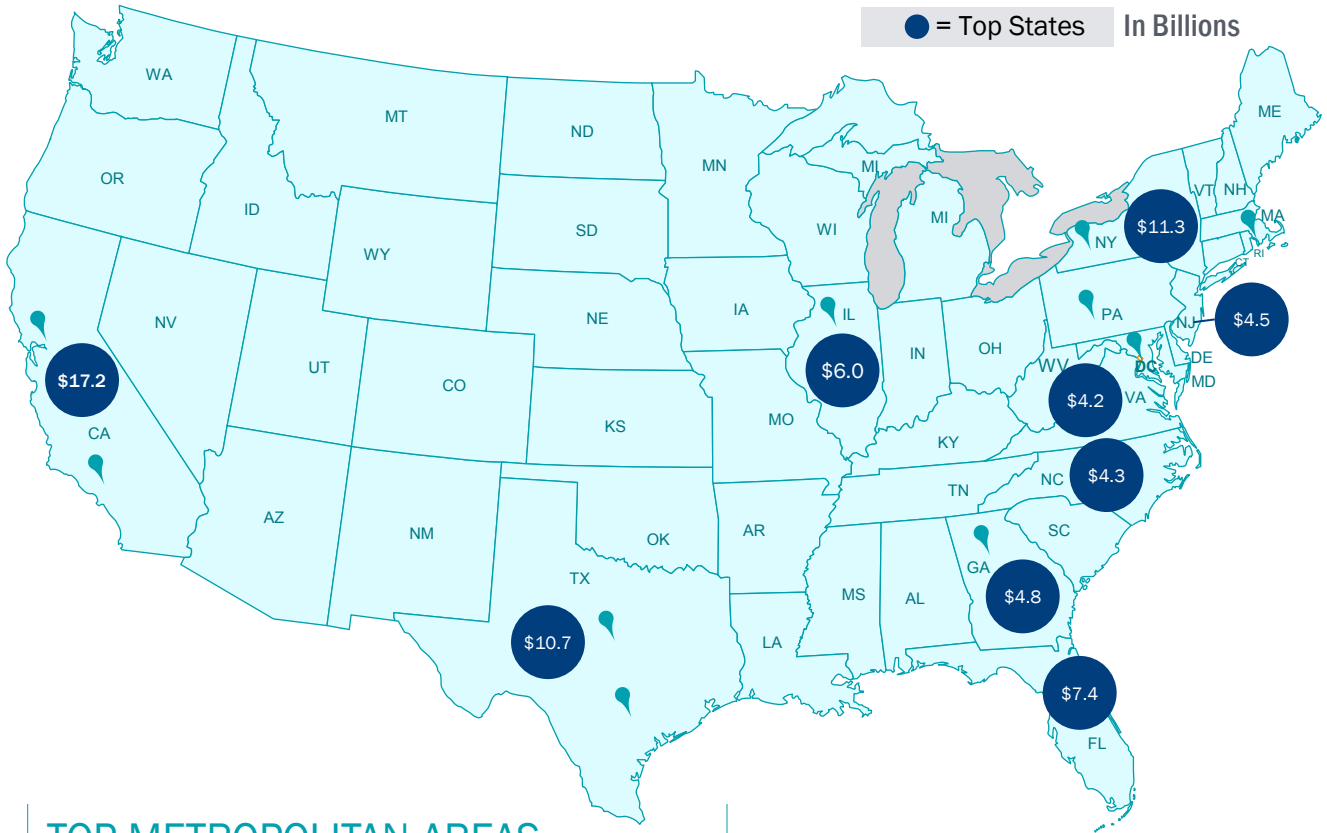
Data based on CCS interviews with over 6,200 non-profit stakeholders during 2012.

ORIGINAL RESEARCH BY:



Source: CCS Fundraising, 2013

How America Gives: The Most Generous Cities And States



TOP METROPOLITAN AREAS BY GIVING

Rank	City	Total Contributions
1	New York*	\$12.9 Billion
2	Los Angeles	\$6.7 Billion
3	Chicago	\$5.1 Billion
4	Washington, DC*	\$4.3 Billion
5	Dallas-Forth Worth	\$3.7 Billion
6	Atlanta	\$3.2 Billion
7	Houston	\$3.1 Billion
8	San Francisco	\$3.1 Billion
9	Philadelphia*	\$3 Billion
10	Boston	\$2.5 Billion

* Includes entire metropolitan areas across nearby states

POINTS TO NOTE...

- **Middle-class Americans** often give a far greater share of their discretionary income to charities than others.
- **The wealthy** who live in more economically diverse communities give a larger percentage of their income to charities.
- **State policies** that promote giving can make a significant difference.
- At least 13 states now offer **special tax benefits** to charity donors.

Disclaimer: The Chronicle of Philanthropy's *How America Gives* analyzes individual giving numbers directly from 2008 IRS tax records. This totaled \$135.3053 billion across America in 2008. These numbers differ from those for individual giving in *Giving USA*, which estimates historical trends in itemized giving (\$299.61 billion in 2008).

Source: The Chronicle of Philanthropy: *How America Gives*

95% Of Millionaire Households Give To Charity

HNW Households Gave On Average 8.7% Of Their Incomes To Charity In 2011²



MILLIONAIRES

OR HNW INDIVIDUALS
ARE THOSE WITH
LIQUID ASSETS OF

\$1 MILLION+

60-75%

of all U.S.
philanthropy comes
from HNW
individuals who
represent just 3% of
the total population¹

95%

of HNW households
donated to at least
one charity in 2011²

3.44

There were 3.44
million HNW
individuals in the
U.S. in 2012 with
estimated wealth
totaling \$11.8
trillion³

68%

of HNW households
give to local
charities in their
states⁴

Source: ¹New York Times, The Rich Are Different From You and Me. They Give More., November 10, 2010; ²Bank of America 2012 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University; ³Cappgemini, World Wealth Report 2013; ⁴Bank of America 2010 Study of High Net Worth Philanthropy

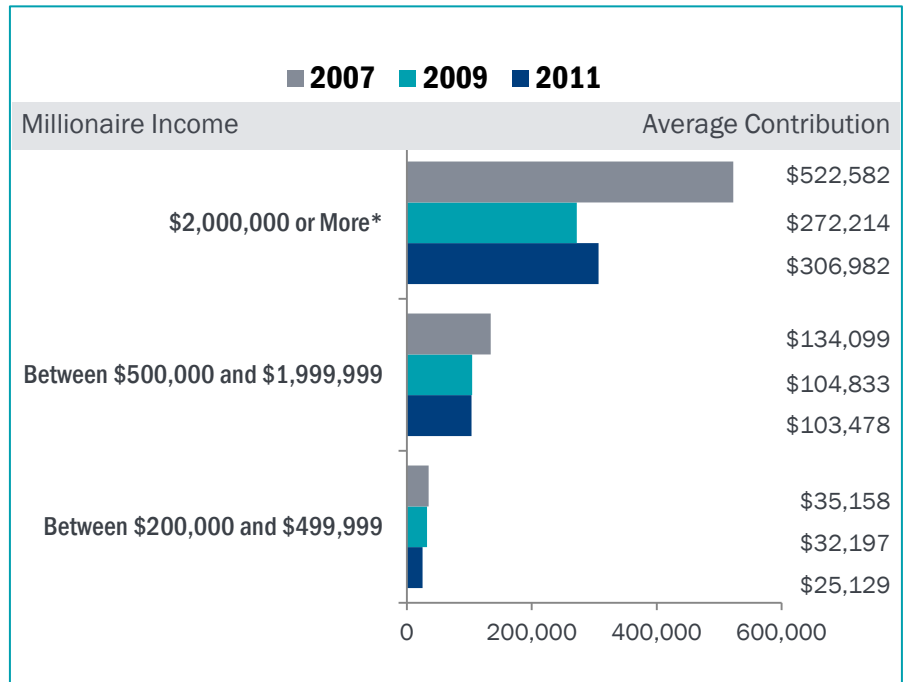
How Do Millionaires Give?

Millionaire Gift Size Trends Up Since 2009



IN 2011, AVERAGE GIVING BY HNW HOUSEHOLDS WITH ANNUAL INCOMES BETWEEN \$200,000 AND \$499,999 WAS **\$25,129**

Average Giving by HNW Households by Income Level in 2007, 2009, and 2011



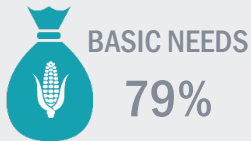
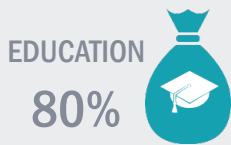
* May not be statistically meaningful because, in some years, this group contains fewer than 50 respondents.

Source: Bank of America 2012 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University

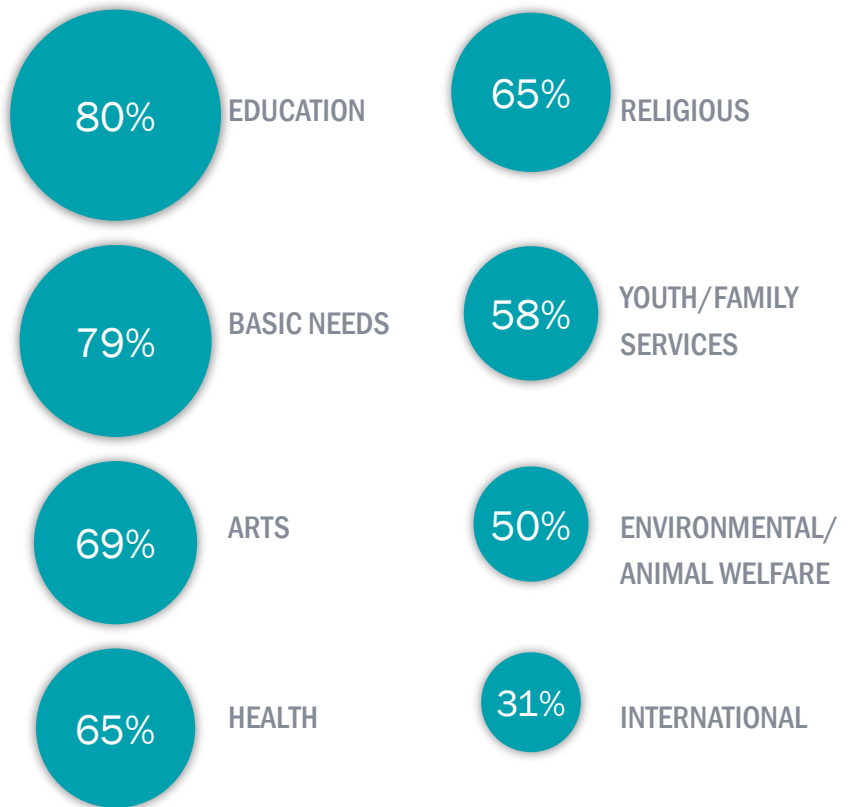
Where Do Donations From Millionaires Go?

