

KEY FACTS ON FAMILY FOUNDATIONS

Grantmaker Data, 2007

The Foundation Center has identified 40,200 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.

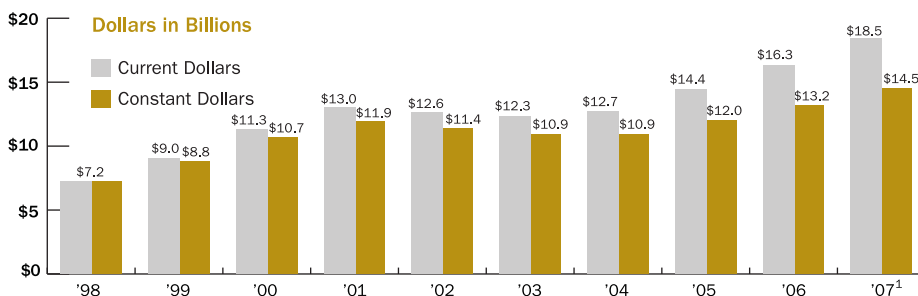
Summary Statistics for Family Foundations, 2006 and 2007

	2006	2007 ¹	% change
No. of Foundations	35,693	37,539	5.2
Total Giving	\$16,285,061	\$18,456,214	13.3
Total Assets	\$266,734,900	\$294,446,400	10.4
Gifts Received	\$17,658,257	\$23,921,057	35.5

Note: Dollars in thousands. Percent change represents current dollars. Excludes 2,619 family foundations that did not report giving in the latest fiscal year. These foundations held \$2.7 billion in assets in 2007 and reported gifts received totaling \$1.7 billion.

¹Figures for 2007 are preliminary.

Inflation-adjusted family foundation giving has more than doubled since 1998



¹Figures for 2007 are preliminary.

\$18.5 billion

Giving by family foundations in 2007

13%

Increase in family foundation giving between 2006 and 2007

37,539

Number of grantmaking family foundations in 2007

48%

Share of family foundations reporting less than \$50,000 in giving in 2007

56%

Estimated family foundation giving as a share of all independent foundation giving in 2007

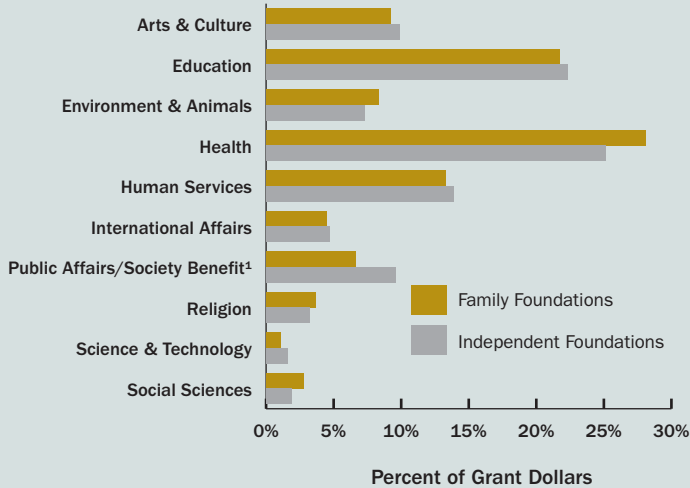
Giving Patterns, 2007

Larger family foundations included in the Foundation Center's 2007 grants sample¹ were more likely to provide funding for the environment and animals, health, religion, and the social sciences than independent foundations overall. They were less likely to give for arts and culture, education, human services, international affairs, and public affairs/society benefit.

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

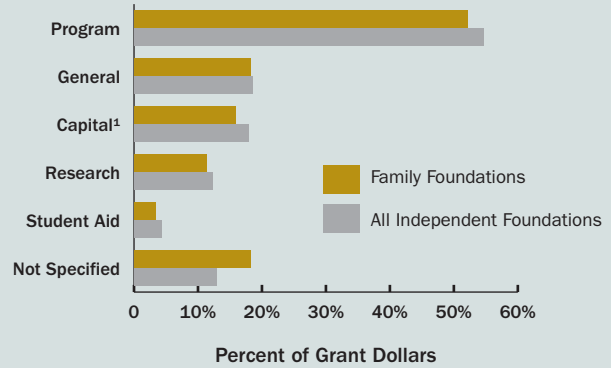
¹The Foundation Center's 2007 grants sample database included all grants of \$10,000 or more awarded by over 1,300 of the largest U.S. foundations and accounted for roughly half of grant dollars awarded by all of the more than 72,000 active U.S. foundations.

