

KEY FACTS ON FAMILY FOUNDATIONS

Grantmaker Data, 2006

The Foundation Center has identified 37,100 independent foundations with measurable donor or donor-family involvement. These “family foundations” represent more than half of all independent foundations and account for similar shares of independent foundations’ giving, assets, and new gifts and bequests from donors. If all of the nation’s family foundations could be identified, these shares would undoubtedly rise.¹

¹Family foundations are not legally distinct from other independent foundations, requiring the Foundation Center to identify them using several objective and subjective criteria. These criteria include independent foundations with “family” or “families” in their name, a living donor whose surname matches the foundation name, or at least two trustee surnames that match a living or deceased donor’s name, along with any independent foundations that self-identify as family foundations on annual Foundation Center surveys.

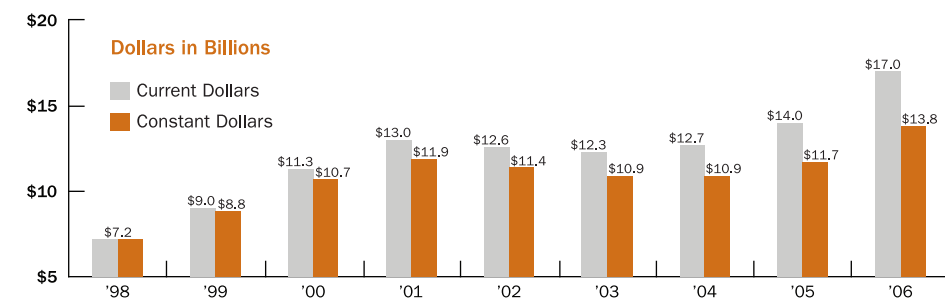
Summary Statistics for Family Foundations, 2005 and 2006

	2005	2006 ¹	% change
No. of Foundations	33,994	34,687	2.0
Total Giving	\$14,028,469	\$17,034,318	21.4
Total Assets	\$233,179,446	\$259,943,740	11.5
Gifts Received	\$11,926,655	\$14,117,880	18.4

Note: Dollars in thousands. Percent change represents current dollars. Excludes 2,411 family foundations that did not report giving in the latest fiscal year. These foundations held \$1.5 billion in assets in 2006 and reported gifts received totaling \$813.7 million.

¹Figures for 2006 are preliminary.

Inflation-adjusted family foundation giving has nearly doubled since 1998



\$17 billion
Giving by family foundations in 2006

21%
Increase in family foundation giving between 2005 and 2006

34,687
Number of grantmaking family foundations

49%
Share of family foundations reporting less than \$50,000 in giving in 2006

59%
Estimated family foundation giving as a share of all independent foundation giving

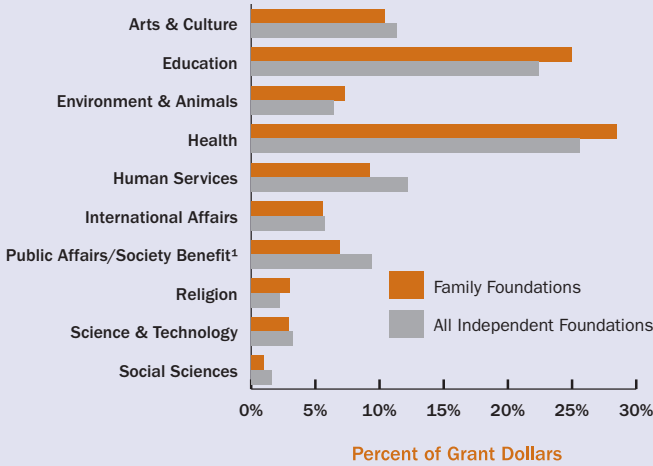
Giving Patterns, 2006

Larger family foundations included in the Foundation Center's 2006 grants sample¹ were more likely to provide funding for health, education, the environment and animals, and religion than independent foundations overall. They were less likely to give for human services, arts and culture, public affairs/society benefit, international affairs, science, and the

social sciences. By types of support, family foundations directed very similar shares of giving for program, general, and capital support compared to independent foundations overall.

