

# Giving in Connecticut 2015



Connecticut Council for Philanthropy  
Serving funders. Advancing effective giving.

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# Giving in Connecticut

## Foreword

The stories and efforts profiled in Connecticut Council for Philanthropy's *Giving in Connecticut 2015* illustrate that cross-sector collaboration is gaining strength in Connecticut philanthropy. There is greater recognition that all of us must leverage our economic, cultural and social capital to achieve movement forward. And yet, if we compared this report about generosity and the incredible investments made by people who care deeply about the public good against reports like the [United Way's Connecticut Alice Report](#), we struggle to see our impact.

With \$4.66 billion invested by individuals and foundations in our communities and social profit organizations, have we made a difference? Some would ask what would have happened without those investments—it would have been even worse. Why is life not better for children and families in Connecticut? What is philanthropy and our partners not able to sufficiently grapple with to turn the tide on key social issues?

My sense, over my 20 plus years in this sector, is that we have gotten smarter and better at our work, more professional and able to better share the products of our labors. I am proud that the maturing regional association network has played a part in this advancement. However, there are many days when I feel as though we miss the opportunity to weave together our philanthropic efforts.

Why do we feel comfortable funding the same organizations when no impact has been seen? We say this is not true, but the Center for Effective Philanthropy's research demonstrates that most charitable and philanthropic giving is based on relationships, instinct or feeling and not data. Why do we fear engaging in advocacy and public policy to change systems, but are not afraid of paying for the poor results over and over again through remediation? Is just doing good, good enough? Is making some impact, enough impact?

More than half of Connecticut foundation giving comes from private foundations, of which many have family dynamics, goals, issues and historical obligations, or in many cases are geographically tied. The majority of these foundations are small with little or no professional staff. About another 40% of foundation giving is corporate or operating foundation dollars that also have many competing energies and obligations. The remaining 10% moves through community foundation grants and is primarily from donor advised or endowment funds that have very specific directives. Therefore, when we think about 2013's \$999 million in foundation giving, we are not talking about a free flow of unencumbered resources for the public good. These dollars are resources that are mostly designated in some way requiring philanthropy to weave, blend and braid together disparate parts for real impact.

This weaving of resources requires foundations to not only think about their work's impact, but also the work of others. For many philanthropists and foundations this is not a full time engagement; and with little or no professional staff this work is complicated to do well. Many are satisfied to do the best they can and this is an understandable pursuit. I challenge each philanthropic stakeholder—foundation donor, leader, trustee and staff member—to ask themselves if they are doing the best they can to weave their work with that of others for the most impact—because good, really isn't good enough to turn the tide on key social challenges facing Connecticut.



Maggie Gunther Osborn  
President

# Key Findings

## Total Charitable Giving

- Individuals and foundations in Connecticut gave \$4.66 billion in charitable contributions during 2013. This is up 0.7% from \$4.62 billion in 2012.
- Individuals in Connecticut accounted for 71% of the state's 2013 charitable giving, with foundations comprising 21.5%, and charitable bequests representing 7.6%.

## Giving by Individuals

- Individuals (including bequests) in Connecticut gave \$3.66 billion to charity in 2012, up 1.1% from 2012.
- 34.9% of Connecticut returns reported a contribution compared to 25% nationally. 41.8% of Connecticut returns reported itemized deductions. The number of Connecticut residents who reported a contribution is down 2.2% from 2012.

## Giving by Foundations

- Foundations in Connecticut gave \$999 million in 2013, a 1% decrease from 2012. Connecticut foundations gave \$10,248,472 less in 2013.
- Connecticut foundation assets totaled \$10.9 billion in 2013, up \$2 billion from 2012. This represents a 22.6% increase in foundation assets.
- In 2013, Connecticut was home to 1,607 active grantmaking foundations, a slight increase from the 2012 figure of 1,592.
- The top 5 Connecticut foundations (by giving) represented 41.3% of the grants awarded in 2013.

## Grantmaking by Geographic Area

- Grantmakers in Fairfield County disbursed the majority of grant dollars (73.8%) – followed by Hartford County (14.2%) and New Haven County (8.7%).
- Fairfield County is home to 894 foundations, which represents 55.6% of the foundations in the state and 59.4% of assets held. This is followed by Hartford Country with 306 foundations (19%) with 23.1% of assets.

