

SNAPSHOT OF TODAY'S

PHILANTHROPIC LANDSCAPE

A Guide to Navigating the Philanthropic Terrain in the U.S.

7th Edition, 2018



CCS
FUNDRAISING



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// LETTER FROM THE CHAIRMAN

The resilience of American generosity has been steadfast through dramatic economic, political, and social change.

It has been nearly ten years since the depths of the Great Recession, which was the singular time in more than half a century that U.S. charitable giving saw a notable decline. Since then, philanthropy in America has been on a steady rise and is now thriving. 2017 represented a historic moment, as giving surpassed the **\$400 billion** mark for the first time ever.

With this in mind, we are pleased to introduce the seventh edition of the *Snapshot of Today's Philanthropic Landscape*, a comprehensive report that continues to grow in scope along with American philanthropy.

This document features the most recent philanthropic data from many major sources in the industry, offering information on individual, foundation, corporate, bequest, and digital giving. We also provide a glance back to detail the progress of charitable giving since the Great Recession, as well as a glimpse forward at the potential impact our new tax laws may have on giving in the U.S.

With a 70-year history advising more than 12,000 charitable organizations globally, CCS Fundraising has designed this digest to help you develop more informed strategies that support your mission to bring about positive change.



Robert Kissane

Chairman
CCS Fundraising

Report Highlights



\$410 BILLION

In 2017, the **\$400 billion barrier was broken for the first time in history** and most charitable sectors saw an increase in giving



RECESSION RECOVERY

Total charitable giving has grown \$82.7 billion in inflation-adjusted dollars since 2009



91%

OF HIGH NET WORTH INDIVIDUALS gave, with 83% of these donors planning to give as much or more through 2018



24%
OF AMERICANS VOLUNTEERED for a nonprofit organization



ONLINE GIVING rose 12% from last year and now accounts for 8% of all giving. In particular, giving on a mobile device increased

205%



Gifts from Baby Boomers accounted for

41% OF TOTAL GIVING

while Generation X surpassed the Silent Generation in total giving



Globally, foundation assets were above **\$1.5 TRILLION**, with the U.S. representing 60% of that total

Corporations gave **\$20.8 BILLION** to charity, accounting for 5% of total giving

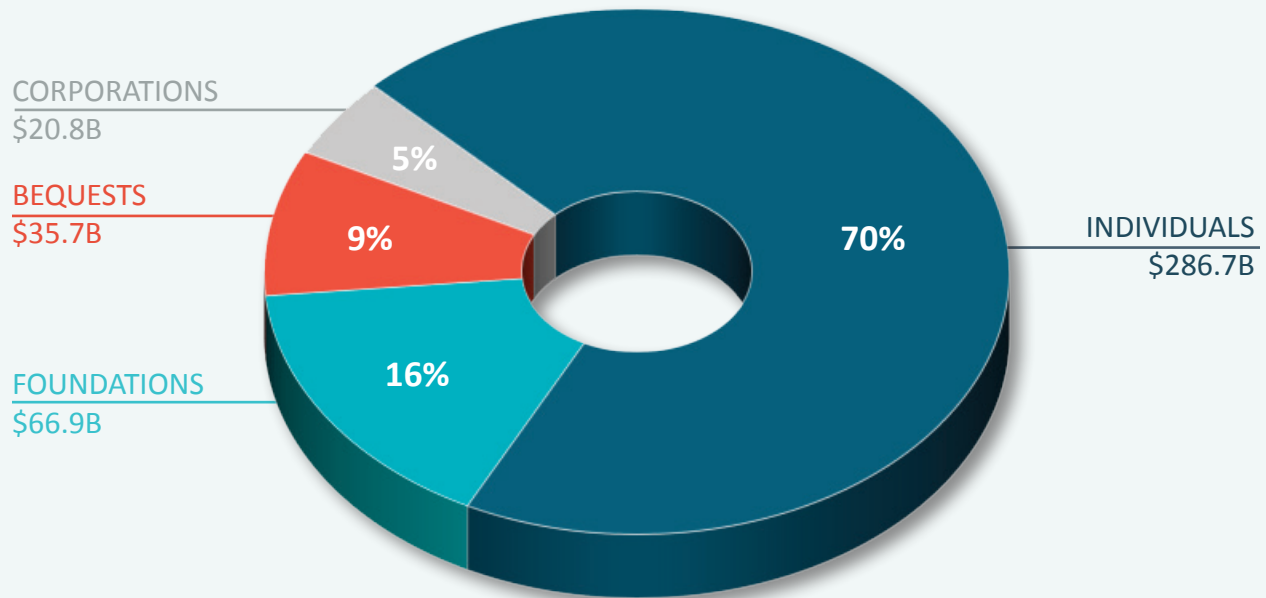


On average, High Net Worth Individuals expect to leave

80% OF THEIR WEALTH to family inheritance



In 2017, Americans Gave \$410 Billion



GIVING SOURCE	AMOUNT	CHANGE IN GIVING SINCE 2016
Corporations	\$20.8B	Increased by 8.0%
Foundations	\$66.9B	Increased by 6.0%
Individuals	\$286.7B	Increased by 5.2%
Bequests	\$35.7B	Increased by 2.3%

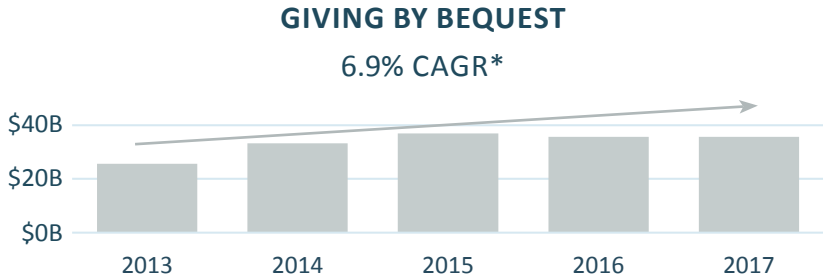
Philanthropy Milestones

- 1991 broke \$100 billion with \$102.58 billion
- 1999 broke \$200 billion with \$203.19 billion
- 2007 broke \$300 billion with \$311.06 billion

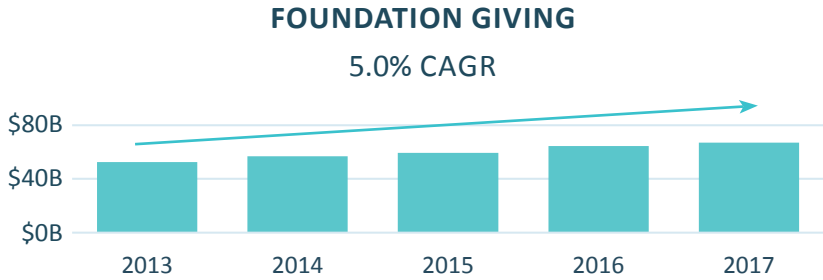
Source: The Giving Institute: *Giving USA*, 2018

Five-Year Giving Trends

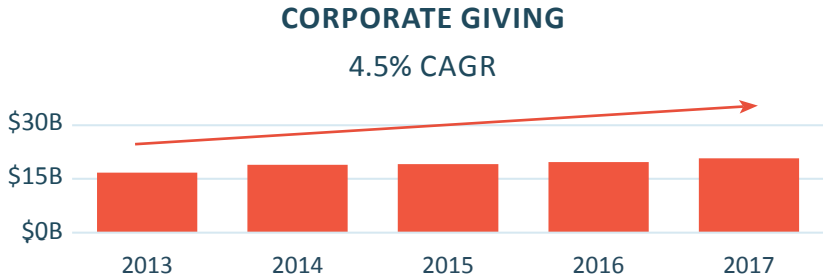
All charitable giving sources have grown over the last five years.



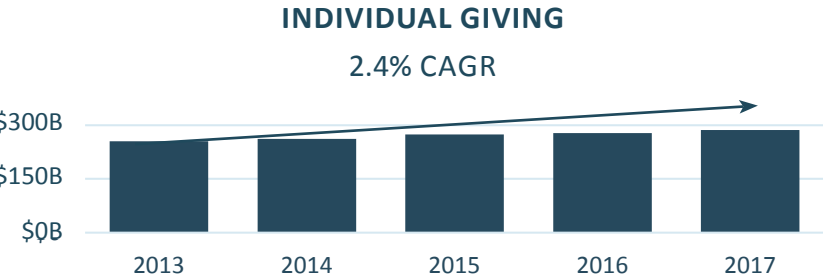
Giving by bequest grew by **6.9%**



Foundation giving grew by **5.0%**



Corporate giving grew by **4.5%**

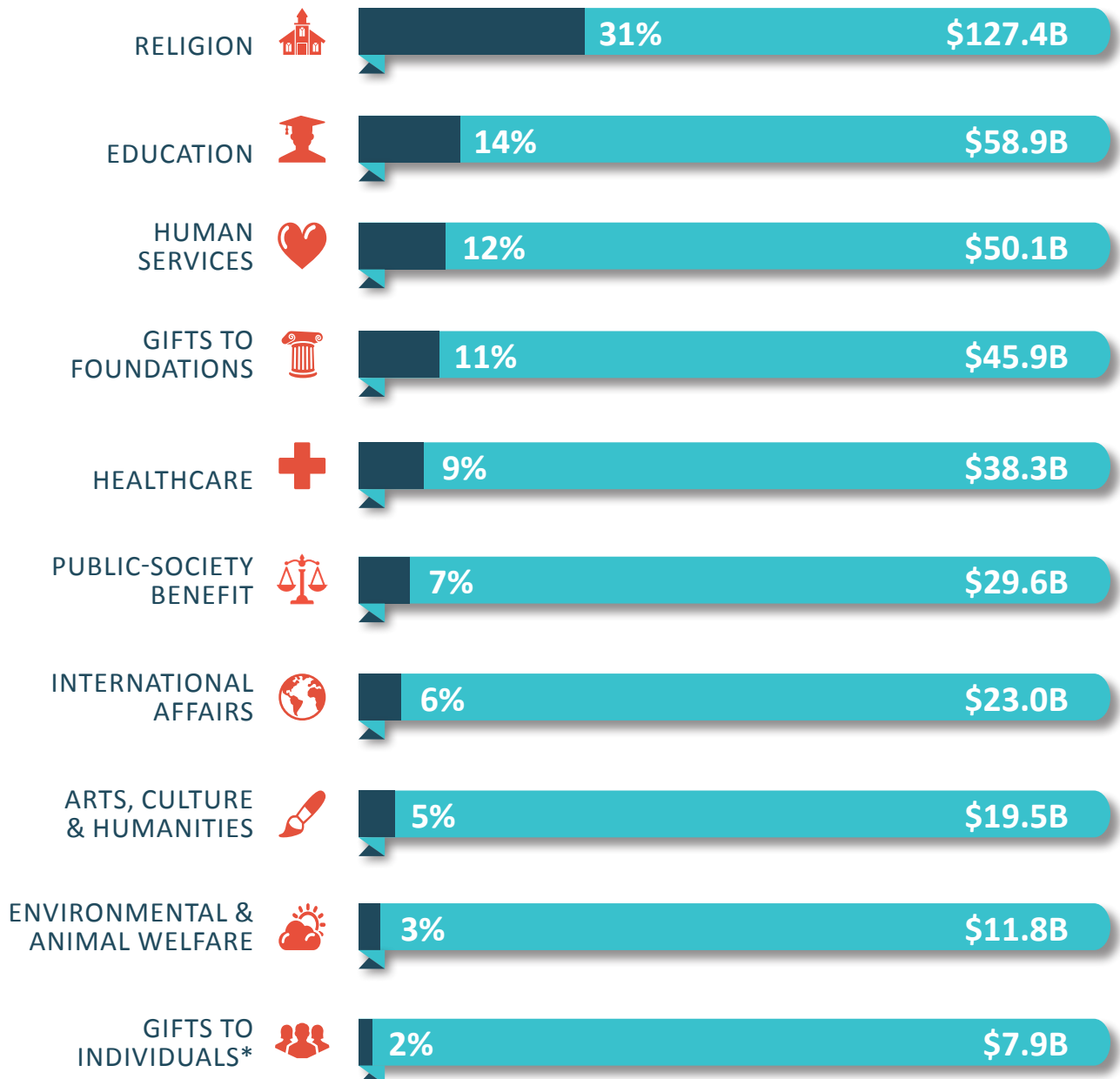


Individual giving grew by **2.4%**

*Compound annual growth rate (CAGR).

Source: The Giving Institute: *Giving USA*, 2018

\$410 Billion Supported the Following Sectors:



*Gifts to Individuals: In-kind gifts to individuals in need, made by foundations or assistance programs.

Source: The Giving Institute: *Giving USA*, 2018

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

Gifts to Foundations saw the largest gain.

