Grantmaker Data, 2009

The Foundation Center has identified 38,701 grantmaking 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

Between 2008 and 2009, giving by grantmaking family foundations decreased 4 percent. The reduction stood in contrast to the 14.4 percent increase in the prior year.

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 Grantmaking Family Foundations, 2008 and 2009

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
<th>2009¹</th>
<th>% Change²</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Foundations</td>
<td>38,339</td>
<td>38,701</td>
<td>0.9</td>
</tr>
<tr>
<td>Total Giving</td>
<td>$21,117,277</td>
<td>$20,268,001</td>
<td>-4.0³</td>
</tr>
<tr>
<td>Total Assets</td>
<td>$246,044,927</td>
<td>$247,669,220</td>
<td>0.7</td>
</tr>
<tr>
<td>Gifts Received</td>
<td>$19,068,875</td>
<td>$17,261,950</td>
<td>-9.5</td>
</tr>
</tbody>
</table>

Note: Dollars in thousands. Excludes 2,992 family foundations that did not report giving in the latest fiscal year. These foundations held $2.2 billion in assets in 2009 and reported gifts received totalling $1 billion.

¹Figures for 2009 are preliminary.
³Percent change represents current dollars.
²Excluding the Bill & Melinda Gates Foundation, giving decreased 6 percent.

Inflation-adjusted Family Foundation Giving, 1999 to 2009

<table>
<thead>
<tr>
<th></th>
<th>1999</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Dollars</td>
<td>$19.9</td>
<td>$11.3</td>
<td>$10.9</td>
<td>$13.0</td>
<td>$12.6</td>
<td>$12.3</td>
<td>$11.2</td>
<td>$11.2</td>
<td>$12.3</td>
<td>$13.5</td>
<td>$14.8</td>
</tr>
<tr>
<td>Constant Dollars</td>
<td>$13.0</td>
<td>$7.1</td>
<td>$6.5</td>
<td>$7.6</td>
<td>$7.3</td>
<td>$7.1</td>
<td>$7.0</td>
<td>$7.0</td>
<td>$7.1</td>
<td>$7.4</td>
<td>$7.7</td>
</tr>
</tbody>
</table>

¹Figures for 2009 are preliminary.
Giving Patterns, 2009

Larger family foundations included in the Foundation Center’s 2009 grants sample were more likely to provide funding for health, education, international affairs, science and technology, and religion than independent foundations overall. They were less likely to give for human services, public affairs/society benefit, arts and culture, and the social sciences, and gave an equal share for environment and animals. By types of support, family foundations directed similar shares of giving for program, general, and capital support compared to independent foundations overall.

¹The Foundation Center’s 2009 grants sample database included all grants of $10,000 or more awarded by 1,384 of the largest U.S. foundations, including 641 family foundations. The overall sample accounted for roughly half of grant dollars awarded by all of the more than 75,000 active U.S. foundations.

²Figures for the South exclude the District of Columbia. The DC-based family foundations in the sample awarded grants totaling $50.7 million.

³Excluding the Bill & Melinda Gates Foundation—the nation’s largest foundation—education ranked first among the funding priorities of Western foundations (26.2 percent), followed by human services (20.1 percent), health (13 percent), arts and culture (10.1 percent), social sciences (9.9 percent), science and technology (8.8 percent), public affairs/society benefit (7.3 percent), international affairs (2.8 percent), religion (1.3 percent), and the social sciences (0.7 percent).

Larger family foundations favored health and education in 2009

Larger family foundations directed the biggest share of their 2009 giving for programs

Education was the top priority of larger family foundations in three of the four major regions in 2009

Note: Based on all grants of $10,000 or more awarded by a sample of 1,037 larger independent foundations, including 641 family foundations. Capital support includes endowment funds.

Note: Based on all grants of $10,000 or more awarded by a sample of 641 larger family foundations.

Note: Based on all grants of $10,000 or more awarded by a sample of 641 larger family foundations.
Larger family foundations prioritized giving for the economically disadvantaged in 2009

Family foundation board size tends to increase as foundations age

Giving: Nearly half of family foundations reported less than $50,000 in giving in 2009

Assets: 64 percent of family foundations reported less than $1 million in assets in 2009
Family foundations accounted for three-fifths of overall giving by independent foundations in 2009

Note: Based on 67,379 grantmaking independent foundations, including 38,701 family foundations. Due to rounding, figures may not total 100 percent.

¹Figures for 2009 are preliminary.

Source for all data:
The Foundation Center

For more information contact Reina Mukai at (212) 807-2485 or rkm@foundationcenter.org.
“Key Facts on Family Foundations” is available at foundationcenter/gainknowledge/research/nationaltrends.html