Education And Basic Needs Were Top Giving Categories In 2011

TWO CHARITABLE CATEGORIES...



received donations from the highest percentage of HNW households in 2011



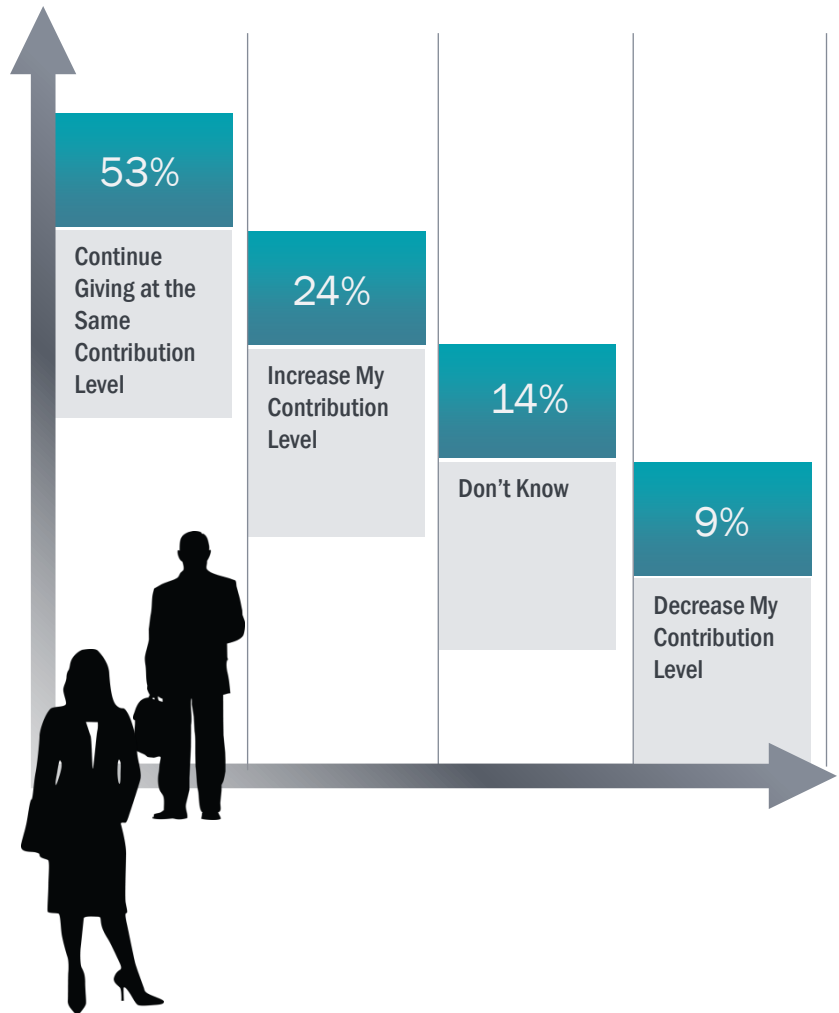
Source: Bank of America 2012 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University

What's The Giving Forecast For Millionaires?



53%

OF HNW HOUSEHOLDS reported that they plan to give at the same level in the next three to five years as they did in 2011



Source: Bank of America 2012 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University

Why Do HNW Donors Give?

Reasons Why Donors Give

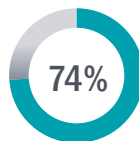
58%

OF WEALTHY HOUSEHOLDS

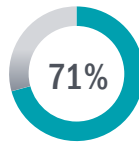
who stop giving to a charity attribute the change to no longer feeling connected to the organization¹

In 2011, for every \$100 gained from new donors, organizations lost \$100 through gift attrition (net gain of 0 for giving). This number is a decrease from the previous 4 years, but still significantly higher than pre-recession.²

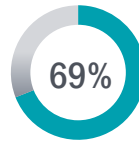
Why HNWIs Continue to Give



Gift will make a difference



Feel financially secure



Support the same causes annually



Give to an efficient organization

91%

of HNW households reported having confidence in the ability of non-profit organizations to solve societal or global problems³

Source: ^{1,3}Bank of America 2012 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University; ²AFP's 2012 Fundraising Effectiveness Project Report

The Top 50 Philanthropists In 2012

Who They Are And How They Give

TOTAL GIVING
\$7.4
BILLION

MEDIAN GIFT
\$49.6
MILLION

The Philanthropy 50 gave \$7 of every \$10 last year to their alma maters, to hospitals, to cultural groups, and to their own foundations

2012's Philanthropy 50 donors provided more than \$1 billion to Community Funds — a sum equal to the total that top donors provided in the previous decade

PHILANTHROPY
50

Stats on the 50 Largest 2012 Donors

11 made their money in finance, more than any other line of work

6 made their money in technology (more in 2012 than any other year)

19 have appeared on the list more than once

1 couple has appeared on the list every year since 2000

20 of the donors live in California



30 of the gifts by these top donors went to organizations in New York

44 are men

6 inherited their wealth

7 left bequests

11 have signed the Giving Pledge to donate at least half their wealth

Source: The Chronicle of Philanthropy, Philanthropy 50, 2013

Where The Philanthropy 50 Gave In 2012

Philanthropy 50 Primary Causes¹

Cause	Amount of Gifts	# of Gifts
Foundations	\$3.7 Billion	9
Schools, Colleges, and Universities	\$1.5 Billion	41
Community Foundations	\$1.0 Billion	7
Hospitals and Medical Centers, Medical Research, Science, and Health Charities	\$461.4 Million	15
Museums and Libraries	\$193.5 Million	10
Sports and Recreation	\$163.0 Million	4
Human-Service Groups	\$120.0 Million	4
Historic Preservation	\$10.7 Million	3
Arts Groups	\$2.0 Million	2
Total	\$7.1 Billion	95

Donations By The Philanthropy 50

\$150 Million

Mount Sinai School of Medicine
Carl C. Icahn

\$100 Million

Central Park Conservancy
John and Jenny Paulson

\$30 Million

Northeastern University
Richard D'Amore

\$30 Million

Northeastern University
Alan McKim

\$12 Million

Boston College
High School
Patrick and Tandra Cadigan

Source: ¹The Chronicle of Philanthropy, Philanthropy 50, 2013

Who Are America's Top Donors?

America's Largest Givers: Aggregate Philanthropy 50 Giving From 2008-2012

5 Year Rank (2008-2012)	Donor	Primary Wealth	Giving Pledge	Years on List (2008-2012)	Giving Recent 5 Years (2008-2012)
1	Margaret A. Cargill†	Family Wealth		1	\$6,000,000,000
2	Leona M. Helmsley†	Family Wealth		1	\$5,200,000,000
3	James LeVoy Sorenson†	Invention		1	\$4,500,000,000
4	Warren Buffett	Investments	Yes	1	\$3,100,000,000
5	Michael R. Bloomberg	Media and entertainment	Yes	4	\$1,079,480,000
6	Peter G. Peterson and Joan Ganz Cooney	Finance	Yes	1	\$1,015,500,000
7	Paul G. Allen	Technology	Yes	5	\$854,850,316
8	George Soros	Finance		3	\$817,000,000
9	Stanley F. and Fiona B. Druckenmiller	Finance		1	\$705,000,000
10	Mark Zuckerberg and Priscilla Chan	Technology	Yes	2	\$598,800,000
11	John M. Templeton†	Finance		1	\$573,000,000
12	John D. and Laura Arnold	Finance	Yes	2	\$524,400,000
13	William S. Dietrich II†	Manufacturing		1	\$500,000,000
14	Eli and Edythe Broad	Finance	Yes	5	\$452,000,000
15	Harold Alfond†	Manufacturing		1	\$360,000,000
16	William H. (Bill) III and Melinda F. Gates	Technology	Yes	1	\$350,000,000
17	Donald B. and Dorothy L. Stabler†‡	Construction		1	\$334,200,000
18	David G. and Suzanne Deal Booth	Finance		1	\$300,000,000
19	Sergey Brin and Anne Wojcicki	Technology		2	\$284,800,000
20	Frank C. Doble†	Energy		1	\$272,000,000

Disclaimer: The annual Philanthropy 50, The Chronicle's list of America's most generous donors, is based on gifts and pledges of cash and stock to nonprofit organizations. Although The Chronicle attempted to find all information about large contributions made by individuals in 2012, not all philanthropists disclose details about their charitable donations publicly, and they are not required by law to do so. Gifts that donors made from their family foundations were not counted to avoid including them twice—when the donor gave the money to the foundation and when he or she selected a beneficiary for the money. The list does not include payments that donors made on pledges announced in previous years, to avoid counting the same gifts twice.

Source: The Chronicle of Philanthropy, Philanthropy 50, 2009-2013: † Deceased, ‡ Spouse Deceased

Who Are America's Top Donors?

America's Largest Givers: Aggregate Philanthropy 50 Giving From 2008-2012

5 Year Rank (2008-2012)	Donor	Primary Wealth	Giving Pledge	Years on List (2008-2012)	Giving Recent 5 Years (2008-2012)
21	Irwin and Joan Jacobs	Telecommunications	Yes	4	\$268,790,694
22	David H. Koch	Oil		3	\$260,000,000
23	Robert L. and Catherine H. McDevitt†‡	Investments		1	\$250,000,000
24	Lawrence Ellison	Technology	Yes	5	\$237,100,850
25	Pierre and Pam Omidyar	Technology	Yes	3	\$228,020,065
26	Raymond G. and Ruth C. Perelman‡(Ruth)	Finance		1	\$227,300,000
27	Dorothy Clarke Patterson†	Family Wealth		1	\$225,000,000
27	Philip and Penelope Knight	Manufacturing		2	\$225,000,000
29	T. Denny Sanford	Finance	Yes	2	\$223,196,000
30	Sheldon and Miriam Adelson	Hotels		3	\$219,850,000
31	H. F. (Gerry) and Marguerite B. Lenfest	Media and entertainment	Yes	2	\$214,900,000
32	David and Dana Dornsife	Manufacturing		1	\$200,000,000
32	Mortimer B. Zuckerman	Media and entertainment		1	\$200,000,000
34	Fred Fields†	Manufacturing		1	\$191,500,000
35	Louise Dieterle Nippert†	Family Wealth		1	\$185,000,000
36	Jon L. Stryker	Family Wealth		5	\$176,045,117
37	Richard W. Weiland†	Technology		1	\$174,300,000
38	Robert E. and Dorothy J. King	Finance		1	\$166,500,000
39	Michael Moritz and Harriet Heyman	Finance		2	\$166,400,000
40	Helen L. Kimmel	Real estate		1	\$156,500,000

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Who Are America's Top Donors?