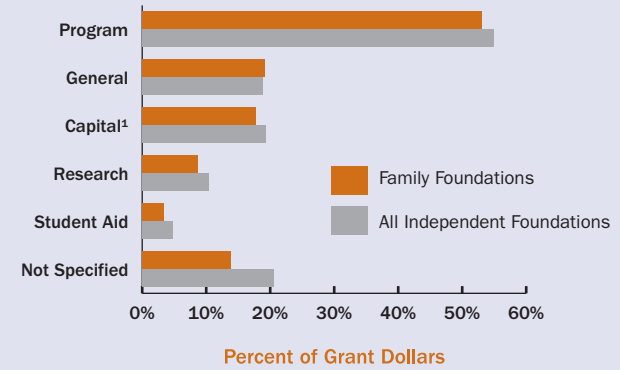
¹The Foundation Center's 2006 grants sample database included the grants of \$10,000 or more awarded by over 1,200 of the largest U.S. foundations and accounted for roughly half of grant dollars awarded by all of the more than 71,000 active U.S. foundations.

Larger family foundations favored health and education in 2006



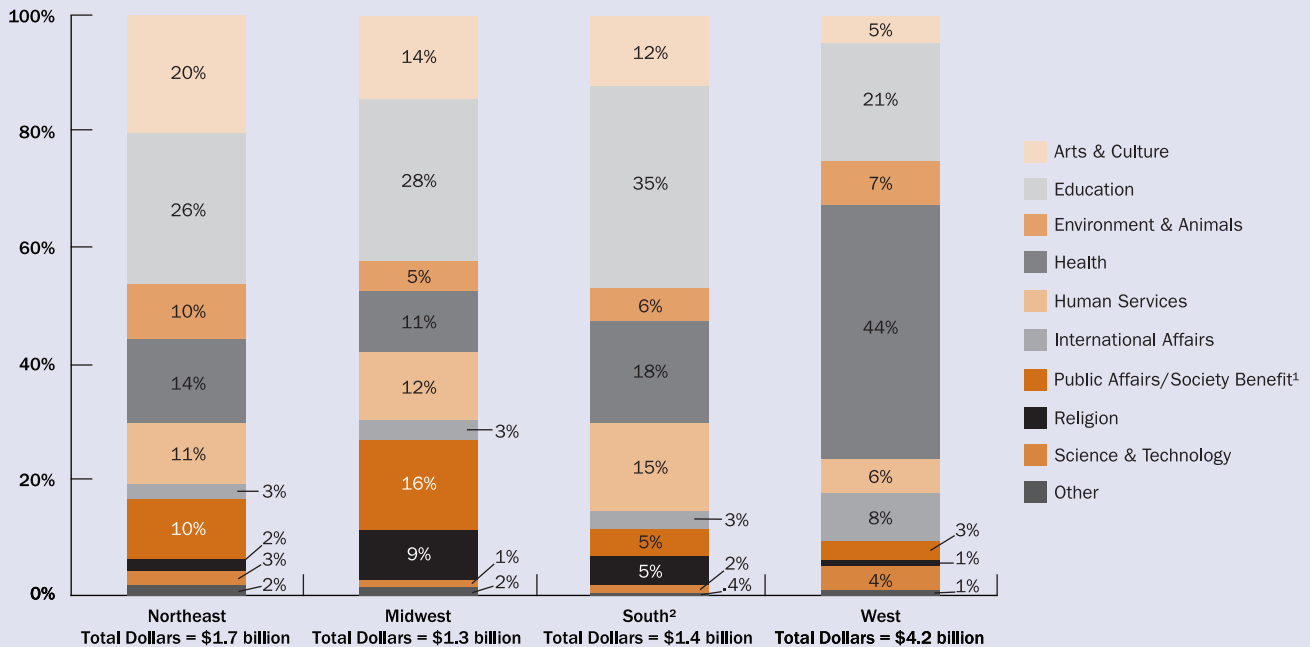
Note: Based on grants of \$10,000 or more awarded by a sample of 956 larger independent foundations, including 577 family foundations.
¹Includes Civil Rights and Social Action, Community Improvement and Development, Philanthropy and Voluntarism, and Public Affairs.

