



SNAPSHOT OF TODAY'S
**PHILANTHROPIC
LANDSCAPE**

6th Edition, 2017

A Guide for Philanthropy in the United States



Contents

- 2** Letter from the Chairman
- 3** Snapshot
- 9** Individual Giving
- 25** Foundation Giving
- 31** Corporate Giving
- 39** Giving by Bequest
- 45** Non-Profit Overview
- 51** About CCS



Letter from the Chairman

The data and stories we've collected throughout the past year overwhelmingly confirm what we see every day working alongside non-profits and donors alike: philanthropy's role in uplifting, challenging, and strengthening our communities is stronger than ever. That's why I am so pleased to share this sixth edition of the *Snapshot of Today's Philanthropic Landscape*, a guide that helps you navigate the philanthropic terrain and celebrates those who advance the country's most important missions.

As usual, we've included data pertaining to individual, corporate, foundation, and bequest giving along with details about our nation's high net worth donors. We've also provided a close look at emerging trends related to digital giving, donor-advised funds, donor retention, as well as giving in the current political climate.

As a firm that has worked with over 12,000 non-profit organizations throughout the globe, we hope this resource helps you pursue your missions and make an impact on your communities and the world at large.

A handwritten signature in black ink, appearing to read "Robert Kissane", with a long horizontal flourish extending to the right.

Robert Kissane

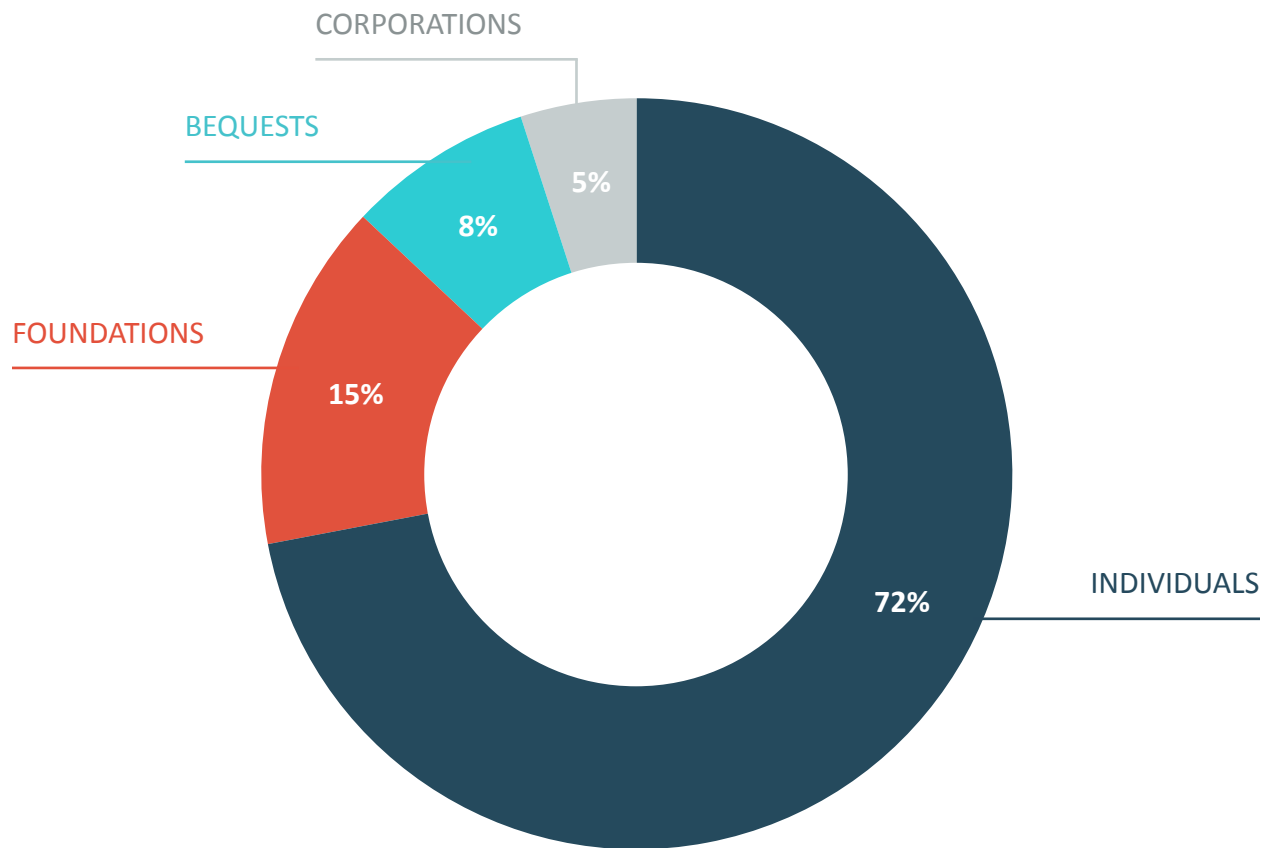
Chairman
CCS Fundraising





Snapshot

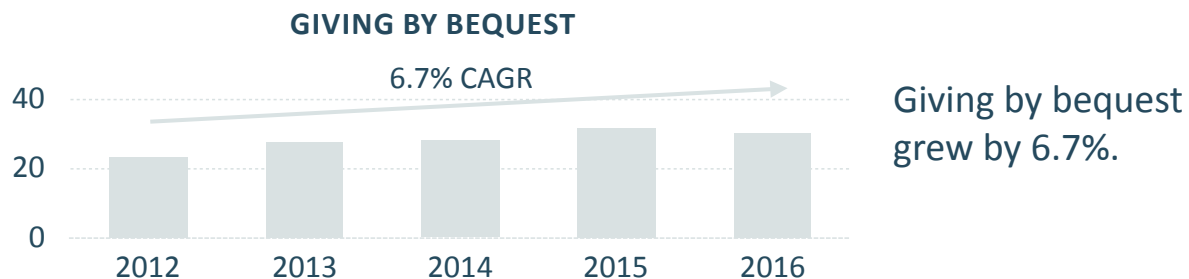
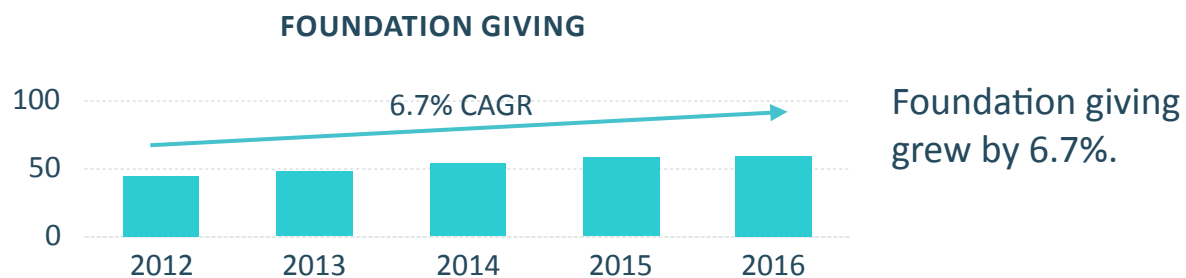
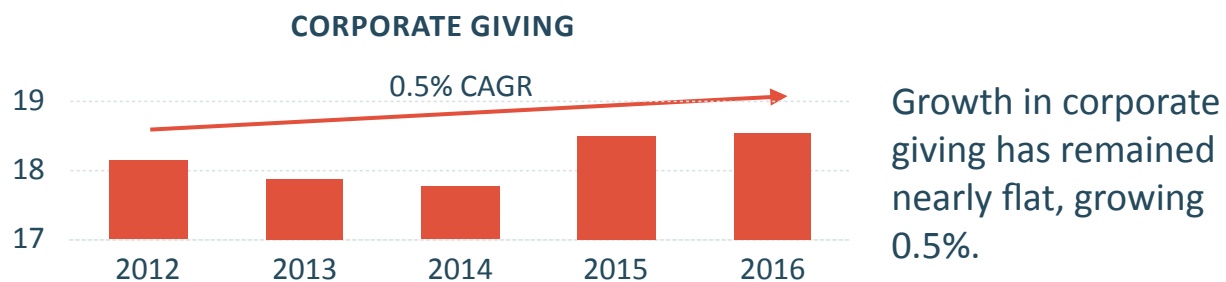
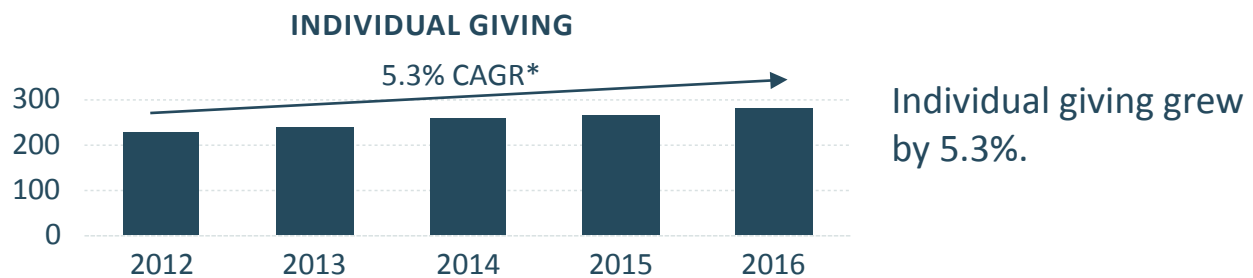
Last Year, Americans Gave \$390.1 Billion



GIVING SOURCE	AMOUNT	TWO-YEAR CHANGE IN GIVING
Individuals	\$281.9B	Increased by 8.0%
Foundations	\$59.3B	Increased by 8.0%
Bequests	\$30.4B	Decreased by 2.3%
Corporations	\$18.6B	Increased by 2.7%