America's Largest Givers: Aggregate Philanthropy 50 Giving From 2008-2012

5 Year Rank (2008-2012)	Donor	Primary Wealth	Giving Pledge	Years on List (2008-2012)	Giving Recent 5 Years (2008-2012)
41	Carl Icahn	Investments	Yes	1	\$150,000,000
42	Jeffrey S. Skoll	Technology	Yes	1	\$144,100,000
43	David Gundlach†	Insurance		1	\$140,000,000
44	David Rockefeller	Family Wealth	Yes	1	\$137,800,000
45	David M. Rubenstein	Finance	Yes	3	\$135,348,000
46	Arthur G. and Margaret B. Glasgow†‡	Engineering		1	\$125,000,000
46	John A. and Jenny Paulson	Finance		2	\$125,000,000
48	Leonard Blavatnik	Investments		1	\$117,204,000
49	Ronald O. Perelman	Finance	Yes	2	\$112,500,000
50	Frances Lasker Brody†	Family Wealth		1	\$110,000,000
50	John and Julie Mork	Oil		1	\$110,000,000
52	Stephen A. Schwarzman	Investments		1	\$105,000,000
53	J. Ronald and Frances Terwilliger	Real estate		1	\$102,004,746
54	Theodore (Ted) and Vada Stanley	Marketing		3	\$102,000,000
55	T. Boone Pickens	Investments	Yes	1	\$101,046,512
56	Meyer and Renee Luskin	Manufacturing		1	\$100,500,000
57	Gerhard R. Andlinger	Finance		1	\$100,000,000
57	Kenneth G. and Elaine A. Langone	Retail	Yes	1	\$100,000,000
57	Marc R. and Lynne Benioff	Technology		1	\$100,000,000
57	Richard O. Jacobson	Industry		1	\$100,000,000

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Who Are America's Top Donors?

America's Largest Givers: Aggregate Philanthropy 50 Giving From 2008-2012

5 Year Rank (2008-2012)	Donor	Primary Wealth	Giving Pledge	Years on List (2008-2012)	Giving Recent 5 Years (2008-2012)
57	William P. Clements Jr. †	Oil		1	\$100,000,000
62	Jack C. Taylor	Retail		1	\$99,800,000
63	Fritz J. and Dolores H. Russ†‡	Technology		1	\$94,800,000
64	Frank Batten Sr. †	Media and entertainment		1	\$93,000,000
65	Brooke Russell Astor†	Family Wealth		1	\$88,800,000
66	Terrence M. and Kim Pegula	Oil		1	\$88,000,000
67	John C. Malone	Media and entertainment		2	\$87,000,000
68	Juanita Kious Waugh†	Family Wealth		1	\$83,707,473
69	Wayne and Delores Barr Weaver	Retail		1	\$83,700,000
70	Jesse H. and Beulah C. Cox†‡	Manufacturing		1	\$83,500,000
71	Porter B. Byrum	Law		1	\$81,800,000
72	David R. and Patricia D. Atkinson	Finance		1	\$80,000,000
72	John E. and Marion Anderson†	Finance		1	\$80,000,000
72	Thomas F. Steyer and Kat Taylor	Finance	Yes	2	\$80,000,000
75	Raymond A. Rich†	Finance		1	\$76,800,000
76	Eric F. Ross†	Chemicals		1	\$76,500,000
78	Alfred M. and Mary Swain Wood†‡	Marketing		1	\$75,876,931
79	Henry R. and Marie-Josée Kravis	Finance		1	\$75,000,000
80	A. Alfred Taubman	Real estate		1	\$67,000,000
80	Henry C. Jr. and Jane C. Woods†‡	Family Wealth		1	\$67,000,000

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Source: The Chronicle of Philanthropy,
Philanthropy 50, 2009-2013: † Deceased, ‡ Spouse Deceased

Who Are America's Top Donors?

America's Largest Givers: Aggregate Philanthropy 50 Giving From 2008-2012

5 Year Rank (2008-2012)	Donor	Primary Wealth	Giving Pledge	Years on List (2008-2012)	Giving Recent 5 Years (2008-2012)
82	Julian H. Jr. and Josie Robertson	Finance	Yes	1	\$66,100,000
83	Leslie H. and Abigail S. Wexner	Retail		1	\$65,000,000
83	Patrick Soon-Shiong and Michele B. Chan	Pharmaceuticals		1	\$65,000,000
85	William I. Koch	Energy		1	\$64,600,000
86	Conrad T. Prebys	Construction		1	\$63,100,000
87	A.B. Hudson†	Oil		1	\$60,000,000
87	Guy and Virginia (Betty) Beatty	Real estate		1	\$60,000,000
87	Herbert and Florence Irving	Food and beverage		1	\$60,000,000
90	William A. and Karen Ackman	Finance	Yes	1	\$59,319,234
91	Malone III and Amy Mitchell	Oil		1	\$57,200,000
92	Joshua Rechnitz	Family Wealth		1	\$57,000,000
93	Felix E. Martin Jr. †	Family Wealth		1	\$56,600,000
94	Charles E. Kaufman†	Investments		1	\$53,340,000
95	Donald J. and Ruth Weber Goodman†‡	Family Wealth		1	\$52,700,000
96	Dolores Jordan	Construction		1	\$52,042,516
97	Robert Gumbiner†	Health care		1	\$50,033,878

Disclaimer: The annual Philanthropy 50, The Chronicle's list of America's most generous donors, is based on gifts and pledges of cash and stock to nonprofit organizations. Although The Chronicle attempted to find all information about large contributions made by individuals in 2012, not all philanthropists disclose details about their charitable donations publicly, and they are not required by law to do so. Gifts that donors made from their family foundations were not counted to avoid including them twice—when the donor gave the money to the foundation and when he or she selected a beneficiary for the money. The list does not include payments that donors made on pledges announced in previous years, to avoid counting the same gifts twice.

Source: The Chronicle of Philanthropy, Philanthropy 50, 2009-2013: † Deceased, ‡ Spouse Deceased

Inspiring Transformational Gifts

Sanford and Joan Weill

\$250,000,000

Weill Cornell Medical College

Stephen A. Schwarzman

\$100,000,000

Schwarzman Scholars at Tsinghua University

Robert and Renée Belfer

\$100,000,000

Weill Cornell Medical College

Kenneth Langone

\$100,000,000

NYU Langone Medical Center

George Soros

\$100,000,000

Human Rights Watch

George Soros

\$100,000,000

Institute for New Economic Thinking (INET)

Marc and Lynne Benioff

\$100,000,000

University of California-San Francisco Benioff Children's Hospital

Jim and Marilyn Simons

\$150,000,000

Stony Brook University

Fiona and Stan Druckenmiller

\$100,000,000

NYU Langone Medical Center

J. Ronald Terwilliger

\$100,000,000

Habitat for Humanity International

Joan and Irwin Jacobs

\$75,000,000

University of California-San Diego

Ronald O. Perelman

\$100,000,000

Columbia Business School

Stella and Charles Guttman Foundation

\$15,000,000

City University of New York

David Koch

\$100,000,000

NewYork-Presbyterian

Henry R. Kravis

\$100,000,000

Columbia Business School

Source: Indiana University Lilly School of Philanthropy's Million-Dollar List; Various media sources

What Is The Giving Pledge?

Many Of America's Top Donors Have Already Signed The Giving Pledge

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.

100 U.S.

There are 100 U.S. pledgers.

12 new

On February 19, 2013, the Giving Pledge announced the addition of 12 new signatories – all from outside the United States.

\$504 billion combined

With a combined net worth of roughly \$504 billion, the commitments made by the current participants could bring more than \$252 billion to charity.

9 more

The giving pledge continues to grow as 9 more wealthy families and individuals signed the giving pledge on May 7, 2013.

76 years of age

The median age of participants is 76 years (David Rockefeller at 97 is the oldest, while Cari Tuna is the youngest at 28).

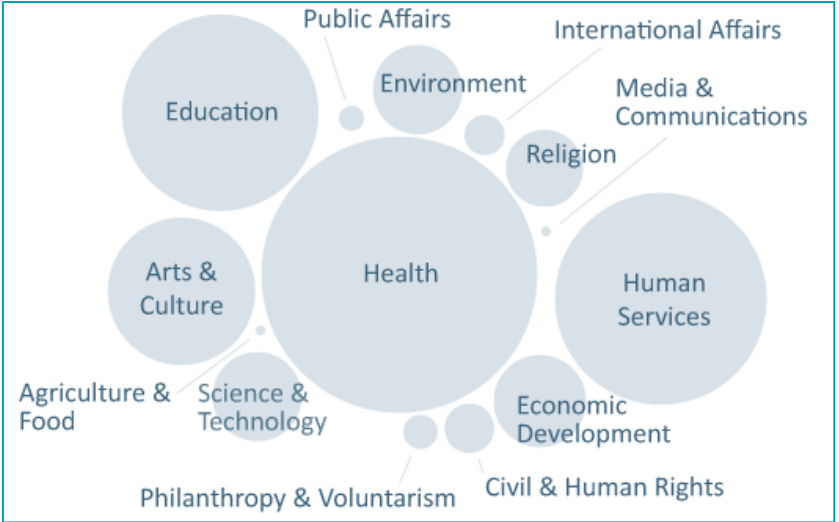
Source: The Foundation Center: Eye on Giving Pledge, GlassPockets, June 2013