SECTOR	AMOUNT	CHANGE SINCE 2016
Gifts to Foundations	\$45.9B	Increased 15.5%
Arts, Culture & Humanities	\$19.5B	Increased 8.7%
Public-Society Benefit	\$29.6B	Increased 7.8%
Healthcare	\$38.3B	Increased 7.3%
Environmental & Animal Welfare	\$11.8B	Increased 7.2%
Education	\$58.9B	Increased 6.2%
Human Services	\$50.1B	Increased 5.1%
Religion	\$127.4B	Increased 2.9%
International Affairs	\$23.0B	Decreased 4.4%
Gifts to Individuals	\$7.9B	Decreased 20.7%



Arts, Culture & Humanities had the second fastest sector growth

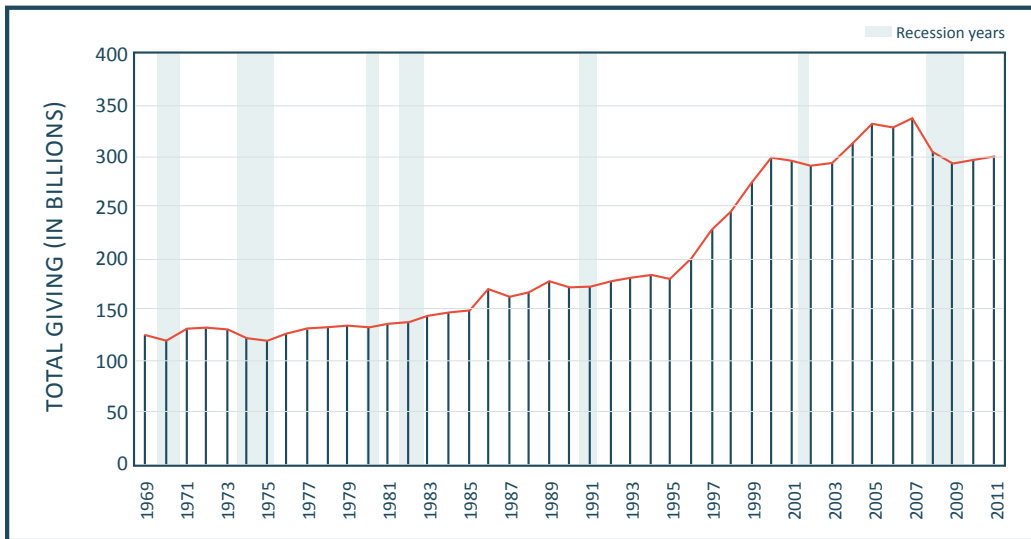


Giving to **Individuals** saw the sharpest decline

Recessions and Philanthropy

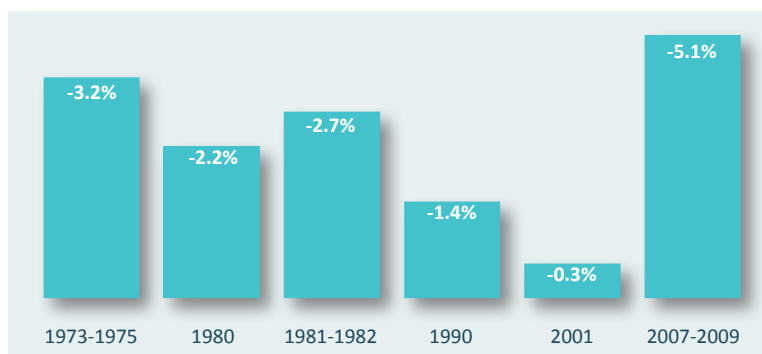
In 2008, total giving fell by 7%, and dropped another 6.2% in 2009 (inflation-adjusted dollars).¹

TOTAL CHARITABLE GIVING (INFLATION-ADJUSTED DOLLARS)



A definitive link between recessions and a decline in giving has not been proven. As seen above, drops in total giving do not always occur during a recession.

RECESSIONS AND GDP



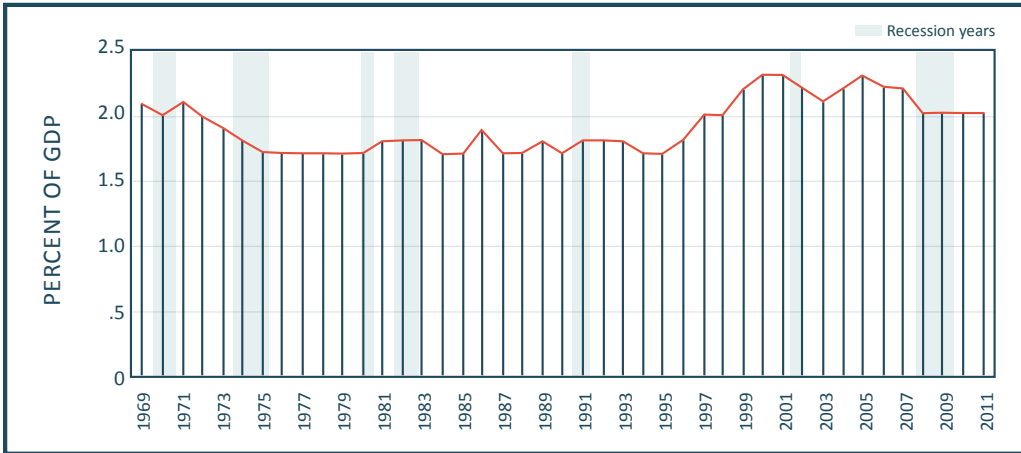
Since the end of the Great Recession in 2009, total giving has grown 31%, adjusted for inflation. Total giving has increased \$96 billion since 2009.²

Sources:

1 Russell Sage Foundation and The Stanford Center on Poverty and Inequality: *Charitable Giving and the Great Recession*, 2012

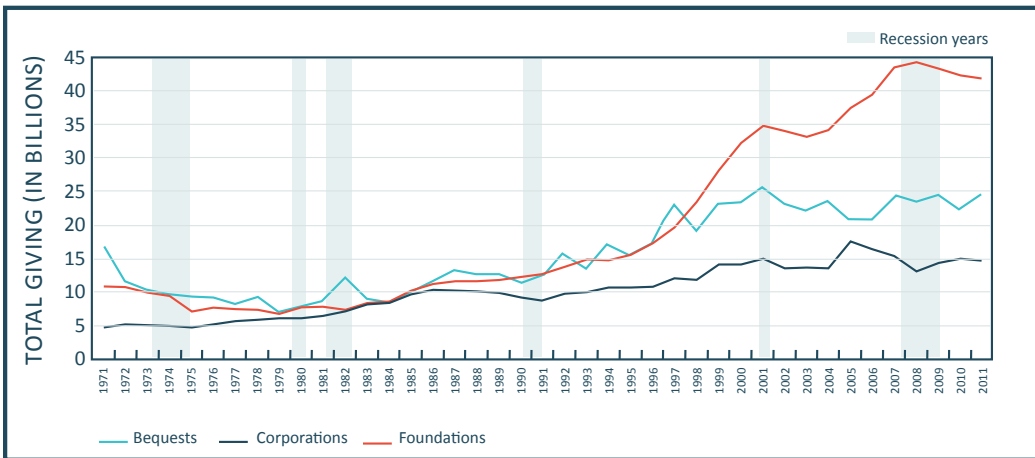
2 The Giving Institute: *Giving USA*, 2018

TOTAL CHARITABLE GIVING AS PERCENTAGE OF GDP



As a percentage of GDP, total giving has only declined slightly during some recessions. During the Great Recession, it fell from 2.1% in 2008 to 2.0% in 2009, and remained at that level through 2011.

GIVING BY SOURCE



Seen above, foundation giving was least affected by the Great Recession. Foundations appear to have directed their grants toward areas with the highest unemployment levels. These areas saw a jump from 19% of funds awarded in 2008 to 65% in 2009.

Average Household Giving

\$286.7B

Individuals gave **\$286.7 billion** to charity in 2017¹

70%

Individual giving **increased by 5.2%** since 2016 and accounted for **70%** of all giving in the United States

The Majority of Americans Give²

- **56%** of the population gave to charity
- **\$2,514** was the average amount given

Average American Donors Spend³...



55 cents on charity for every \$1 on healthcare



35 cents on charity for every \$1 on food

Sources:

1 The Giving Institute: *Giving USA*, 2018

2 IUPUI Lilly Family School of Philanthropy: *Philanthropy Panel Study*, 2017

3 Bureau of Labor Statistics: *Consumer Expenditures in 2016*, 2016



America's Most Philanthropic States

TOP 10 STATES BY TOTAL GIVING



Although New York and Florida share the same population size (19.6M), **New Yorkers** gave \$6.4 billion more.

Source: Chronicle of Philanthropy: "Giving in the 50 Largest Metropolitan Areas," 2017

Top Giving Metro Areas by Population



	METRO AREAS	POPULATION	AVERAGE GIFT	AVERAGE % OF INCOME TO CHARITY	TOTAL ITEMIZED CONTRIBUTIONS
1.	New York	20.0M	\$6,410	2.8%	\$20.1B
2.	Los Angeles	13.0M	\$6,098	2.9%	\$9.8B
3.	Chicago	9.5M	\$5,289	2.7%	\$6.8B
4.	Dallas-Fort Worth	6.8M	\$7,626	3.8%	\$5.2B
5.	Houston	6.3M	\$7,949	3.7%	\$5.0B
6.	Philadelphia	6.0M	\$4,430	2.5%	\$4.0B
7.	Washington, DC	5.9M	\$5,290	2.9%	\$6.3B
8.	Miami-Fort Lauderdale	5.9M	\$8,460	3.4%	\$4.3B
9.	Atlanta	5.5M	\$8,044	4.6%	\$5.7B
10.	Boston	4.7M	\$5,885	2.5%	\$4.6B



Despite its lesser population of 5.9M, **Miami-Fort Lauderdale** outranked all top areas in average gift size



Atlanta ranked #1 in average percentage of income to charity despite ranking 9th on this list in population size

The Value of Volunteering

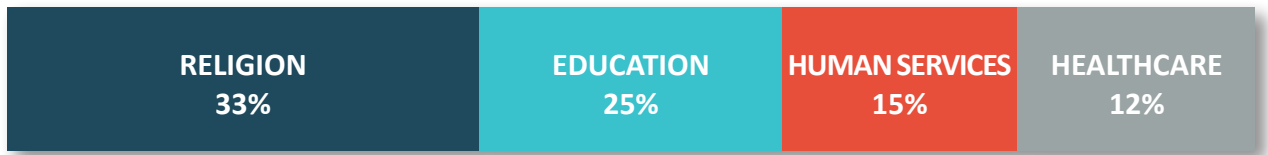
24%

According to the most recent data, **24%** of Americans volunteered¹

79%

79% of volunteers also donated²

TOP FOUR SECTORS FOR VOLUNTEERING¹



Of those who volunteered, **49%** gave their time to three or more organizations.³



Total volunteer hours by adults living in the U.S. amounted to **7.9 billion hours**. This figure translates into an equivalent of \$184 billion contributed to charities and communities across the nation.²

Sources:

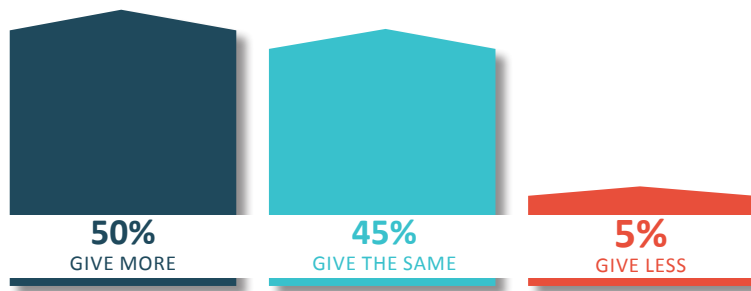
- 1 Bureau of Labor Statistics: *Volunteering in the United States*, 2015
- 2 The Giving Institute: *Giving USA*, 2017
- 3 Fidelity Charitable Report: *Time and Money*, 2014

Volunteering and Giving

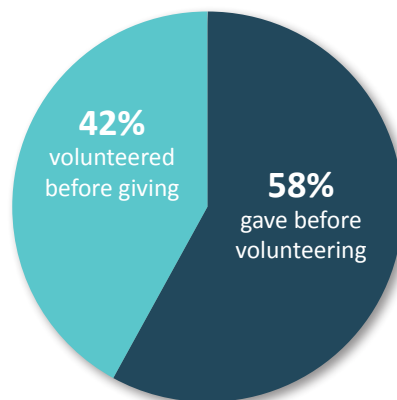
Top reasons why people volunteer



After volunteering, those surveyed said they...



Americans are more likely to give first than volunteer



An Overview of High Net Worth Individuals

7.8%

The population of High Net Worth Individuals (HNWIs)* in North America grew 2% in 2015, but gained **7.8%** in 2016¹

8.1%

HNWI wealth rose **8.1%** in 2016

5.2M

There were **5.2 million** HNWIs in North America, accounting for 31% of the global HNWI population

Did You Know?

43% of the world's millionaires are American²

*High Net Worth Individuals (HNWIs) are those having investible assets of \$1 million or more, excluding primary residence, collectibles, consumables, and consumer durables.