Larger family foundations favored health and education in 2007



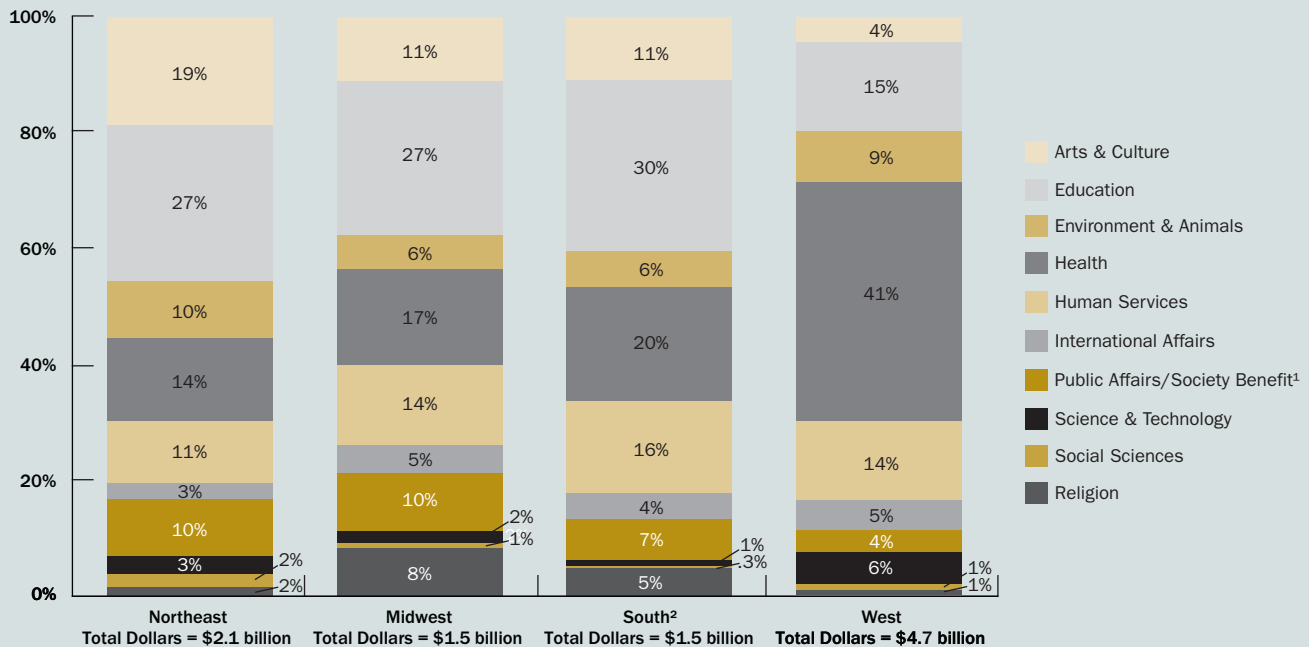
Note: Based on all grants of \$10,000 or more awarded by a sample of 999 larger independent foundations, including 617 family foundations.
¹Includes civil rights and social action, community improvement and development, philanthropy and voluntarism, and public affairs.