Breakdown Of Giving Pledge Participants

Interests

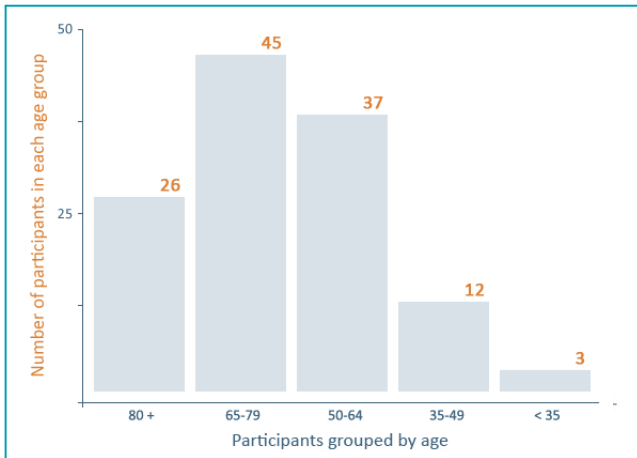
INTERESTS

of pledge mainly in health, human services, education, and arts & culture



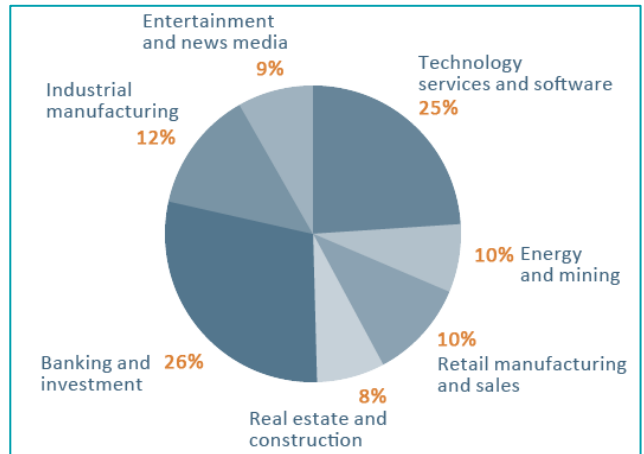
Age Distribution

The age distribution of the Giving Pledge participants strongly favors those born before World War II.



Industry Focus

Pledge participants show strong presence of HNW individuals from financial and high-tech industries.



Source: The Foundation Center: Eye on Giving Pledge, GlassPockets, June 2013

Who Signed The Giving Pledge?

Giving Pledge Now Includes 114 Participants

Bill and Karen Ackman	Paul G. Allen	Laura and John Arnold	Lord Ashcroft KCMG PC	Nicolas Berggruen	Manoj Bhargava
Steve Bing	Sara Blakely	Arthur M. Blank	Michael R. Bloomberg	Richard and Joan Branson	Eli and Edythe Broad
Charles R. Bronfman	Edgar M. Bronfman	Warren Buffett	Jean and Steve Case	John Caudwell	Lee and Toby Cooperman
Joe Craft	Joyce and Bill Cummings	Ray and Barbara Dalio	John Paul DeJoria	Barry Diller and Diane von Furstenberg	Ann and John Doerr
Glenn and Eva Dubin	Larry Ellison	Charles F. Feeney	Andrew and Nicola Forrest	Ted Forstmann (d. 2011)	Phillip and Patricia Frost
Bill and Melinda Gates	Monica and David Gelbaum	Dan and Jennifer Gilbert	David and Barbara Green	Jeff and Mei Sze Greene	Harold and Sue Ann Hamm
Reed Hastings and Patty Quillin	Lyda Hill	Barron Hilton	Christopher Hohn	Jon and Karen Huntsman	Dr. Mo Ibrahim
Carl Icahn	Joan and Irwin Jacobs	George B. Kaiser	Vinod and Neeru Khosla	Sidney Kimmel	Rich and Nancy Kinder
Elaine and Ken Langone	Gerry and Marguerite Lenfest	Peter B. Lewis	Lorry I. Lokey	George Lucas	Duncan and Nancy MacMillan
Alfred E. Mann	Joe and Rika Mansueto	Bernie and Billi Marcus	Craig and Susan McCaw	Red and Charline McCombs	Michael and Lori Milken

Shaded box = International

Source: The Giving Pledge, June 2013

Who Signed The Giving Pledge?

Giving Pledge Now Includes 114 Participants

George P. Mitchell	Thomas S. Monaghan	Gordon and Betty Moore	Tashia and John Morgridge	Michael Moritz and Harriet Heyman	Dustin Moskovitz and Cari Tuna
Patrice and Precious Motsepe	Elon Musk	Jonathan M. Nelson	Pierre and Pam Omidyar	Bernard and Barbro Osher	Ronald O. Perelman
Jorge M. and Darlene Perez	Peter G. Peterson	T. Boone Pickens	Victor Pinchuk	Hasso Plattner	Vladimir Potanin
Azim Premji	Julian H. Robertson, Jr.	David Rockefeller	Edward W. and Deedie Potter Rose	Stephen M. Ross	David M. Rubenstein
David Sainsbury	John and Ginger Sall	Henry and Susan Samuelli	Herb and Marion (d. 2012) Sandler	Denny Sanford	Vicki and Roger Sant
Lynn Schusterman	Walter Scott, Jr.	Tom and Cindy Secunda	Annette and Harold Simmons	Jim and Marilyn Simons	Paul E. Singer
Jeff Skoll	John A. and Susan Sobrato, John Michael Sobrato	Michele and Patrick Soon-Shiong	Ted and Vada Stanley	Mark and Mary Stevens	Tom Steyer and Kat Taylor
Jim and Virginia Stowers	Vincent Tan Chee Yioun	Tad Taube	Claire and Leonard Tow	Ted Turner	Albert Lee Ueltschi (d. 2012)
Dr. Romesh and Kathleen Wadhvani	Sanford and Joan Weill	Shelby White	Samuel Yin	Charles Zegar and Merryl Snow Zegar	Mark Zuckerberg

Shaded box = International

Bequests

\$23.41 Billion Was Given In Bequests In 2012



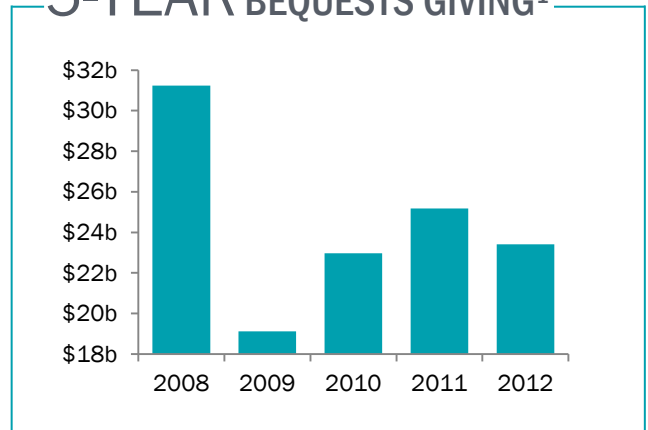
\$23.41
BILLION¹

THE SHARE OF BEQUEST GIVING BY ITEMIZING ESTATES amounted to \$18.62 billion in 2012, or 80% of the total bequest estimate

It is estimated that between **\$6.6 TRILLION** and **\$27.4 TRILLION** in charitable bequests will be made between 1998-2052²



5-YEAR BEQUESTS GIVING¹



Source: ¹Giving USA Foundation (Giving USA, 2013);
²Bank of America 2010 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University

Where Do Bequests Go?



TWO-THIRDS OF RESPONDING NON-PROFITS

report using planned giving in 2012; more than one-third report increases in planned gifts received

7.0%

Giving by bequest **declined** by an estimated 7.0% between 2011 and 2012, to \$23.41 billion.

**\$4.80
BILLION**

The estimate for giving by bequest for non-filing estates in 2012 is \$4.80 billion.

**\$2.6
MILLION**

The average amount of bequest deductions claimed between 2001 and 2011 was \$2.6 million.

**\$7
MILLION**

In 2011, the average amount of bequest deductions across all filing estates was higher than average at \$7 million.

How Intergenerational Wealth Transfer Impacts Philanthropy

Dramatic Changes In Intergenerational Wealth

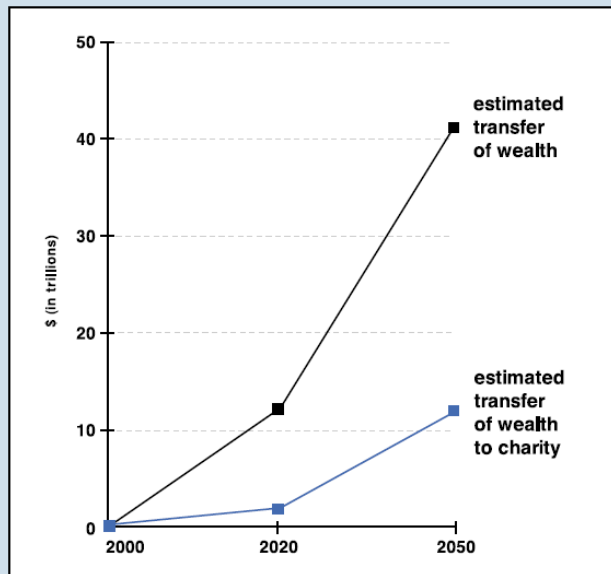


BY THE YEAR 2055,
\$41 TRILLION
will change hands as Americans pass on their accumulated assets to the next generation¹



The intergenerational transfer of wealth²

2000-2050



Source: ¹Bank of America 2010 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University ²Investment Management Consultants Association, Inc. 2011

Foundation Giving

Foundations Granted \$45.74 Billion In 2012



\$45.74
BILLION¹

GRANTMAKING BY COMMUNITY FOUNDATIONS...

 rose 9.1%
between 2011
and 2012

The number of foundations has increased **33.6%** since 2000 and **6%** since 2005²

The number of foundations has increased **242%** since 1980³



Grantmaking by operating foundations and independent foundations increased 3.5% and 3.9% respectively.¹

5-YEAR FOUNDATION GIVING¹



Source: ¹Giving USA Foundation (Giving USA 2013);
^{2,3}Bureau of Labor Statistics, 2012

