

# CONNECTICUT GIVING REPORT

June 2019



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### About the *Connecticut Giving Report*

This report covers giving for calendar year 2016, the most recent year available for comparable data. Every year the Connecticut Council for Philanthropy (CCP) collects and analyzes information for this report from a variety of sources including: the University of Indiana’s Giving USA, Guidestar, the IRS Statistics of Income Division (SOI), and from data collected by the Foundation Center.

Limitations to our data include the following: overall statistics about individual giving only capture donations itemized on federal tax returns; available grants data characteristics, like issue or geographic focus, reflect 60% of foundation grants; the foundation data was taken at a point in time, June 21, 2019; Foundation Center is constantly updating data.

The *Connecticut Giving Report* provides top-line information about Connecticut’s philanthropy. We hope this report is useful to our members as well as other grantmakers; national, state, and local leaders; and the general public.

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# Introduction

For 50 years, the Connecticut Council for Philanthropy has supported the philanthropic sector – connecting funders, sharing information, supporting collaboration, and collecting and analyzing data. This year, we continue our tradition of reporting on charitable giving with a focus on 2016 donations.

The *Connecticut Giving Report* aims to provide a snapshot of philanthropic giving in the state: How much was given? Who gave? What issues were supported? Like last year, we explored some new questions, too: Is the decline in the number of charitable givers in the state outpacing the decline in Connecticut’s population? What percentage of foundation dollars do the top fundraising nonprofits take in? If we unpack foundation giving focused on education, where are the dollars being invested?

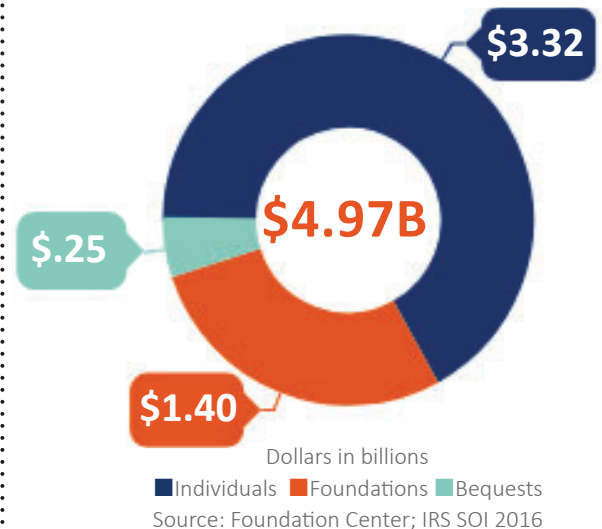
The takeaways from this year’s report deliver contrasting messages. Foundation giving continued to grow, but just 35% supported Connecticut nonprofits. Individual giving fell, but the percentage of individuals giving increased. Connecticut nonprofits attracted over \$400 million from out-of-state foundations, yet the majority of that funding went to a small number of nonprofits.

While we believe there is value in this analysis, we know that more has happened recently that will impact the philanthropic community and the organizations it supports: the federal and state governments have reduced their support for human service programs; changes to the federal tax code resulted in stagnated individual giving in 2018; a new public-private venture, Partnership for Connecticut, will inject new philanthropic support to nonprofits working to improve education; and the philanthropic sector is receiving increased attention and scrutiny.

Given the current environment, CCP will continue its work to better understand the philanthropic landscape in Connecticut – the challenges it faces and the opportunities for making more impact.

We hope this report helps catalyze conversations and inform charitable giving. We welcome your questions and your input as we continually work to improve our data, analysis, and resource development.

## Connecticut Charitable Giving 2016



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# Charitable Giving in 2016

## Connecticut Charitable Giving

In 2016, charitable giving from Connecticut foundations and residents totaled \$4.97 billion, falling slightly from the prior year's \$5 billion giving total. As in past years, individual donors comprised the majority of this giving, with individual donations and bequests totaling 72%, or \$3.57 billion, of giving. Foundation giving made up 28%, or \$1.4 billion, of all giving in 2016.



**Individuals and foundations in Connecticut gave \$4.97 billion to nonprofit organizations in 2016.**

While donors provided the majority of charitable giving, overall gifts made through both donations and bequests fell from 2015 to 2016. In 2016, \$3.32 billion was provided by individuals in the state through traditional giving, a decline of about 4.5% or \$156 million.

Bequests, or property given through a will, are an unpredictable giving source often fluctuating significantly from year to year. Giving through bequests fell by 34%, from \$330 million to \$247 million.

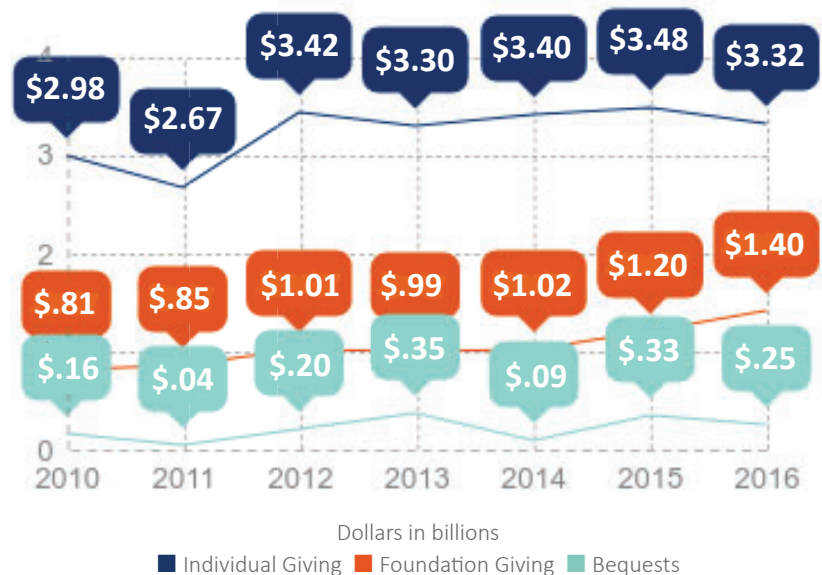
The decline in Connecticut individual giving occurred even as individual giving grew by 6% nationally.<sup>1</sup>

During the same time, Connecticut foundation giving experienced robust growth. In 2016, the state's foundations provided grants totaling \$1.4 billion, an increase of over 17% from 2015. This increase was much higher than foundation growth nationally, which increased by 7%.

## Total Giving 2010-2016



## Individual and Foundation Giving



# Individual Giving

## Key Findings

- **Connecticut is one of the wealthiest states.** It ranked number one in both household and per capita income.
- **Connecticut is also a generous state.** In 2016, more of the state's taxpayers reported charitable contributions (35%) than taxpayers nationally (25%).
- **The percentage of givers in the state increased.** While the number of taxpayers reporting charitable giving fell, the percentage of those reporting giving grew. More than 607,000 people reported charitable contributions totaling \$3.3 billion in 2016.
- **Charitable giving increased across nearly all income levels.** There was a decrease in giving only among those earning more than \$1 million.

%

2% of donors contributed 45% of individual giving in 2016.

Connecticut Individual Giving by Income Level



Source: IRS Statistics of Income 2016

# Individual Giving

## Number of Givers Fell, Percentage of Givers Grew

The number of Connecticut residents reporting charitable giving on their federal tax returns has slowly declined, but so has the state's population. When reports of donations are examined relative to the state population, you see that the percentage of residents reporting charitable giving continues to be quite strong. For example, from 2015 to 2016, the population of the state fell by .49%, but the number of charitable givers fell by just .18%.

## Individual Giving Fell in 2016

While individual giving grew nationally by 6%, in Connecticut it fell by 4.5%. In 2016, individuals reported contributions to nonprofits totaling about \$3.32 billion, a decline of about \$160 million from the \$3.48 billion given in 2015.

The fall in charitable giving was not the result of a fall in giving across incomes. In fact, from 2015 to 2016, total giving across nearly all income levels grew. Instead, the decline in overall individual giving is the result of a fall in giving in the highest income bracket, those earning more than \$1 million. Giving from this group fell by about 12%, while the number of donors in this income bracket fell by about 4%.



From 2006-2016,  
individual giving  
increased by **18%**,  
while the  
number of donors  
decreased by  
**10%**.

## Individual Giving



Dollars in billions - Source: IRS SOI 2016

## Today's Concerns About Charitable Giving

National experts reported that charitable giving nationally remained flat in 2018. Adjusted for inflation, it fell 3.4% from 2017.<sup>2</sup> While concerning, this was projected and is attributed to the 2017 federal tax law changes. In Connecticut, where nonprofits are already struggling to absorb cuts in state contracts and federal support, they also are reporting that they see their donor base contracting. Quantifying the tax law changes on Connecticut-based charitable giving requires state-specific IRS data which will not be available until 2020. To get a sense of how nonprofits are faring, the Connecticut Council for Philanthropy partnered with the CT Nonprofit Alliance to survey nonprofits and funders in the state. We found that more than 40% of nonprofits experienced a decline, or expected to experience a decline, in 2018 donations. Read more about this survey in Connecticut Council for Philanthropy's recent report, *Response to Financial Challenges: Funder — Nonprofit Survey*.