Sources:

1 Capgemini: *World Wealth Report*, 2018

2 Credit Suisse: *Global Wealth Report*, 2017

Impact of High Net Worth Individuals

91%

91% of HNW households donated to charity in 2015¹, compared to 56% of the general population²

83%

83% plan to give as much (55%) or more (28%) through 2018

39%

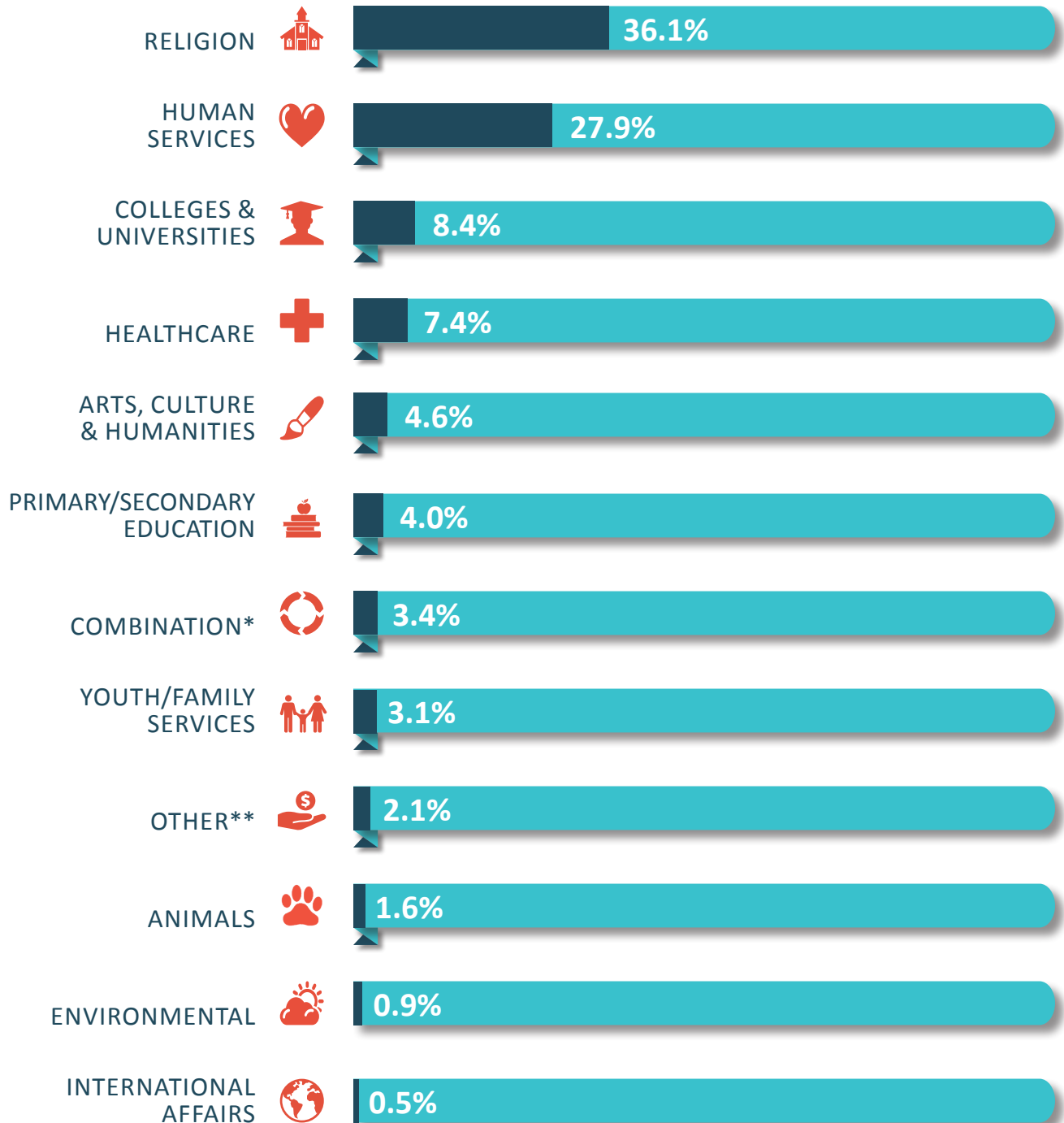
39% believe restricted giving is more targeted, and therefore more effective

A Closer Look at HNWIs³

- 1 in 4 serve on the board of a nonprofit organization
- Of those who serve on a nonprofit board, over 50% serve on more than one board currently
- When surveyed, HNWIs say the top two reasons to serve on a board are: belief that their skills can help, and a deep personal commitment to the organization
- On average, donors who volunteered also gave 56% more than those who did not¹

Sources:
1 Bank of America: U.S. Trust Study of High Net Worth Philanthropy, 2016
2 IUPUI Lilly Family School of Philanthropy: Philanthropy Panel Study, 2017
3 Bank of America: U.S. Trust Insights on Wealth and Worth, 2017

High Net Worth Households: Reported Giving by Sector



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

**Organizations in the "Other" category include LGBTQ organizations, veterans affairs, and neighborhood associations, among others.

Source: Bank of America: U.S. Trust Study of High Net Worth Philanthropy, 2016

BEYOND GIVING, HOW HNWIs CREATE IMPACT¹ %

Volunteer	69%
Serve on a nonprofit or foundation board	27%
Invest in companies that support positive social or environmental policies and practices	17%
Own a company that creates jobs and opportunities for others	14%
Work for a nonprofit organization	13%
Are social entrepreneurs who own a company that addresses social or environmental solutions	7%

TOP 3 REASONS WHY HNWIs STOPPED GIVING² %

Were solicited too frequently	41%
Household circumstances changed	40%
Nonprofit organization appeared ineffective	18%

On average, HNWIs expect to leave 80% of their wealth to family as inheritance, and leave **16%** to charity.

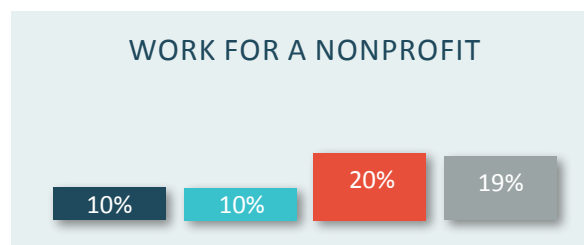
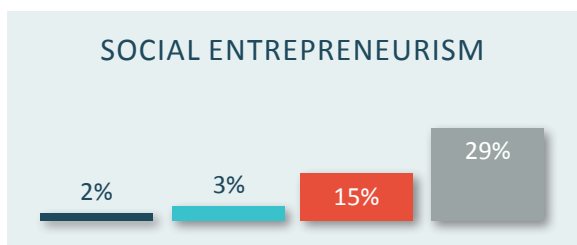
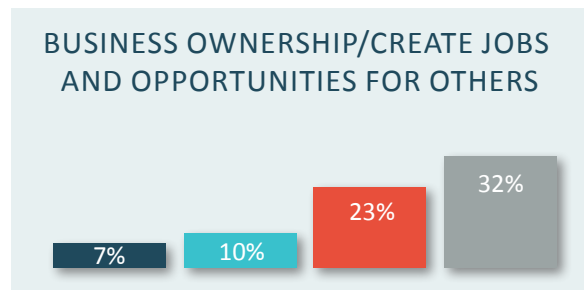
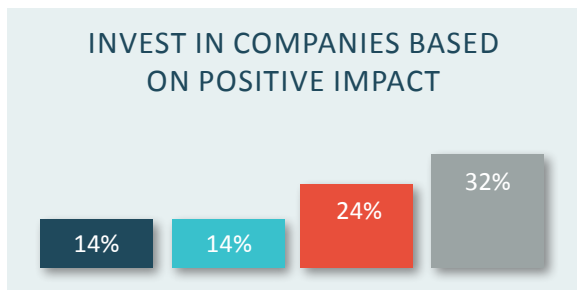
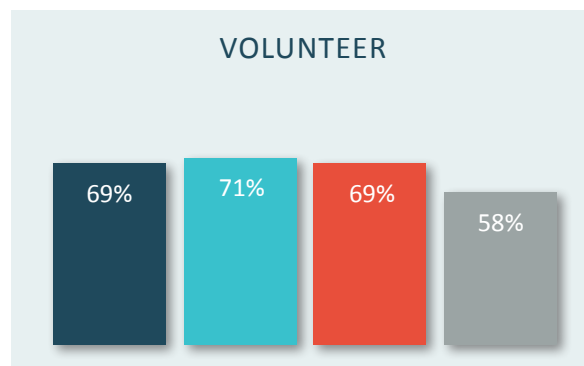
Sources:

1 Bank of America: *U.S. Trust Insights on Wealth and Worth*, 2017

2 Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2016

High Net Worth Individuals: Generational Differences in Giving and Impact

- Silent (born 1945 and earlier)
- Baby Boomers (born 1946-1964)
- Generation X (born 1965-1976)
- Millennials (born 1977-1995)

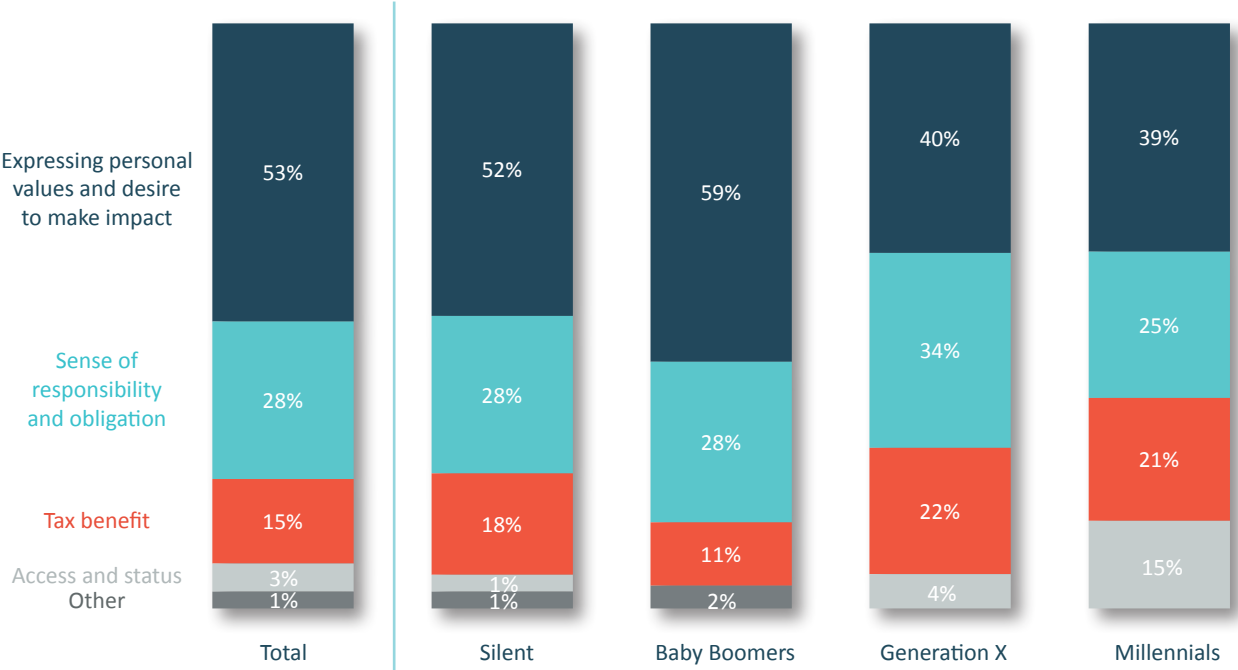


Millennials are the generation least likely to give financially, but the most likely to view work and investment decisions as positive impact.

Source: Bank of America: U.S. Trust Insights on Wealth and Worth, 2017

High Net Worth Individuals: Motivations for Giving

GIVING MINDSET

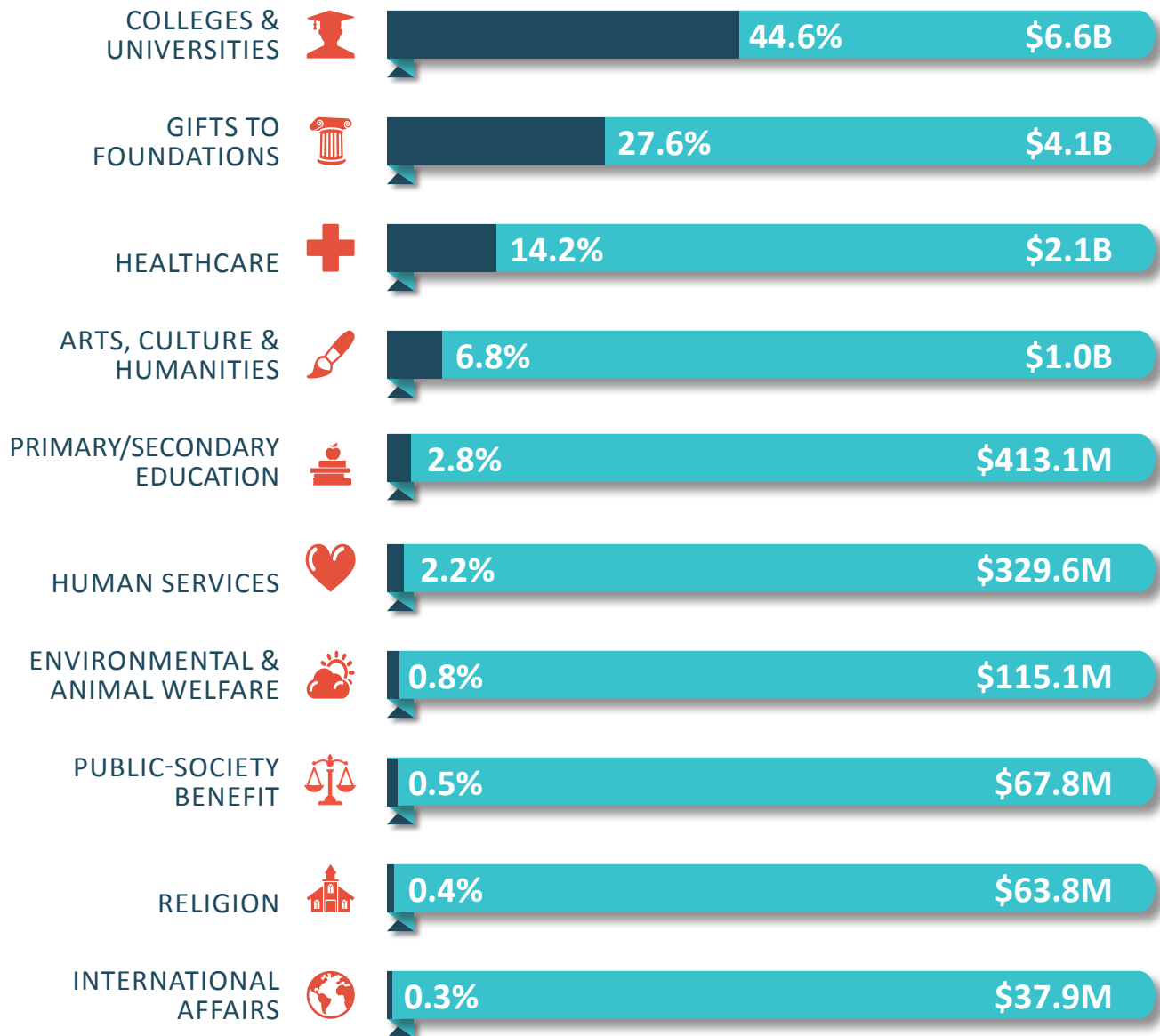


- Nearly half of HNWI's make charitable donations to express personal values or make an impact
- The second most popular reason is a sense of responsibility and obligation
- Tax benefits, status, and access are more likely to be reasons to give for younger generations than older generations

Source: Bank of America: U.S. Trust Insights on Wealth and Worth, 2017

High Net Worth Donors: Where They Gave

TOP 10 SECTORS FOR PUBLICLY REPORTED GIFTS OF \$1 MILLION+



Source: Chronicle of Philanthropy: "Big Charitable Gifts," 2017

**PUBLICLY REPORTED GIFTS OF \$1 MILLION+
(JANUARY 2017 – MARCH 2018), TOP 10 SECTORS**

	SECTOR	SUM OF GIFT VALUE	NUMBER OF GIFTS	% OF TOTAL GIFT VALUE	% OF TOTAL GIFT COUNT
1	Colleges & Universities	\$6.6B	453	44.6%	54.0%
2	Gifts to Foundations	\$4.1B	28	27.6%	3.0%
3	Healthcare	\$2.1B	131	14.2%	16.0%
4	Arts, Culture & Humanities	\$1.0B	91	6.8%	11.0%
5	Primary/Secondary Education	\$413.1M	41	2.8%	5.0%
6	Human Services	\$329.6M	42	2.2%	5.0%
7	Environmental & Animal Welfare	\$115.1M	20	0.8%	2.0%
8	Public-Society Benefit	\$67.8M	9	0.5%	1.0%
9	Religion	\$63.8M	10	0.4%	1.0%
10	International Affairs	\$37.9M	7	0.3%	1.0%
	TOTALS*	\$14.8B	832	100%	100%

*Percentages are rounded.