America's Top Foundations

Top 50 U.S. Foundations By Total Giving

Rank	Name/(State)	Total Giving	Assets	As of
1	Bill & Melinda Gates Foundation (WA)	\$3.2 Billion	\$34.6 Billion	12/31/2011
2	Walton Family Foundation, Inc. (AR)	\$487.7 Million	\$1.7 Billion	12/31/2011
3	Ford Foundation (NY)	\$478.2 Million	\$10.9 Billion	9/30/2012
4	The Robert Wood Johnson Foundation (NJ)	\$386.2 Million	\$8.9 Billion	12/31/2011
5	The William and Flora Hewlett Foundation (CA)	\$353.6 Million	\$7.2 Billion	12/31/2011
6	The Susan Thompson Buffett Foundation (NE)	\$347.1 Million	\$2.2 Billion	12/31/2011
7	W. K. Kellogg Foundation (MI)	\$296.9 Million	\$7.2 Billion	8/31/2012
8	Silicon Valley Community Foundation (CA)	\$249.0 Million	\$2.0 Billion	12/31/2011
9	Foundation to Promote Open Society (NY)	\$247.9 Million	\$2.2 Billion	12/31/2011
10	The Andrew W. Mellon Foundation (NY)	\$246.8 Million	\$5.2 Billion	12/31/2011
11	The David and Lucile Packard Foundation (CA)	\$245.2 Million	\$5.7 Billion	12/31/2011
12	Gordon and Betty Moore Foundation (CA)	\$241.9 Million	\$5.3 Billion	12/31/2011
13	Lilly Endowment Inc. (IN)	\$234.4 Million	\$7.2 Billion	12/31/2012
14	The John D. and Catherine T. MacArthur Foundation (IL)	\$222.3 Million	\$5.7 Billion	12/31/2011
15	Greater Kansas City Community Foundation (MO)	\$218.0 Million	\$1.1 Billion	12/31/2011
16	Charles and Lynn Schusterman Family Foundation (OK)	\$182.9 Million	\$2.3 Billion	12/31/2011
17	Annenberg Foundation (CA)	\$179.1 Million	\$1.5 Billion	12/31/2011
18	Eli & Edythe Broad Foundation (CA)	\$149.4 Million	\$1.5 Billion	12/31/2011
19	The Leona M. and Harry B. Helmsley Charitable Trust (NY)	\$148.4 Million	\$4.0 Billion	3/31/2012
20	Margaret A. Cargill Foundation (MN)	\$141.9 Million	\$2.5 Billion	12/31/2011
21	The Kresge Foundation (MI)	\$140.6 Million	\$3.0 Billion	12/31/2011
22	The New York Community Trust (NY)	\$137.4 Million	\$1.9 Billion	12/31/2011
23	Robert W. Woodruff Foundation, Inc. (GA)	\$133.5 Million	\$2.8 Billion	12/31/2012
24	The Rockefeller Foundation (NY)	\$132.6 Million	\$3.5 Billion	12/31/2011
25	California Community Foundation (CA)	\$131.2 Million	\$1.2 Billion	6/30/2012

Source: The Foundation Center, June 2013

America's Top Foundations

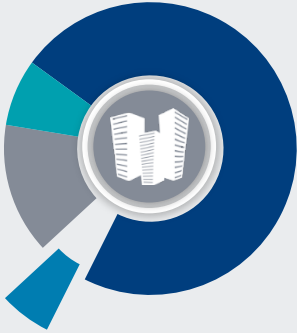
Top 50 U.S. Foundations By Total Giving

Rank	Name/(State)	Total Giving	Assets	As of
26	The Bloomberg Family Foundation, Inc. (NY)	\$123.9 Million	\$2.9 Billion	12/31/2011
27	The Simons Foundation (NY)	\$123.8 Million	\$1.9 Billion	12/31/2011
28	The California Endowment (CA)	\$116.3 Million	\$3.6 Billion	3/31/2012
29	Carnegie Corporation of New York (NY)	\$113.0 Million	\$2.7 Billion	9/30/2012
30	The Duke Endowment (NC)	\$112.6 Million	\$2.8 Billion	12/31/2011
31	Charles Stewart Mott Foundation (MI)	\$108.5 Million	\$2.1 Billion	12/31/2011
32	The Columbus Foundation and Affiliated Organizations (OH)	\$106.1 Million	\$1.1 Billion	12/31/2011
33	The Chicago Community Trust (IL)	\$104.3 Million	\$1.5 Billion	9/30/2011
34	The Annie E. Casey Foundation (MD)	\$100.1 Million	\$2.6 Billion	12/31/2011
35	John S. and James L. Knight Foundation (FL)	\$99.8 Million	\$2.0 Billion	12/31/2011
36	The Harry and Jeanette Weinberg Foundation, Inc. (MD)	\$93.7 Million	\$2.0 Billion	2/28/2012
37	The McKnight Foundation (MN)	\$91.4 Million	\$1.9 Billion	12/31/2011
38	Richard King Mellon Foundation (PA)	\$90.6 Million	\$1.9 Billion	12/31/2011
39	Conrad N. Hilton Foundation (CA)	\$81.6 Million	\$2.1 Billion	12/31/2011
40	The William Penn Foundation (PA)	\$81.5 Million	\$4.3 Billion	12/31/2011
41	The Cleveland Foundation (OH)	\$78.6 Million	\$1.8 Billion	12/31/2011
42	Houston Endowment Inc. (TX)	\$77.1 Million	\$1.4 Billion	12/31/2011
43	Doris Duke Charitable Foundation (NY)	\$76.3 Million	\$1.6 Billion	12/31/2011
44	Alfred P. Sloan Foundation (NY)	\$75.0 Million	\$1.6 Billion	12/31/2011
45	Tulsa Community Foundation (OK)	\$72.0 Million	\$3.8 Billion	12/31/2011
46	John Templeton Foundation (PA)	\$71.2 Million	\$2.2 Billion	12/31/2011
47	The Heinz Endowments (PA)	\$65.5 Million	\$1.3 Billion	12/31/2011
48	The James Irvine Foundation (CA)	\$64.5 Million	\$1.5 Billion	12/31/2011
49	The Oregon Community Foundation (OR)	\$60.0 Million	\$1.1 Billion	12/31/2010
50	The Wallace Foundation (NY)	\$59.7 Million	\$1.3 Billion	12/31/2011

Source: The Foundation Center, June 2013

Corporate Giving

Corporations Gave \$18.15 Billion In 2012



\$18.15
BILLION

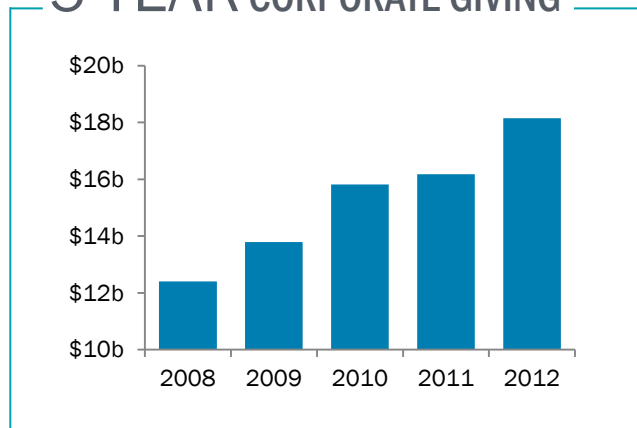
**CORPORATIONS
GAVE MOST OFTEN TO
EDUCATION &
HEALTH & SOCIAL
SERVICES**

Giving by corporations is directly linked with companies' profits and the economic environment in which corporations operate



- Giving by corporations is estimated to have increased 12.2% in 2012.
- Corporate giving can include gifts of cash and in-kind gifts made through corporate giving programs, as well as grants and gifts made by corporate foundations.
- The 2012 estimate for giving by corporations includes \$131 million in corporate contributions made to non-profit organizations in support of Hurricane Sandy relief efforts.

5-YEAR CORPORATE GIVING



Source: Giving USA Foundation (Giving USA 2013)

Which Companies Were Most Generous?

Top 50 Most Generous Companies of 2011 By Cash Giving

Rank	Corporation	State	Industry	Cash Giving (2011)	2011 Cash and Product Giving (2011)	2011 Giving as a Percentage of 2010 Pre-Tax Profits
1	Wal-Mart Stores	AR	General merchandisers	\$342.3 Million	\$958.9 Million	1.5%
2	Goldman Sachs Group	NY	Securities	\$337.0 Million	\$337.0 Million	2.6%
3	ExxonMobil Corporation	TX	Petroleum refining	\$232.6 Million	\$234.6 Million	0.4%
4	Wells Fargo & Company	CA	Commercial banks	\$213.4 Million	\$213.4 Million	1.1%
5	Chevron Corporation	CA	Petroleum refining	\$209.2 Million	\$209.2 Million	0.7%
6	Bank of America	NC	Commercial banks	\$208.4 Million	\$208.4 Million	-
7	J.P. Morgan Chase & Co.	NY	Commercial banks	\$202.9 Million	\$273.4 Million	0.8%
8	Target Corporation	MN	General merchandisers	\$146.1 Million	\$209.2 Million	3.3%
9	General Electric Company	CN	Diversified financials	\$144.1 Million	\$146.0 Million	1.0%
10	Citigroup	NY	Commercial banks	\$121.9 Million	\$121.9 Million	0.9%
11	Johnson & Johnson	NJ	Pharmaceuticals	\$118.9 Million	\$706.0 Million	0.8%
12	Google	CA	Internet services and retailing	\$115.0 Million	\$1.1 Billion	1.1%
13	Coca-Cola Company	GA	Beverages	\$112.1 Million	\$123.5 Million	0.8%
14	Microsoft Corporation	WA	Computer software	\$105.0 Million	\$949.0 Million	0.6%
15	Intel Corporation	CA	Semiconductors and other electronic components	\$90.6 Million	\$90.6 Million	0.6%
16	General Mills	MN	Food and consumer products	\$88.7 Million	\$113.0 Million	4.0%
17	AT&T Corporation	TX	Telecommunications	\$83.7 Million	\$83.7 Million	0.4%
18	Merck & Company	NJ	Pharmaceuticals	\$72.6 Million	\$1.2 Billion	4.4%
19	Kroger Company	OH	Food and drug stores	\$69.7 Million	\$183.8 Million	4.0%
20	PNC Financial Services Group	PA	Commercial banks	\$68.6 Million	\$68.6 Million	1.7%
21	Verizon Communications	NY	Telecommunications	\$65.8 Million	\$65.8 Million	0.5%
22	Bristol-Myers Squibb	NY	Pharmaceuticals	\$64.3 Million	\$551.3 Million	1.1%
23	State Farm Mutual Automobile Insurance Company	IL	Insurance, property and casualty	\$62.7 Million	\$63.0 Million	-
24	Procter & Gamble	OH	Household and personal products	\$61.0 Million	\$101.0 Million	-
25	Abbott Laboratories	IL	Pharmaceuticals	\$60.3 Million	\$732.3 Million	1.1%

Which Companies Were Most Generous?