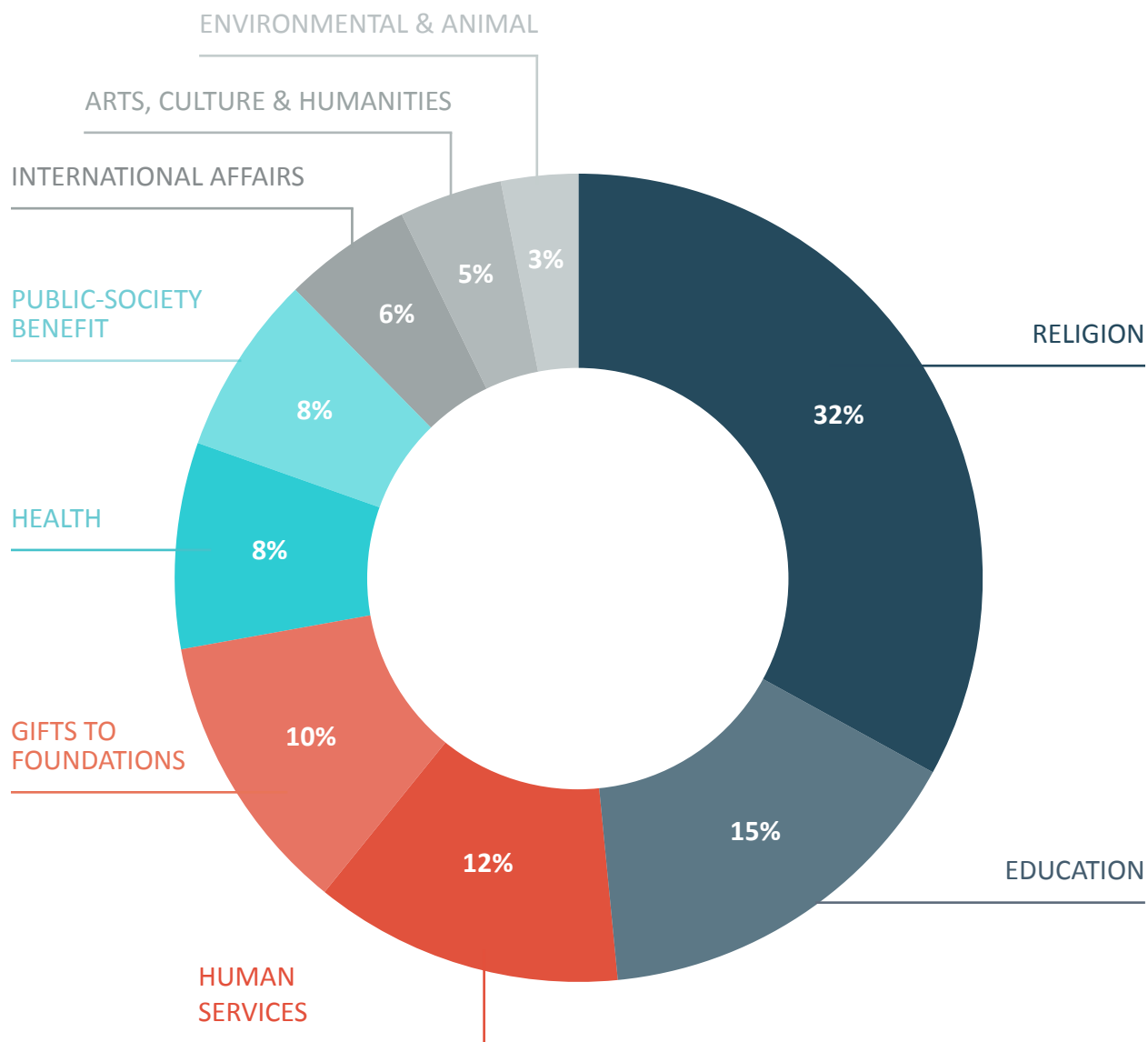
Five-Year Giving Trends

All charitable giving sources have grown over the last five years.



*Compound annual growth rate (CAGR)

\$390.1 Billion Supported the Following Sectors:




Over the Past Two Years, Most Major Charitable Sectors Saw an Increase in Giving

Giving to International Affairs saw the largest gain.

SECTOR	AMOUNT	TWO-YEAR CHANGE IN GIVING
Religion	\$122,900.0M	Increased 6.0%
Education	\$59,800.0M	Increased 12.5%
Human Services	\$46,800.0M	Increased 8.1%
Gifts to Foundations	\$40,600.0M	Decreased 7.4%
Health	\$33,100.0M	Increased 6.3%
Public-Society Benefit	\$29,900.0M	Increased 10.1%
International Affairs	\$22,000.0M	Increased 20.7%
Arts, Culture & Humanities	\$18,200.0M	Increased 12.3%
Environmental & Animal	\$11,100.0M	Increased 13.5%



A close-up photograph of a hand holding a small amount of dark, moist soil. The background is a soft-focus view of a natural landscape, possibly a forest floor or a field, with various shades of green and brown. The lighting is natural, suggesting daylight. The overall mood is earthy and organic.

Individual Giving

Americans are Generous

\$281.9
BILLION

Individuals gave **\$281.9 billion** to charity in 2016.

72%
OF ALL GIVING

Individual giving increased by **3.9%** since 2015 and accounted for **72%** of all giving in the United States.

COMPARING THE GENERAL U.S. POPULATION TO WEALTHY HOUSEHOLDS



U.S. POPULATION



59% of the population gave to charity.



\$2,520
AVERAGE

\$2,520 was the average amount given.



WEALTHY HOUSEHOLDS



91% of wealthy households gave to charity.



\$25,509
AVERAGE

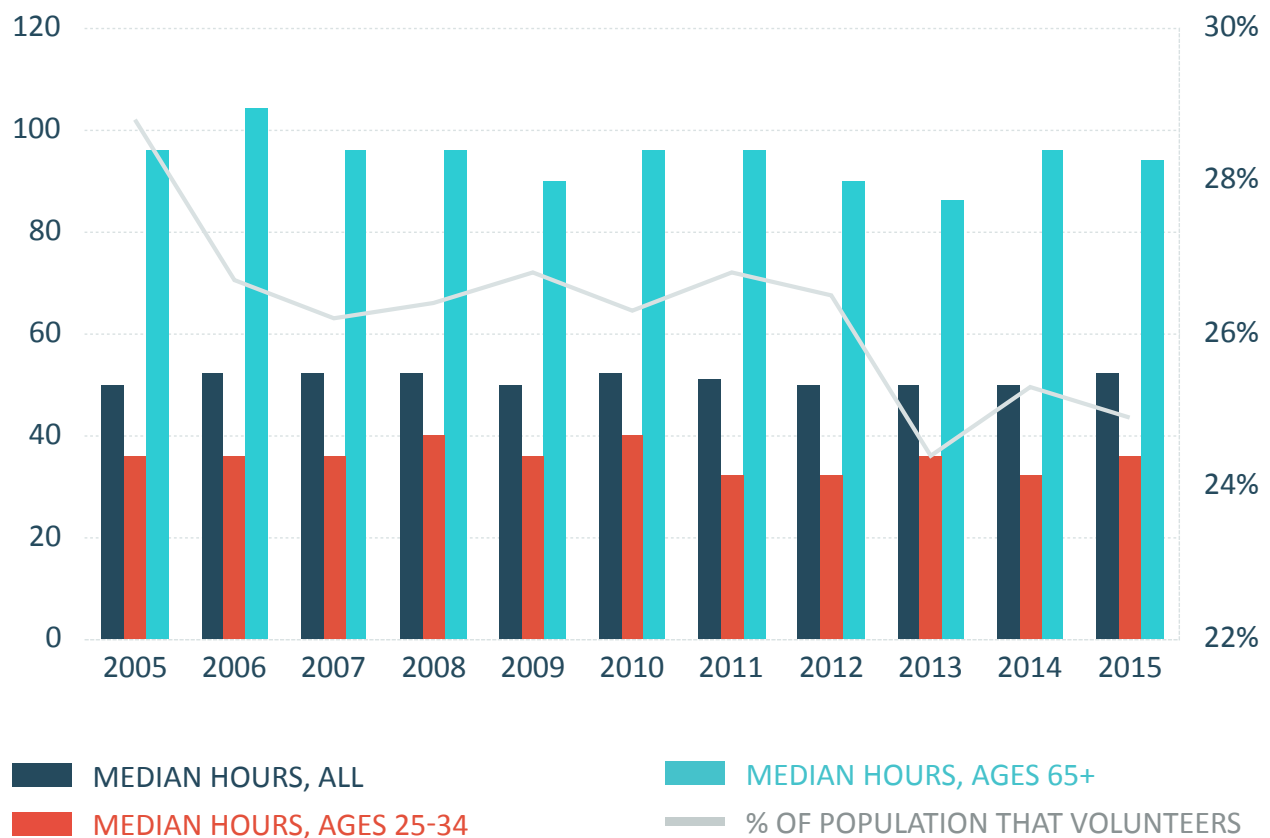
\$25,509 was the average amount given.

1 in 4 Americans Volunteered Last Year, 62.6 Million People



50% of wealthy households volunteered their time — **twice the rate** of the general population.

MEDIAN HOURS VOLUNTEERED BY AGE GROUP

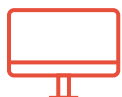


While the number of Americans volunteering has declined over the past 10 years, the median number of hours volunteered has remained consistent.

Digital Giving Continues to Grow



Digital giving increased by **8.6%** in 2016.