Source: Chronicle of Philanthropy: "Big Charitable Gifts," 2017

Top 50 Publicly Reported Gifts by Individuals (January 2017—March 2018)

	DONOR	RECIPIENT	GIFT VALUE
1	Mark Zuckerberg and Priscilla Chan	Chan Zuckerberg Foundation (CA)	\$1.9B
2	Michael S. and Susan Dell	Michael & Susan Dell Foundation (TX)	\$1.0B
3	Henry L. Hillman	Hillman Family Foundation (PA)	\$800.0M
4	Herbert and Florence Irving	Columbia U., Herbert and Florence Irving Medical Center (NY)	\$600.0M
5	Helen Diller Foundation (Helen Diller)	U. of California at San Francisco (CA)	\$500.0M
6	Roy and Diana Vagelos	Columbia U. College of Physicians and Surgeons (NY)	\$250.0M
7	A. James and Alice B. Clark Charitable Foundation (Alice B. Clark)	U. of Maryland at College Park (MD)	\$219.5M
8	Henry and Susan Samuelli	U. of California at Irvine (CA)	\$200.0M
9	Mark Zuckerberg and Priscilla Chan	Silicon Valley Community Foundation (CA)	\$162.3M
10	Larry and Beth Gies	U. of Illinois at Urbana-Champaign (IL)	\$150.0M
11	David Geffen	Los Angeles County Museum of Art (CA)	\$150.0M
12	Anonymous	Massachusetts Institute of Technology (MA)	\$140.0M
13	Kenneth C. Griffin Charitable Fund (Kenneth Griffin)	U. of Chicago (IL)	\$125.0M
14	David Rockefeller	Museum of Modern Art (NY)	\$125.0M
15	Jay Shidler	U. of Hawaii at Manoa (HI)	\$117.0M
16	Ray and Dagmar Dolby	U. of Cambridge (UK)	\$114.1M
17	William and Linda Frost	California Polytechnic State U. at San Luis Obispo (CA)	\$110.0M
18	Roberta Elliott	Montage Health Foundation (CA)	\$105.8M
19	Joseph (Rusty) Walter III and Paula Walter	Houston Methodist Hospital (TX)	\$101.0M
20	Peter H. and Paula Lunder	Colby College Museum of Art (ME)	\$100.0M
21	John A. and Susan Sobrato	Santa Clara U. (CA)	\$100.0M
22	Charles Butt	Holdsworth Center (TX)	\$100.0M
23	Kenneth and Pamela Ricci	U. of Notre Dame (IN)	\$100.0M
24	Agnes Gund	Art For Justice Fund (NY)	\$100.0M
25	Craig and Janet Duchossois	U. of Chicago Medicine (IL)	\$100.0M

Source: Chronicle of Philanthropy: "Big Charitable Gifts," 2017

	DONOR	RECIPIENT	GIFT VALUE
26	Sheryl Sandberg	Sheryl Sandberg Philanthropy Fund (CA)	\$98.0M
27	Paul F. and Virginia J. Engler Foundation (Paul Engler)	West Texas A&M U. (TX)	\$80.0M
28	Herbert and Florence Irving	Metropolitan Museum of Art (NY)	\$80.0M
29	Richard and Amy Wallman	U. of Chicago (IL)	\$75.0M
30	Anonymous	Kenyon College (OH)	\$75.0M
31	Bloomberg Philanthropies (Michael Bloomberg)	The Shed (NY)	\$75.0M
32	Taner Halicioglu	U. of California at San Diego (CA)	\$75.0M
33	Porter Byrum	Wake Forest U. (NC)	\$70.0M
34	Don and Barbara Hrbek Zucker	Northwell Health (NY)	\$61.0M
35	Ed Babka	U. of Dubuque (IA)	\$60.0M
36	Allen Davis	California Institute of Technology (CA)	\$60.0M
37	Ballmer Group (Steve and Connie Ballmer)	StriveTogether (OH)	\$60.0M
38	Gordon and Betty Moore	Lucile Packard Children's Hospital Stanford (CA)	\$50.0M
39	Harry and Linda Fath	Lindner Center of Hope (OH)	\$50.0M
40	Austin McChord	Rochester Institute of Technology (NY)	\$50.0M
41	Michael and Alison Grott Bonney	Bates College (ME)	\$50.0M
42	John and Marree Townsend	U. of North Carolina at Chapel Hill (NC)	\$50.0M
43	Anonymous	U. of Oregon (OR)	\$50.0M
44	David Booth	U. of Kansas (KS)	\$50.0M
45	Q. William Hammack Jr.	Oglethorpe U. (GA)	\$50.0M
46	Haim and Cheryl Saban	Academy Museum of Motion Pictures (CA)	\$50.0M
47	Patel Family Foundation (Kiran and Pallavi Patel)	Nova Southeastern U. (FL)	\$50.0M
48	Stephen Ross	U. of Michigan at Ann Arbor (MI)	\$50.0M
49	Jerry and Debbie Ivy	Iowa State U. (IA)	\$50.0M
50	James Maguire Sr. and Frances Maguire	Saint Joseph's U. (PA)	\$50.0M

Source: Chronicle of Philanthropy: "Big Charitable Gifts," 2017

Breakdown of the Top 50 U.S. Donors

These donors gave the most over the course of 2017.

13

of the gifts by these top donors went to **organizations** in California

12

live in California

9

made their money in **technology**, more than any other line of work

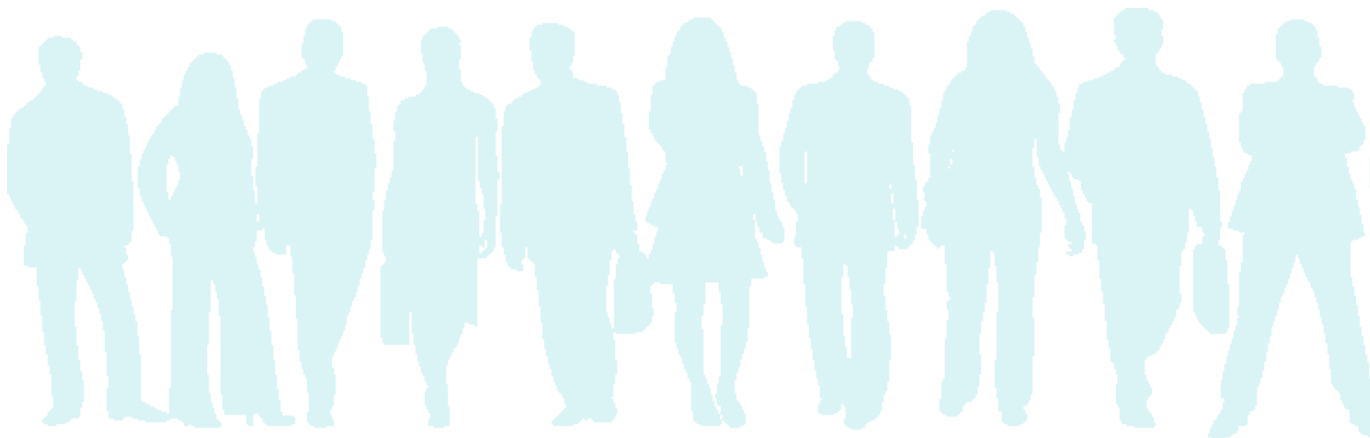
5

made their money in **real estate**

4

left **bequests**

Every person in the top 10 of this list grew at least **\$1 billion** richer in the past year.



Source: Chronicle of Philanthropy: *Philanthropy 50*, 2018

Forbes 400 List of Richest Americans Continues to Rise

- **17** individuals from the Philanthropy 50 were also listed on the Forbes 400, and these individuals gave almost \$10.3 billion in 2017
- There were **22** newcomers, 14 of whom are self-made entrepreneurs
- The minimum net worth to make the Forbes 400 is now a record **\$2 billion**, up from \$1.7 billion a year ago
- In 2017, the group's total net worth climbed to **\$2.7 trillion**



Online Giving in 2017

Online giving made up **8%** of all giving.¹

12%

Online giving increased **12%**

40%

Monthly online donations jumped **40%**, which accounted for 16% of all online dollars²

38%

38% of donors who gave online in 2016 made another donation in 2017



Sources:

1 Chronicle of Philanthropy: "Online Giving Rose 12% in 2017," 2018

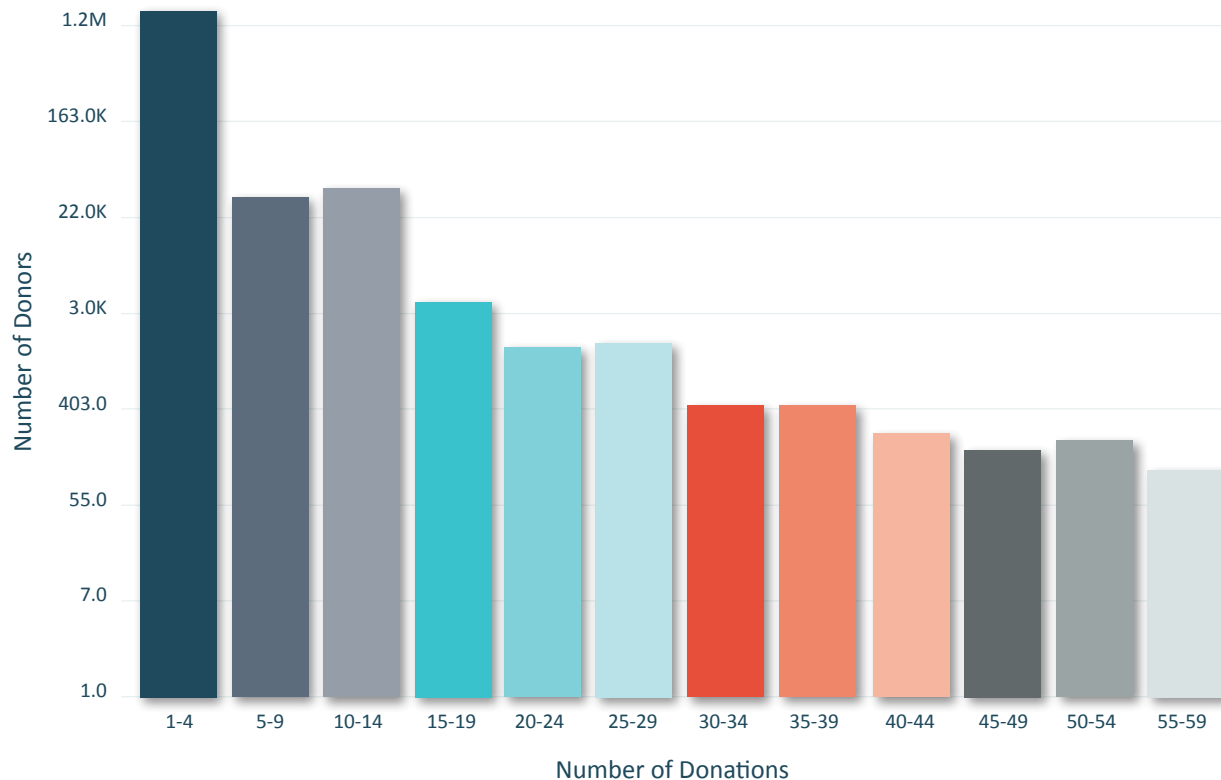
2 Chronicle of Philanthropy: "Online Donations Rose a Median of 23%," 2018

3 Chronicle of Philanthropy: "Few Nonprofits Do Enough to Make Sure Website Visitors Become Donors," 2018



Frequency of Online Giving

About **95%** of donors gave fewer than five times a year, but their gifts represented 79% of the total amount given.