# Foundation Giving

## Foundation Assets and Total Giving



## Foundations Continued to Increase Giving

In 2016, Connecticut foundations' total assets equaled \$11.96 billion, a slight decline of 0.3% from 2015. In a year when foundation giving grew by 7% nationally, Connecticut foundations increased their giving by 17%. This is the second consecutive year that Connecticut foundations increased their giving by 17%, a rate well above the national average. And in 2016, this increased giving happened even as overall foundation assets remained relatively flat.

## Connecticut Foundation Size and Scale

In 2015, the number of foundations operating in Connecticut reached a high of 1669. In 2016, that number fell to 1600. Reasons for the drop include: foundations moving to another state, foundations closing their doors, or foundations changing their nonprofit designation.

The majority of Connecticut's 1600 foundations are small, with nearly 800 giving grants totaling less than \$50,000 in the year. Despite their small size, these foundations collectively provided over \$12 million in grants to nonprofit groups. Foundations giving grants totaling between \$50,000 and \$500,000 in 2016 numbered 615, and their grants totaled over \$100 million in support for nonprofits.

The largest foundations in the state make up the majority of giving. About 95 foundations made grants totaling between \$1 million and \$5 million; these foundations provided over \$190 million in grants. And the 21 largest foundations provided about \$1 billion in support to nonprofit organizations. This is to say that 7% of the state's foundations comprised over 85% of all foundation giving that originated from the state.

### Foundation Giving by Range

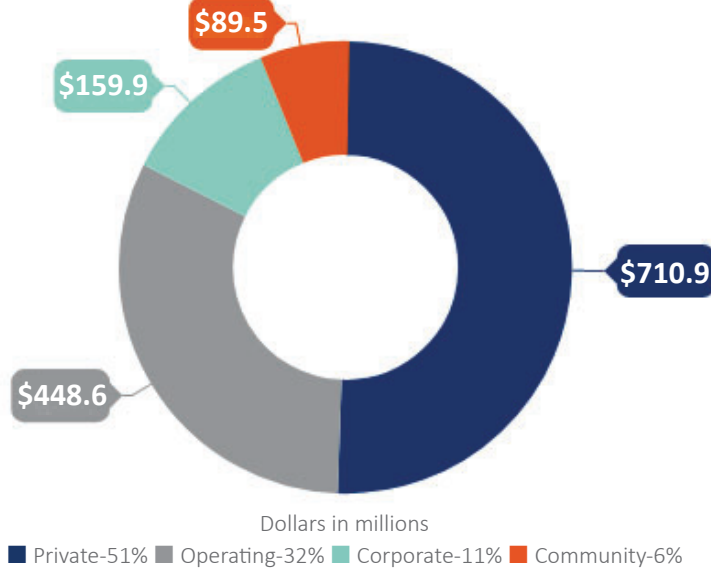
# Foundations	% Total Foundations	Giving Range
774	48%	Under \$50K
239	15%	\$50 K-\$100 K
376	24%	\$100 K-\$500 K
95	6%	\$500 K-\$1 M
95	6%	\$1 M-\$5 M
21	1%	\$5 M+
1600	100%	

Source: CT Foundation Stats

# Foundations By Type

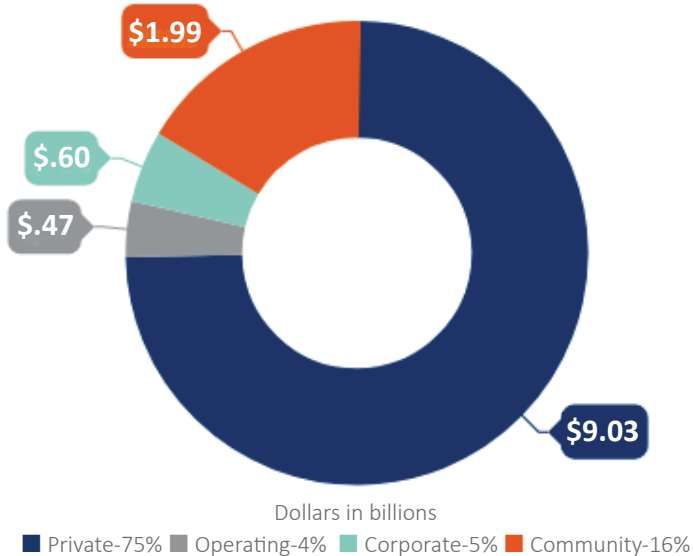
## Giving By Foundations by Type<sup>3</sup>

\$1.4 Billion in 2016 Giving



## Assets By Foundations by Type<sup>3</sup>

\$12 Billion Held in Assets



Source: CT Foundation Stats, June 19, 2019.

## 1,600 Foundations in CT

### 1,442 are Private Foundations

This IRS category includes independent and family foundations. These foundations make grants based on charitable endowments and are governed by a board of directors. They generally do not raise funds or seek public financial support.

### 74 are Operating Foundations

Operating foundations are a type of private foundation. These organizations spend at least 85% of their income to provide charitable services or operate charitable programs of their own. These foundations may also make grants.

### 64 are Corporate Foundations

Established by businesses, corporate foundations are another type of private foundation. Unlike corporate giving programs, corporate foundations are legally separate entities from the businesses that establish them.

### 20 are Community Foundations

Community foundations are grantmaking public charities that are dedicated to improving the well-being of people in a defined geographic area. Community foundations are where people and families from a broad range of income levels and a wide variety of charitable interests can make gifts through such vehicles as donor advised funds, scholarship funds, and endowments. Unlike private foundations, community foundations generally engage in fundraising activities to support their mission.

## Other Grantmakers

While this report focuses on foundation and individual giving, there are many other grantmaking entities that provide financial support to Connecticut's nonprofit sector, and their giving is not captured in this report. Additional supporters to the state's nonprofits include: corporate and business giving programs; federal, state, and municipal grantmaking programs; quasi-public agencies, such as the Connecticut Health and Education Facilities Authority; and grantmaking public charities, such as Connecticut's United Ways. Some of these organizations are included in the "Top 100 Connecticut Grantmakers" listing in the Appendices.



# Community Foundations

## Community Foundations Grow

Connecticut is home to a robust network of community foundations. Currently numbering 20, community foundations provided \$97 million in grants to nonprofits in 2016. This is a modest increase of \$1.5 million or about 2% over 2015 giving.

This part of Connecticut's philanthropic community has grown significantly over the past 5 years, with community foundation giving increasing by over 40% and community foundation assets increasing by over 65%.

In addition to being a trusted partner to engage in community philanthropy, community foundations also provide leadership in the communities they serve. Activities can include: hosting community conversations, conducting or commissioning research; providing learning opportunities, technical assistance, and other supports to their grantees; and bringing people together across their communities to solve problems.

Many of Connecticut's community foundation leaders connect and work together through the Connecticut Council for Philanthropy's Community Foundation CEO Network. Over the years, the network has enabled community foundations to share information, support each other's work, and collaborate on statewide issues.

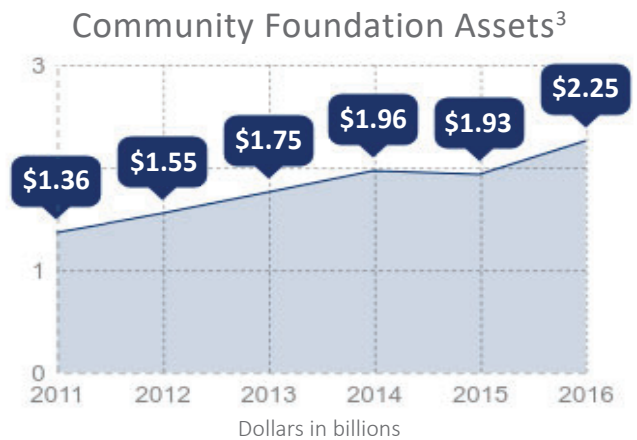
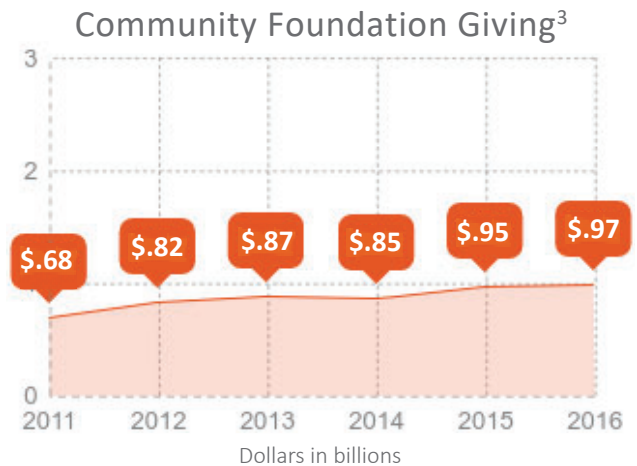
### Community Foundations Partner on Journalism Series: CT Fiscal Crisis and Its Impacts

In 2018, The Community Foundation for Greater New Haven, The Community Foundation of Eastern Connecticut, Connecticut Community Foundation (serving Greater Waterbury and the Litchfield Hills), Fairfield County's Community Foundation, Hartford Foundation for Public Giving, and Main Street Community Foundation partnered to support a statewide investigative journalism series by the *CT Mirror*. The series explored the long-term impact of Connecticut's fiscal crisis on the nonprofit sector and the impact of wealth disparities in Connecticut.

The *CT Mirror's* series, *Extreme Inequality: Connecticut's Wealth Dilemma*, launched in May 2018. The project's intent was to inform residents, catalyze more educated dialogue around key issues, increase levels of civic engagement, and share knowledge to inform the development of creative, realistic solutions to address the challenges and opportunities facing Connecticut.