Larger family foundations directed the biggest share of their 2007 giving for programs



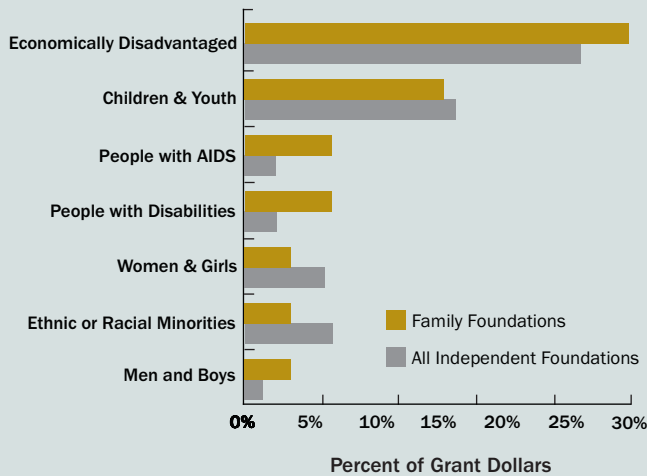
Note: Based on all grants of \$10,000 or more awarded by a sample of 999 larger independent foundations, including 617 family foundations.
¹Capital support includes endowment funds.

Education was the top priority of family foundations in three of the four major regions in 2007



Note: Based on all grants of \$10,000 or more awarded by a sample of 617 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 \$58 million.

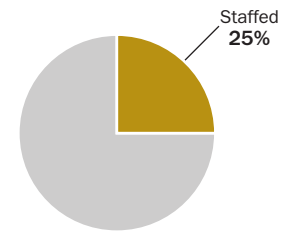
Family foundations prioritized giving for the economically disadvantaged in 2007



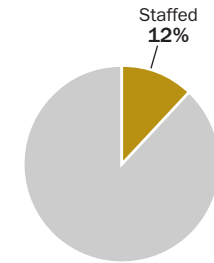
Note: Based on all grants of \$10,000 or more awarded by a sample of 999 larger independent foundations, including 617 family foundations. Chart includes selected beneficiary groups representing at least 1 percent of family foundation grant dollars. Figures represent only grants awarded to groups that 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.

12 percent of larger family foundations reported having paid staff in 2008, but shares varied by size

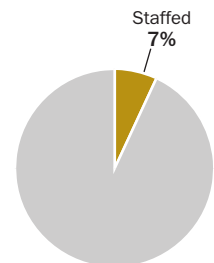
ASSET RANGES



Assets of \$5 million or more
Number = 5,443



Assets of \$2.5 million to under \$5 million
Number = 2,719



Assets of \$1 million to under \$2.5 million
Number = 2,019

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 1,572 foundations reported having paid staff.

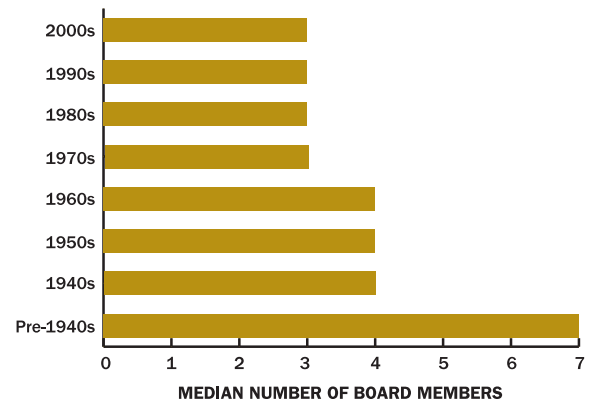
Top 25 Family Foundations by Total Giving, 2007