Distribution of Gifts



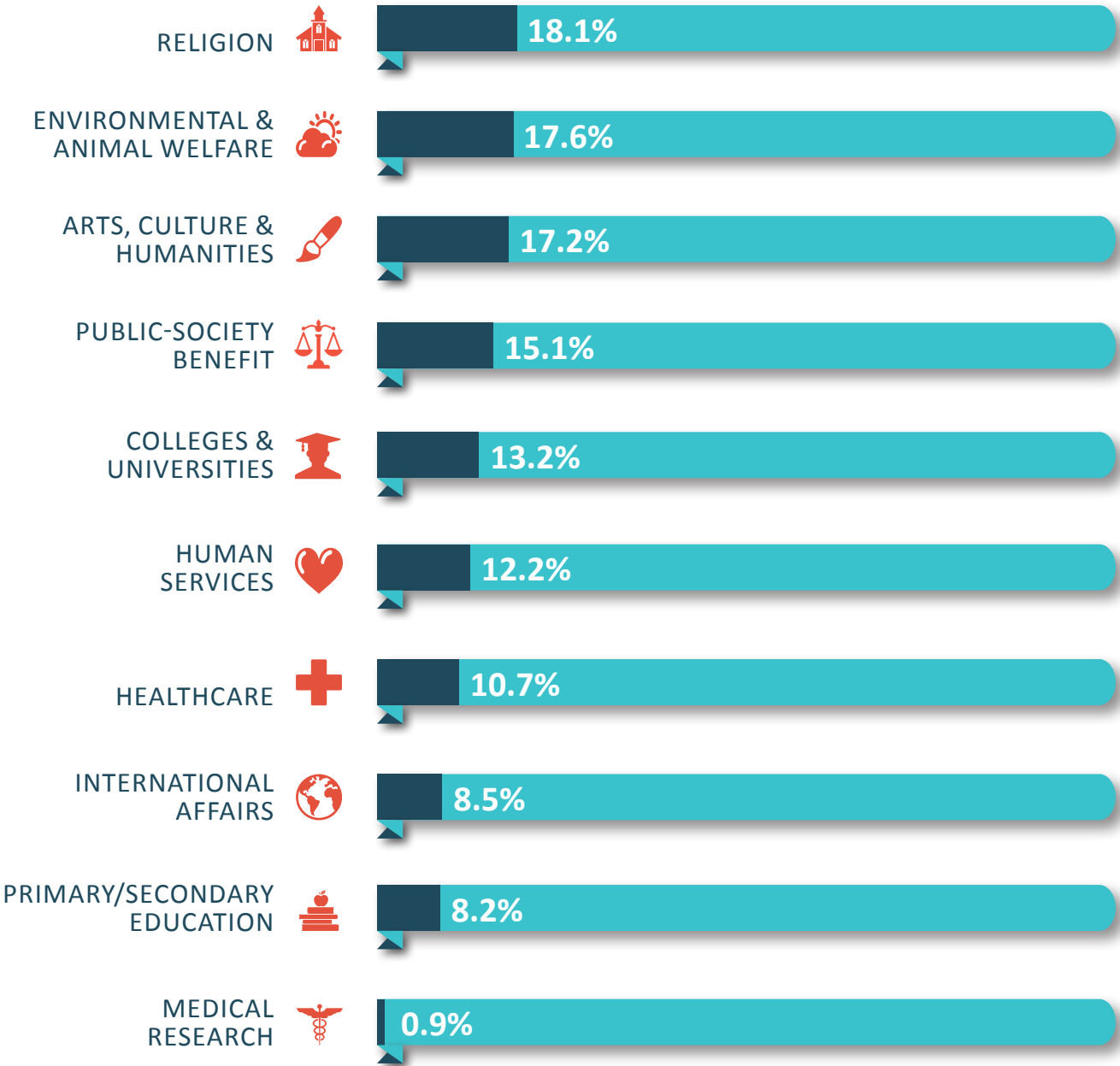
Human Services received more donations than any other cause—735,735 gifts totaling **\$89 million**



Education came in second, with 303,819 contributions totaling **\$45 million**

Source: Chronicle of Philanthropy: "Online Trends," 2017

Online Giving Growth by Sector



Source: Blackbaud: *The Next Generation of American Giving*, 2018

Effectiveness of Social Media

55% of people who engage with nonprofits via social media end up taking some form of action:

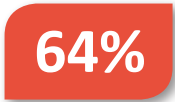


Source: Nonprofits Source: "Online Giving Statistics," 2018

Mobile Trends

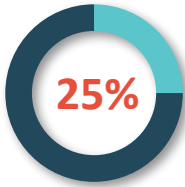


The average mobile donation pledge was **\$167**

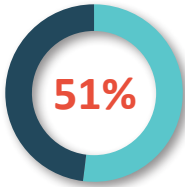


64% of mobile donations were made by women

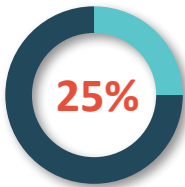
In 2017, mobile giving increased **205%**



25% use mobile devices to discover nonprofits



51% of people visit a nonprofit's website using a mobile device

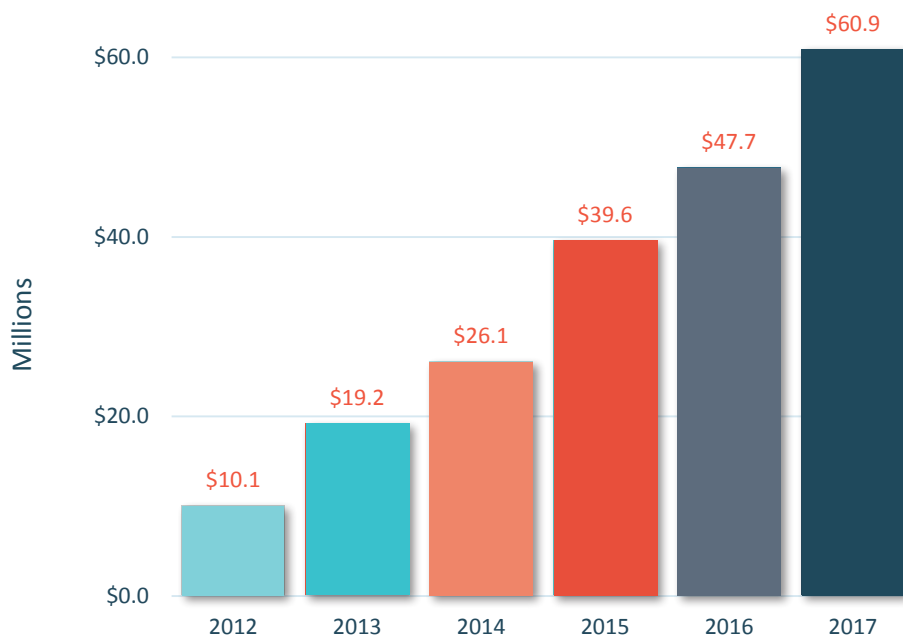


25% of donors complete their donations on mobile devices

Source: Nonprofits Source: "Online Giving Statistics," 2018

The Impact of Giving Tuesday

Giving Tuesday is a day for celebration and support of charity through social media. Over **\$300 million** was raised on Giving Tuesday worldwide, and over **\$60 million** in the U.S. Since its inception in 2012, Giving Tuesday fundraising has grown **500%**.¹



Giving Tuesday Trends

- Total donations on Giving Tuesday increased by more than **50%** from last year²
- **Medical Research** is among the top nonprofit sub-sectors outperforming other sectors on Giving Tuesday¹

Sources:

1 Blackbaud: *Charitable Giving Report 2017*

2 Chronicle of Philanthropy: "Giving Tuesday Raises \$274 Million in Its 6th Year" 2017

Popular Giving Days

Out of over 35,000 nonprofit organizations surveyed, the following days saw significant online giving:¹

August 28-31, 2017

- 136,665 donations totaling **\$19.5M**

December 29-30, 2017

- 62,138 donations totaling **\$14.9M**

December 31, 2017

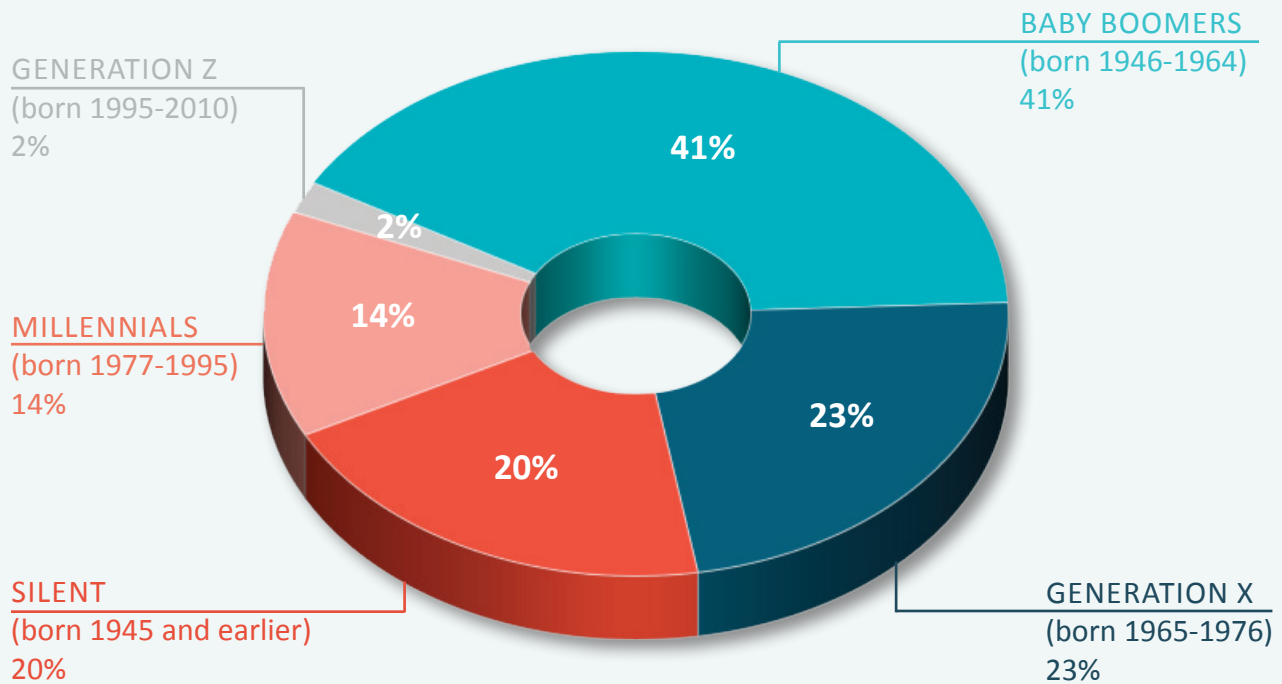
- 60,975 donations totaling **\$14.4M**

30% of all yearly giving occurs in December, and **10%** of that during the last three days of the year.²

Source:
1 Chronicle of Philanthropy: "Online Trends," 2017
2 Nonprofits Source: "Online Giving Statistics," 2018

Generational Giving

PERCENTAGE OF TOTAL GIVING BY GENERATION



- Generation X**

Many want to focus on Millennials, but Generation X should not be underestimated. They surpassed the Silent Generation in total giving, and are approaching the prime age for giving.
- Silent**

The Silent Generation donated to a larger number of charities and gave more per capita (\$1,235) than any other cohort.
- Baby Boomers**

Baby Boomers gave 41% of donations last year. Almost three-fourths of Baby Boomers say their giving will either remain the same in 2018 (60%) or increase (12%).

Source: Blackbaud: *The Next Generation of American Giving*, 2018

2017 OVERVIEW BY GENERATION¹

	% THAT GAVE	NUMBER OF DONORS	AVERAGE GIVING PER PERSON	AVERAGE NUMBER OF CHARITIES	TOTAL GIVING
Silent	78%	23.5M	\$1,235	6.3	\$29.0B
Baby Boomers	75%	55.3M	\$1,061	4.2	\$58.6B
Generation X	55%	35.8M	\$921	3.8	\$32.9B
Millennials	51%	34.1M	\$591	3.5	\$20.1B
Generation Z	44%	9.3M	\$341	4.6	\$3.2B

While Religion typically ranks at the top, generations prioritize other causes differently²

Silent	Emergency Relief, Troops & Veterans, The Arts, Advocacy & Election Campaigns
Baby Boomers	First Responder Organizations
Generation X	Health Services, Animal Rights & Welfare, Environmental Protection
Millennials	Human Rights & International Development, Child Development, Victims of Crime/Abuse

Sources:

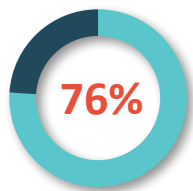
1 Blackbaud: *The Next Generation of American Giving*, 2018

2 Classy.org: "Generational Giving," 2017

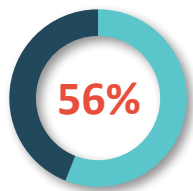
What All Generations Want to Know About Nonprofits

TOPIC	% OF DONORS WHO RESEARCH BEFORE GIVING
Efficiency	70%
Impact	59%
General Reputation	54%
Operating Costs	53%
Mission and Services	53%
Executive Salaries	43%
Funding Sources	31%