Top 50 Most Generous Companies of 2011 By Cash Giving

Rank	Corporation	State	Industry	Cash Giving (2011)	2011 Cash and Product Giving (2011)	2011 Giving as a Percentage of 2010 Pre-Tax Profits
26	UnitedHealth Group	MN	Health care, insurance and managed care	\$59.4 Million	\$60.1 Million	0.8%
27	Pfizer	NY	Pharmaceuticals	\$56.4 Million	\$3.0 Billion	0.6%
28	Caterpillar	IL	Industrial and farm equipment	\$50.0 Million	\$50.0 Million	-
29	Medtronic	MN	Medical products and equipment	\$49.7 Million	\$59.9 Million	1.3%
30	3M Company	MN	Miscellaneous	\$49.2 Million	\$75.0 Million	0.2%
31	MetLife	NY	Insurance, life and health	\$47.8 Million	\$47.8 Million	1.5%
32	Eli Lilly and Company	IN	Pharmaceuticals	\$47.7 Million	\$597.0 Million	0.7%
33	Morgan Stanley	NY	Financial services	\$47.3 Million	\$47.3 Million	0.8%
34	IBM	NY	Computers, office equipment	\$46.9 Million	\$196.1 Million	0.2%
35	U.S. Bancorp	MN	Commercial banks	\$45.7 Million	\$45.7 Million	1.1%
36	UPS	GA	Mail, package, and freight delivery	\$45.3 Million	\$48.0 Million	0.8%
37	Nike	OR	Apparel	\$45.2 Million	\$59.9 Million	0.2%
38	Cisco Systems	CA	Network and other communications equipment	\$42.9 Million	\$295.1 Million	0.5%
39	Altria	VA	Tobacco	\$42.7 Million	\$48.2 Million	0.7%
40	Dow Chemical Company	MI	Chemicals	\$41.7 Million	\$49.5 Million	1.5%
41	Kraft Foods	IL	Food and consumer products	\$39.5 Million	\$147.7 Million	1.1%
42	Prudential Financial	NJ	Insurance, life and health	\$38.3 Million	\$38.3 Million	0.9%
43	Home Depot	GA	Specialty retailers	\$37.8 Million	\$58.8 Million	0.6%
44	Alcoa	PA	Metals	\$36.6 Million	\$36.6 Million	6.7%
45	Philip Morris International	NY	Tobacco	\$34.3 Million	\$34.3 Million	-
46	Dell	TX	Computers, office equipment	\$33.3 Million	\$44.1 Million	1.0%
47	Chesapeake Energy Corporation	OK	Mining, crude-oil production	\$31.8 Million	\$33.1 Million	1.1%
48	Starbucks Corporation	WA	Food services	\$30.5 Million	\$47.8 Million	2.1%
49	Ford Motor Company	MI	Motor vehicles and parts	\$29.5 Million	\$29.5 Million	0.3%
50	Capital One Financial Corporation	VA	Commercial banks	\$29.3 Million	\$29.3 Million	1.1%

Key Facts On Corporate Foundations

IN 2011, GIVING BY
THE NATION'S
APPROXIMATELY
2,700 GRANTMAKING
CORPORATE
FOUNDATIONS GREW
TO AN ESTIMATED
\$5.2 BILLION



Up 6% from 2010¹

\$5.2 billion

Estimated giving by
corporate foundations
in 2011

6.0%

Estimated increase in
corporate foundation
giving between
2010 and 2011

2,718

Number of grantmaking
corporate foundations
in 2010

20%

Share of corporate
foundations reporting
more than \$1 million in
giving in 2010

11%

Corporate foundation
giving as a share of all
Foundation giving
in 2010

Note: ¹Figures exclude giving by corporate operating foundations

America's Top Corporate Foundations

Top 50 Corporate Grantmaking Foundations By Giving

Rank	Name/(state)	Total Giving	As of
1	Sanofi Foundation for North America (NJ)	\$497.4 Million	12/31/2011
2	Novartis Patient Assistance Foundation, Inc. (NJ)	\$331.9 Million	12/31/2011
3	The Bank of America Charitable Foundation, Inc. (NC)	\$198.2 Million	12/31/2011
4	The Wal-Mart Foundation, Inc. (AR)	\$175.6 Million	1/31/2012
5	The JPMorgan Chase Foundation (NY)	\$136.2 Million	12/31/2011
6	GE Foundation (CT)	\$115.7 Million	12/31/2011
7	Wells Fargo Foundation (CA)	\$107.5 Million	12/31/2011
8	Citi Foundation (NY)	\$78.6 Million	12/31/2011
9	The Coca-Cola Foundation, Inc. (GA)	\$76.2 Million	12/31/2011
10	ExxonMobil Foundation (TX)	\$74.5 Million	12/31/2011
11	Verizon Foundation (NJ)	\$56.2 Million	12/31/2011
12	The PNC Foundation (PA)	\$54.2 Million	12/31/2011
13	The Merck Company Foundation (NJ)	\$53.3 Million	12/31/2011
14	Caterpillar Foundation (IL)	\$49.7 Million	12/31/2011
15	Johnson & Johnson Family of Companies Foundation (NJ)	\$49.5 Million	12/31/2009
16	Intel Foundation (OR)	\$43.3 Million	12/31/2011
17	MetLife Foundation (NY)	\$41.1 Million	12/31/2012
18	The UPS Foundation (GA)	\$39.8 Million	12/31/2011
19	Illinois Tool Works Foundation (IL)	\$36.1 Million	12/31/2011
20	Lucasfilm Foundation (CA)	\$34.7 Million	12/31/2011
21	Reckitt Benckiser Pharmaceuticals Patient Help Foundation (VA)	\$30.5 Million	12/31/2011
22	The PepsiCo Foundation, Inc. (NY)	\$29.7 Million	12/31/2011
23	Abbott Fund (IL)	\$29.5 Million	12/31/2011
24	The Medtronic Foundation (MN)	\$29.2 Million	4/30/2012
25	The Goldman Sachs Foundation (NY)	\$29.2 Million	12/31/2011

Source: Foundation Center, June 2013

America's Top Corporate Foundations

Top 50 Corporate Grantmaking Foundations By Giving

Rank	Name/(state)	Total Giving	As of
26	The Prudential Foundation (NJ)	\$28.8 Million	12/31/2011
27	The Bristol-Myers Squibb Foundation, Inc. (NY)	\$28.8 Million	12/31/2011
28	Newman's Own Foundation (CT)	\$27.3 Million	12/31/2011
29	Eli Lilly and Company Foundation (IN)	\$26.9 Million	12/31/2011
30	Nationwide Insurance Foundation (OH)	\$26.5 Million	12/31/2011
31	General Mills Foundation (MN)	\$25.4 Million	5/31/2011
32	The Dow Chemical Company Foundation (MI)	\$24.8 Million	12/31/2011
33	Emerson Charitable Trust (MO)	\$24.5 Million	9/30/2011
34	California Physicians' Service Foundation (CA)	\$24.5 Million	12/31/2011
35	General Motors Foundation, Inc. (MI)	\$23.5 Million	12/31/2011
36	IBM International Foundation (NY)	\$23.0 Million	12/31/2011
37	American Electric Power Foundation (OH)	\$22.2 Million	12/31/2011
38	3M Foundation (MN)	\$22.1 Million	12/31/2011
39	U.S. Bancorp Foundation, Inc. (MN)	\$21.9 Million	12/31/2011
40	Freddie Mac Foundation (VA)	\$21.3 Million	12/31/2011
41	Alcoa Foundation (PA)	\$21.0 Million	12/31/2011
42	State Street Foundation, Inc. (MA)	\$20.9 Million	12/31/2011
43	Valero Energy Foundation (TX)	\$20.7 Million	12/31/2011
44	Dennis & Phyllis Washington Foundation, Inc. (MT)	\$20.4 Million	12/31/2010
45	BP Foundation, Inc. (TX)	\$20.1 Million	12/31/2011
46	Ford Motor Company Fund (MI)	\$19.4 Million	12/31/2011
47	Amgen Foundation, Inc. (CA)	\$18.5 Million	12/31/2011
48	The Capital Group Companies Charitable Foundation (CA)	\$18.3 Million	6/30/2012
49	Harold Simmons Foundation (TX)	\$17.3 Million	12/31/2011
50	The Allstate Foundation (IL)	\$17.2 Million	12/31/2012