Foundation	State	Total Giving ¹	Assets	Fiscal Date
1. Bill & Melinda Gates Foundation	WA	\$2,011,675,000	\$38,921,022,000	12/31/2007
2. Lilly Endowment	IN	341,863,979	7,734,860,156	12/31/2007
3. David and Lucile Packard Foundation	CA	307,935,012	6,594,540,283	12/31/2007
4. Gordon and Betty Moore Foundation	CA	285,912,559	6,409,252,816	12/31/2007
5. Annenberg Foundation	PA	266,898,723	2,487,703,921	6/30/2008
6. Walton Family Foundation	AR	218,864,851	1,595,597,053	12/31/2007
7. Susan Thompson Buffett Foundation	NE	202,684,478	3,907,771,072	12/31/2007
8. Eli & Edythe Broad Foundation	CA	127,304,000	1,964,521,000	12/31/2007
9. T. Boone Pickens Foundation	TX	120,425,524	188,966,228	12/31/2007
10. Richard King Mellon Foundation	PA	109,215,672	2,219,250,223	12/31/2007
11. Michael and Susan Dell Foundation	TX	95,250,084	1,398,768,744	12/31/2007
12. McKnight Foundation	MN	93,643,806	2,310,279,385	12/31/2007
13. W.M. Keck Foundation	CA	67,889,763	1,531,767,000	12/31/2007
14. Brown Foundation	TX	64,308,170	1,301,109,971	6/30/2008
15. Sherwood Foundation	NE	63,225,776	240,440,461	12/31/2007
16. Anschutz Foundation	CO	63,076,654	1,195,692,532	11/30/2007
17. William Penn Foundation	PA	61,644,970	1,555,505,085	12/31/2007
18. Heinz Endowments	PA	58,267,054	1,686,008,063	12/31/2007
19. Howard G. Buffett Foundation	IL	57,123,103	264,678,972	12/31/2007
20. Robert W. Wilson Charitable Trust	NY	55,735,488	198,201,421	12/31/2007
21. Wayne & Gladys Valley Foundation	CA	55,625,627	652,805,327	9/30/2007
22. Richard and Rhoda Goldman Fund	CA	53,581,755	453,300,000	12/31/2007
23. Turner Global Foundation	FL	50,000,000	298,347,123	12/31/2007
24. Grainger Foundation	IL	49,340,305	72,815,877	12/31/2007
25. Ahmanson Foundation	CA	47,698,270	1,148,525,258	10/31/2007

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

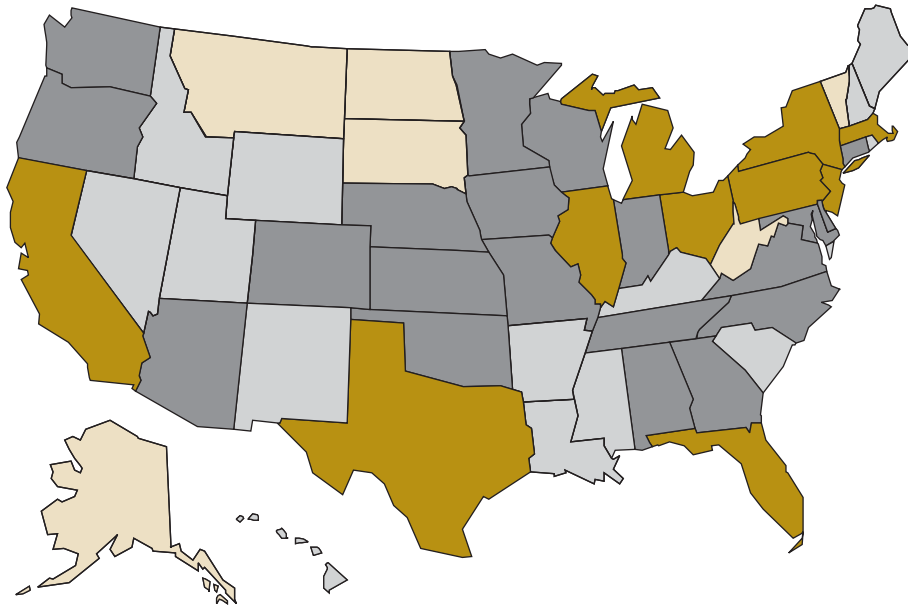
Family foundation board size tends to increase as foundations age

DECADE ESTABLISHED¹



¹Excludes family foundations lacking establishment information.

Number of Family Foundations by State, 2007



Total Family Foundations¹ = 37,539

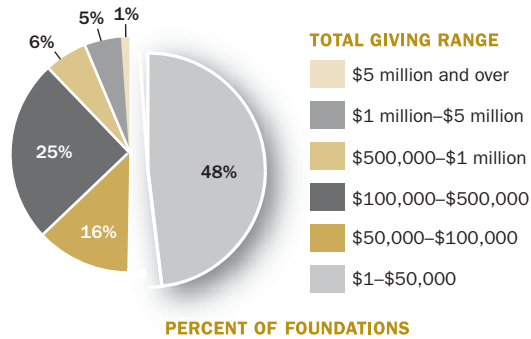
■ 1,000+ ■ 300–under 1,000 ■ 100–under 300 ■ Under 100

¹Number of family foundations includes three foundations located in Puerto Rico and five in the Virgin Islands.