Institutional spend remains a priority



76% are concerned about how much money goes to an organization's overhead

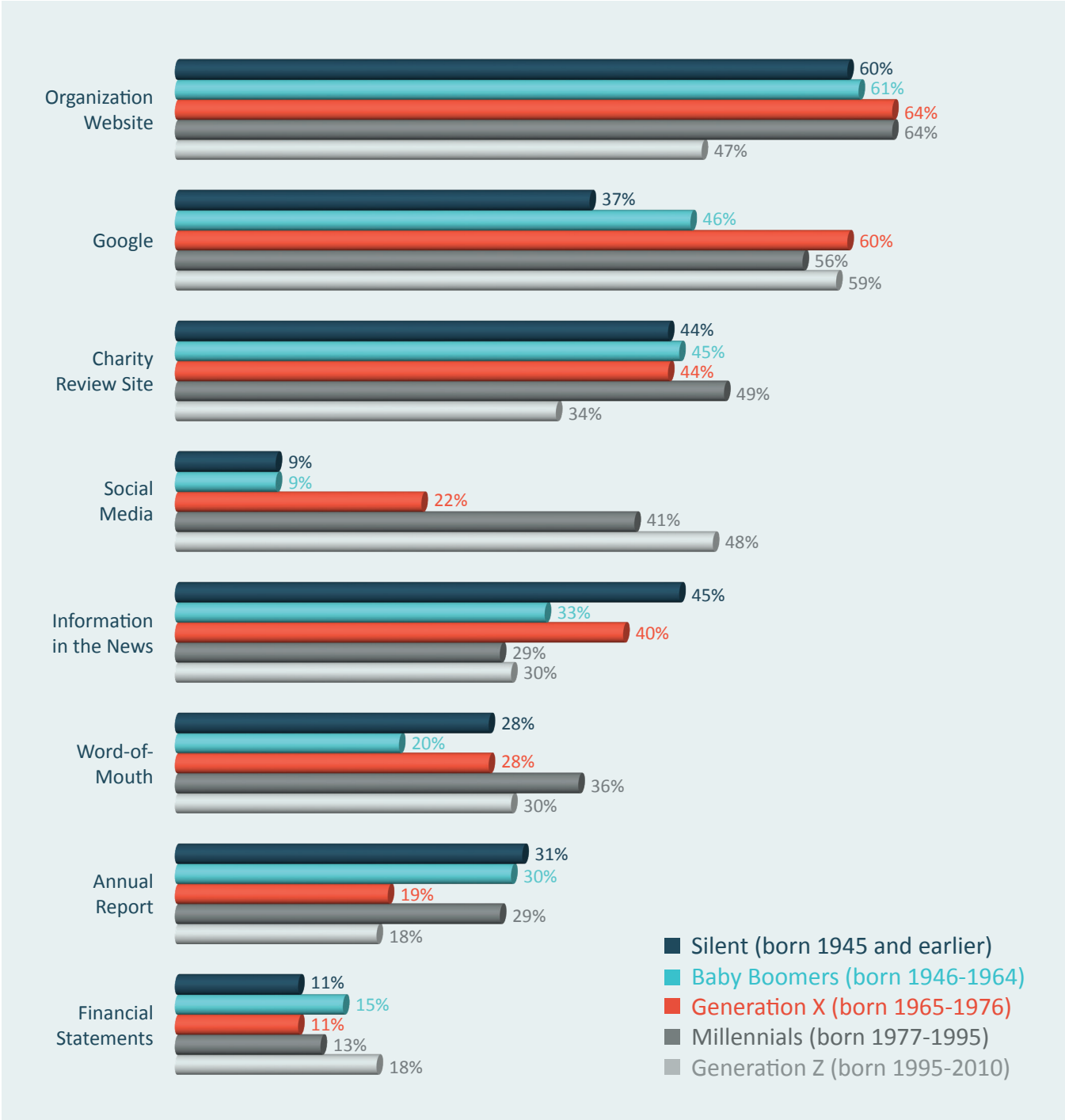


56% put research into finding out how an organization spends its funds

Source: Blackbaud: *The Next Generation of American Giving*, 2018

Preferred Information Sources

WHERE EACH GENERATION FINDS INFORMATION ON NONPROFITS

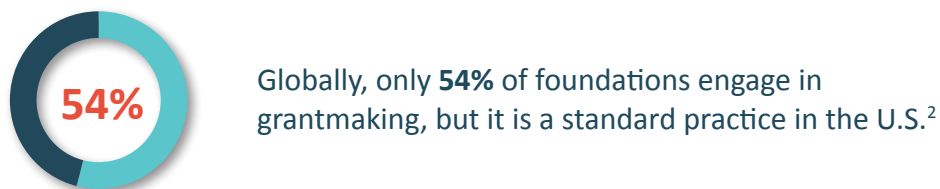
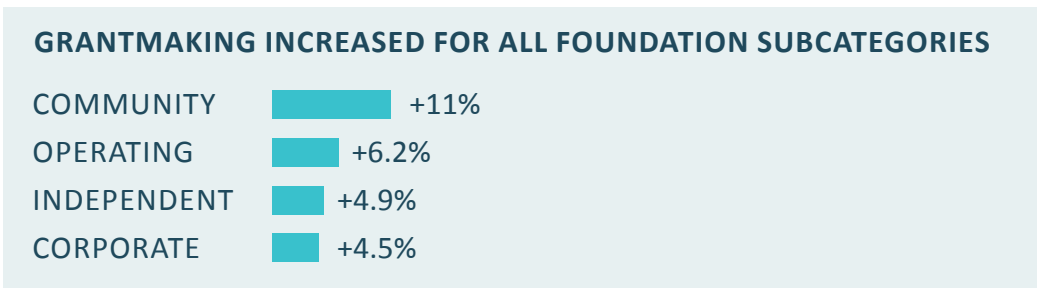


Source: Blackbaud: *The Next Generation of American Giving*, 2018

Foundations Gave \$66.9 Billion to Charity in 2017



The U.S. prioritizes grantmaking



Sources:
 1 The Giving Institute: *Giving USA*, 2018
 2 UBS and Hauser Institute for Civil Society: *Global Philanthropy Report*, 2018

Top Independent Foundations by Total Giving

	FOUNDATION	TOTAL GIVING	TOTAL ASSETS
1	Bill & Melinda Gates Foundation (WA)	\$3.4B	\$44.3B
2	Ford Foundation (NY)	\$518.3M	\$12.4B
3	The Robert Wood Johnson Foundation (NJ)	\$346.2M	\$10.5B
4	Lilly Endowment Inc. (IN)	\$333.6M	\$9.9B
5	The William and Flora Hewlett Foundation (CA)	\$353.5M	\$9.0B
6	W. K. Kellogg Foundation (MI)	\$294.9M	\$8.6B
7	The David and Lucile Packard Foundation (CA)	\$291.7M	\$7.1B
8	Gordon and Betty Moore Foundation (CA)	\$220.7M	\$6.6B
9	Bloomberg Philanthropies (NY)	\$148.7M	\$6.6B
10	The John D. and Catherine T. MacArthur Foundation (IL)	\$222.5M	\$6.5B
11	The Andrew W. Mellon Foundation (NY)	\$231.8M	\$6.4B
12	The Leona M. and Harry B. Helmsley Charitable Trust (NY)	\$222.3M	\$5.4B
13	Open Society Foundations (NY)	\$410.6M	\$4.9B
14	The Rockefeller Foundation (NY)	\$150.3M	\$4.2B
15	The California Endowment (CA)	\$182.8M	\$3.7B
16	The Kresge Foundation (MI)	\$139.9M	\$3.7B
17	The Duke Endowment (NC)	\$140.0M	\$3.4B
18	Carnegie Corporation of New York (NY)	\$96.9M	\$3.3B
19	John Templeton Foundation (PA)	\$162.7M	\$3.2B
20	Robert W. Woodruff Foundation, Inc. (GA)	\$121.5M	\$3.2B
21	The JPB Foundation (NY)	\$117.6M	\$3.1B
22	The Susan Thompson Buffett Foundation (NE)	\$416.4M	\$3.1B
23	Margaret A. Cargill Foundation (MN)	\$150.3M	\$3.1B
24	The Annie E. Casey Foundation (MD)	\$108.9M	\$3.0B
25	Charles Stewart Mott Foundation (MI)	\$72.9M	\$2.8B

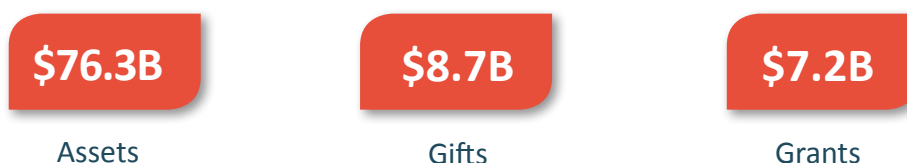
Source: Foundation Center: "Foundation Statistics Database," 2014

Community Foundations

TOP 100 LARGEST COMMUNITY FOUNDATIONS BY TOTAL ASSETS

	2008	2009	2010	2011	2012	2013	2014	2015	2016
Assets	\$38.7B	\$40.2B	\$43.5B	\$44.6B	\$49.3B	\$57.6B	\$63.6B	\$65.5B	\$69.1B
Gifts	\$4.3B	\$3.5B	\$3.9B	\$4.4B	\$5.8B	\$6.7B	\$7.7B	\$7.1B	\$8.1B
Grants	\$3.8B	\$3.5B	\$3.6B	\$3.5B	\$3.8B	\$4.3B	\$5.2B	\$5.9B	\$6.8B

Total reported assets, gifts, and grants for 2016:



Between 2015 and 2016 there was:

- ↑ **5.2%** an increase in median change of total assets
- ↓ **1.3%** a decline in total gifts
- ↑ **7%** an increase in grants

Operations

- The majority of revenue comes from administrative fees (on average 71%)
- Two-thirds of expenses go to personnel costs (66%)
- The smallest (by assets) of 253 community foundations surveyed have a far greater proportion of endowed assets (89%) than the largest community foundations (54%)

Source: Foundation Center: *The Columbus Survey*, 2016

Top 25 Community Foundations by Assets

	FOUNDATION	2016 ASSETS	2016 GIFTS	2016 GRANTS
1	Silicon Valley Community Foundation (CA)	\$8.3B	\$1.4B	\$1.3B
2	Tulsa Community Foundation (OK)	\$4.2B	\$166.3M	\$268.8M
3	Greater Kansas City Community Foundation (KS)	\$2.7B	\$451.3M	\$347.6M
4	The New York Community Trust (NY)	\$2.6B	\$124.5M	\$195.5M
5	The Chicago Community Trust (IL)	\$2.5B	\$333.2M	\$229.0M
6	The Cleveland Foundation (OH)	\$2.1B	\$36.8M	\$93.5M
7	Foundation for the Carolinas (NC)	\$2.1B	\$531.2M	\$312.2M
8	The Columbus Foundation (OH)	\$2.0B	\$314.8M	\$217.7M
9	The Oregon Community Foundation (OR)	\$1.9B	\$254.8M	\$100.0M
10	Marin Community Foundation (CA)	\$1.6B	\$138.6M	\$75.9M
11	California Community Foundation (CA)	\$1.4B	\$194.7M	\$173.7M
12	The San Francisco Foundation (CA)	\$1.3B	\$150.8M	\$135.1M
13	Minnesota Community Foundation and The Saint Paul Foundation (MN)	\$1.2B	\$55.2M	\$58.8M
14	The Pittsburgh Foundation (PA)	\$1.1B	\$43.6M	\$66.3M
15	Omaha Community Foundation (NE)	\$1.0B	\$154.5M	\$181.7M
16	Communities Foundation of Texas, Inc. (TX)	\$1.0B	\$93.8M	\$126.1M
17	The Boston Foundation (MA)	\$967.7M	\$108.9M	\$102.6M
18	The Community Foundation for Greater Atlanta (GA)	\$945.6M	\$132.7M	\$122.8M
19	Hartford Foundation for Public Giving (CT)	\$917.2M	\$13.6M	\$33.3M
20	San Antonio Area Foundation (TX)	\$900.0M	\$49.0M	\$53.4M
21	Oklahoma City Community Foundation, Inc. (OK)	\$848.8M	\$41.3M	\$31.7M
22	Seattle Foundation (WA)	\$848.0M	\$105.3M	\$85.2M
23	The Rhode Island Community Foundation (RI)	\$834.0M	\$60.5M	\$45.2M
24	Community Foundation for Southeast Michigan (MI)	\$804.2M	\$95.4M	\$69.4M
25	The Greater Milwaukee Foundation (WI)	\$756.0M	\$43.1M	\$60.1M

Source: Foundation Center: *The Columbus Survey*, 2016

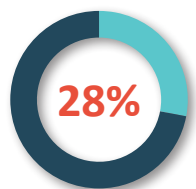
Donor-Advised Funds

DONOR-ADVISED FUNDS COMPARED TO PRIVATE FOUNDATION GROWTH¹

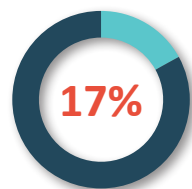
DONOR-ADVISED FUNDS (DAFs)*	2014	2015	2016
Number of DAFs	240,960	266,584	284,965
Assets	\$70.0B	\$77.6B	\$85.2B
Grantmaking	\$12.3B	\$14.3B	\$15.8B
PRIVATE FOUNDATIONS			
Number of Foundations	79,729	81,483	83,276
Assets	\$712.5B	\$728.8B	\$752.5B
Grantmaking	\$41.3B	\$43.7B	\$45.2B

While the number of DAFs has outpaced private foundations, the assets of private foundations have grown at a faster rate.

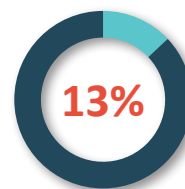
AVERAGE DAF GIVING BY SECTOR IN 2016²



Education



Public-Society
Benefit



Religion

*Donor-Advised Fund (DAF): A fund that allows donors to make contributions and then recommend preferred grants over time.