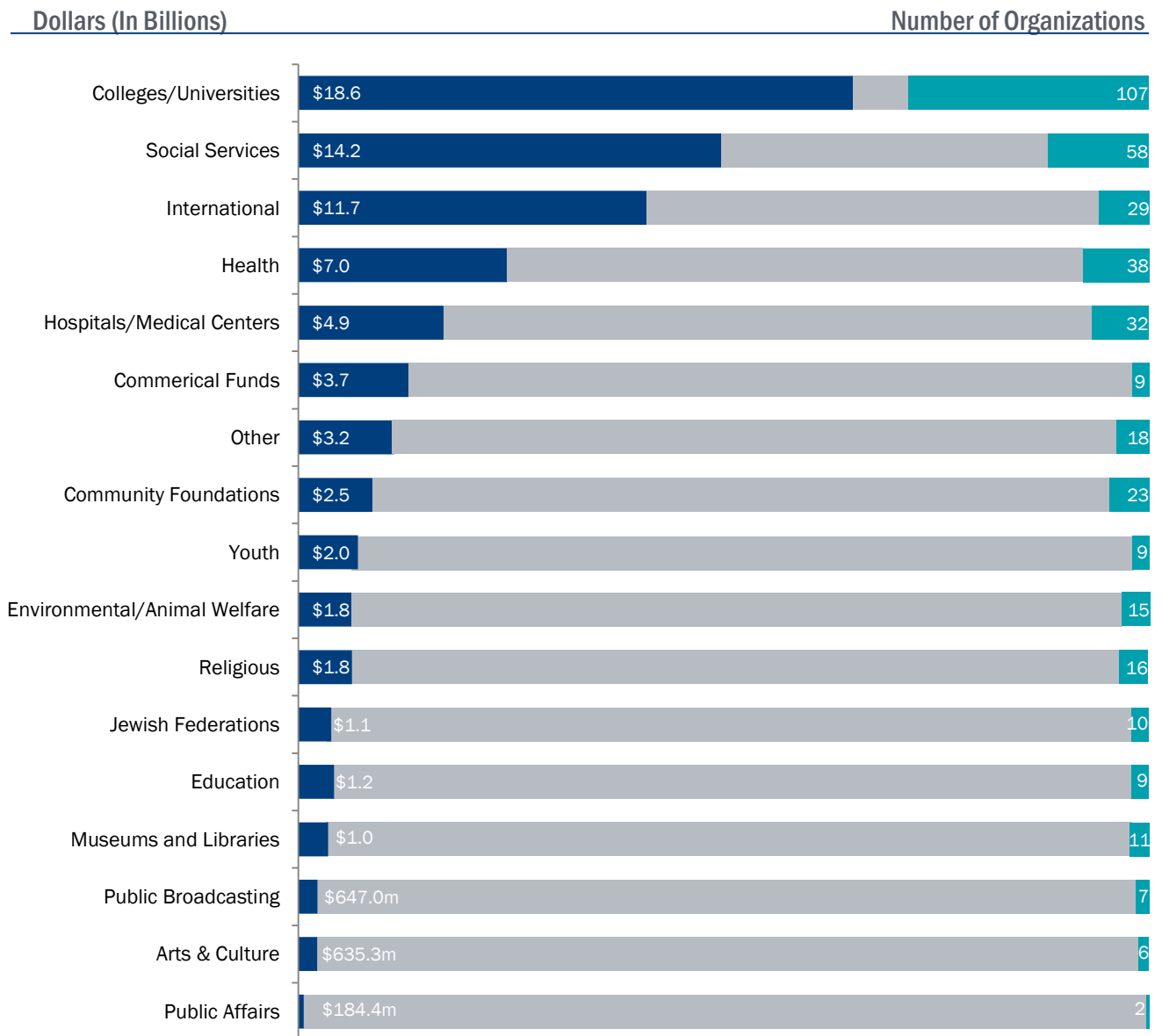
Source: Foundation Center, June 2013

Non-Profit Review

How Do The Top 400 Non-Profits Break Down By Sector?

The Chronicle Of Philanthropy's 2012 Philanthropy 400 Raised \$76.2 Billion In 2011

Analysis of Organization Type on the Philanthropy 400



Source: The Chronicle of Philanthropy 2012

What Did The Top 25 Non-Profits Raise In 2011?

Rank	Organization	Private Support	Total Support	Fundraising Expenses
1	United Way Worldwide	\$3.9 Billion	\$4.1 Billion	\$339.4 Million
2	The Salvation Army	\$1.6 Billion	\$3.2 Billion	\$196.3 Million
3	Catholic Charities USA	\$1.6 Billion	\$4.6 Billion	\$68.4 Million
4	Feeding America	\$1.1 Billion	\$1.1 Billion	\$22.4 Million
5	American Red Cross	\$945.8 Million	\$3.4 Billion	\$127.0 Million
6	Food for the Poor	\$930.2 Million	\$938.2 Million	\$27.7 Million
7	American Cancer Society	\$888.3 Million	\$953.5 Million	\$202.9 Million
8	World Vision	\$848.3 Million	\$1.0 Billion	\$101.7 Million
9	The Y	\$823.4 Million	\$5.9 Billion	\$119.2 Million
10	Habitat for Humanity International	\$787.0 Million	\$1.5 Billion	\$103.0 Million
11	Goodwill Industries International	\$777.9 Million	\$4.4 Billion	\$23.1 Million
12	Stanford University	\$709.4 Million	\$4.3 Billion	\$76.1 Million
13	American Lebanese Syrian Associated Charities/St. Jude Children's Research Hospital	\$698.4 Million	\$814.3 Million	\$139.2 Million
14	AmeriCares Foundation	\$662.8 Million	\$663.7 Million	\$7.2 Million
15	Boys & Girls Clubs of America	\$658.3 Million	\$1.4 Billion	\$80.6 Million
16	National Christian Foundation	\$656.5 Million	\$665.6 Million	\$2.3 Million
17	Harvard University	\$639.1 Million	\$5.1 Billion	\$93.7 Million
18	Yale University	\$580.3 Million	--	--
19	Compassion International	\$547.4 Million	\$548.9 Million	\$49.4 Million
20	Massachusetts Institute of Technology	\$545.6 Million	\$3.4 Billion	\$25.2 Million
21	Lutheran Services in America	\$516.3 Million	\$18.3 Billion	\$67.2 Million
22	American Heart Association	\$510,312,545	\$657,224,306	\$81,383,891
23	The Nature Conservancy	\$504,031,637	\$997,037,763	\$73,533,115
24	Columbia University	\$495,562,000	--	--
25	The Johns Hopkins University	\$485,410,000	--	--

How Do Non-Profit Boards Give?

Nearly 75% Of Non-Profits Report 90-100% Giving Rate By Board Members

PERCENTAGE OF PERSONAL GIVING BY BOARD MEMBERS IS HIGH, BUT FUNDRAISING EFFORTS LEAVE MUCH TO BE DESIRED

In 2011 and 2010, chief executives ranked fundraising as the weakest area of board performance

- ▶ **40%** of CEOs indicate that board members are reluctant to take on fundraising responsibilities
- ▶ **59%** of CEOs agree that board members are not comfortable meeting potential donors face-to-face

Source: BoardSource Nonprofit Governance Index 2012

CCS Interviewed

over 6,200 individuals prior to non-profit campaigns, 1,300 of whom identified themselves as non-profit board members or trustees during 2012. The survey showed:



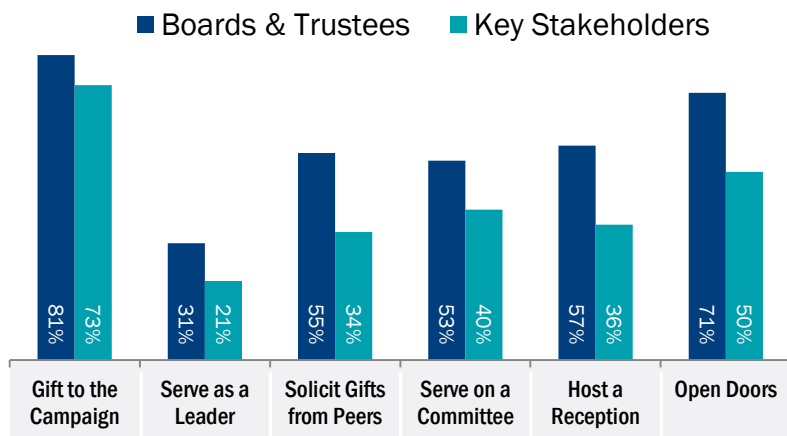
81%

said they would give a gift to the campaign

71%

said they would facilitate a connection

How This Stacks Up...



ORIGINAL RESEARCH BY:



How Americans Give Online

140

OF THE LARGEST CHARITIES

reported receiving \$2.1 billion in online donations in 2010 compared to the \$887 million received in 2009¹

\$146

was the average online gift size in 2012²

Non-profits' online revenue in 2012 grew
21%
compared with 2011 totals

Across 2012, online monthly giving, grew by

43%

The number of internet donations charities received climbed

20%
in 2012

The share of people who made a gift in response to an e-mail fundraising appeal dropped

21%

Source: 2013 eNonprofit Benchmarks Study, 2013;
¹Congressional Research Service, 2011; ²Blackbaud, 2013

How Americans Give Online

25 Largest Online Fundraising Organizations In 2010

20%

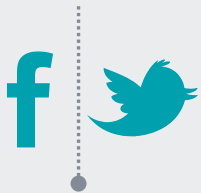
OF THE YEAR'S ONLINE
FUNDRAISING TAKES
PLACE DURING
DECEMBER¹

	Organization	Sector	Raised in 2010	YOY Change
1	United Way Worldwide	Social Service	\$359.8 Million	7%
2	American Red Cross	Social Service	\$188.6 Million	1279%
3	Leukemia & Lymphoma Society	Health	\$78.9 Million	4%
4	National Multiple Sclerosis Society	Health	\$73.4 Million	9%
5	Doctors Without Borders	International	\$51.4 Million	351%
6	American Heart Association	Health	\$36.9 Million	11%
7	World Vision	International	\$36.9 Million	50%
8	Samaritan's Purse	International	\$33.2 Million	140%
9	United States Fund for UNICEF	International	\$32.5 Million	315%
10	Partners in Health	Health	\$28.0 Million	858%
11	Salvation Army	Social Service	\$27.0 Million	93%
12	Alzheimer's Association	Health	\$22.5 Million	28%
13	Catholic Relief Services	International	\$21.2 Million	509%
14	Cystic Fibrosis Foundation	Health	\$16.3 Million	24%
15	Autism Speaks	Health	\$15.2 Million	3%
16	Islamic Relief USA	International	\$14.3 Million	146%
17	Save the Children	International	\$14.0 Million	319%
18	Young Life	Religious	\$13.4 Million	29%
19	Dana-Farber Cancer Institute	Health	\$11.9 Million	6%
20	Mercy Corps	International	\$11.1 Million	184%
21	Habitat for Humanity International	Social Service	\$9.8 Million	34%
22	Feed the Children	International	\$9.7 Million	0%
23	Stanford University	Higher Education	\$9.3 Million	20%
24	Wycliffe Bible Translators	Religious	\$9.0 Million	34%
25	University of Pennsylvania	Higher Education	\$9.3 Million	72%

Disclaimer: 2011 is the last year in which online donation data was collected by organization. It is now anonymized.