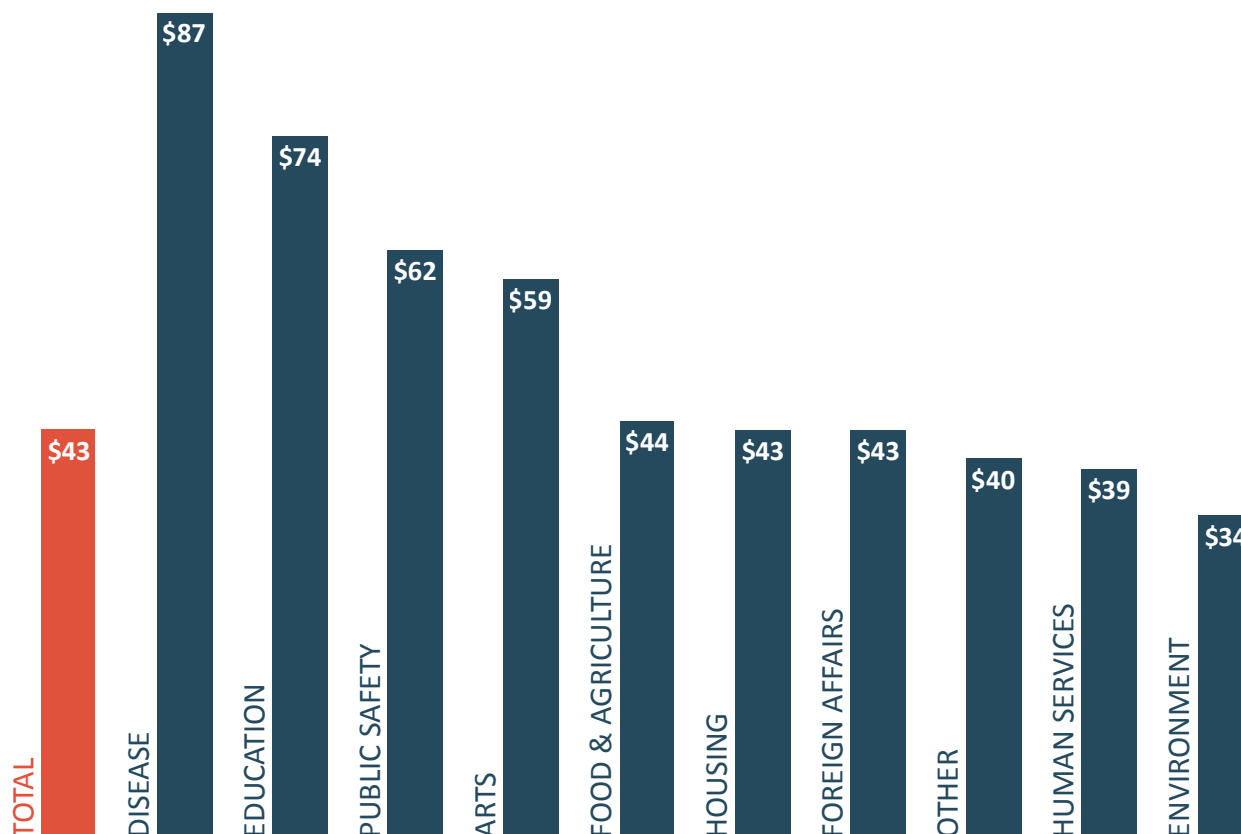


50%
GIVE

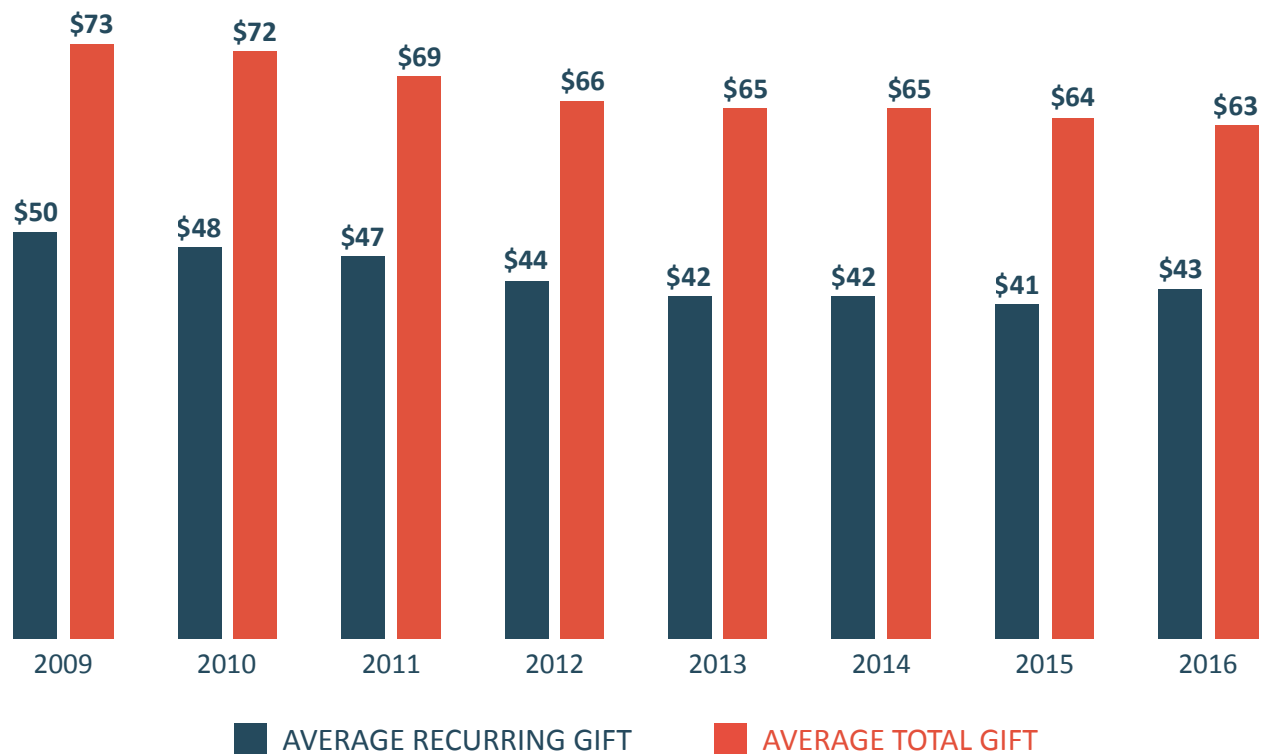
50% of wealthy people reported making a gift online.

The average size of recurring gifts varies significantly by cause.

AVERAGE RECURRING GIFT SIZE



In 2016, the average recurring gift size **increased to \$43** after decreasing for six consecutive years.

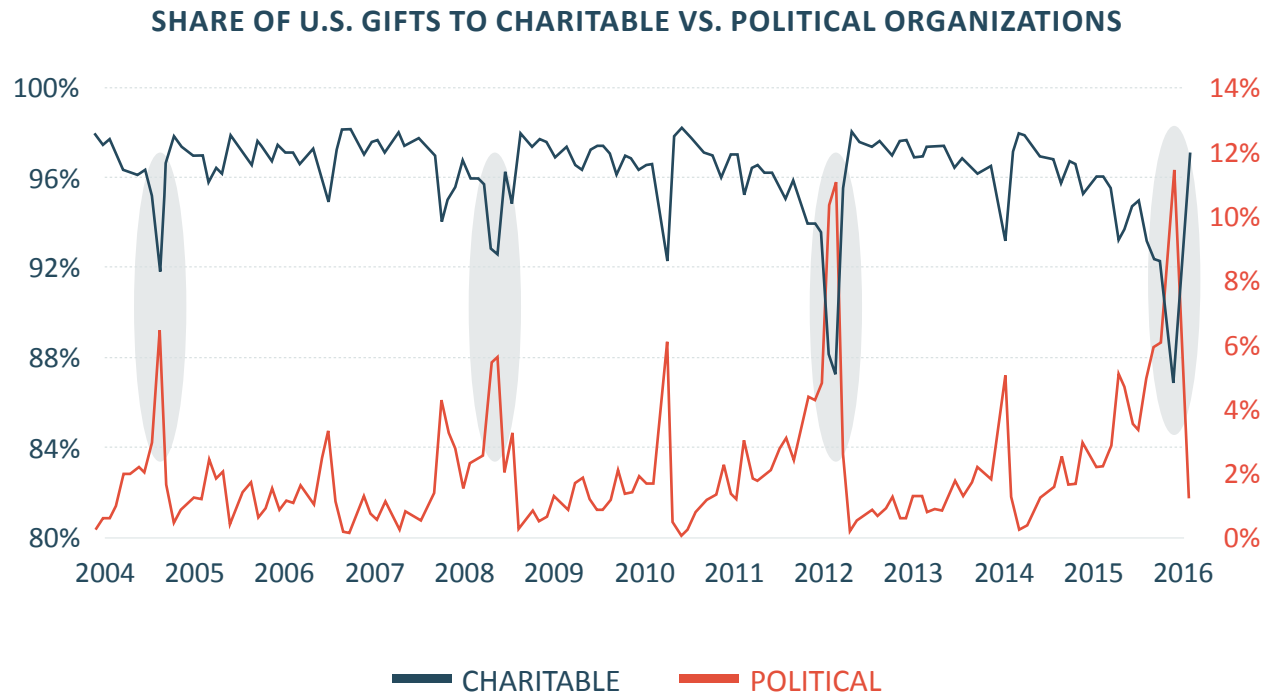


The average total gift is declining as total online giving increases.



Political Giving & Philanthropy

There appears to be a correlation between political and charitable giving.



As political giving increases around U.S. presidential and congressional elections, charitable giving decreases.

There is also an uptick in charitable giving following elections.



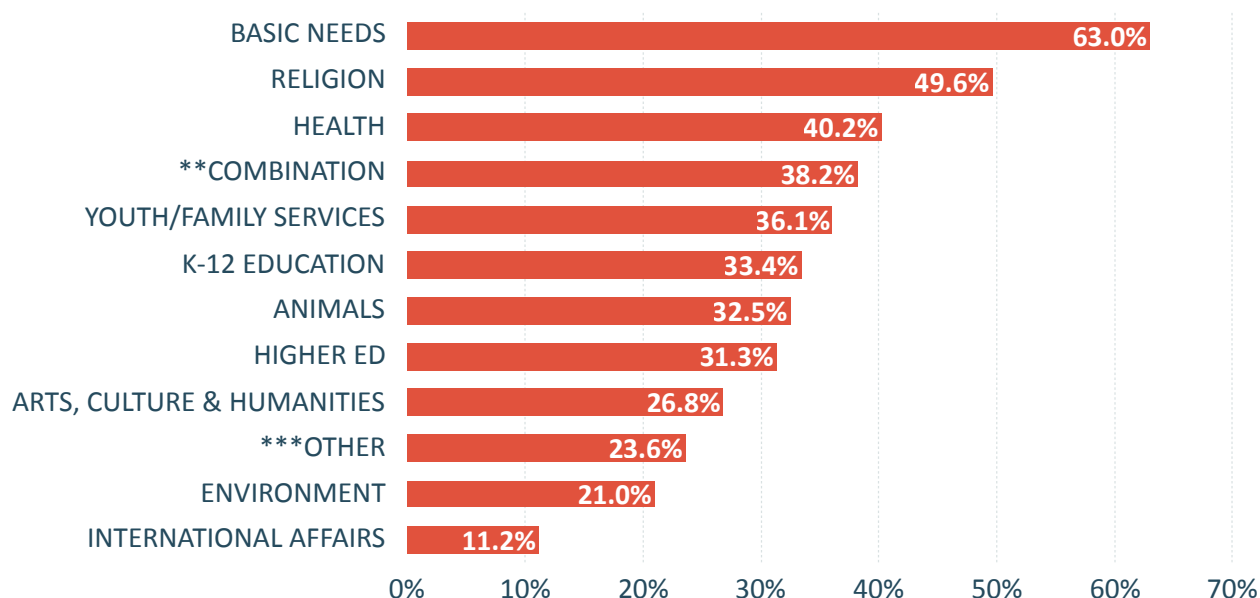
A Generational Shift in Giving to Religion

While giving to Religion remains the top cause across all generations, giving to other causes varies significantly by generation.