Sources:

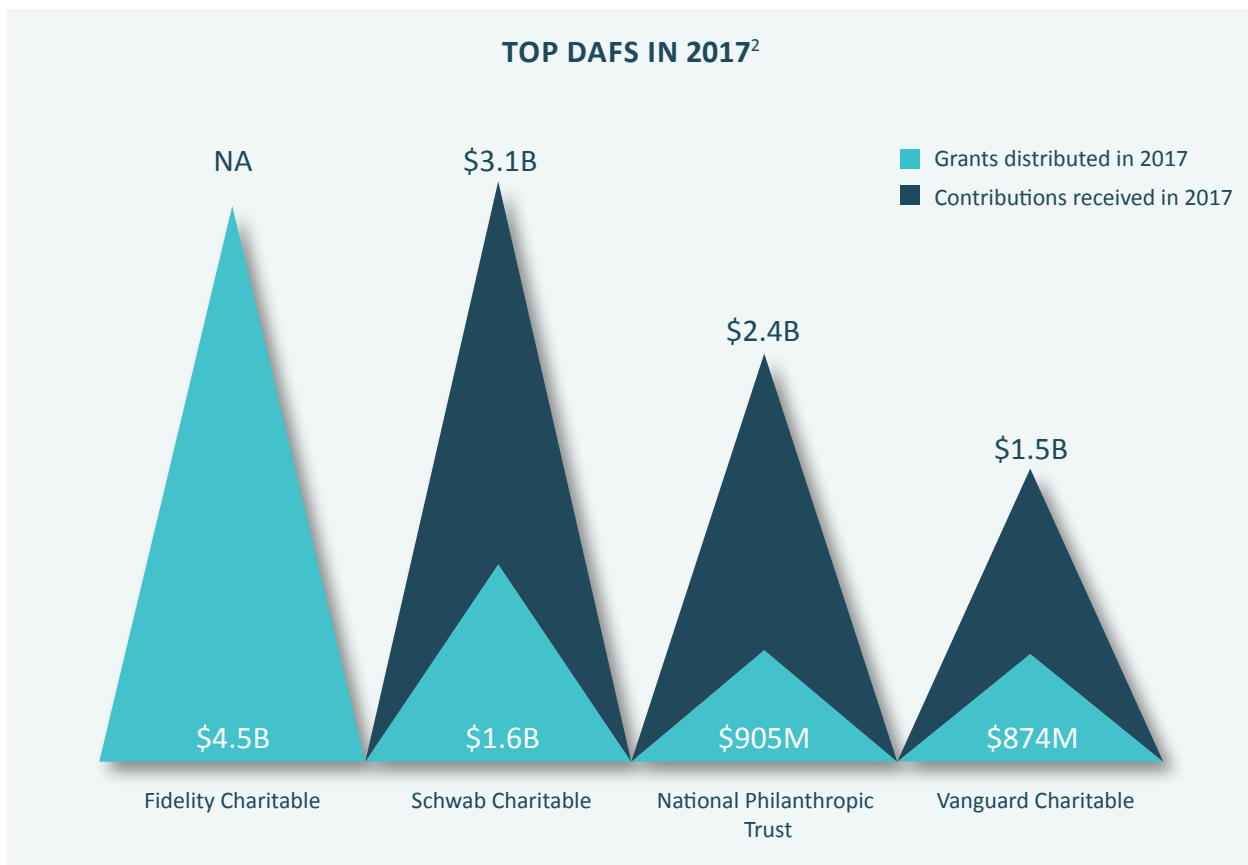
1 National Philanthropic Trust: *Donor-Advised Fund Report*, 2017

2 The Giving Institute: *The Data on Donor-Advised Funds*, 2018

A Closer Look at Donor-Advised Funds

DAFs on the Rise

- In 2016 there was a nearly **7%** increase in the number of individual DAFs, and there has been at least a 6% increase every year since 2012¹
- In 2016, charitable assets under management in all DAFs reached an all-time high at \$85.2 billion, which was a **10% increase** from the previous year
- In 2016, \$23.27 billion was put into DAFs, a **7% increase** from 2015
- The annual payout rate continued to **exceed 20%** from 2015 to 2017



Sources:

1 National Philanthropic Trust: *Donor-Advised Fund Report, 2017*

2 Fidelity Charitable Report: *Fidelity Giving Report, 2018*

A Global Look at Foundations

Global foundations are growing fast, with **72%** of foundations established in the past 25 years.

35%

35% of all foundations in the world are located in North America

60%

Global foundation assets were above \$1.5 trillion, with the U.S. representing **60%** of that total

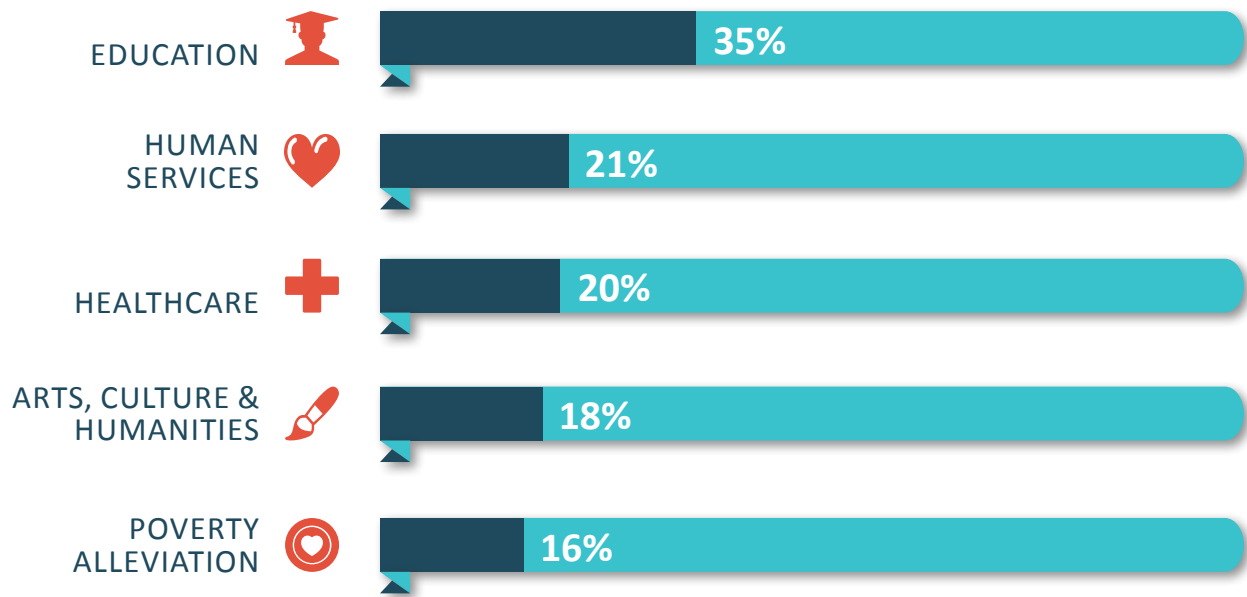
4.8%

U.S. foundation assets were **4.8%** of GDP, behind the Netherlands and Switzerland, the only countries to top 10%

9%

The global percentage of assets spent for charitable purposes was 10%, while the average spend rate in the U.S. was **9%**

Top Sectors Supported by Global Foundations



- Resources are highly concentrated in certain sectors, with **Education** being the most popular area for investment
- **58%** of the foundations identified do not collaborate with other foundations despite having overlapping goals

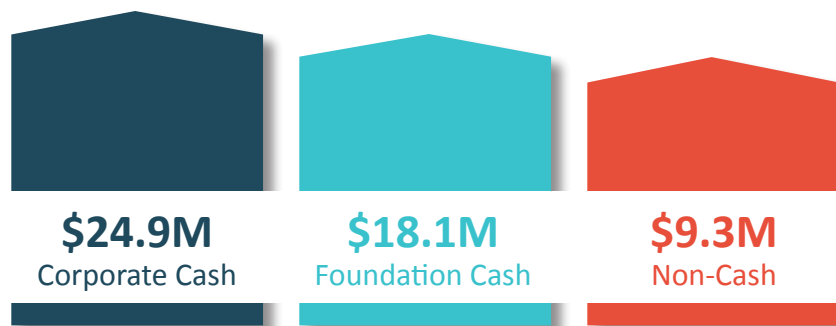
Corporations Gave \$20.8 Billion to Charity in 2017

- 5%** 5% of all giving came from corporations¹
- 8%** Corporate giving increased by 8%
- 4.5%** Corporate foundation grantmaking increased 4.5%

Giving by corporations saw a **\$40 million** rise due to gifts in response to natural disasters.

7 out of 10 companies gave to recipients outside of their headquarters' country.²

BREAKDOWN OF TOTAL GIVING BY FUNDING TYPE



\$52.3 million was the median total giving for the top-quartile leaders.

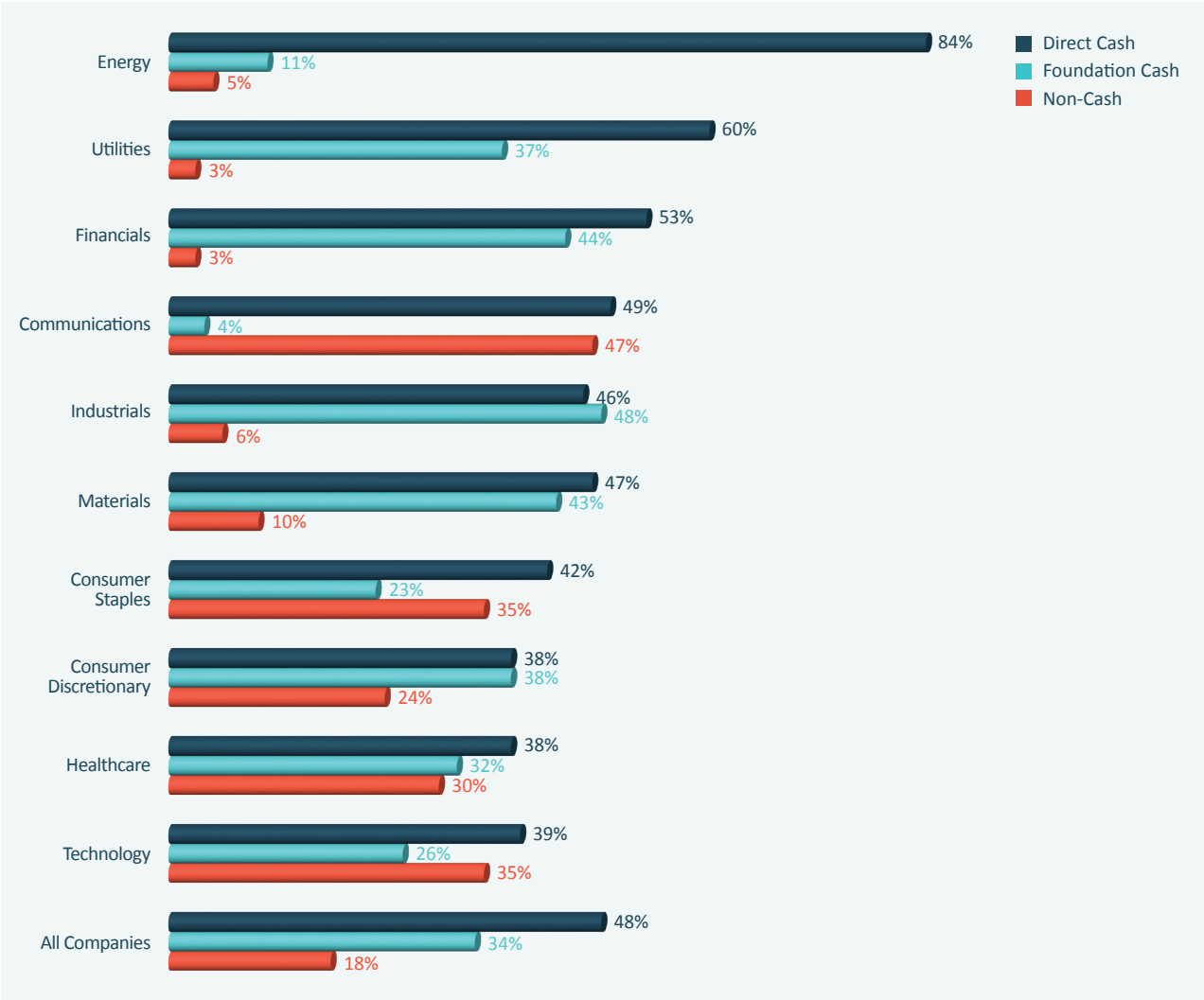
Sources:

1 The Giving Institute: *Giving USA*, 2018

2 CECP: "Brave Leaders, Bold Moves: Giving in Numbers Brief," 2017

Funding Type by Industry in 2016

Non-Cash giving in **Communications, Consumer Staples, and Technology** represented more than one-third of overall giving.



Funding type changes 2012-2016:

↑44%

Non-Cash giving increased 44%

↑12%

Direct Cash giving increased 12%

↓6%

Foundation Cash giving decreased 6%

Source: CECP: Giving in Numbers Report, 2017

Corporate Gift Matching Programs

Matching gifts contributed **13%** of total cash giving.

The majority of Fortune 500 companies have gift matching programs

87%

87% of companies surveyed offered a matching gift program

Employee participation is low

9%

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

Measuring Impact in Volunteering

- **27%** of companies measured the business value of their volunteer programs and employee participation
- Companies that measured both outcomes/impacts and business value of employee volunteer programs saw a **22%** increase in total giving



Top 50 Corporations by Cash Giving

	CORPORATION	PRE-TAX PROFIT	TOTAL CASH DONATIONS	CASH DONATIONS AS % OF PRE-TAX PROFIT
1	Gilead Sciences	\$21.7B	\$446.7M	2.1%
2	Walmart Stores	\$24.8B	\$301.0M	1.2%
3	Wells Fargo & Company	\$33.6B	\$281.3M	0.8%
4	Goldman Sachs Group	\$8.8B	\$276.4M	3.2%
5	ExxonMobil Corporation	\$22.0B	\$268.0M	1.2%
6	Chevron Corporation	\$4.8B	\$225.0M	4.7%
7	JPMorgan Chase & Company	\$30.7B	\$224.0M	0.7%
8	Bank Of America	\$22.2B	\$168.5M	0.8%
9	Google	\$19.7B	\$167.9M	0.9%
10	Citigroup	\$24.9B	\$142.8M	0.6%
11	Microsoft Corporation	\$18.5B	\$135.2M	0.7%
12	Merck & Company	\$5.4B	\$132.5M	2.5%
13	Coca-Cola Company	\$9.6B	\$117.3M	1.2%
14	AT&T Corporation	\$20.7B	\$112.9M	0.6%
15	Target Corporation	\$5.0B	\$111.5M	2.3%
16	General Mills	\$1.8B	\$105.0M	6.0%
17	Pfizer	\$9.0B	\$93.3M	1.0%
18	Kroger Company	\$3.1B	\$76.5M	2.5%
19	PNC Financial Services Group	\$5.5B	\$72.0M	1.3%
20	Morgan Stanley	\$8.5B	\$62.5M	0.7%
21	State Farm Mutual Automobile Insurance Company	N/A	\$60.8M	N/A
22	PepsiCo	\$7.4B	\$56.4M	0.8%
23	Verizon Communications	\$28.2B	\$56.4M	0.2%
24	Ford Motor Company	\$10.2B	\$55.6M	0.5%
25	Capital One Financial Corporation	\$5.9B	\$53.7M	0.9%