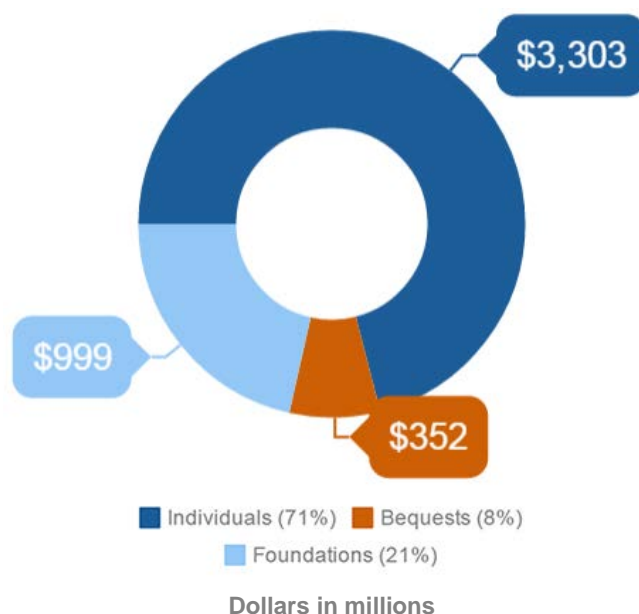
## Connecticut Giving Highlights

- \$3.66 billion in contributions from individuals, up from \$3.61 billion in 2012
- \$999 million given by Connecticut foundations
- \$10.9 billion Connecticut foundation assets
- 1,607 active grantmaking foundations
- 21.9% of grants (by number) were awarded to Human Services; 25.9% of grant dollars were awarded to Education
- 59% of Connecticut foundation assets are held in in Fairfield County

## Grantmaking by Subject Area

- In 2013, Connecticut grantmakers devoted the largest share of their grant dollars to education (25.9%), followed by health (22.9%), philanthropy and nonprofit management (16%), and human services (8.7%) (see Appendix D for more detail).

Connecticut Charitable Giving





# Charitable Giving

Individuals and foundations in Connecticut gave a total of \$4.66 billion in charitable contributions in 2013 (the latest year for which complete data is available). This giving represents a 0.7% increase compared to 2012. The percentage change for individuals, bequests and foundations varies (Table 1).

**Table 1: Total Connecticut Giving 2012-2013**

	2012	2013	Change
Foundations	1010	999.8	-0.1%
Individuals	3,415.8	3,303.5	-3.3%
Bequests	198.8	352.1	77.2%
<b>Total</b>	<b>\$4,624.6</b>	<b>\$4,655.4</b>	<b>0.7%</b>

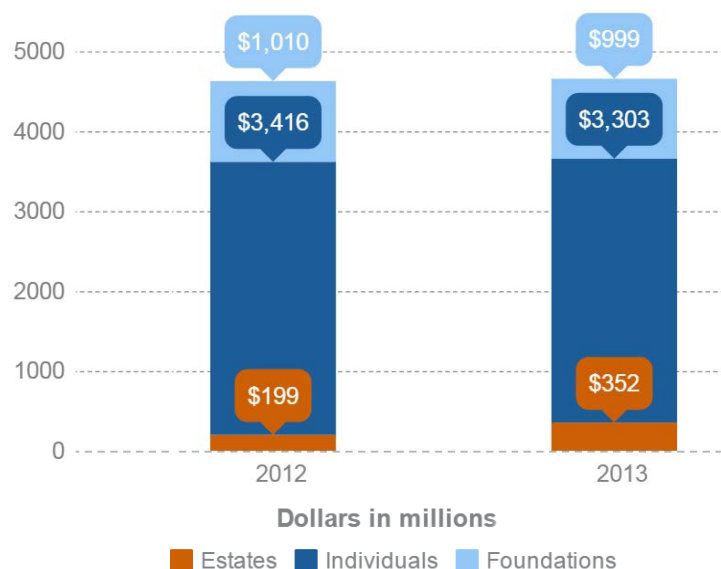
Source: Foundation Center, 2015. IRS, 2015. Dollars in millions.

The last 5 years of giving (for which there is complete data), 2009-2013, shows a 3.4% increase in individual contributions (includes bequests) compared to the 5 years before that, 2008-2012. (Table 2)

Individuals in Connecticut accounted for 71% of charitable giving in the state in 2013. The percentage of giving by individuals has steadily decreased since 2011 when it accounted for 75% of charitable giving.

Foundation giving made up 21.5% of total giving and charitable bequests account for the remaining 7.6%. 2013 marks the first year foundation giving has decreased since 2009, when giving dropped following the 2008 financial crisis.

**Total Connecticut Giving**



In 2013, Connecticut ranked number 1 in the nation for average household income. This ranking is established using IRS data (adjusted gross income divided by the number of returns).

Connecticut's index on income is distorted by high net-worth individuals. A disproportionate concentration of these individuals reside in Fairfield County.

As many public programs are funded relative to resident's property tax, this disproportionately has policy implications, and real-life outcomes. How much different would CT's giving look without Fairfield County? (see page 6 for continued detail).