	GIVING TO RELIGION	OTHER TOP CAUSES
MATURES <i>(born 1945 and earlier)</i>	60% donate 51% volunteer	Higher Education, Health, Emergency Relief, Troops & Veterans, Arts & Culture, Advocacy
BABY BOOMERS <i>(born 1946 – 1964)</i>	48% donate 48% volunteer	Higher Education, Health, and First Responder Organizations
GENERATION X <i>(born 1965 – 1976)</i>	38% donate 30% volunteer	Health, Environmental & Animal
MILLENNIALS <i>(born 1977 – 1995)</i>	32% donate 24% volunteer	Human Rights, International Affairs, Child Development, and Social Justice

High Net Worth Giving Trends

CAUSES SUPPORTED BY HNW* DONORS



WILL GIVE AS
MUCH OR MORE

85% of wealthy individuals plan to give as much or more in the next three years.

Women, African Americans, and younger individuals (under 50) are **even more likely to increase** their giving.

*High Net Worth (HNW) individuals are defined as having a net worth of \$1 million or more (excluding the value of their primary home).

**Combined organizations include: United Way, United Jewish Appeal, Catholic Charities, and community foundations, among others.

***Other includes: LGBT organizations, veteran affairs, and neighborhood associations, among others.

73.6% of Wealthy Donors Made Unrestricted Gifts to Charity

BELIEFS ABOUT UNRESTRICTED GIVING



50.5% of wealthy donors report no preference for restricted and unrestricted giving.



44.2% believe unrestricted giving allows organizations to meet and sustain their missions.



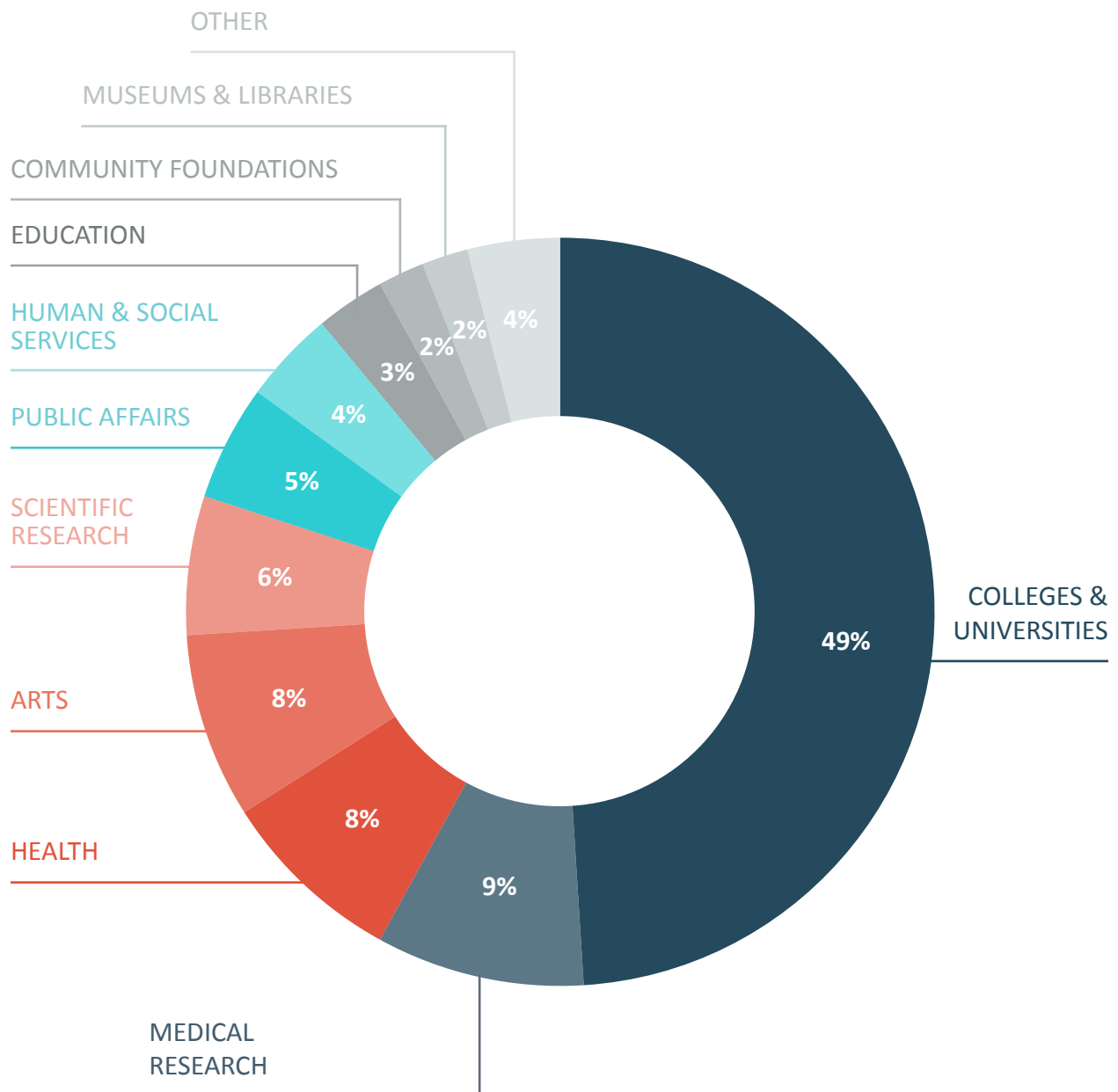
38.8% believe unrestricted giving places the decisions about funding allocation and budgeting at the organization level.



■ NO PREFERENCE ■ FAVOR UNRESTRICTED ■ FAVOR RESTRICTED

High Net Worth Donors: Where They Gave

LARGEST PUBLICLY REPORTED GIFTS BY PERCENT OF GIFT VALUE



**PUBLICLY REPORTED GIFTS OF \$1 MILLION+
(JANUARY 2016 – MARCH 2017), TOP 10 SECTORS**

	SECTOR	SUM OF GIFT VALUE	NUMBER OF GIFTS	% OF GIFT VALUE	% OF COUNT
1	Colleges & Universities	\$5,100.0M	536	49%	56%
2	Medical Research	\$907.0M	19	9%	2%
3	Health	\$847.8M	110	8%	12%
4	Arts	\$800.7M	65	8%	7%
5	Scientific Research	\$600.0M	2	6%	0%
6	Public Affairs	\$530.0M	8	5%	1%
7	Human & Social Services	\$390.2M	39	4%	4%
8	Education	\$299.1M	47	3%	5%
9	Community Foundations	\$247.5M	9	2%	1%
10	Museums & Libraries	\$193.6M	34	2%	4%
	All	\$10,500.0M	995	100%	100%

Top 50 Publicly Reported Gifts by Individuals (January 2016 – March 2017)

	DONOR	RECIPIENT	GIFT VALUE
1	Nicolas Berggruen	Berggruen Institute (CA)	\$500.0M
2	Philip H. and Penelope Knight	University of Oregon (OR)	\$500.0M
3	Philip H. Knight	Stanford University (CA)	\$400.0M
4	Michael R. Bloomberg	Johns Hopkins University, Bloomberg School of Public Health (MD)	\$300.0M
5	Steven A. Cohen	Cohen Veterans Network (CT)	\$275.0M
6	Charles T. Munger	University of California at Santa Barbara (CA)	\$200.0M
7	Lawrence J. Ellison	University of Southern California (CA)	\$200.0M
8	Sanford I. and Joan H. Weill	University of California at San Francisco (CA)	\$185.0M
9	Sheryl Sandberg	Sheryl Sandberg & Dave Goldberg Family Foundation (CA)	\$107.2M
10	Russell L. Carson and James Simons	New York Genome Center (NY)	\$100.0M
11	Patricia and Phillip Frost	University of Miami (FL)	\$100.0M
12	Paul G. Allen	Paul G. Allen Frontiers Group (WA)	\$100.0M
13	David Geffen	Museum of Modern Art (NY)	\$100.0M
14	Reed Hastings	Silicon Valley Community Foundation (CA)	\$100.0M
15	Robert E. and Dorothy J. King	Stanford University (CA)	\$100.0M
16	Charles Butt*	Holdsworth Center (TX)	\$100.0M
17	John A. and Susan Sobrato*	Santa Clara University (CA)	\$100.0M
18	Peter H. and Paula Lunder*	Colby College Museum of Art (ME)	\$100.0M
19	Roxanne Quimby	National Park Foundation (DC)	\$80.0M
20	Steven A. and Alexandra M. Cohen	NewYork-Presbyterian Hospital (NY)	\$75.0M
21	Ronald O. Perelman	World Trade Center (NY)	\$75.0M
22	Mickey Sands and Rob Sands and Richard Sands	Rochester Area Community Foundation (NY)	\$61.0M
23	Suzanne Dworak-Peck	University of Southern California (CA)	\$60.0M
24	Walter Scott Jr.	Colorado State University (CO)	\$53.3M
25	Anonymous	Yale University (CT)	\$50.0M