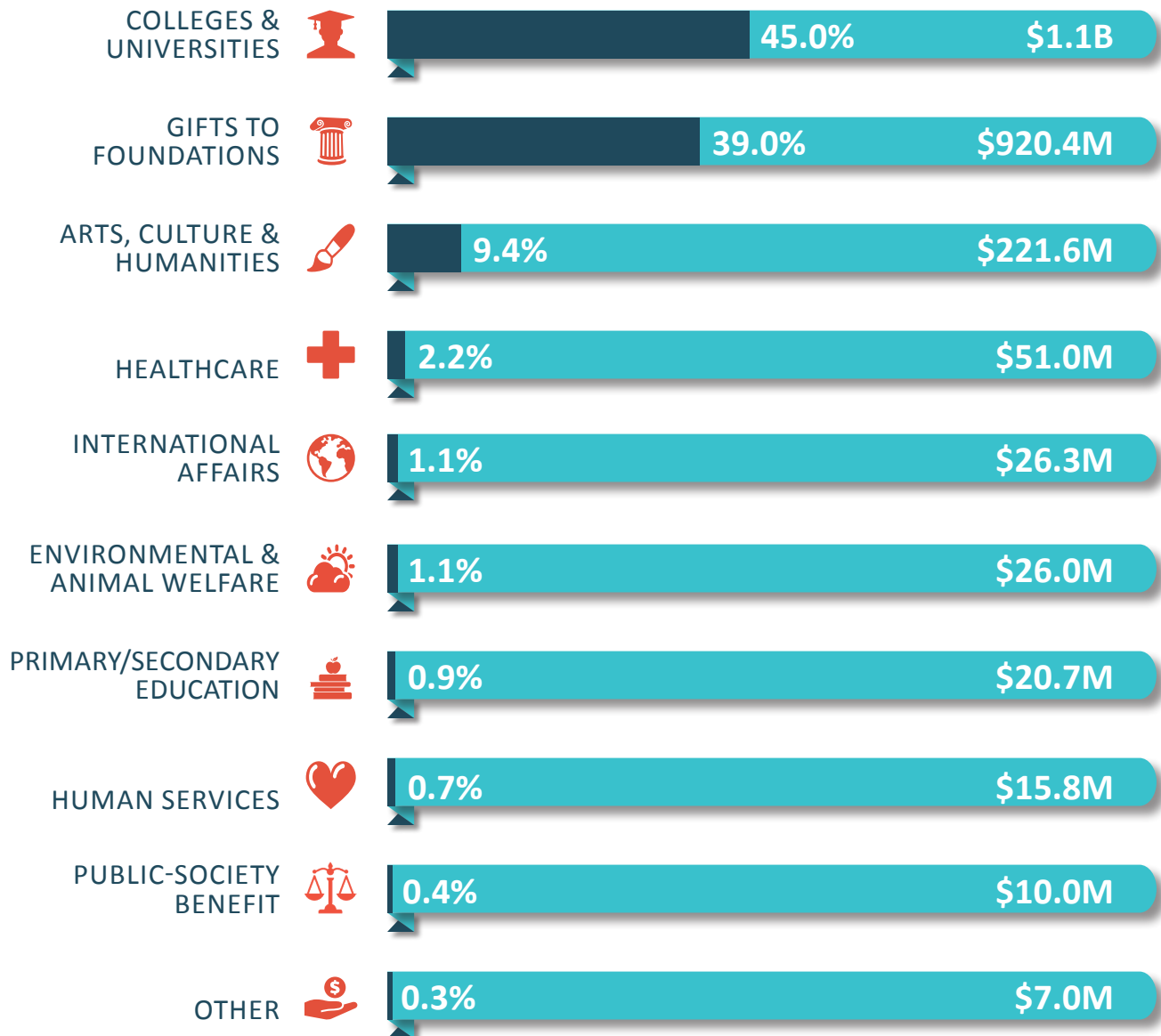
Source: Chronicle of Philanthropy: "How Much America's Biggest Companies Give to Charity," 2016

	CORPORATION	PRE-TAX PROFIT	TOTAL CASH DONATIONS	CASH DONATIONS AS % OF PRE-TAX PROFIT
26	U.S. Bancorp	\$8.3B	\$53.0M	0.7%
27	Prudential Financial	\$7.8B	\$51.9M	0.7%
28	Eli Lilly and Company	\$2.8B	\$50.0M	1.8%
29	Caterpillar	\$2.9B	\$46.0M	1.6%
30	Nationwide	\$1.2B	\$44.7M	3.7%
31	ConocoPhillips	\$7.2B	\$44.1M	0.6%
32	MetLife	\$7.5B	\$42.6M	0.6%
33	Cisco Systems	\$11.2B	\$41.2M	0.4%
34	Dow Chemical Company	\$10.0B	\$40.9M	0.4%
35	American Express Company	\$9.0B	\$37.2M	0.5%
36	Emerson	\$4.2B	\$35.8M	0.9%
37	Allstate Corporation	\$3.2B	\$31.1M	1.0%
38	General Motors Corporation	\$7.8B	\$30.0M	0.4%
39	Deere & Company	\$2.8B	\$28.6M	1.0%
40	Qualcomm	\$6.5B	\$28.0M	0.4%
41	Bristol-Myers Squibb	\$2.1B	\$27.0M	1.3%
42	Lockheed Martin Corporation	\$5.0B	\$27.0M	0.5%
43	Sears, Roebuck and Company	\$1.2B	\$26.2M	1.9%
44	Kimberly-Clark Corporation	\$1.4B	\$25.0M	1.9%
45	Starbucks Corporation	\$4.0B	\$23.5M	0.6%
46	Dominion Resources	\$2.8B	\$23.4M	0.8%
47	Travelers Companies	\$4.7B	\$22.3M	0.5%
48	Aetna	\$4.2B	\$22.0M	0.5%
49	New York Life Insurance Company	N/A	\$21.4M	N/A
50	Valero Energy Corporation	\$6.0B	\$20.5M	0.3%

Source: Chronicle of Philanthropy: "How Much America's Biggest Companies Give to Charity," 2016

\$35.7 Billion Was Donated by Bequests in 2017

TOP 10 SECTORS FOR PUBLICLY REPORTED GIFTS BY BEQUESTS OF 1 MILLION+



Sources:

1 The Giving Institute: *Giving USA*, 2018

2 Chronicle of Philanthropy: "Big Charitable Gifts," 2017

**WHERE THEY GAVE: PUBLICLY REPORTED BEQUESTS OF \$1 MILLION+ BY SECTOR
(JANUARY 2017 – MARCH 2018), TOP 10 SECTORS**

	SECTOR	SUM OF GIFT VALUE	NUMBER OF GIFTS	% OF TOTAL GIFT VALUE	% OF TOTAL GIFT COUNT
1	Colleges & Universities	\$1.1B	53	45.0%	45.0%
2	Gifts to Foundations	\$920.4M	14	39.0%	12.0%
3	Arts, Culture & Humanities	\$221.6M	20	9.4%	17.0%
4	Healthcare	\$51.0M	12	2.2%	10.0%
5	International Affairs	\$26.3M	2	1.1%	2.0%
6	Environmental & Animal Welfare	\$26.0M	3	1.1%	3.0%
7	Primary/ Secondary Education	\$20.7M	6	0.9%	5.0%
8	Human Services	\$15.8M	6	0.7%	5.0%
9	Public-Society Benefit	\$10.0M	1	0.4%	1.0%
10	Other	\$7.0M	2	0.3%	2.0%
	TOTALS*	\$2.4B	119	100%	100%

9%

9% of all giving came through bequests

2.3%

After a 9% decline between 2015 and 2016, giving by bequests rose **2.3%**

*Percentages are rounded.

Source: Chronicle of Philanthropy: "Big Charitable Gifts," 2017

Top 25 Publicly Reported Bequests 2017

	DONOR	RECIPIENT	GIFT VALUE
1	Henry L. Hillman	Hillman Family Foundation (PA)	\$800.0M
2	Helen Diller	University of California at San Francisco (CA)	\$500.0M
3	David Rockefeller	Museum of Modern Art (NY)	\$125.0M
4	Porter Byrum	Wake Forest University (NC)	\$70.0M
5	Ed Babka	University of Dubuque (IA)	\$60.0M
6	Allen Davis	California Institute of Technology (CA)	\$60.0M
7	Marcia Cohn	Brandeis University (MA)	\$50.0M
8	Robert H. Taylor	Princeton University (NJ)	\$42.0M
9	Porter Byrum	Wingate University (NC)	\$35.0M
10	Porter Byrum	Queens University of Charlotte (NC)	\$35.0M
11	Nancy W. Mattis	Rhode Island Foundation (RI)	\$28.0M
12	David Rockefeller	Council on Foreign Relations (NY)	\$25.0M
13	John McGovern	University of Houston (TX)	\$20.0M
14	Jean Hower Tabor	University of Akron (OH)	\$20.0M
15	Robert W. Franz	Providence Health and Services (OR)	\$20.0M
16	David Rockefeller	Mount Desert Land and Garden Preserve (ME)	\$20.0M
17	R. Kingman Webster	Essex County Community Foundation (MA)	\$18.0M
18	Betty Houston	Museum of Flight (WA)	\$17.0M
19	Forest Minger	Manistee County Community Foundation (MI)	\$15.0M
20	Dan and Elaine McGill	Maryville College (TN)	\$15.0M
21	David Rockefeller	David Rockefeller Fund (NY)	\$15.0M
22	Carl and Alice Bimel	Cincinnati Art Museum (OH)	\$11.7M
23	Wade F. B. Thompson	Museum of the City of New York (NY)	\$10.0M
24	Maedell Hoover Broad	Loyola University New Orleans (LA)	\$10.0M
25	Arthur McFerrin Jr. and Dorothy McFerrin	Texas A&M University (TX)	\$10.0M

David Rockefeller appears four times on the list with gift values amounting to \$185 million.



Itemizations and Giving

In December 2017, the Tax Cuts and Jobs Act (TCJA) was passed. This section explores the potential impact on giving.

84.4%

In 2017, itemized giving represented **84.4%** of all individual giving¹

5.6%

Giving increased from both itemizing (+5.6%) and non-itemizing (+3.3%) households

RELEVANT CHANGES UNDER THE NEW TAX LEGISLATION²

	Prior Law (2017)		New Law (2018)
Individual Rates			
Lower tax rates for five out of seven tax brackets	10%, 15%, 25%, 28%, 33%, 35%, 39.6%	↓	10%, 12%, 22%, 24%, 32%, 35%, 37%
Standard Deduction			
Nearly doubles the standard deduction for individual and joint filers	Single - \$6,350 Married - \$12,700 Household - \$9,350	↑	Single - \$12,000 Married - \$24,000 Household - \$18,000
Charitable Contributions for Cash Gifts			
Increases limit on cash contributions and retains the 5-year-carry-over	50% of AGI*	↑	60% of AGI
Estate Tax Exemption			
Retains the current estate tax rate, but doubles the threshold for triggering an estate, gift, or generation-skipping tax	\$5.5M per person \$10.98 per married couple	↑	\$11.2M per person \$22.4M per married couple
Corporate Rate			
Flat corporate tax rate made permanent by this bill	35% max rate	↓	21% flat rate

State and Local Tax Deductions

The state and local tax deductions now have a \$10,000 cap, which will affect those who live in high-tax states. Some states with the largest income tax burdens also have the largest number of itemizers and some of the highest levels of philanthropy.

Some examples, with itemizer percentages from 2014, are the following:
NY (34.2%), CA (33.9%), MD (45.2%), MA (36.8%), CT (41.2%), OR (36.0%)³

*Adjusted Gross Income (AGI).

Sources:

1 The Giving Institute: *Giving USA*, 2018

2 Tax Foundation: "Preliminary Details and Analysis of the Tax Cuts and Jobs Act," 2017

3 Tax Foundation: "State and Local Tax Deduction: A Primer," 2017

44M

44 million households itemized deductions in 2014¹

21M

It is estimated that in 2018, 21 million households will no longer itemize charitable deductions²

The TCJA raised the limit on cash charitable contributions and lowered tax rates. It is expected that HNWI's will continue to itemize charitable deductions.

Despite a potential decline in itemizations, mission and impact drive charitable giving.

WHY PEOPLE GIVE³

HNW donors reported they would **always** give for the following reasons:



*Tax Benefits rank 7th

Sources:

1 Congressional Research Service: *Itemized Tax Deductions for Individuals: Data Analysis*, 2017

2 Forbes: "21 Million Taxpayers Will Stop Taking the Charitable Deductions Under New Law," 2018

3 Bank of America: *U.S. Trust Study of High Net Worth Philanthropy*, 2016

Glossary of Terms

CAGR

Compound annual growth rate. The rate of growth for an investment over a specific period of time.

Community Foundation

Nonprofit organization dedicated to a particular area.

Corporate Foundation

Nonprofit organization that is funded by a profit-making company.

Corporate Cash

Charitable giving of direct cash.

Donor-Advised Fund (DAF)

A fund that allows donors to make contributions and then recommend preferred grants over time.

Family Foundation

Nonprofit organization funded by the endowment from a family.

Fortune 500

The 500 largest U.S. corporations by total revenue.

Foundation Cash

Grant awarded by corporate foundations.

GDP

Gross Domestic Product. Measure of all goods/services produced in a period of time.

Gifts to Individuals

In-kind gifts to individuals in need, made by foundations or assistance programs.

High Net Worth Individuals (HNWI)

Those having investible assets of \$1 million or more, excluding primary residence, collectibles, consumables, and consumer durables.

Independent Foundation

Nonprofit organization not governed by a benefactor, family, or corporation.

Itemized Giving

Tax deductions claimed for charitable donations made.

Non-Cash

A form of corporate giving that includes in-kind gifts and pro bono services.

Operating Foundation

Nonprofit organization that operates its own charitable programs.

Public-Society Benefit

Organizations focused on voter rights, civil rights, consumer rights, and community or economic development.

TCJA

The Tax Cuts and Jobs Act of 2017.

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Forbes

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IUPUI Lilly Family School of Philanthropy

National Philanthropic Trust

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Tax Foundation

Tax Policy Center

UBS and Hauser Institute for Civil Society




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