Larger family foundations directed the largest share of their 2006 giving for programs



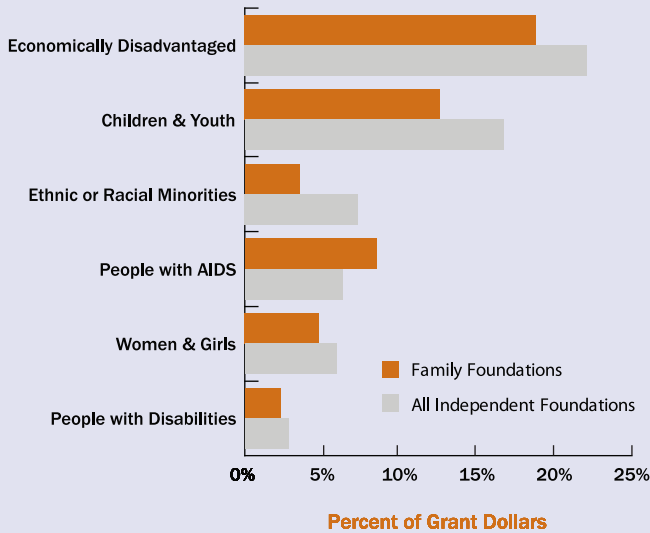
Note: Based on grants of \$10,000 or more awarded by a sample of 956 larger independent foundations, including 577 family foundations.
¹Capital support includes endowment funds.

Education was the top priority of family foundations in three of the four major regions in 2006



Note: Based on a sample of 577 larger family foundations.
¹Includes Civil Rights and Social Action, Community Improvement and Development, Philanthropy and Voluntarism, and Public Affairs.
²Figures for the South exclude the District of Columbia. The DC-based family foundations in the sample awarded grants totaling \$82 million.

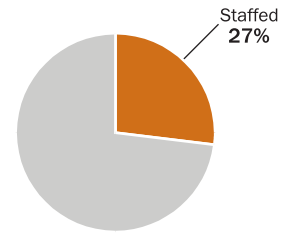
Larger family foundations prioritized giving for the economically disadvantaged in 2006



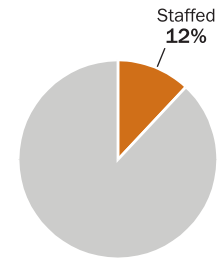
Note: Based on a sample of 956 larger independent foundations, including 577 family foundations. Chart includes selected beneficiary groups representing at least 1 percent of family foundation grant dollars. Figures represent only grants awarded to groups that could be identified as serving specific populations or grants whose descriptions specified a benefit for a specific population. These figures do not reflect all giving benefiting these groups. In addition, grants may benefit multiple population groups, e.g., a grant for homeless children, and would therefore be counted more than once.

15 percent of larger family foundations reported having paid staff in 2007, but shares varied by size

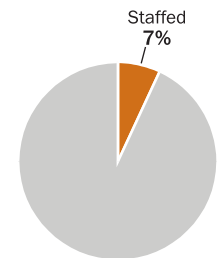
ASSET RANGES



Assets of \$5 million or more
Number = 4,906



Assets of \$2.5 million–under \$5 million
Number = 2,632



Assets of \$1 million–under \$2.5 million
Number = 2,169

Note: Based on Foundation Center survey of family foundations with at least \$1 million in assets or making grants of \$100,000 or more. A total of 1,887 foundations reported having paid staff.

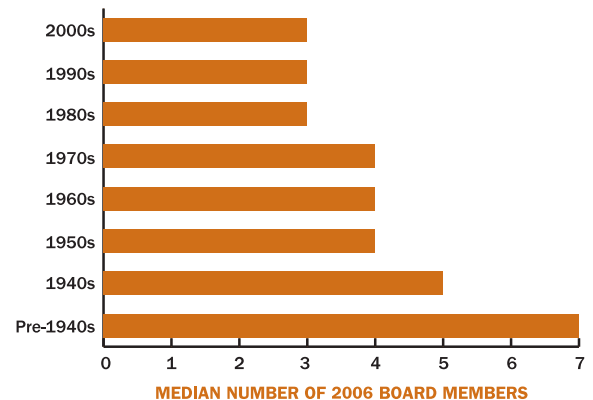
Bill & Melinda Gates Foundation ranked first among family foundations by total giving in 2006