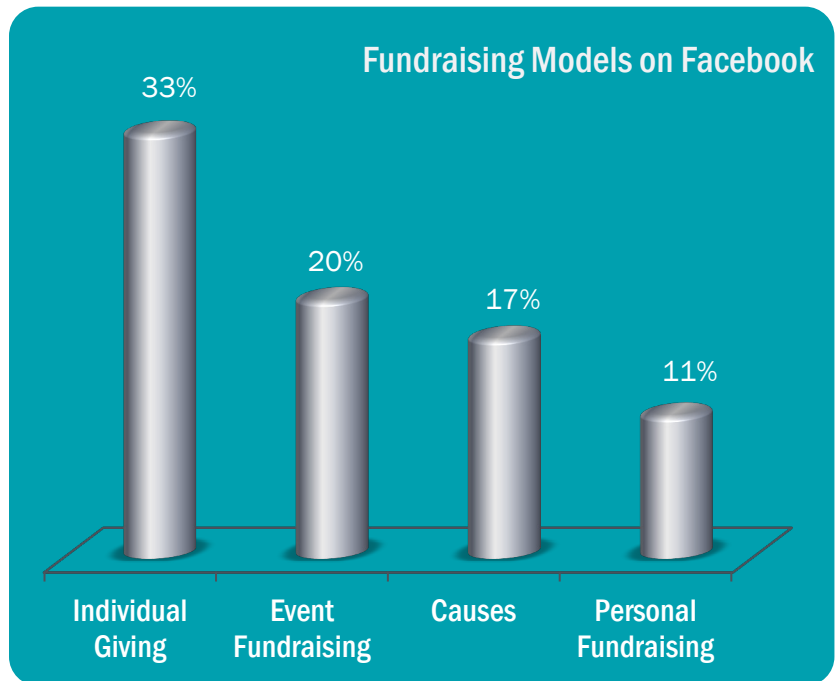
How Non-Profits Use Social Media

89% Of Non-Profits Have A Facebook Page¹



FACEBOOK & TWITTER
COMMUNITIES
GREW BY 46% AND
264%, RESPECTIVELY,
IN 2012²

The most common Facebook
fundraising tactic for non-profits
is an individual gift ask



FOR EVERY 1,000 EMAIL SUBSCRIBERS, NONPROFITS HAVE...³

f 149

FACEBOOK FANS

53

TWITTER FOLLOWERS

29

MOBILE SUBSCRIBERS



Source: Nonprofit Social Network Benchmark Report, 2012;
¹Huffington Post, 2012; ^{2,3} 2013 eNonprofit Benchmarks Study

How Millennials Give

75%

OF MILLENNIALS
REPORTED THAT THEY
GAVE A FINANCIAL GIFT
IN 2011²

63%

VOLUNTEERED FOR A
NON-PROFIT IN 2011²

Millennial Statistics

16-34 age

Millennials are
between the
ages of 16 and
34¹

20% population

Millennials make up
about 20% of the
adult population³

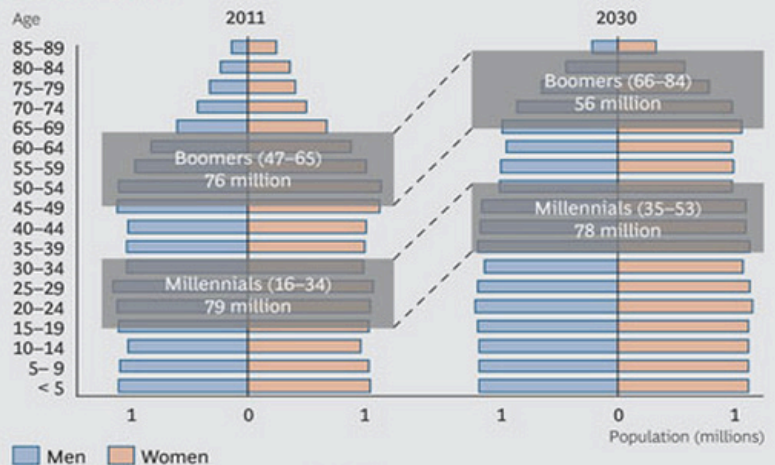
45.8 million

There are 45.8
million people in the
Millennial
generation⁴

89% techies

Millennials are born
techies – 89% use
the internet, 82%
use social media⁵

U.S. Millennials Will Outnumber Non-Millennials by 22 Million by 2030



Source: U.N., Department of Economic and Social Affairs.

Source: ¹Boston Consulting Group; ²2012 Millennial Impact, Achieve and Johnson, Grossnickle & Associates (JGA); ³Scarborough Research; ⁴Pew Research, 2009; ⁵eMarketer 2010;

Why Does Volunteerism In America Matter?

People Who Volunteer Donate More To Non-Profit Organizations¹

Volunteerism On The Rise

89%

**OF WEALTHY
INDIVIDUALS**

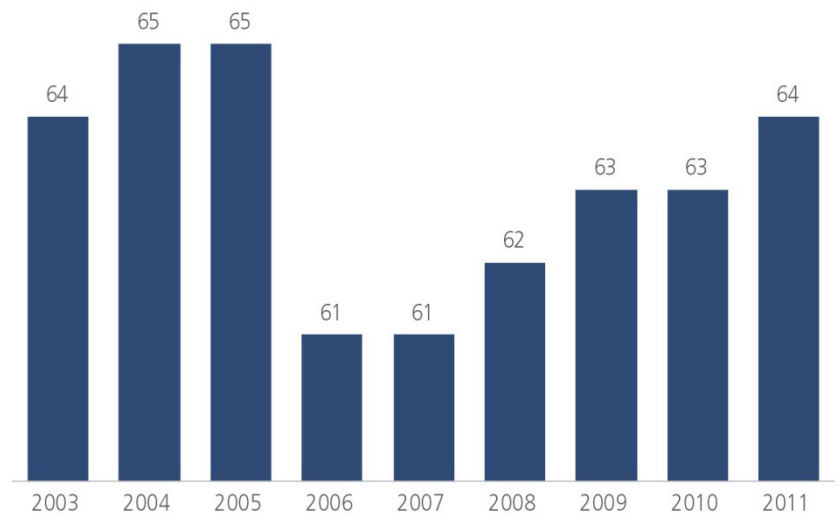
volunteered their time
and talent to non-profit
organizations in 2011¹

About 64.5 million
volunteered

through or for an organization at least
once between September 2011 and
September 2012²



Number of volunteers in millions of people, 2003–2011



Source: Giving USA Foundation (Giving USA 2013)

Source: ^{1,2}Bank of America 2012 Study of High Net Worth Philanthropy, The Lilly Family School of Philanthropy at Indiana University

Impact Of New Tax Code On Giving

Tax		Potential Impact	Implication
Income Taxes	Top marginal tax rate will increase from 35% to 39.6% for individuals with adjusted gross income exceeding \$400,000 and married couples who file jointly and earn more than \$450,000 (\$400,000/ \$450,000)	<ul style="list-style-type: none"> Higher income levels in the final agreement will affect significantly fewer taxpayers, so the decrease could ultimately be lower A new Urban Institute study suggests that giving could increase by more than 1% as a result of the agreement 	+ +
Capital Gains Tax Rate	Taxes on long-term capital gains and qualified dividends will go up from 15% to 20% for those earning above \$400,000 / \$450,000 Starting in 2013, there is a 3.8% unearned income social security tax on high income tax payers	<ul style="list-style-type: none"> May actually lead to an increase in gifts of stocks and other highly-appreciated assets to avoid the new rate Those subject to the highest marginal tax rate could explore new ways to limit their tax burden Combined with an increased capital gains rate, this provides even more incentive to donate stocks, real estate, fine art, and other assets 	+ = +
Estate Taxes	Estate tax exemption remains at \$5,000,000, but the rate will increase from 35% to 40% for estates above that threshold; In addition, the exemption threshold is indexed and will automatically adjust every year now as opposed to requiring legislation	<ul style="list-style-type: none"> Since the exemption is at same level it was in 2012, there will likely be no impact to gifts from estates based on this part of the bill Increase in the tax rate will likely have a positive impact on legacy giving as high-net worth individuals seek to limit estate taxes 	= +
IRA Rollovers	Legislation included an extension of the IRA Rollover provision to the end of 2013, which allows individuals 70½ and older to make charitable gifts of up to \$100,000 from IRAs without tax penalty	<ul style="list-style-type: none"> Good news for both donors and charities - donors get another chance to reduce their taxable income in 2012 and can do the same for 2013 	+
Itemized Deduction Phase-out	Limitation on Itemized Deductions, also known as the Pease Amendment, was previously repealed through 2012 but has returned in this new law; This is a type of “soft cap” on all itemized deductions, not just charitable gifts, that reduces the amount allowed for those above a certain income level; The limit kicks in for those earning more than \$250,000/ \$300,000 (which is more generous – at some 40% to 70% higher – than the original law)	<ul style="list-style-type: none"> The Tax Policy Center states that the Pease Amendment is effectively “a very minor tax surcharge on the very wealthy.” Studies found that the original law increased taxes by less than 1% Highest-earning households typically give twice the amount of their deduction cap Taking these two factors into consideration, it is unlikely that a change in the deduction will influence giving levels 	= = =

+potential for positive impact; -potential for negative impact; = likely no impact

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Thank You!

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

- AFP (Association of Fundraising Professionals)
- Bank of America
- Blackbaud
- Board Source
- Boston Consulting Group
- Bureau of Economic Analysis
- Bureau of Labor Statistics
- Business Week
- Capgemini
- Common Knowledge
- Congressional Research
- eMarketer
- eNonprofit
- Forbes
- Giving USA Foundation
- HIPAA
- Huffington Post
- Independent Sector
- Indiana University Lilly Family School of Philanthropy
- Internal Revenue Service
- Investment Management Consultants Association, Inc.
- Johnson, Grossnickle & Associates (JGA)
- M+R Strategic Services
- Merrill Lynch
- National Center for Charitable Statistics
- NTEN
- Pew Research
- Scarborough Research
- The Chronicle of Philanthropy
- The Cygnus Donor Group
- The Giving Pledge
- The Giving Institute
- The Foundation Center
- The New York Times
- USA Today

For their contributions to this report, we offer special thanks to: Faön Mahunik, Director of Analytics; Jeremy Woolf, New Media and Corporate Communications Director; and Carolyn Dixon, Vice President, Special Projects.

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 national and international charities; public and private colleges and universities; academic medical centers, community and regional hospitals, children's and women's hospitals, cancer centers, and hospices; faith-based initiatives; museums, opera companies, symphony orchestras, dance groups, and theater groups; advocacy groups; global initiatives; medical, professional, and trade associations; environmental and conservation groups; and social service agencies.

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.

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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.

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