Community foundation giving has grown more than **40%** over the past 5 years.



Source: CCP member self reported data and IRS 990s.

# Private, Operating, and Corporate Foundations

## Private Foundations

In Connecticut, the vast majority of foundations (90%) are private foundations. This group provided 50% of all foundation grant dollars and held 74% of all foundation assets. The number of private foundations in the state has modestly grown over time; in 2011 there were 1,422 private foundations and in 2016 there were 1,442. Giving among these foundations has grown considerably, however. Over the past five years, private foundation giving increased 54% from \$458 million in 2011 to \$705 million in 2016. More than half of Connecticut's 1,442 private foundations are located in Fairfield County.

## Corporate Foundations

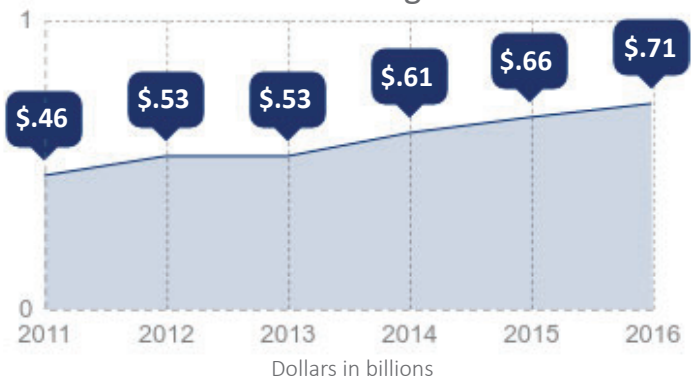
In 2016, Connecticut's corporate foundations made grants totaling about \$160 million, falling about \$21 million or 12% from 2015 giving. The number of corporate foundations grew about 10% from 2011's 59 to 2016's 64. While the assets among these foundations has grown by about 20% in the past five years, their giving has fallen – from \$173 million in 2011 to \$160 million in 2015.

While some corporations establish foundations to organize their philanthropy, others choose different strategies to support their local communities. Many Connecticut businesses provide donations directly from the corporation, through in-kind products and services, or through employee giving or volunteerism.

## Operating Foundations

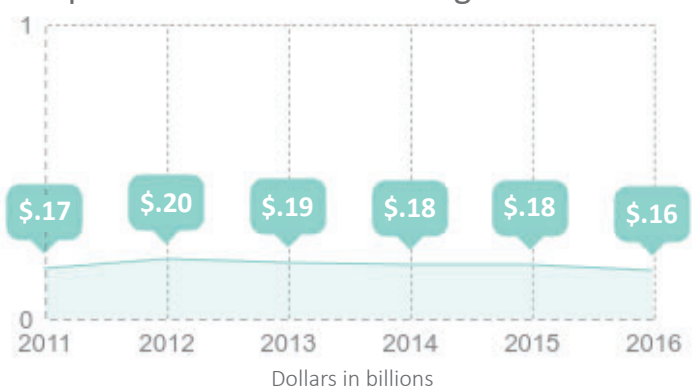
Operating foundations are private foundations that use the majority of their income to run their own charitable programs or charitable services. Some also make grants. In 2016 in Connecticut, there were 74 operating foundations, a fall of nearly 25% from 2011's 98 foundations. While the number of operating foundations has fallen, their assets and giving have grown steeply. The assets of operating foundations increased from \$187 million in 2011 to \$475 million in 2016. Their giving over the same period grew from \$151 million in 2011 to \$449 million in 2016. The significant jump in giving from 2015 to 2016 is attributable to a single foundation nearly doubling its giving.

## Private Foundation Giving



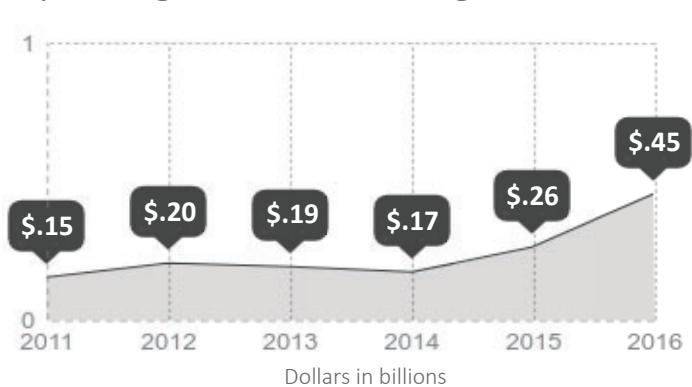
Source: CT Foundation Stats; CCP data trends

## Corporate Foundation Giving



Source: CT Foundation Stats; CCP data trends

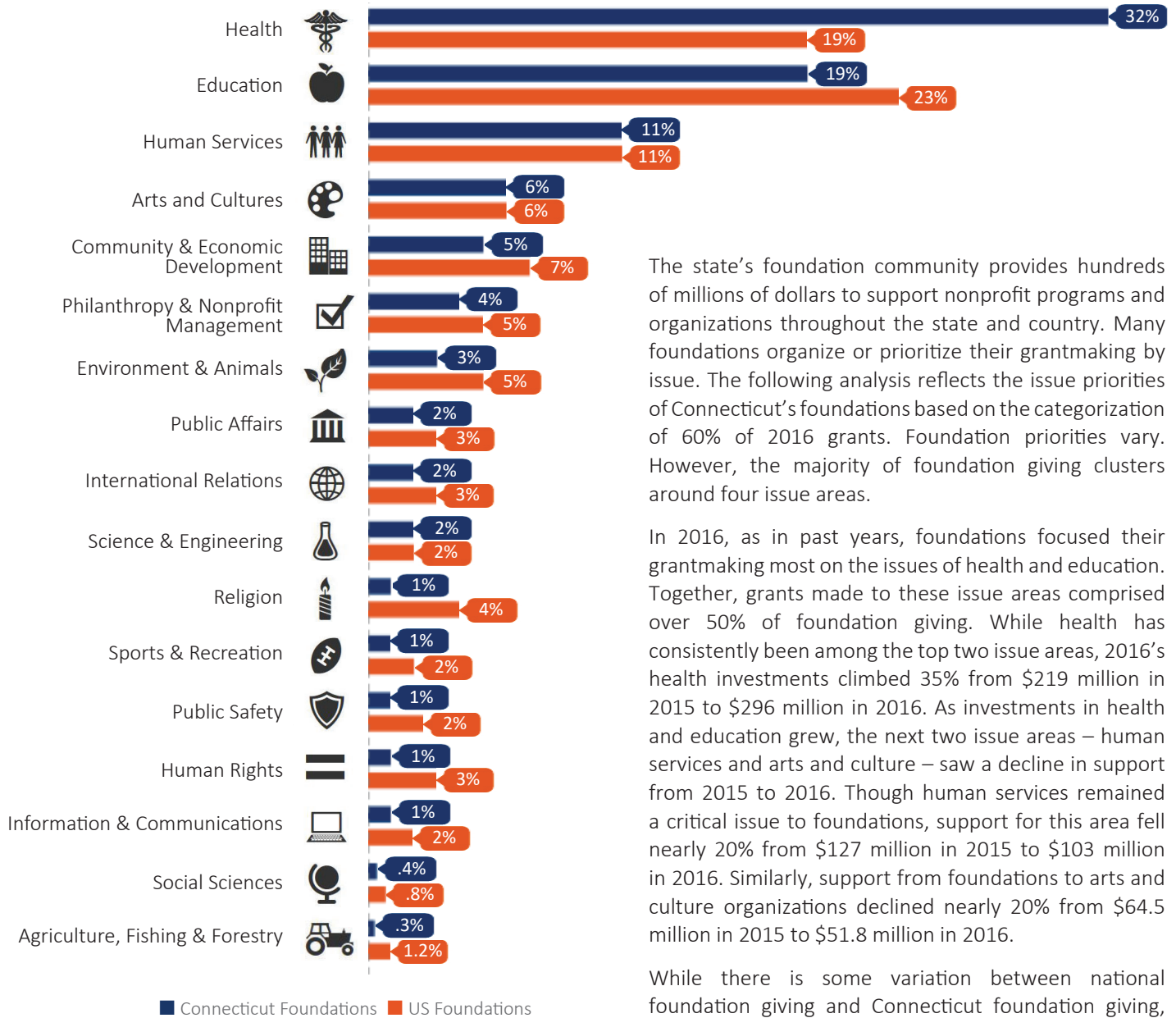
## Operating Foundation Giving



Source: CT Foundation Stats; CCP data trends

# Where Do Foundation Dollars Go?

## Foundation Giving by Issue



Source: CT Foundation Stats; Foundation Maps

The state’s foundation community provides hundreds of millions of dollars to support nonprofit programs and organizations throughout the state and country. Many foundations organize or prioritize their grantmaking by issue. The following analysis reflects the issue priorities of Connecticut’s foundations based on the categorization of 60% of 2016 grants. Foundation priorities vary. However, the majority of foundation giving clusters around four issue areas.