	DONOR	RECIPIENT	GIFT VALUE
26	Robert F. Smith	Cornell University (NY)	\$50.0M
27	Harriet Heyman and Michael Moritz	University of Chicago (IL)	\$50.0M
28	Michael R. Bloomberg	Johns Hopkins University (MD)	\$50.0M
29	Sidney Kimmel	Johns Hopkins University (MD)	\$50.0M
30	Elaine Wynn	Los Angeles County Museum of Art (CA)	\$50.0M
31	Steven and Roberta Denning	Stanford University (CA)	\$50.0M
32	Michael R. Bloomberg	Museum of Science, Boston (MA)	\$50.0M
33	Harold C. and Annette C. Simmons	Trinity Park (TX)	\$50.0M
34	James and Miriam Mulva	University of Texas at Austin (TX)	\$50.0M
35	William K. Bowes Jr.	University of California at San Francisco (CA)	\$50.0M
36	Joan E. Kuni	Community Foundation for Southwest Washington (WA)	\$50.0M
37	Howard R. Levine	Foundation for the Carolinas (NC)	\$45.0M
38	Jeffrey Gundlach	Albright-Knox Art Gallery (NY)	\$42.0M
39	Kenneth C. Griffin	Museum of Modern Art (NY)	\$40.0M
40	William H. and Sue Gross	University of California at Irvine (CA)	\$40.0M
41	Thompson Dean	University of Virginia (VA)	\$40.0M
42	Richard and Joyce Farmer	Miami University (OH)	\$40.0M
43	Anonymous	University of North Carolina at Chapel Hill (NC)	\$40.0M
44	James F. Goldstein	Los Angeles County Museum of Art (CA)	\$40.0M
45	Frank Stanton	Ohio State University College of Veterinary Medicine (OH)	\$39.0M
46	James Simons	University of California at San Diego (CA)	\$38.4M
47	Bernard and Billi Marcus	Hillel International (DC)	\$38.0M
48	Ernest Tschannen	University of California at Davis Eye Center (CA)	\$37.0M
49	Saul Zaentz	Harvard Graduate School of Education (MA)	\$35.5M
50	Joe and Rika Mansueto	University of Chicago (IL)	\$35.0M

*Gift made in 2017





Foundation Giving

Foundations Gave \$59.3 Billion to Charity in 2016



15%
OF ALL GIVING

15% of all giving came from foundations.



3.5%
INCREASE

Foundation giving increased by **3.5%**.



\$28.9
BILLION

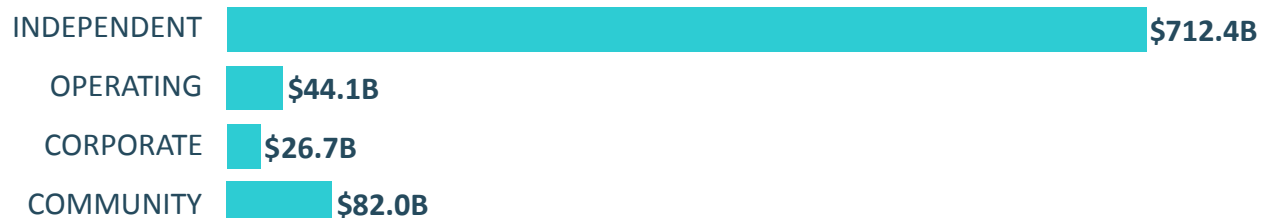
Family foundations gave **\$28.9 billion**, 48.7% of giving by all foundations.

Independent foundations make up the majority of U.S. foundations.

TOTAL FOUNDATIONS: 86,726



TOTAL ASSETS: \$865.2 BILLION



Top Foundations by Total Giving

	FOUNDATION	TOTAL GIVING	TOTAL ASSETS
1	Bill & Melinda Gates Foundation (WA)	\$3,439.7M	\$44,320.9M
2	Silicon Valley Community Foundation (CA)	\$956.8M	\$6,529.5M
3	The Atlantic Philanthropies (NY)	\$521.7M	\$2,219.5M
4	Ford Foundation (NY)	\$518.4M	\$12,400.5M
5	The Susan Thompson Buffett Foundation (NE)	\$416.4M	\$3,112.1M
6	Foundation to Promote Open Society (NY)	\$410.6M	\$4,986.9M
7	Walton Family Foundation, Inc. (AR)	\$360.5M	\$2757.1M
8	The William and Flora Hewlett Foundation (CA)	\$353.6M	\$9,020.1M
9	The Robert Wood Johnson Foundation (NJ)	\$346.2M	\$10,501.4M
10	W. K. Kellogg Foundation (MI)	\$294.9M	\$8,621.2M
11	The David and Lucile Packard Foundation (CA)	\$291.7M	\$7,084.9M
12	Greater Kansas City Community Foundation (MO)	\$263.3M	\$2,401.1M
13	Richard F. Aster, Jr. Foundation (DE)	\$237.2M	\$0.1M
14	The Andrew W. Mellon Foundation (NY)	\$231.8M	\$6,427.5M
15	Simons Foundation (NY)	\$230.8M	\$2,337.2M
16	The John D. and Catherine T. MacArthur Foundation (IL)	\$222.5M	\$6,469.2M
17	The Leona M. and Harry B. Helmsley Charitable Trust (NY)	\$222.3M	\$5,444.2M
18	Gordon and Betty Moore Foundation (CA)	\$220.7M	\$6,559.4M
19	Wells Fargo Foundation (CA)	\$189.4M	\$294.6M
20	The California Endowment (CA)	\$182.8M	\$3,668.5M
21	The Bank of America Charitable Foundation, Inc. (NC)	\$175.7M	\$4.1M
22	The Chicago Community Trust (IL)	\$171.0M	\$2,290.7M
23	The Wal-Mart Foundation, Inc. (AR)	\$168.6M	\$18.6M
24	John Templeton Foundation (PA)	\$162.7M	\$3,231.7M
25	Eli & Edythe Broad Foundation (CA)	\$158.3M	\$1,941.4M
26	The New York Community Trust (NY)	\$157.8M	\$2571.0M
27	California Community Foundation (CA)	\$154.6M	\$1,457.1M
28	Howard G. Buffett Foundation (IL)	\$154.5M	\$315.3M
29	The Rockefeller Foundation (NY)	\$150.3M	\$4,237.7M
30	Margaret A. Cargill Foundation (MN)	\$150.3M	\$3,050.6M
31	Bloomberg Philanthropies (NY)	\$148.7M	\$6,550.3M
32	The Columbus Foundation and Affiliated Organizations (OH)	\$142.9M	\$1,826.9M
33	The Duke Endowment (NC)	\$140.0M	\$3,433.2M
34	The Kresge Foundation (MI)	\$140.0M	\$3,666.6M
35	Tosa Foundation (CA)	\$136.5M	\$648.4M

Giving to Donor-Advised Funds is Outpacing Overall Charitable Giving

3X
INCREASE

While total charitable giving in the United States grew by 13%, contributions to donor-advised funds nearly **tripled** from 2008 to 2013.

10%
OF INDIVIDUAL
GIVING

Donor-advised funds could soon account for **10%** of all individual giving.

Donor-advised funds are a way for individuals to make non-cash gifts.

 **18%**
INCREASE

Fidelity reported an **18%** increase in contributions from 2015.

 **2/3**
NON-CASH
ASSETS

Two-thirds of those contribution dollars were non-cash, such as stock and real estate.

25 LARGEST DONOR-ADVISED FUNDS AND COMMUNITY FOUNDATIONS BY TOTAL GIVING

	ORGANIZATION	TOTAL GIVING	CONTRIBUTIONS	TOTAL ASSETS	PAYOUT RATE
1	Fidelity Charitable Gift Fund	\$2,841.5M	\$4,607.9M	\$15,222.0M	16%
2	Silicon Valley Community Foundation	\$822.4M	\$1,857.7M	\$5,183.4M	14%
3	National Christian Foundation	\$811.7M	\$959.3M	\$1,538.1M	35%
4	Vanguard Charitable Endowment Program	\$698.5M	\$1,205.2M	\$5,143.4M	12%
5	Foundation for the Carolinas	\$310.7M	\$558.6M	\$848.9M	27%
6	Jewish Communal Fund	\$294.2M	\$401.0M	\$1,391.5M	17%
7	Goldman Sachs Philanthropy Fund	\$216.7M	\$950.7M	\$1,486.3M	13%
8	American Endowment Foundation	\$143.8M	\$402.0M	\$746.5M	16%
9	Goldman Sachs Charitable Gift Fund	\$141.0M	\$159.6M	\$414.9M	25%
10	Ayco Charitable Foundation	\$119.8M	\$198.6M	\$511.9M	19%
11	Morgan Stanley Global Impact Funding Trust	\$116.7M	\$335.4M	\$772.4M	13%
12	New York Community Trust	\$110.1M	\$142.2M	\$1,048.7M	10%
13	Greater Kansas City Community Foundation	\$109.9M	\$127.8M	\$1,079.0M	9%
14	Bank of America Charitable Gift Fund	\$108.8M	\$254.1M	\$592.1M	16%
15	Community Foundation of Greater Memphis	\$106.4M	\$137.3M	\$228.0M	32%
16	Tides Foundation	\$105.9M	\$104.6M	\$131.8M	45%
17	Renaissance Charitable Foundation	\$104.3M	\$198.5M	\$755.1M	12%
18	Charities Aid Foundation America	\$103.8M	\$104.4M	\$66.5M	61%
19	Greater Houston Community Foundation	\$87.1M	\$193.4M	\$479.2M	15%
20	Community Foundation for Greater Atlanta	\$83.0M	\$67.0M	\$541.1M	13%
21	Columbus Foundation	\$75.3M	\$72.1M	\$557.4M	12%
22	Minneapolis Foundation	\$68.6M	\$45.7M	\$319.1M	18%
23	U.S. Charitable Gift Trust	\$60.4M	\$88.4M	\$320.5M	16%
24	Greater Cincinnati Foundation	\$58.4M	\$73.0M	\$181.8M	24%
25	Seattle Foundation	\$57.2M	\$49.6M	\$264.1M	18%



A man with grey hair and a beard, wearing a light blue shirt and dark tie, is looking down at a tablet held by a woman. The woman has long dark hair and is wearing a dark blue sleeveless top. They are both focused on the screen. The background is a blurred office environment with warm lighting. A dark blue banner with white text and red diagonal lines is at the bottom.