Source for all data:
The Foundation Center

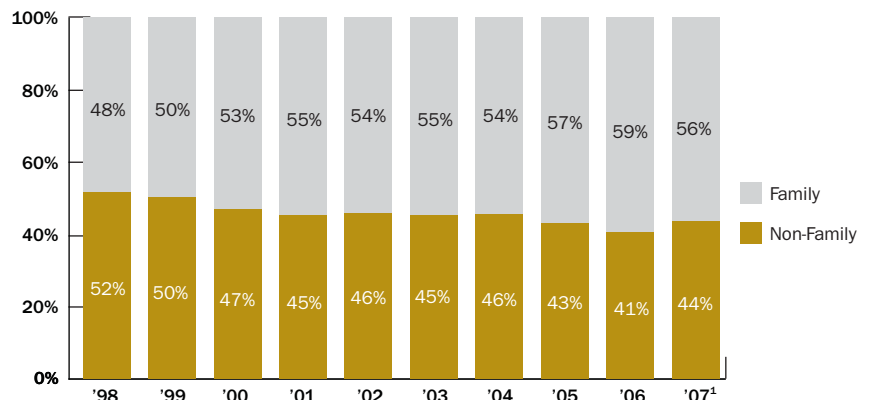
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“Key Facts on Family Foundations”
is available at
[foundationcenter.org/gainknowledge/
research/nationaltrends.html](http://foundationcenter.org/gainknowledge/research/nationaltrends.html)

Giving: 48 percent of family foundations reported less than \$50,000 in giving in 2007



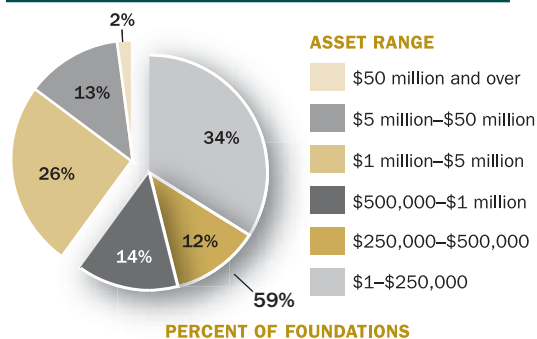
Note: Based on 37,539 grantmaking family foundations. Excludes 2,619 family foundations that did not report giving in the latest fiscal year. Figures for 2007 are preliminary. Due to rounding, figures may not total 100.

Family foundations account for close to three-fifths of overall giving by independent foundations



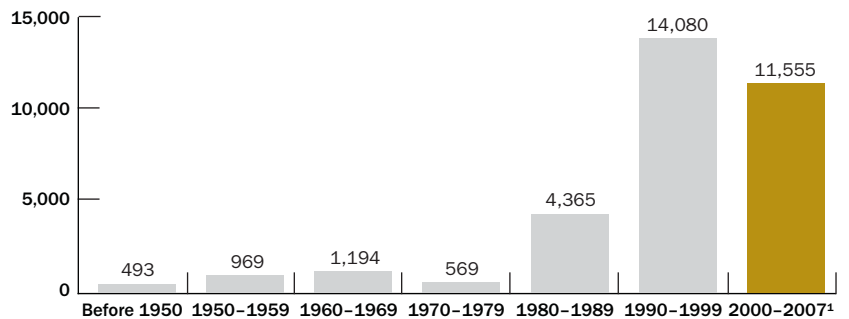
¹Figures for 2007 are preliminary.

Assets: 59 percent of family foundations reported less than \$1 million in assets in 2007



Note: Based on 37,539 grantmaking family foundations. Excludes 2,619 family foundations that did not report giving in the latest fiscal year. Figures for 2007 are preliminary. Due to rounding, figures may not total 100.

One-third of family foundations have been established in the 2000s



Note: Excludes 4,314 grantmaking family foundations that lack establishment information.
¹Data incomplete for period 2000–2007.