In 2016, as in past years, foundations focused their grantmaking most on the issues of health and education. Together, grants made to these issue areas comprised over 50% of foundation giving. While health has consistently been among the top two issue areas, 2016’s health investments climbed 35% from \$219 million in 2015 to \$296 million in 2016. As investments in health and education grew, the next two issue areas – human services and arts and culture – saw a decline in support from 2015 to 2016. Though human services remained a critical issue to foundations, support for this area fell nearly 20% from \$127 million in 2015 to \$103 million in 2016. Similarly, support from foundations to arts and culture organizations declined nearly 20% from \$64.5 million in 2015 to \$51.8 million in 2016.

While there is some variation between national foundation giving and Connecticut foundation giving, there is significant overlap in giving trends by issue. In Connecticut and nationally, foundations are investing most in health, education, human services, arts and culture, and community and economic development.

Learn more at Connecticut Foundation Stats: [Connecticut.foundationcenter.org](http://Connecticut.foundationcenter.org).

# Where Do Foundation Dollars Go?

## Foundation Giving by Geography

Connecticut foundations provide state leadership through grantmaking, advocacy and education, research, convening, and other services. Many foundations also provide leadership nationally or internationally with their philanthropic resources.

Even though foundation giving in 2016 increased, support for Connecticut-based organizations fell from \$260 million in 2015 to \$229 million in 2016. As in past years, the majority of Connecticut foundations' giving went to support organizations outside of the state. In-state organizations received about 27% of support, and international organizations received about 1% of grantmaking dollars. While the numbers vary from year to year, the geographic allocation remains consistent, with the majority of philanthropic dollars going to out-of-state organizations.

As in the previous section, this analysis is based on the categorization of 60% of 2016 grants data.

## Foundation Giving by Population

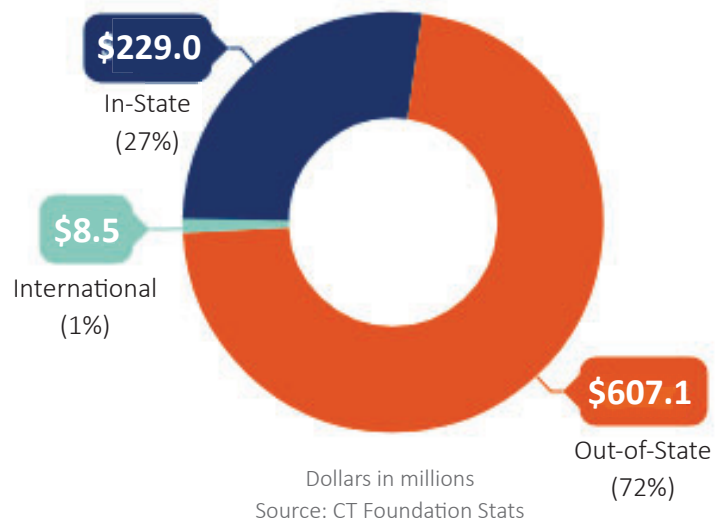
While some foundations focus on specific issues, others use their grantmaking to impact certain community populations, like women and girls or children and youth. Looking at 2016 grantmaking through the lens of population of focus shows that the majority of foundations working in this way are focused on organizations working with low-income people and children and youth. The next largest investments supported organizations working with military personnel or veterans, people with disabilities, and women and girls.

These giving trends have been consistent over the past few years. Since 2013, population-focused Connecticut foundation giving has most supported low-income people, children and youth, people with disabilities, and women and girls. This trend also aligns with national foundation giving which has prioritized the same four populations.

This analysis is limited by foundation reporting. In 2016, 46% of grants included a population focus. Some foundations may not report this as it is irrelevant to their grantmaking.

For foundations interested in advancing equity through grantmaking, this is one data point that could be tracked to look for shifting trends. For example, from 2015 to 2016, investments to organizations working with women and girls increased by about 27%, and support for groups working with immigrants, migrants, and refugees grew by over 100%. During the same period however, grants to groups supporting ethnic and racial minorities fell by about 45%.

Connecticut Foundation Grants



Population (Dollars in millions)	2016	2015 <sup>4</sup>	% change
Economically Disadvantaged	\$282.63	\$169.21	67.0%
Children and Youth	\$155.80	\$164.67	-5.4%
Military Personnel & Veterans	\$28.47	\$31.97	-10.9%
People with Disabilities	\$26.11	\$65.55	-60.2%
Women & Girls	\$22.78	\$17.47	30.4%
Religious Groups	\$12.68	\$12.40	2.2%
Men & Boys	\$8.11	\$8.75	-7.3%
Aging/Seniors	\$5.78	\$7.13	-18.9%
Immigrants, Migrants, & Refugees	\$4.60	\$2.18	111.1%
Incarcerated People	\$4.10	\$2.85	43.8%
Ethnic/Racial Minorities	\$3.66	\$6.56	-44.2%
People with HIV/AIDS	\$2.26	\$5.33	-57.7%
Substance Abusers	\$1.50	\$1.36	10.0%
LGBTQ	\$.41	\$.42	-2.5%

Source: CT Foundation Stats

# Where Do Foundation Dollars Go?

## Connecticut Nonprofits

In 2016, over 5,500 Connecticut nonprofits received about \$646 million in foundation support. Nearly two-thirds of those grant dollars came from out-of-state foundations. Connecticut foundations provided 35% of that support. As in past years, the top recipients of funding included universities, hospitals, and national nonprofits.

While foundation support went to thousands of nonprofit organizations, the top fifty nonprofits raised about \$318 million in 2016. That is to say that about 1% of the nonprofit recipients took in about 50% of all foundation funding.

## Foundation Giving for Education

With so many foundations making grants related to education equity and success, we more deeply explored what foundation investments in education supported in 2016. Overall, education organizations received \$233 million in foundation giving. Nearly 10,000 grants were made by over 3,000 funders to just over 1,500 organizations. Grants from the ten largest foundations totaled \$57 million or just under 25% of all foundation giving.

Support for undergraduate colleges, universities, and professional programs (like law and medical degrees) garnered \$96.5 million, or 41% of all education funding. The second largest investment supported elementary and secondary education; this includes support for private elementary and secondary schools, as well as \$13.1 million in support for charter schools.

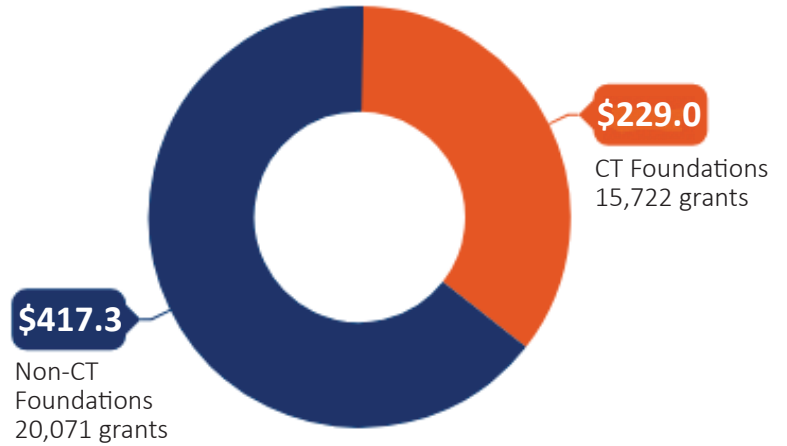
Education services, which includes things like test preparation, e-learning, computer literacy, and out-of-school learning received grants totaling \$16.9 million. Support for adult education, vocational education, and community college totaled \$4.1 million, and support for early childhood totaled \$2.5 million.

## CT Nonprofits Attract Out-of-State Foundation Support

Many of Connecticut's nonprofits attracted support from foundations around the country. In 2016, foundations outside of Connecticut contributed \$417.3 million to the state's nonprofits. This is a decline of about 5% from last year's contribution of \$438 million. Out-of-state foundations who provided grants to Connecticut's nonprofits include national foundations, family foundations with connections to the state, national corporate foundations, and others.

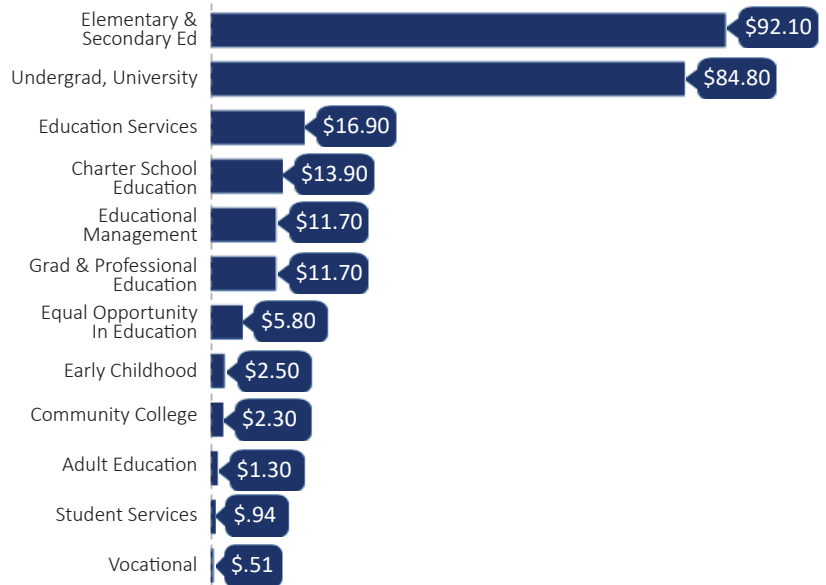
Out-of-state foundation support comprised 65% of the \$646 million that went to Connecticut's nonprofits in 2019. This particular trend has remained consistent over the past few years, with out of state organizations making grants totaling about two-thirds of all foundation funding.