Foundation	State	Total Giving ¹	Assets	Fiscal Date
1. Bill & Melinda Gates Foundation	WA	\$2,845,654,000	\$33,120,381,000	12/31/2006
2. Lilly Endowment	IN	352,335,165	7,601,664,181	12/31/2006
3. Annenberg Foundation	PA	279,575,225	2,685,286,093	6/30/2007
4. David and Lucile Packard Foundation	CA	238,242,075	6,350,664,410	12/31/2006
5. Gordon and Betty Moore Foundation	CA	231,158,757	5,836,161,877	12/31/2006
6. Walton Family Foundation	AR	188,906,015	1,382,097,632	12/31/2006
7. Broad Foundation	CA	113,451,000	1,802,485,000	12/31/2006
8. Susan Thompson Buffett Foundation	NE	100,229,020	457,605,808	12/31/2006
9. Richard King Mellon Foundation	PA	93,576,542	2,088,186,647	12/31/2006
10. McKnight Foundation	MN	93,482,513	2,213,868,000	12/31/2006
11. Houston Endowment	TX	87,407,633	1,627,711,546	12/31/2006
12. Robert W. Wilson Charitable Trust	NY	76,629,647	154,579,374	12/31/2006
13. Michael and Susan Dell Foundation	TX	67,074,424	1,331,980,763	12/31/2006
14. Brown Foundation	TX	66,846,498	1,388,462,472	6/30/2007
15. William Penn Foundation	PA	62,874,720	1,428,365,937	12/31/2006
16. Heinz Endowments	PA	57,029,975	1,435,890,084	12/31/2006
17. Hall Family Foundation	MO	55,708,950	883,436,222	12/31/2006
18. Joseph and Bessie Feinberg Foundation	IL	50,790,748	73,533,426	10/31/2006
19. Charles E. Smith Family Foundation	VA	50,725,342	70,020,765	2/28/2007
20. W. M. Keck Foundation	CA	49,889,653	1,410,261,448	12/31/2006
21. Bing Fund Corporation	NV	46,671,250	7,560,876	5/31/2006
22. Richard and Helen DeVos Foundation	MI	42,997,920	52,844,858	12/31/2006
23. Ahmanson Foundation	CA	42,637,697	1,036,118,744	10/31/2006
24. Wayne & Gladys Valley Foundation	CA	42,306,690	607,517,865	9/30/2006
25. J. E. and L. E. Mabee Foundation	OK	40,291,415	827,458,229	8/31/2007

¹Includes grants, scholarships, and employee matching gifts excludes set-asides, loans, PRIs, and program expenses.

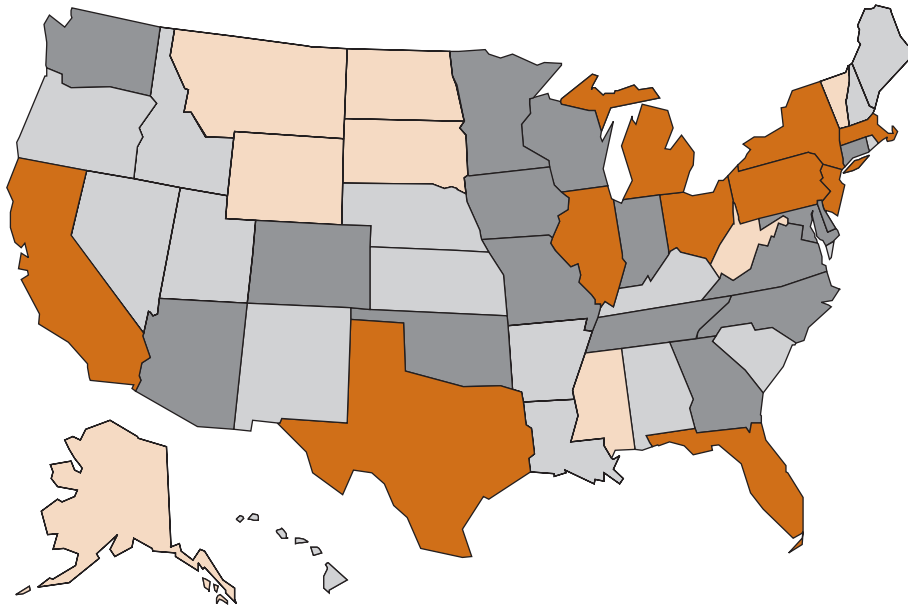
Family foundation board size tends to increase as foundations age

DECADE ESTABLISHED¹



¹Excludes family foundations lacking establishment information.