Corporate Giving

Corporations Gave \$18.6 Billion to Charity in 2016

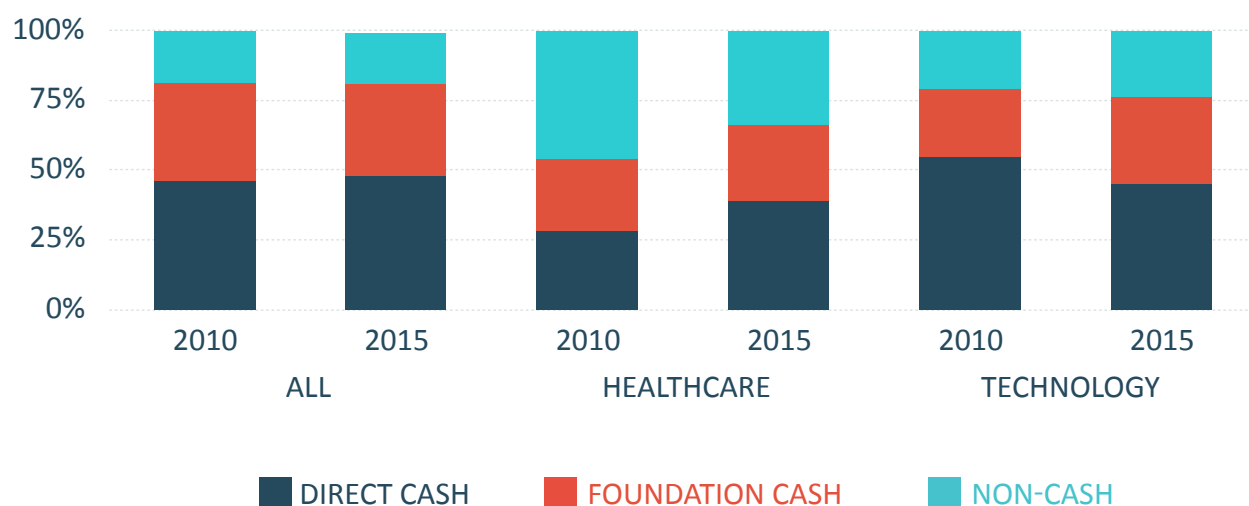
5%
OF ALL GIVING 5% of all giving came from corporations.

3.5%
INCREASE Corporate giving increased by 3.5%.

82%+
CASH GIVING Cash giving represents the majority of corporate contributions, over 82%.

Cash giving by corporations has remained consistent across the board with the exception of the Healthcare and Technology industries.

INDUSTRY BREAKDOWN OF TOTAL GIVING BY FUNDING TYPE, AVERAGE PERCENTAGE



Corporate Gift Matching Programs

Corporate gift matching accounts for nearly 13% of corporate cash giving.



\$2-3
BILLION

An estimated \$2-3 billion was donated through corporate gift matching programs, nearly 13% of corporate cash contributions.

...It could be even higher.



\$6-10B
UNCLAIMED EACH YEAR

An estimated \$6-10 billion in matching gift funds go unclaimed each year.

The majority of Fortune 500 companies have gift matching programs.



65%
FORTUNE 500

65% of Fortune 500 companies offer gift matching programs.

...Employee participation is low.



9%
PARTICIPATE

The median employee participation rate for matching gift programs is 9%.

Top 50 Corporations by Cash Giving

	CORPORATION	PRE-TAX PROFIT	TOTAL CASH DONATIONS	CASH DONATIONS AS % OF PRE-TAX PROFIT
1	Gilead Sciences	\$21,700.0M	\$446.7M	2.1%
2	Walmart Stores	\$24,800.0M	\$301.0M	1.2%
3	Wells Fargo & Company	\$33,600.0M	\$281.3M	0.8%
4	Goldman Sachs Group	\$8,800.0M	\$276.4M	3.2%
5	ExxonMobil Corporation	\$22,000.0M	\$268.0M	1.2%
6	Chevron Corporation	\$4,800.0M	\$225.0M	4.7%
7	JPMorgan Chase & Company	\$30,700.0M	\$224.0M	0.7%
8	Bank Of America	\$22,200.0M	\$168.5M	0.8%
9	Google	\$19,700.0M	\$167.9M	0.9%
10	Citigroup	\$24,900.0M	\$142.8M	0.6%
11	Microsoft Corporation	\$18,500.0M	\$135.2M	0.7%
12	Merck & Company	\$5,400.0M	\$132.5M	2.5%
13	Coca-Cola Company	\$9,600.0M	\$117.3M	1.2%
14	AT&T Corporation	\$20,700.0M	\$112.9M	0.6%
15	Target Corporation	\$5,000.0M	\$111.5M	2.3%
16	General Mills	\$1,800.0M	\$105.0M	6.0%
17	Pfizer	\$9,000.0M	\$93.3M	1.0%
18	Kroger Company	\$3,100.0M	\$76.5M	2.5%
19	PNC Financial Services Group	\$5,500.0M	\$72.0M	1.3%
20	Morgan Stanley	\$8,500.0M	\$62.5M	0.7%
21	State Farm Mutual Automobile Insurance Company	N/A	\$60.8M	N/A
22	PepsiCo	\$7,400.0M	\$56.4M	0.8%
23	Verizon Communications	\$28,200.0M	\$56.4M	0.2%
24	Ford Motor Company	\$10,200.0M	\$55.6M	0.5%
25	Capital One Financial Corporation	\$5,900.0M	\$53.7M	0.9%

	CORPORATION	PRE-TAX PROFIT	TOTAL CASH DONATIONS	CASH DONATIONS AS % OF PRE-TAX PROFIT
26	U.S. Bancorp	\$8,300.0M	\$53.0M	0.7%
27	Prudential Financial	\$7,800.0M	\$51.9M	0.7%
28	Eli Lilly and Company	\$2,800.0M	\$50.0M	1.8%
29	Caterpillar	\$2,900.0M	\$46.0M	1.6%
30	Nationwide	\$1,200.0M	\$44.7M	3.73%
31	ConocoPhillips	(\$7,200.0M)	\$44.1M	(0.6%)
32	Metlife	\$7,500.0M	\$42.6M	0.6%
33	Cisco Systems	\$11,200M	\$41.2M	0.4%
34	Dow Chemical Company	\$10,000.0M	\$40.9M	0.4%
35	American Express Company	\$9,000.0M	\$37.2M	0.5%
36	Emerson	\$4,200.0M	\$35.8M	0.9%
37	Allstate Corporation	\$3,200.0M	\$31.1M	1.0%
38	General Motors Corporation	\$7,800.0M	\$30.0M	0.4%
39	Deere & Company	\$2,800.0M	\$28.6M	1.0%
40	Qualcomm	\$6,500.0M	\$28.0M	0.4%
41	Bristol-Myers Squibb	\$2,100.0M	\$27.0M	1.3%
42	Lockheed Martin Corporation	\$5,000.0M	\$27.0M	0.5%
43	Sears, Roebuck and Company	(\$1,200.0M)	\$26.2M	(1.9%)
44	Kimberly-Clark Corporation	\$1,400.0M	\$25.0M	1.9%
45	Starbucks Corporation	\$4,000.0M	\$23.5M	0.6%
46	Dominion Resources	\$2,800.0M	\$23.4M	0.8%
47	Travelers Companies	\$4,700.0M	\$22.3M	0.5%
48	Aetna	\$4,200.0M	\$22.0M	0.5%
49	New York Life Insurance Company	N/A	\$21.4M	N/A
50	Valero Energy Corporation	\$6,000.0M	\$20.5M	0.3%



Total Cash Giving, Past 4 Years

	CORPORATION	INDUSTRY	TOTAL CASH GIVING	2015	2014	2013	2012
1	Walmart Stores	Retailers	\$1,200.0M	\$301.0M	\$322.4M	\$311.6M	\$311.6M
2	Wells Fargo & Company	Banks	\$1,100.0M	\$281.3M	\$281.2M	\$275.5M	\$315.8M
3	Goldman Sachs Group	Banks	\$1,000.0M	\$276.4M	\$251.0M	\$262.6M	\$241.3M
4	Chevron Corporation	Energy	\$1,000.0M	\$225.0M	\$242.3M	\$274.3M	\$262.4M
5	ExxonMobil Corporation	Energy	\$945.6M	\$268.0M	\$236.7M	\$227.5M	\$213.4M
6	JPMorgan Chase & Company	Banks	\$859.0M	\$224.0M	\$240.6M	\$210.9M	\$183.5M
7	Gilead Sciences	Healthcare	\$721.7M	\$446.7M	\$275.0M	N/A	N/A
8	Bank Of America	Banks	\$714.3M	\$168.5M	\$192.5M	\$166.5M	\$186.8M
9	Google	Retailers	\$573.0M	\$167.8M	\$154.7M	\$105.5M	\$145.0M
10	Citigroup	Banks	\$571.2M	\$142.8M	\$146.7M	\$144.6M	\$137.0M
11	Target Corporation	Retailers	\$513.1M	\$111.5M	\$105.9M	\$148.6M	\$147.0M
12	Coca-Cola Company	Food	\$473.8M	\$117.3M	\$128.2M	\$131.8M	\$96.6M
13	Microsoft Corporation	Information Technology	\$465.3M	\$135.2M	\$119.0M	\$112.2M	\$99.0M
14	Merck & Company	Healthcare	\$413.0M	\$132.5M	\$110.6M	\$107.0M	\$62.4M
15	AT&T Corporation	Information Technology	\$393.6M	\$112.9M	\$87.2M	\$98.0M	\$95.5M
16	General Mills	Food	\$318.8M	\$105.1M	\$108.3M	N/A	\$105.6M
17	Kroger Company	Food	\$311.9M	\$76.5M	\$82.0M	\$76.0M	\$77.4M
18	Pfizer	Healthcare	\$279.4M	\$93.3M	\$73.6M	\$51.7M	\$60.7M
19	State Farm Mutual Automobile Insurance Company	Insurance	\$247.1M	\$60.8M	\$60.6M	\$61.6M	\$64.0M
20	Capital One Financial Corporation	Banks	\$219.3M	\$53.7M	\$52.2M	\$58.1M	\$55.3M
21	Morgan Stanley	Other	\$213.4M	\$62.5M	\$55.2M	\$49.3M	\$46.4M
22	U.S. Bancorp	Banks	\$211.6M	\$53.0M	\$44.5M	\$66.4M	\$47.7M
23	Eli Lilly and Company	Healthcare	\$203.1M	\$50.0M	\$42.5M	\$55.7M	\$54.9M
24	PepsiCo	Food	\$192.2M	\$56.4M	\$48.2M	\$46.9M	\$40.6M
25	Verizon Communications	Information Technology	\$180.3M	\$56.4M	\$67.5M	N/A	\$56.4M



A person with curly hair is shown in profile, looking out over a blurred landscape. The background features a green field and distant hills under a bright sky. A dark blue banner is overlaid at the bottom, containing the text "Giving by Bequest".