## Grants to Connecticut Nonprofit Recipients



Dollars in millions - Source: CT Foundation Stats

## 2016 Education Funding



Dollars in millions - Source: Foundation Maps



# About Connecticut Council for Philanthropy



The Connecticut Council for Philanthropy (CCP), the state’s association of grantmakers, promotes and supports effective philanthropy for the public good. In 2019, CCP is celebrating 50 years of philanthropic leadership. CCP membership is comprised by foundations, business and corporate giving programs, individual philanthropists, and those serving the philanthropic sector.

The Connecticut Council for Philanthropy is committed to being a leader and catalyst for philanthropic action in response to community and statewide issues.

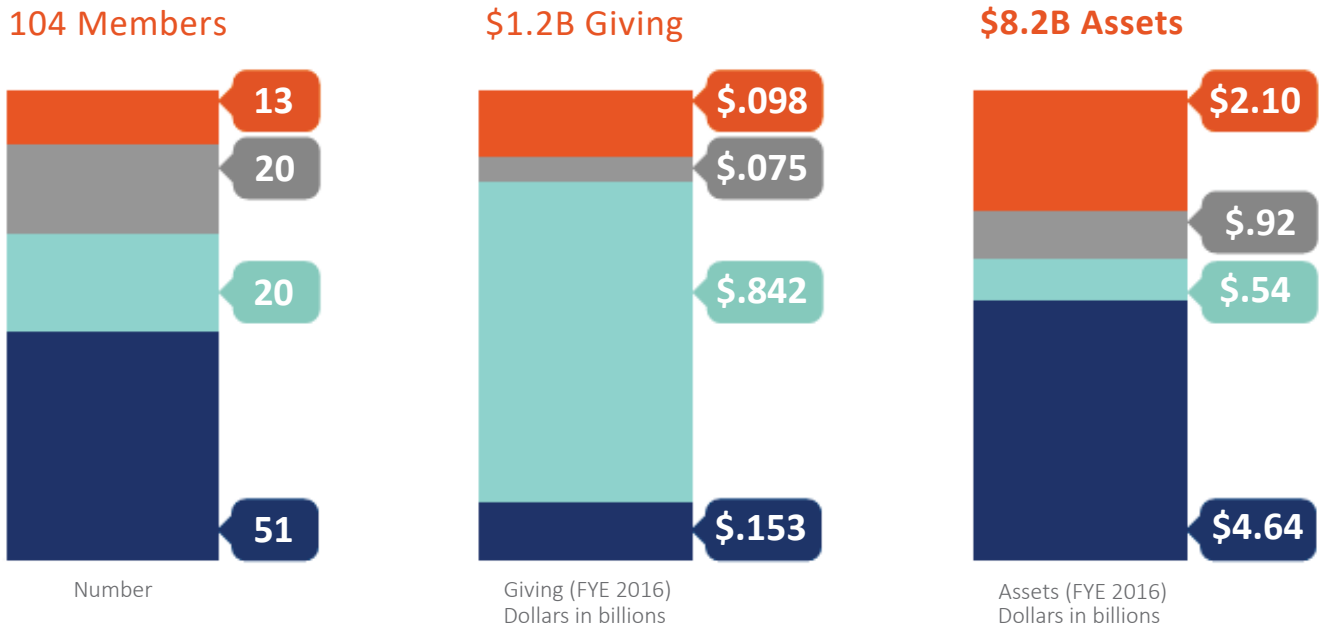
We facilitate the regular exchange of ideas, experiences, information, and expertise among Connecticut grantmakers. We provide knowledge and education about philanthropy for Connecticut’s grantmakers, decision makers, and the general public. We aim to increase public understanding of the value and impact of philanthropy. We look for opportunities to partner across sectors with government and business to improve the health and well-being of the state, its cities and towns, and its residents.

We accomplish our work by:

- Connecting and networking philanthropic professionals;
- Supporting learning and professional development;
- Understanding, analyzing, and informing grantmaking in Connecticut; and,
- Advocating on behalf of the philanthropic community.

For more information, visit: [CTphilanthropy.org](http://CTphilanthropy.org).

## CCP Members by Type, Assets and Giving



■ Private, Family, Independent Foundations ■ Corporate Foundations & Corporate Giving Programs  
 ■ Public Charities & Other ■ Community Foundations

Source: CCP member self reported data and IRS 990s.



## Appendix A

### Connecticut Council for Philanthropy Members [A–G]

Grantmaker	Assets	Total Grants	County	Fiscal Year End
1. Aetna Foundation	\$80,685,655	\$11,837,677	Hartford	12/31/2016
2. Ahearn Family Foundation	\$490,423	\$34,577	*	12/31/2016
3. Paul J. Aicher Foundation (Everyday Democracy)	\$5,576,077	\$-	Hartford	12/31/2016
4. American Savings Foundation	\$78,233,865	\$3,390,393	Hartford	12/31/2016
5. Aurora Foundation for Women and Girls in Greater Hartford	\$584,153	\$100,000	Hartford	12/31/2016
6. Avangrid Foundation	\$8,084,258	\$3,023,523	New Haven	12/31/2016
7. Bank of America	\$8,568,131	\$163,926,706	*	12/31/2016
8. The Barnes Foundation	\$8,810,820	\$470,923	Hartford	12/31/2016
9. Berkshire Taconic Community Foundation	\$131,719,896	\$8,889,958	*	12/31/2016
10. J. Walton Bissell Foundation	\$21,928,778	\$840,250	Hartford	12/31/2016
11. Boehringer Ingelheim Cares Foundation	\$58,552,823	\$423,534,490	Fairfield	12/31/2016
12. Branford Community Foundation	\$2,114,774	\$104,190	New Haven	12/31/2016
13. Elizabeth Carse Foundation	\$2,408,164	\$93,000	*	6/30/2016
14. Casey Family Programs	\$2,142,942,381	\$4,234,961	*	12/31/2016
15. Chelsea Groton Foundation	\$8,761,992	\$187,619	Fairfield	12/31/2016
16. Children’s Fund of Connecticut	\$32,429,668	\$1,406,114	Hartford	9/30/2016
17. Cigna Foundation	\$6,130,959	\$6,182,200	*	12/31/2016
18. CohnReznick†	\$604,817	\$342,450	*	12/31/2016
19. Comcast	—	—	*	
20. The Common Sense Fund	\$29,563,408	\$1,626,813	Fairfield	12/31/2016
21. The Community Foundation for Greater New Haven	\$487,352,421	\$27,762,527	New Haven	12/31/2016
22. The Community Foundation of Eastern Connecticut	\$70,082,987	\$4,382,127	New London	12/31/2016
23. Community Foundation of Greater New Britain	\$41,916,169	\$1,187,057	Hartford	12/31/2016
24. Ruth S. Conant Trust	\$354,735	\$12,200	*	12/31/2016
25. Connecticut Bar Foundation	\$10,681,215	\$15,741,573	Hartford	12/31/2016
26. Connecticut Community Foundation	\$98,214,231	\$4,593,955	New Haven	12/31/2016
27. Connecticut Health and Educational Facilities Authority	\$-	\$2,000,235	Hartford	12/31/2016
28. Connecticut Health Foundation	\$99,751,586	\$2,706,319	Hartford	12/31/2016
29. Dominion Nuclear Connecticut	\$6,409,756	\$14,957,606	*	12/31/2015
30. Donaghue Foundation	\$66,828,821	\$2,471,052	Hartford	12/31/2016
31. Doolittle Family Foundation	\$206,975	\$12,295	New Haven	12/31/2016
32. The Eder Family Foundation	\$7,253,990	\$321,150	New Haven	9/30/2016
33. Thomas and Jeanne Elmezzi Foundation	\$33,946,299	\$3,745,907	*	12/31/2016
34. Ensworth Charitable Foundation	\$22,435,481	\$1,040,175	Hartford	5/31/2016
35. George H.C. Ensworth Memorial Fund	\$803,048	\$29,500	*	5/31/2016
36. Eversource Energy	\$19,231,711	\$3,811,464	Hartford	12/31/2016
37. Fairfield County’s Community Foundation	\$175,494,767	\$13,353,458	Fairfield	6/30/2016
38. Farmington Bank Community Foundation	\$13,373,891	\$451,898	Hartford	12/31/2016
39. Fiduciary Investment Advisors†	—	—	Hartford	
40. Foundation for Community Health	\$25,536,518	\$487,361	Litchfield	12/31/2016
41. The Fund for Greater Hartford	\$16,071,958	\$720,782	Hartford	12/31/2016
42. The Gawlicki Family Foundation	\$31,387,340	\$233,444	Hartford	11/30/2016
43. Grace Farms Foundation	\$140,682,994	\$52,500	Fairfield	12/31/2016
44. William C. Graustein	—	—	New Haven	
45. William Caspar Graustein Memorial Fund	\$107,802,693	\$2,404,826	New Haven	12/31/2016
46. The Grossman Family Foundation	\$148,233,197	\$6,760,082	Fairfield	12/31/2016
47. The Guilford Foundation	\$2,049,071	\$63,723	New Haven	1/31/2016
48. Newell D. Hale Foundation	\$350,250	\$831,000	Windham	12/31/2016
49. The Hampshire Foundation	\$37,202,037	\$792,667	Hartford	12/31/2016
50. Hartford Foundation for Public Giving	\$917,285,394	\$30,269,563	Hartford	12/31/2016