Number of Family Foundations by State, 2006



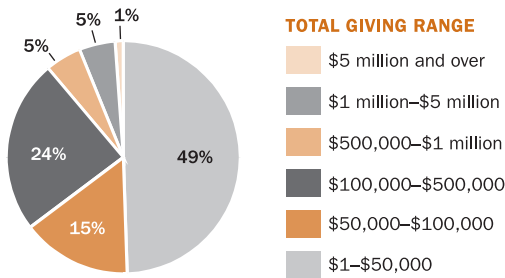
Total Family Foundations = 34,687

1,000+ 300–under 1,000 100–under 300 Under 100

Source for all data:
The Foundation Center

For more information contact
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“Key Facts on Family Foundations”
is available at
[foundationcenter/gainknowledge/
research/nationaltrends.html](http://foundationcenter/gainknowledge/research/nationaltrends.html)

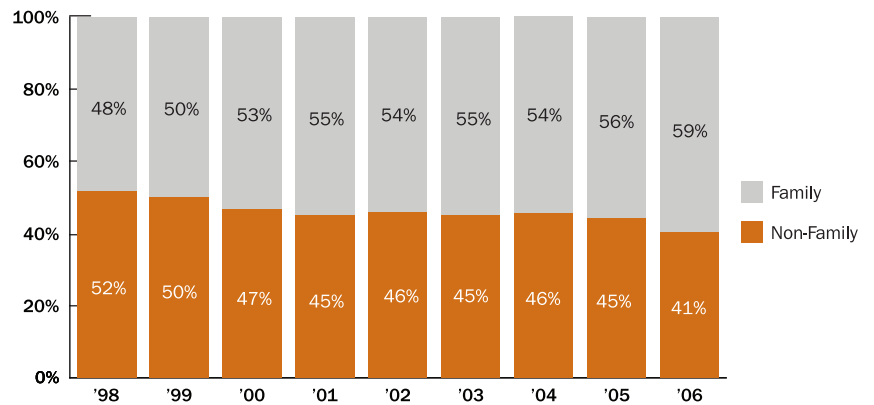
Giving: 49 percent of family foundations reported less than \$50,000 in giving in 2006



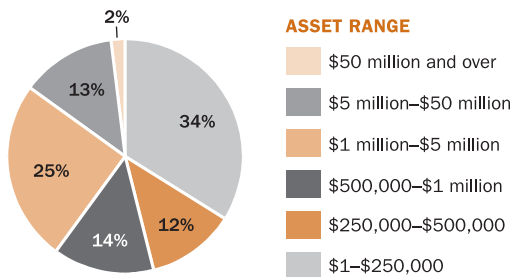
PERCENT OF FOUNDATIONS

Note: Based on 34,687 grantmaking family foundations. Excludes 2,411 family foundations that did not report giving in the latest fiscal year. Figures for 2006 are preliminary. Due to rounding, figures do not total 100.

Family foundations now account for about three-fifths of overall giving by independent foundations



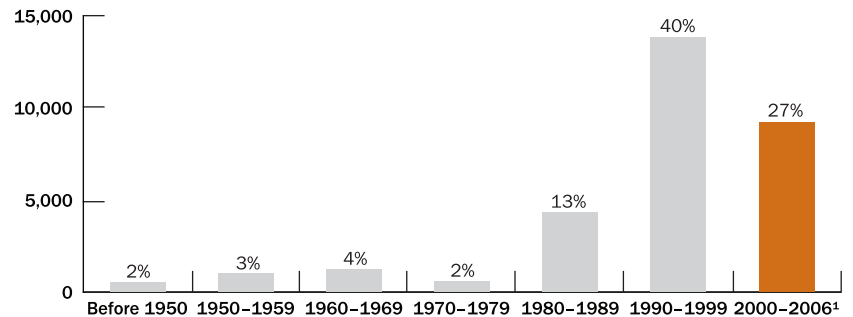
Assets: 60 percent of family foundations reported less than \$1 million in assets in 2006



PERCENT OF FOUNDATIONS

Note: Based on 34,687 grantmaking family foundations. Excludes 2,411 family foundations that did not report giving in the latest fiscal year. Figures for 2006 are preliminary.

Nearly 27 percent of family foundations have been established in the 2000s



Note: Excludes 3,981 grantmaking family foundations that lack establishment information.
¹Data incomplete for period 2000–2006.