Giving by Bequest

\$30.4 Billion Was Given By Bequests in 2016



8%

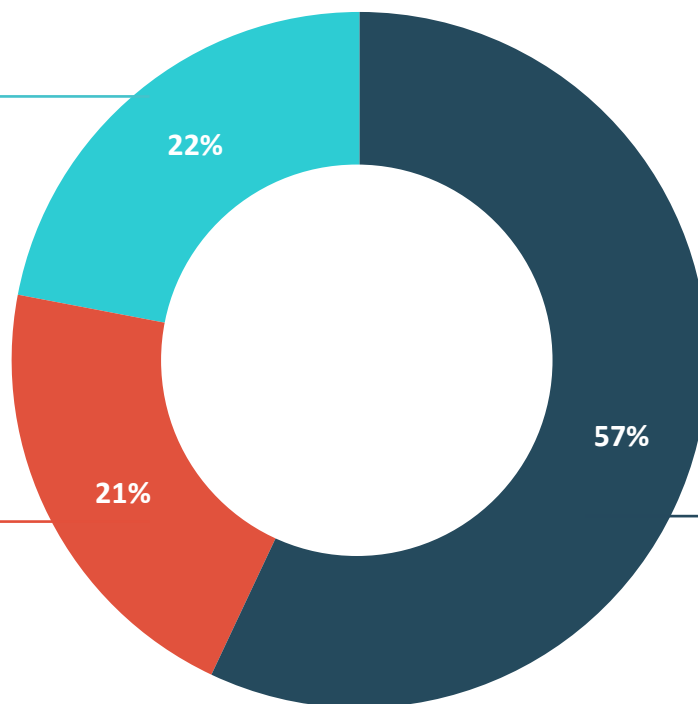
OF ALL GIVING

8% of all giving came through bequests.

TOTAL BEQUESTS BY ESTATE SIZE

ESTATES < \$1M
\$6.7B

ESTATES > \$1M+
AND <\$5M
\$6.5B



ESTATES OF \$5M+
\$17.2B

**WHERE THEY GAVE: PUBLICLY REPORTED BEQUESTS OF \$1M+ BY SECTOR
(JANUARY 2016 – MARCH 2017), TOP 10 SECTORS**

	SECTOR	GIFT VALUE	COUNT	% OF VALUE	% OF COUNT
1	Colleges & Universities	\$844.4M	58	50%	42%
2	Scientific Research	\$400.0M	1	24%	1%
3	Health	\$135.9M	14	8%	10%
4	Community Foundations	\$94.1M	12	6%	9%
5	Arts & Culture	\$72.1M	11	4%	8%
6	Education	\$41.9M	11	2%	8%
7	Museums & Libraries	\$39.7M	15	2%	11%
8	Conservation & The Environment	\$26.8M	2	2%	1%
9	Religious Groups	\$12.5M	2	1%	1%
10	Human & Social Services	\$10.8M	5	1%	4%
	ALL	\$1,700.0M	137	100%	100%

Giving by bequest declined 9% between 2015 and 2016.



Top 25 Publicly Reported Bequests (January 2016 – March 2017)

	DONOR	RECIPIENT	GIFT VALUE
1	Helen Diller*	University of California at San Francisco (CA)	\$500.0M
2	Howard and Lottie Marcus	American Associates, Ben-Gurion University of the Negev (NY)	\$400.0M
3	Kingsley and Kenyon Gillespie	Massachusetts Institute of Technology (MA)	\$100.0M
4	Robert and Helen Lerner	University of Vermont College of Medicine (VT)	\$66.0M
5	Dorothy Braude Edinburg	Art Institute of Chicago (IL)	\$35.0M
6	Nancy W. Mattis*	Rhode Island Foundation (RI)	\$28.0M
7	Wade F.B. Thompson	Central Park Conservancy (NY)	\$25.0M
8	Rosaline and Marcia Cohn	Roosevelt University (IL)	\$25.0M
9	Anonymous	University of Rochester, Simon Graduate School of Business (NY)	\$20.0M
10	Dorothea Ilgen Shaffer	Syracuse University (NY)	\$19.8M
11	R. Kingman Webster*	Essex County Community Foundation (MA)	\$18.0M
12	Cora Nunnally Miller	University of Georgia (GA)	\$17.0M
13	Robert P. Hubbard	Kenyon College (OH)	\$12.0M
14	Robert P. Hubbard	Loomis Chaffee School (CT)	\$12.0M
15	David Dobrow	University of California at Los Angeles (CA)	\$11.7M
16	Eugene Colef	Congregation of Moses (MI)	\$10.5M
17	Daniel W. Dietrich II	Philadelphia Museum of Art (PA)	\$10.0M
18	Joseph A.W. Clayes III	Rady Children's Hospital (CA)	\$10.0M
19	Margaret Talkington	Texas Tech University System (TX)	\$10.0M
20	Juanita Schmeeckle	Southern Minnesota Initiative Foundation (MN)	\$10.0M
21	Don L. Jacobs	University of Kentucky (KY)	\$10.0M
22	Wade F.B. Thompson*	Museum of the City of New York (NY)	\$10.0M
23	Donna Morris	Peninsula College Foundation (WA)	\$9.0M
24	Mary Janvrin and Natalie Janvrin Wiggins*	Community Foundation of Eastern Connecticut (CT)	\$8.0M
25	Mary Janvrin and Natalie Janvrin Wiggins*	Community Foundation of Middlesex County (CT)	\$8.0M

*Gift made in 2017





Non-Profit Overview

Public Charities Contribute an Estimated \$905.9 Billion to the U.S. GDP

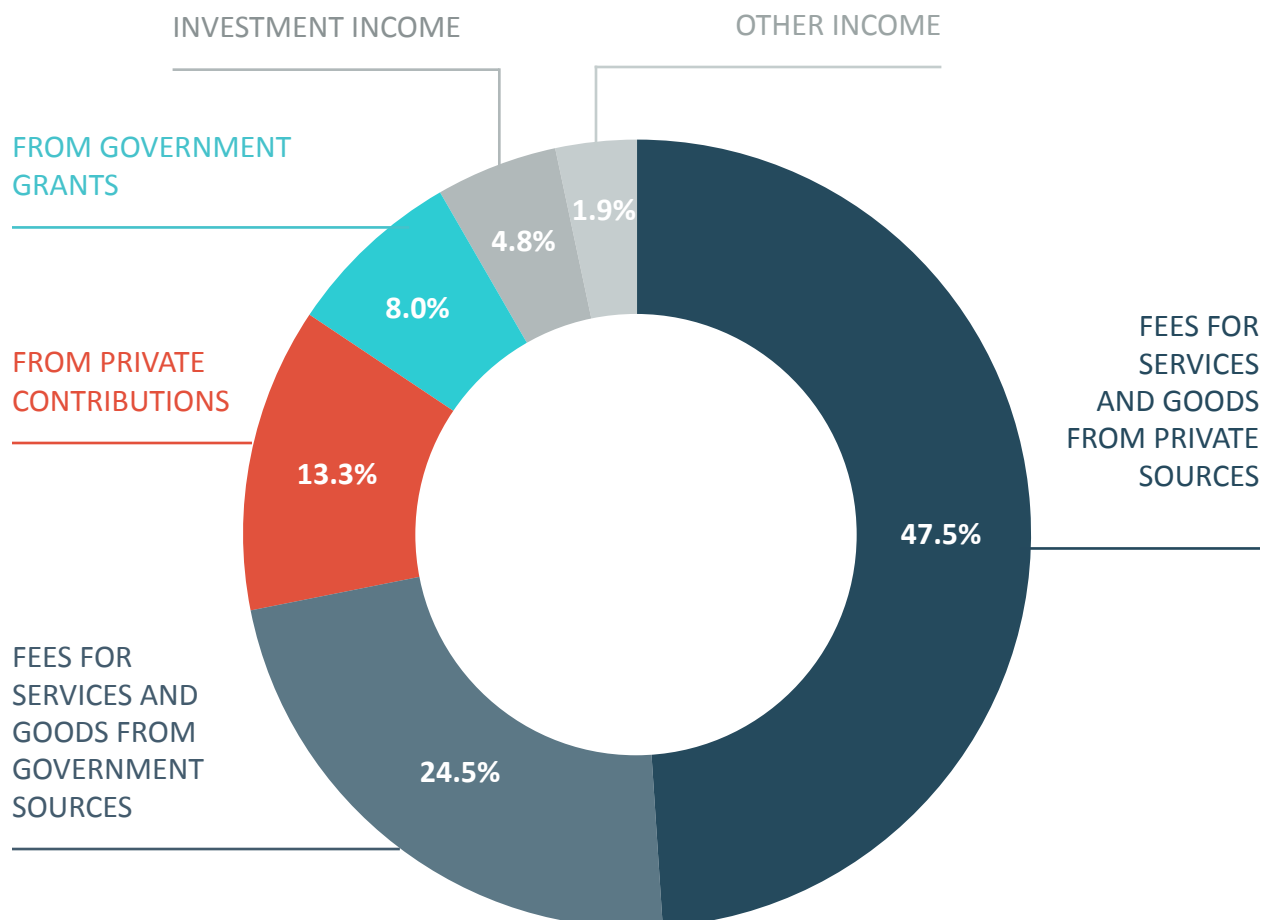
1
MILLION

There are nearly **1 million** public charities in the U.S.