\*Located out of state, \*\*CT figures only, †Associate member, — Information not available/applicable

## Appendix A

### Connecticut Council for Philanthropy Members [G–T]

Grantmaker	Assets	Total Grants	County	Fiscal Year End
51. Harvard Pilgrim Health Care Foundation	\$2,703,313	\$3,882,248	*	12/31/2016
52. Per and Astrid Heidenreich Family Foundation	\$10,579,266	\$682,235	Fairfield	12/31/2016
53. Jeniam Foundation	\$20,341,346	\$937,487	*	12/31/2016
54. Jewish Community Foundation of Greater Hartford	\$119,726,760	\$4,332,634	Hartford	6/30/2016
55. JPMorgan Chase Foundation	\$36,025,881	\$163,012,810	*	12/31/2016
56. The Betty Knox Foundation	\$1,353,376	\$50,782	Hartford	12/31/2016
57. Ethel and Abe Lapides Foundation	\$1,672,611	\$57,250	New Haven	11/30/2016
58. Lawson Valentine Foundation	\$12,990,535	\$542,550	Hartford	12/31/2016
59. Ryan T. Lee Memorial Foundation	\$69,010	\$45,435	Hartford	12/31/2016
60. The Leever Foundation	\$21,292,630	\$1,007,975	New Haven	12/31/2016
61. Liberty Bank Foundation	\$15,786,045	\$725,780	Middlesex	12/31/2016
62. Lincoln Financial Foundation	\$6,071,702	\$9,131,402	*	12/31/2016
63. Lone Pine Foundation	\$41,320,716	\$7,287,859	Fairfield	12/31/2016
64. Main Street Community Foundation	\$38,860,754	\$1,455,028	Hartford	12/31/2016
65. McCall Kulak Family Foundation	\$493,862	\$172,000	*	12/31/2016
66. The Melville Charitable Trust	\$143,154,081	\$6,135,276	New Haven	12/31/2016
67. MetroHartford Alliance*	\$3,054,712	\$-	Hartford	12/31/2016
68. MFUND	\$1,515,605	\$120,448	New Haven	12/31/2016
69. Nellie Mae Education Foundation	\$507,900,527	\$28,203,956	*	12/31/2016
70. Christine E. Moser Foundation	\$543,733	\$19,000	Hartford	12/31/2016
71. New Canaan Community Foundation	\$16,307,948	\$1,124,548	Fairfield	12/31/2016
72. NewAlliance Foundation	\$28,522,706	\$1,063,333	New Haven	12/31/2016
73. Newman’s Own Foundation	\$229,813,829	\$26,625,000	Hartford	12/31/2016
74. Northwest Connecticut Community Foundation	\$94,068,718	\$2,968,655	Litchfield	12/31/2016
75. The Nutmeg Foundation	\$2,790,826	\$124,500	Hartford	12/31/2016
76. Jeffrey P. Ossen Family Foundation	\$18,130,382	\$948,064	Windham	7/31/2016
77. People’s United Community Foundation	\$54,895,770	\$2,575,359	Fairfield	12/31/2016
78. Perrin Family Foundation	\$19,268,763	\$648,932	New Haven	12/31/2016
79. PFK O’Connor Davies, LLP*	—	—	*	
80. Reid & Riege*	\$835,656	\$82,986	Hartford	12/31/2016
81. Ritter Family Foundation	\$11,135,387	\$190,000	Fairfield	12/31/2016
82. Edward C. and Ann T. Roberts Foundation	\$6,956,803	\$325,500	Hartford	12/31/2016
83. Charles Nelson Robinson Fund	\$4,562,045	\$186,000	Hartford	6/30/2017
84. The Rockfall Foundation	\$4,743,155	\$40,125	Middlesex	6/30/2016
85. SBM Charitable Foundation	\$34,413,392	\$2,255,407	Hartford	12/31/2016
86. The Scripps Family Fund for Education and the Arts	\$3,753,667	\$120,000	*	12/31/2016
87. Seedlings Foundation	\$84,907,503	\$27,868,300	New Haven	12/31/2016
88. Social Venture Partners Connecticut	—	—	Fairfield	
89. Swindells Charitable Foundation	\$2,428,173	\$116,000	*	2/29/2016
90. Tauck Family Foundation	\$21,711,545	\$1,274,337	Fairfield	12/31/2016
91. The Tow Foundation	\$226,838,932	\$17,278,732	Fairfield	12/31/2016
92. Town Fair Tire Foundation	\$14,266,182	\$1,080,800	New Haven	12/31/2016
93. Travelers & the Travelers Foundation	\$61,589	\$6,493,765	*	12/31/2016
94. Emily Hall Tremaine Foundation	\$78,645,805	\$2,347,044	New Haven	12/31/2016
95. United Technologies Corporation	—	—	Hartford	
96. United Way of Central & Northeastern Connecticut	\$35,410,500	\$18,087,938	Hartford	6/30/2016
97. United Way of Coastal Fairfield County	\$7,640,140	\$2,254,388	Fairfield	6/30/2016
98. United Way of Connecticut	\$4,807,551	\$-	Hartford	6/30/2016
99. United Way of Western Connecticut	\$4,188,614	\$1,867,539	Fairfield	6/30/2016
100. Universal Health Care Foundation of Connecticut	\$21,902,119	\$105,763	New Haven	12/31/2016

\*Located out of state, \*\*Connecticut figures only, +Associate member, — Information not available/applicable

## Appendix A

### Connecticut Council for Philanthropy Members [T-Z]

Grantmaker	Assets	Total Grants	County	Fiscal Year End
101. Valley Community Foundation	\$21,642,605	\$1,449,233	New Haven	12/31/2016
102. H. A. Vance Foundation	\$8,822,727	\$400,000	Hartford	12/31/2016
103. Webster Bank	—	\$1,718,000	New Haven	12/31/2016
104. The ZOOM Foundation	\$936,719,290	\$46,177,708	Fairfield	6/30/2016

\*Located out of state, \*\*Connecticut figures only, +Associate member, — Information not available/applicable



**MISSION:** CCP is an association of grantmakers committed to promoting and supporting effective philanthropy for the public good.

**OUR COMMITMENTS:** CCP is committed: to be a leader and catalyst for philanthropic action in response to community issues; to facilitate the regular exchange of ideas, experiences, information, and expertise among Connecticut grantmakers; to be a reliable source of knowledge and education about philanthropy for Connecticut's grantmakers; national, state, and local leaders; and the general public; and to increase public understanding of the value and impact of philanthropy.

**OUR VALUES:** CCP believes in encouraging philanthropy that is guided by the values of transparency, accessibility, ethical conduct, and responsiveness to diverse populations. Further, we value a diverse workforce and diverse leadership, because we believe that this enriches and elevates our work and community.

## Appendix B

### Top 100 Connecticut Grantmakers by Total Grants, 2016 [1–50]

Grantmaker	County	Total Grants
<b>1. Boehringer Ingelheim Cares Foundation</b>	<b>Fairfield</b>	<b>\$423,534,490</b>
2. Dalio Foundation	Fairfield	\$124,849,299
3. GE Foundation	Fairfield	\$87,768,269
4. Steven & Alexandra M Cohen Foundation	Fairfield	\$61,890,851
5. Stanley Family Foundation	Fairfield	\$50,650,000
<b>6. The ZOOM Foundation</b>	<b>Fairfield</b>	<b>\$46,177,708</b>
<b>7. Hartford Foundation for Public Giving</b>	<b>Hartford</b>	<b>\$30,269,563</b>
<b>8. The Community Foundation for Greater New Haven</b>	<b>New Haven</b>	<b>\$29,211,759</b>
<b>9. Seedlings Foundation</b>	<b>New Haven</b>	<b>\$27,868,300</b>
<b>10. Newman's Own Foundation</b>	<b>Hartford</b>	<b>\$26,625,000</b>
11. Cohen Veterans Network	Fairfield	\$26,221,360
12. Alexion Access Foundation	New Haven	\$18,929,852
<b>13. United Way of Central &amp; Northeastern Connecticut</b>	<b>Hartford</b>	<b>\$18,087,938</b>
<b>14. The Tow Foundation</b>	<b>Fairfield</b>	<b>\$17,278,732</b>
<b>15. Connecticut Bar Foundation</b>	<b>Hartford</b>	<b>\$15,741,573</b>
16. The Sage Foundation	Fairfield	\$13,521,416
<b>17. Fairfield County's Community Foundation</b>	<b>Fairfield</b>	<b>\$13,353,458</b>
<b>18. Aetna Foundation</b>	<b>Hartford</b>	<b>\$11,837,677</b>
<b>19. Lone Pine Foundation</b>	<b>Fairfield</b>	<b>\$7,058,427</b>
20. Deloitte Foundation	Fairfield	\$7,048,507
<b>21. The Grossman Family Foundation</b>	<b>Fairfield</b>	<b>\$6,760,082</b>
<b>22. The Melville Charitable Trust</b>	<b>New Haven</b>	<b>\$6,135,276</b>
23. Leandro P. Rizzuto Foundation	Fairfield	\$5,931,639
<b>24. Lone Pine Foundation</b>	<b>Fairfield</b>	<b>\$7,287,859</b>
25. Deloitte Foundation	Fairfield	\$7,048,507
<b>26. The Grossman Family Foundation</b>	<b>Fairfield</b>	<b>\$6,760,082</b>
<b>27. The Melville Charitable Trust</b>	<b>New Haven</b>	<b>\$6,135,276</b>
28. Royce Family Fund	Fairfield	\$5,523,615
29. WorldQuant Foundation	Fairfield	\$4,660,609
<b>30. Connecticut Community Foundation</b>	<b>New Haven</b>	<b>\$4,593,955</b>
<b>31. The Community Foundation of Eastern Connecticut</b>	<b>New London</b>	<b>\$4,382,127</b>
<b>32. Jewish Community Foundation of Greater Hartford</b>	<b>Hartford</b>	<b>\$4,332,634</b>
33. The Jane Coffin Childs Memorial Fund for Medical Research	New Haven	\$4,150,573
34. S&L Marx Foundation	Fairfield	\$4,092,200
35. The Pitney Bowes Foundation	Fairfield	\$4,018,406
36. The Frederick A. DeLuca Foundation	New Haven	\$3,855,850
37. Weiss Family Foundation	Hartford	\$3,842,125
<b>38. Eversource Energy Foundation</b>	<b>Hartford</b>	<b>\$3,811,464</b>
39. The Children's Investment Fund Foundation	Hartford	\$3,656,359
40. The Bauer Foundation	Fairfield	\$3,539,151
<b>41. American Savings Foundation</b>	<b>Hartford</b>	<b>\$3,390,393</b>
42. The Robbins Family Foundation	Fairfield	\$3,237,812
43. The Tudor Foundation	Fairfield	\$3,169,697
44. Silver Family Foundation	Fairfield	\$3,041,620
<b>45. Avangrid Foundation</b>	<b>New Haven</b>	<b>\$3,023,523</b>
46. The Harold W. McGraw, Jr. Family Foundation	Fairfield	\$3,022,551
<b>47. Northwest Connecticut Community Foundation</b>	<b>Litchfield</b>	<b>\$2,968,655</b>
48. The Maximilian E. & Marion O. Hoffman Foundation	Hartford	\$2,898,000
49. Doris & Simon Konover Family Foundation	Hartford	\$2,862,137
50. The Bok Family Foundation	Litchfield	\$2,810,000

CCP members are bolded.

## Appendix B

### Top 100 Connecticut Grantmakers by Total Grants, 2016 [51–100]

Grantmaker	County	Total Grants
<b>51. Connecticut Health Foundation</b>	<b>Hartford</b>	<b>\$2,706,319</b>
52. Rodkin Family Foundation	Fairfield	\$2,665,167
<b>53. People's United Community Foundation</b>	<b>Fairfield</b>	<b>\$2,575,359</b>
54. The John and Polly Sparks Foundation	Hartford	\$2,549,000
55. Rosenthal Family Foundation	Fairfield	\$2,544,638
56. The Brightwater Fund	Fairfield	\$2,526,958
57. The ALFA Foundation	Fairfield	\$2,513,334
58. Twenty-Seven Foundation	Hartford	\$2,483,000
<b>59. Donaghue Foundation</b>	<b>Hartford</b>	<b>\$2,471,052</b>
<b>60. William Caspar Graustein Memorial Fund</b>	<b>New Haven</b>	<b>\$2,404,826</b>
61. Andrew J. & Joyce D. Mandell Family Foundation	Hartford	\$2,370,125
<b>62. Emily Hall Tremaine Foundation</b>	<b>New Haven</b>	<b>\$2,347,044</b>
<b>63. SBM Charitable Foundation</b>	<b>Hartford</b>	<b>\$2,255,407</b>
<b>64. United Way of Coastal Fairfield County</b>	<b>Fairfield</b>	<b>\$2,254,388</b>
65. The William T. Morris Foundation	Fairfield	\$2,245,000
66. Maranatha Foundation	Fairfield	\$2,196,346
67. The Bingham Trust	New London	\$2,174,510
68. The Barbara and Edward Netter Foundation	Fairfield	\$2,051,745
69. Viking Global Foundation	Fairfield	\$2,012,046
70. The Elinor Patterson Baker Foundation	Fairfield	\$2,002,500
<b>71. Connecticut Health and Educational Facilities Authority</b>	<b>Hartford</b>	<b>\$2,000,235</b>
72. Joel E. Smilow Charitable Trust	Fairfield	\$1,928,666
73. The Seidenberg Family Foundation	Fairfield	\$1,911,400
74. The Meredith and Whitney George Family Foundation	Fairfield	\$1,904,350
75. Lego Community Fund U.S.	Hartford	\$1,876,195
<b>76. United Way of Western Connecticut</b>	<b>Fairfield</b>	<b>\$1,867,539</b>
77. OdysseyRe Foundation	Fairfield	\$1,816,666
78. The Diebold Foundation	Litchfield	\$1,785,385
79. Jamieson Family Foundation	Fairfield	\$1,758,049
<b>80. Webster Bank</b>	<b>New Haven</b>	<b>\$1,718,000</b>
81. Sound Shore Foundation	Fairfield	\$1,707,131
82. Richard and Ellen Richman Private Family Foundation	Fairfield	\$1,704,900
83. The Michael & Carol Lowenstein Foundation	Fairfield	\$1,682,246
<b>84. The Common Sense Fund</b>	<b>Fairfield</b>	<b>\$1,626,813</b>
85. The Martino Family Foundation	Fairfield	\$1,600,000
86. Charles R. Wood Foundation	Fairfield	\$1,599,214
87. The Huisling Foundation	New Haven	\$1,560,200
88. Frank Loomis Palmer Fund	Hartford	\$1,545,458
89. The Daphne Seybolt Culpeper Memorial Foundation	Fairfield	\$1,542,446
<b>90. Main Street Community Foundation</b>	<b>Hartford</b>	<b>\$1,455,028</b>
91. Henry E. Niles Foundation	Fairfield	\$1,453,000
<b>92. Valley Community Foundation</b>	<b>New Haven</b>	<b>\$1,449,233</b>
<b>93. Children's Fund of Connecticut</b>	<b>Hartford</b>	<b>\$1,406,114</b>
94. The Goodnow Fund	Fairfield	\$1,400,000
95. The Goldring Family Foundation	Litchfield	\$1,381,569
96. Brothers Brook Foundation	Fairfield	\$1,380,215
97. The Pasculano Foundation	Fairfield	\$1,358,500
98. The Zachs Family Foundation	Hartford	\$1,347,726
99. The Orchard Farm Foundation	Fairfield	\$1,311,910
100. William & Lynda Steere Foundation	Fairfield	\$1,309,420

CCP members are bolded.

## Appendix C

### Top 100 Connecticut Grantmakers by Total Assets, 2016 FYE [1–50]

Grantmaker	County	Assets
<b>1. The ZOOM Foundation</b>	<b>Fairfield</b>	<b>\$936,719,290</b>
<b>2. Hartford Foundation for Public Giving</b>	<b>Hartford</b>	<b>\$917,285,394</b>
3. Dalio Foundation	Fairfield	\$799,350,236
4. Steven & Alexandra M Cohen Foundation, Inc.	Fairfield	\$601,183,645
5. Stanley Family Foundation	Fairfield	\$570,480,121
<b>6. The Community Foundation for Greater New Haven</b>	<b>New Haven</b>	<b>\$487,352,421</b>
<b>7. Newman’s Own Foundation</b>	<b>Hartford</b>	<b>\$229,813,829</b>
<b>8. The Tow Foundation</b>	<b>Fairfield</b>	<b>\$226,838,932</b>
9. The Frederick A. DeLuca Foundation	New Haven	\$219,486,597
10. The Josef and Anni Albers Foundation	New Haven	\$188,599,195
<b>11. Fairfield County’s Community Foundation</b>	<b>Fairfield</b>	<b>\$175,494,767</b>
12. The Children’s Investment Fund Foundation	Hartford	\$159,597,203
<b>13. The Grossman Family Foundation</b>	<b>Fairfield</b>	<b>\$148,233,197</b>
<b>14. The Melville Charitable Trust</b>	<b>New Haven</b>	<b>\$143,154,081</b>
<b>15. Grace Farms Foundation</b>	<b>Fairfield</b>	<b>\$140,682,994</b>
16. The Sage Foundation	Fairfield	\$125,203,042
17. Halvorsen Family Foundation	Fairfield	\$120,050,688
<b>18. Jewish Community Foundation of Greater Hartford</b>	<b>Hartford</b>	<b>\$119,726,760</b>
19. Royce Family Fund	Fairfield	\$116,112,887
<b>20. William Caspar Graustein Memorial Fund</b>	<b>New Haven</b>	<b>\$107,802,693</b>
<b>21. Connecticut Health Foundation</b>	<b>Hartford</b>	<b>\$99,751,586</b>
<b>22. Connecticut Community Foundation</b>	<b>New Haven</b>	<b>\$98,214,231</b>
<b>23. Northwest Connecticut Community Foundation</b>	<b>Litchfield</b>	<b>\$94,068,718</b>
<b>24. Seedlings Foundation</b>	<b>New Haven</b>	<b>\$84,907,503</b>
25. S&L Marx Foundation	Fairfield	\$83,331,982
<b>26. Aetna Foundation</b>	<b>Hartford</b>	<b>\$80,685,655</b>
<b>27. Emily Hall Tremaine Foundation</b>	<b>New Haven</b>	<b>\$78,645,805</b>
<b>28. American Savings Foundation</b>	<b>Hartford</b>	<b>\$78,233,865</b>
<b>29. The Community Foundation of Eastern Connecticut</b>	<b>New London</b>	<b>\$70,082,987</b>
30. The John and Polly Sparks Foundation	Hartford	\$67,681,149
<b>31. Donaghue Foundation</b>	<b>Hartford</b>	<b>\$66,828,821</b>
32. The Harold W. McGraw, Jr. Family Foundation	Fairfield	\$66,216,737
<b>33. Boehringer Ingelheim Cares Foundation</b>	<b>Fairfield</b>	<b>\$58,552,823</b>
34. Maurice Sendak Foundation, Inc.	Fairfield	\$55,168,602
35. The Maximilian E. & Marion O. Hoffman Foundation	Hartford	\$54,977,439
<b>36. People’s United Community Foundation</b>	<b>Fairfield</b>	<b>\$54,895,770</b>
37. Louis J. and June E. Kay Foundation	Fairfield	\$51,456,540
38. The Elinor Patterson Baker Foundation	Fairfield	\$50,016,396
39. The Bingham Trust	New London	\$49,901,744
40. The Jane Coffin Childs Memorial Fund for Medical Research	New Haven	\$49,679,976
41. The Bok Family Foundation	Litchfield	\$48,268,721
42. The William T. Morris Foundation	Fairfield	\$47,840,787
43. Twenty-Seven Foundation	Hartford	\$47,331,504
44. Weiss Family Foundation	Hartford	\$47,284,395
45. The Shumway Foundation	Fairfield	\$43,328,433
46. Brothers Brook Foundation	Fairfield	\$42,772,618
<b>47. Community Foundation of Greater New Britain</b>	<b>Hartford</b>	<b>\$41,916,169</b>
<b>48. Lone Pine Foundation</b>	<b>Fairfield</b>	<b>\$41,320,716</b>
49. The Meredith and Whitney George Family Foundation	Fairfield	\$39,355,305
<b>50. Main Street Community Foundation</b>	<b>Hartford</b>	<b>\$38,860,754</b>