\$3
TRILLION

Public charities control over **\$3 trillion** in assets.

REVENUE SOURCES FOR REPORTING PUBLIC CHARITIES



25 Largest Non-Profits by Total Private Support

	CHARITY	SECTOR	TOTAL PRIVATE SUPPORT	FUNDRAISING EFFICIENCY
1	United Way Worldwide	Social Services	\$3,708.0M	92%
2	Task Force for Global Health	Health	\$3,154.0M	100%
3	Feeding America	Social Services	\$2,150.0M	99%
4	Salvation Army	Social Services	\$1,904.0M	88%
5	YMCA of the USA	Social Services	\$1,202.0M	89%
6	St. Jude Children's Research Hospital	Hospitals & Medical Centers	\$1,181.0M	N/A
7	Food for the Poor	International	\$1,156.0M	97%
8	Boys & Girls Clubs of America	Youth	\$923.0M	89%
9	Catholic Charities USA	Social Services	\$921.0M	92%
10	Goodwill Industries International	Social Services	\$902.0M	97%
11	Habitat for Humanity International	Social Services	\$829.0M	87%
12	World Vision	International	\$825.0M	88%
13	American Cancer Society	Health	\$810.0M	78%
14	Patient Access Network Foundation	Health	\$801.0M	100%
15	Compassion International	International	\$799.0M	N/A
16	Direct Relief	International	\$775.0M	100%
17	Americares Foundation	International	\$740.0M	99%
18	Lutheran Services in America	Social Services	\$723.0M	90%
19	Nature Conservancy	Environment & Animal Welfare	\$646.0M	86%
20	American Heart Association	Health	\$634.0M	86%
21	American National Red Cross	Social Services	\$624.0M	71%
22	Samaritan's Purse	International	\$565.0M	93%
23	MAP International	International	\$545.0M	100%
24	Step Up for Students	Education	\$521.0M	99%
25	Cru	Religious	\$514.0M	92%

Donor Retention

Donor retention rates have been weak over the past 10 years, averaging below 50%.

1 in 5 Nearly **1 in 5** wealthy individuals stopped giving to at least one charity last year.
STOPPED GIVING

Every **\$100** gained in 2015 was offset by **\$91** in losses through gift attrition.

REASONS PEOPLE STOP GIVING TO CHARITY	%
Too frequent solicitation	40.7%
Household circumstance changed	40.0%
Organization was not effective or didn't communicate its effectiveness	18.0%
Other	15.0%
Was asked for an amount you felt was inappropriate	14.0%
You changed your philanthropic focus	12.8%
Organization changed leadership, its mission, or activities in a way you did not support	12.1%
Organization did not respect personal information	9.6%
Organization met its goal or project was completed	3.9%

Improving Donor Retention

FACTORS RANKED AS IMPORTANT TO HNW HOUSEHOLDS AFTER MAKING A GIFT	% RESPONDING IMPORTANT
Spending a reasonable amount on general administrative and fundraising expenses	89.2%
Demonstrating sound business practices including full disclosure of financial statements	89.1%
Don't distribute your name to others	87.8%
Honoring your request for privacy/anonymity	83.5%
Acknowledging gifts by providing a receipt for tax purposes	83.2%
Honoring your request for how your gift is used	82.6%
Acknowledging gifts with a thank you note	64.0%
Communicating specific impact of your gift	60.8%
Providing ongoing communications including newsletters and annual reports	60.8%
Requesting future gifts within your financial limits	40.5%
Offering board membership or other volunteer involvement opportunities	23.6%





About CCS

About CCS

1947
ESTABLISHED

14
EXECUTIVE OFFICES

300+
PROFESSIONAL STAFF MEMBERS

12,000+
ORGANIZATIONS SERVED

CCS is a strategic fundraising firm that partners with non-profits for transformational change. We plan, manage, and implement programs that achieve fundraising goals and mission impact.

WHAT WE DO

CCS designs and implements fundraising initiatives that advance the mission and impact of non-profit organizations across the globe. Specific services include:

- Campaign planning and management
- Major gift acceleration
- Campaign communications and case development
- Feasibility and planning assessments
- Development audits and assessments
- Data analysis, modeling, and research
- Board development and training
- Interim development management
- Learning and leadership development

WHO WE SERVE

Our clients span all non-profit sectors:

- Colleges & Universities
- Independent & Private Schools
- Academic Medical Centers
- Hospitals & Hospices
- Faith-based Organizations
- Arts & Cultural Institutions
- Advocacy & Human Services Organizations
- Medical, Professional, and Trade Associations
- Environmental & Animal Welfare Groups
- Science & Technology Organizations
- Policy Groups

CCS Worldwide

CORPORATE HEADQUARTERS

NEW YORK

527 Madison Avenue, 5th Floor
New York, NY 10022
(212) 695-1175

ccsnewyork@ccsfundraising.com

NEW ENGLAND

BOSTON

155 Federal Street, Suite 306
Boston, MA 02110
(617) 292-2666

ccsboston@ccsfundraising.com

MID-ATLANTIC

BALTIMORE

100 East Pratt Street, Suite 2118
Baltimore, MD 21202
(410) 337-2612

ccsbaltimore@ccsfundraising.com

WASHINGTON, DC

1730 Rhode Island Avenue NW, Suite 406
Washington, DC 20036
(202) 628-4402

ccswashington@ccsfundraising.com

PHILADELPHIA

2001 Market Street, Suite 2500
Philadelphia, PA 19103
(215) 567-6760

ccsphiladelphia@ccsfundraising.com

CENTRAL U.S.

CHICAGO

155 N. Wacker, Suite 1790
Chicago, IL 60606
(312) 596-9300

ccschicago@ccsfundraising.com

ST. LOUIS

231 S. Bemiston Avenue, Suite 800
St. Louis, MO 63105
(314) 854-1350

ccsstlouis@ccsfundraising.com

DALLAS

5050 Quorum Drive, Suite 700
Dallas, TX 75254
(214) 799-8555

ccsdallas@ccsfundraising.com

WEST COAST

SAN FRANCISCO

100 Montgomery Street, Suite 2270
San Francisco, CA 94104
(415) 392-5395

ccssanfrancisco@ccsfundraising.com

SOUTHERN CALIFORNIA

300 Spectrum Center Drive, Suite 1430
Irvine, CA 92618
(949) 954-5252

socal@ccsfundraising.com

SEATTLE

800 5th Avenue, Suite 4100
Seattle, WA 98104
(206) 447-1310

ccsseattle@ccsfundraising.com

CANADA

TORONTO

10 Bay Street, Suite 801
Toronto, Ontario M5J 2R8
(416) 368-5902

ccstoronto@ccsfundraising.com

EUROPE

LONDON

54 Hatton Garden, 5th Floor
London, EC1N 8HN
+44 (0) 207-240-3822

ccsuk@ccsfundraising.com

DUBLIN

c/o Mazars
Harcourt Centre, Block 3
Harcourt Centre, Dublin 2
Ireland
+353 (1) 676-0041

ccsireland@ccsfundraising.com

THANK YOU TO THE FOLLOWING SOURCES FOR THE DATA USED TO COMPILE THIS REPORT:

Pp. 5-8: Giving USA 2017

P.11: Giving USA 2017, Bank of America U.S. Trust Study of High Net Worth Philanthropy 2016, Lily School 2013 Philanthropy Panel Study on Giving in 2012

P. 12: Bureau of Labor Statistics; Volunteering in the U.S. Report (2005 - 2015)

Pp. 13-14: Bank of America U.S. Trust Study of High Net Worth Philanthropy 2016; Mastercard Center for Inclusive Growth, Donation Insights, US Report March 2017

P. 16: Mastercard Center for Inclusive Growth, Donation Insights, US Report March 2017

P. 18: Classy.org, Chronicle of Philanthropy Million Dollar Gift List

Pp. 19-20: Bank of America U.S. Trust Study of High Net Worth Philanthropy 2016

Pp. 21-24: Chronicle of Philanthropy Million Dollar Gift List, January 2016 – March 2017

P. 27: Giving USA 2017, The Foundation Center, Forbes

P. 28: The Foundation Center

Pp. 29-30: The Chronicle of Philanthropy, Fidelity Charitable 2016 Giving Report

Pp. 33: Giving USA 2017; CECF Giving in Numbers 2016

P. 34: CECF Giving in Numbers 2016, Double the Donation, updated Jan 2017.

Pp. 35-38: The Chronicle of Philanthropy

P. 41: Giving USA 2017

P. 42-44: Chronicle of Philanthropy Million Dollar Gift January 2016 – March 2017, Giving USA 2017

P. 47: The Urban Institute

P. 48: Forbes 400 Largest Charities

Pp. 49-50: AFP Fundraising Effectiveness Report 2016, Bank of America U.S. Trust Study of High Net Worth Philanthropy 2016

CCS PUBLICATION STATEMENT

In creating this publication, CCS has made every effort to avoid the unauthorized use of copyrighted works. Facts and statistics presented in this publication have been taken from the public domain or taken from previously published works and attributed to the authors of those works in citations. In its use of information gleaned from the cited works, CCS has attempted to adhere to the principles of fair use set out in the U.S. Copyright Act, 17 U.S.C. § 107. CCS encourages any author who is concerned about an unauthorized use of its work in this publication to contact CCS to request the removal of the allegedly infringing material from this publication.

While every effort has been made to ensure the accuracy of the information contained herein, this publication is provided on an as-is basis with no warranties, either express or implied as to its accuracy or fitness for use for any particular purpose.