CCP members are bolded.



## Appendix C

### Top 100 Connecticut Grantmakers by Total Assets, 2016 [51–100]

Grantmaker	County	Assets
<b>51. The Hampshire Foundation</b>	<b>Hartford</b>	<b>\$37,202,037</b>
<b>52. United Way of Central &amp; Northeastern Connecticut</b>	<b>Hartford</b>	<b>\$35,410,500</b>
<b>53. SBM Charitable Foundation</b>	<b>Hartford</b>	<b>\$34,413,392</b>
54. Frank Loomis Palmer Fund	Hartford	\$34,259,215
55. Charles R. Wood Foundation	Fairfield	\$33,696,932
56. Garden Homes Fund	Fairfield	\$33,188,795
57. The Michael & Carol Lowenstein Foundation	Fairfield	\$33,030,475
<b>58. Children’s Fund of Connecticut</b>	<b>Hartford</b>	<b>\$32,429,668</b>
59. The Huisling Foundation	New Haven	\$32,238,958
60. The ALFA Foundation	Fairfield	\$32,107,162
61. The Martino Family Foundation	Fairfield	\$31,893,123
<b>62. The Gawlicki Family Foundation</b>	<b>Hartford</b>	<b>\$31,387,340</b>
63. The Diebold Foundation	Litchfield	\$30,799,110
64. Henry E. Niles Foundation	Fairfield	\$29,673,584
65. The Bauer Foundation	Fairfield	\$29,599,140
<b>66. The Common Sense Fund</b>	<b>Fairfield</b>	<b>\$29,563,408</b>
<b>67. NewAlliance Foundation</b>	<b>New Haven</b>	<b>\$28,522,706</b>
68. The Zachs Family Foundation	Hartford	\$28,147,409
69. Ernest and Joan Trefz Foundation	Fairfield	\$27,012,933
70. The Goodnow Fund	Fairfield	\$25,972,810
<b>71. Foundation for Community Health</b>	<b>Litchfield</b>	<b>\$25,536,518</b>
72. Wings for Things Foundation	Fairfield	\$25,237,362
<b>73. Ensworth Charitable Foundation</b>	<b>Hartford</b>	<b>\$23,551,133</b>
74. Laura J. Niles Foundation	Fairfield	\$23,231,433
75. Daftuar Family Foundation	Fairfield	\$22,476,410
76. The Meriden Foundation	New Haven	\$22,430,769
77. Deloitte Foundation	Fairfield	\$21,955,276
<b>78. J. Walton Bissell Foundation</b>	<b>Hartford</b>	<b>\$21,928,778</b>
<b>79. Universal Health Care Foundation of Connecticut</b>	<b>New Haven</b>	<b>\$21,902,119</b>
<b>80. Tauck Family Foundation</b>	<b>Fairfield</b>	<b>\$21,711,545</b>
81. The Goldring Family Foundation	Litchfield	\$21,678,235
<b>82. Valley Community Foundation</b>	<b>New Haven</b>	<b>\$21,642,605</b>
83. The Prospector Foundation	Fairfield	\$21,639,392
84. The Daniell Family Foundation	Hartford	\$21,596,380
<b>85. The Leever Foundation</b>	<b>New Haven</b>	<b>\$21,292,630</b>
86. Ner Tzion Foundation	Fairfield	\$21,292,139
87. Yvette & Arthur Eder Charitable Foundation Trust	New Haven	\$21,098,047
88. The Goldstone Family Foundation	Fairfield	\$20,968,871
89. Andrew J. & Joyce D. Mandell Family Foundation	Hartford	\$20,964,565
90. Eric P. Sheinberg Foundation	Fairfield	\$20,685,162
91. Donald C. Brace Foundation	Fairfield	\$20,640,421
92. The E. Matilda Ziegler Foundation for the Blind	Fairfield	\$20,594,904
93. John T. and Jane A. Wiederhold Foundation	Litchfield	\$20,427,007
94. Robert E. Leet & Clara Guthrie Patterson Trust	Hartford	\$20,413,621
95. Rosenthal Family Foundation	Fairfield	\$20,085,412
96. The Wright Foundation	Fairfield	\$19,960,284
97. Windreich Family Foundation	Fairfield	\$19,711,502
<b>98. The Perrin Family Foundation</b>	<b>Fairfield</b>	<b>\$19,268,763</b>
<b>99. Eversource Energy Foundation</b>	<b>Hartford</b>	<b>\$19,231,711</b>
100. James R. and Frances H. Berger Foundation	Fairfield	\$18,948,546

CCP members are bolded.

# Footnotes, Methodology, and References

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## Footnotes

1. Page 2: IRS Statistics of Income, 2016.
2. Page 4: Giving USA 2019.
3. Pages 6 and 7: The variation in community foundation statistics reflects two different data sources. On page 6, data is from CT Foundation Stats which often fails to include multiple funds sitting at community foundations. On page 7, data reflects the inclusion of self-reported data.
4. Page 10: Data source is from the 2015 Connecticut Foundation Stats captured in May 2018.

## Methodology

### Foundation Data

Foundation data included in this report is for 2016 fiscal year end (FYE). Data on Connecticut foundation giving is from Connecticut Foundation Stats generated by Foundation Center. For this report, CCP used data as of June 21, 2019. Foundation Center is constantly adding new foundation and grants data to the platform, and refreshes the databases daily. Sources of grants data include IRS information returns (like IRS Form-990 and Form 990-PF) and information reported directly to Foundation Center through the Electronic Reporting Program from private and public grantmaking foundations in Connecticut.

Foundation trend data is from CCP's database of past Foundation Center data, the Connecticut Foundation Stats dashboard, and Foundation Maps.

Data on Connecticut foundation giving by issue area and population is from Connecticut Foundation Stats. National giving by issue is from Foundation Maps.

Data about community foundations in Connecticut was self-reported and supplemented from GuideStar's database of IRS Form-990s.

Analysis about state corporate foundations was from Foundation Center. CCP corporate members self-report their total giving and assets figures.

The Top 100 Lists were created with data provided by Foundation Center. CCP supplemented this with additional research from the GuideStar database of IRS Form-990 and -990-PFs and self-reporting from Connecticut Council for Philanthropy (CCP) members.

### Individual Data

Information on national and Connecticut individual giving came from the IRS, Statistics of Income Division (SOI), Individual Master File System, August 2017 and was prepared by CCP and United Philanthropy Forum. Individual data represents aggregates of all returns filed and processed through the individual master file (IMF) system during calendar year 2016.

National and Connecticut charitable bequest data came from the IRS, Statistics of Income Division, Estate Tax Returns Study, October 2016 and was prepared by CCP. Generally, an estate files a Federal estate tax return (Form 706) in the year after a decedent's death. In 2016, most returns were filed for deaths that occurred in 2015, for which the filing threshold was \$5.34 million of gross estate. Because of filing extensions, however, some returns were filed in 2016 for deaths that occurred prior to 2015, for which filing thresholds were lower. There are also a small number of returns filed for deaths that occurred in 2016.

Individual trend data is from CCP's database of past IRS SOI data.

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