**Table 2: Individual Connecticut Giving 2008-2013**

	2008	2009	2010	2011	2012	2013	Total 2008-2012	Total 2009-2013	% Change '08-12 to '09-13
Individuals	2,617	2,596	2,981	2,674	3,416	3,304	14,284	14,970	4.8%
Bequests	516	228	156	38	199	352	1,137	972	-14.4%
<b>Total</b>	<b>\$3,944</b>	<b>\$3,560</b>	<b>\$3,949</b>	<b>\$3,563</b>	<b>\$4,625</b>	<b>\$4,655</b>	<b>\$15,421</b>	<b>\$15,943</b>	<b>3.4%</b>

Source: Foundation Center, 2015. IRS, 2015. Dollars in millions.

# Individual Giving

## Individual Giving Down

In 2013, individuals in Connecticut gave a total of \$3.3 billion to charity. This represents a decrease of 3.3% from 2012. National giving to charity also declined at a rate of 1.4% from 2012.

In 2013, the average contribution in Connecticut was \$5,402 which was slightly higher than the US average of \$5,342. 2013's average contribution of \$5,402 per person is 1.78% lower than the 2012 average contribution of \$5,500 per person. More than one third of Connecticut residents claimed charitable contributions on their 2013 federal tax returns, unchanged from 2012 and 2011 figures.

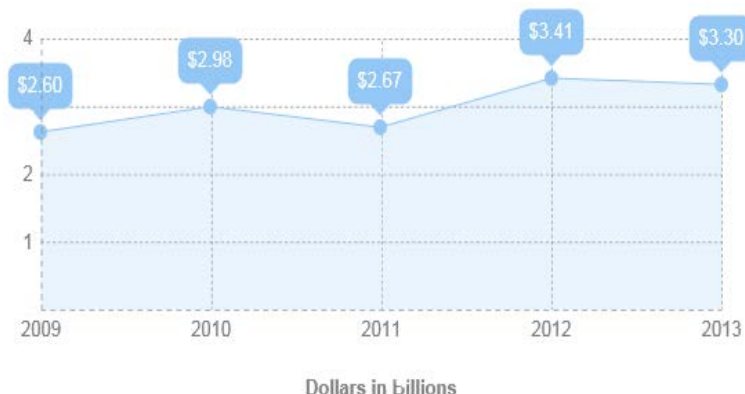
## Context for Connecticut Giving

Using US Census population estimates for 2013, Connecticut collected more per person via income tax revenue than the state of New York. Connecticut collected \$2,330 per person, and New York collected \$2,287 per person.

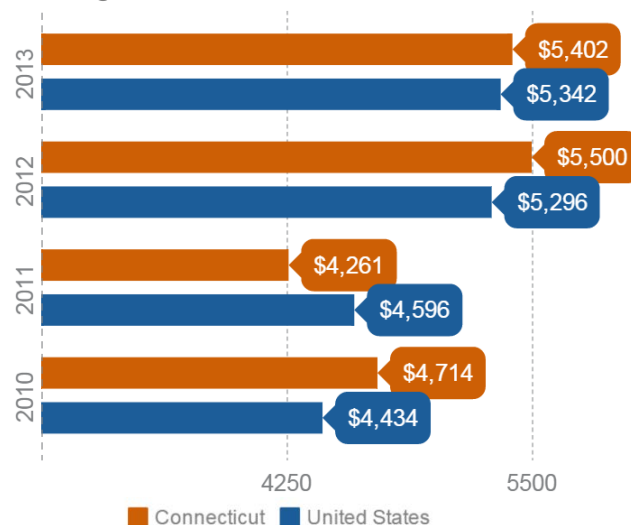
After considering other taxes (sales, property, etc.), the revenue made in Connecticut was \$4,446 per person, \$700 more per person than New York. Connecticut generated \$15.9 billion tax dollars in 2013, with 453 million or 1.9% of the total coming from the income tax.

Source: U.S. Census Bureau, 2013 Annual Survey of State Government Tax Collections.

Connecticut Individual Contributions



Average Contribution Per Person



How Connecticut Stacks Up: Giving by Income Level



## Giving According to Tax Bracket

In 2013, there were 611,470 returns reporting contributions, totaling \$3.3 million. CT residents making \$50-250K represented 66.5% of the total number of returns reporting contributions, and 28.3% of the total dollar value of returns reporting contributions. The average contribution per return for CT residents making \$50-250K was \$2,163.

Those who made greater than \$200K only represented 17.2% of the number of returns reporting contributions in Connecticut, but they represent two thirds of the total dollar value of returns reporting contributions. The average contribution per return for CT residents making greater than \$200K was \$21,099 (Table 3).

Source: IRS, 2015.

## Charitable Bequests Up

In addition to the \$3.3 billion in giving from living Connecticut donors in 2013, another source of charitable giving comes from individuals who make gifts through their wills. Charitable bequests totaled \$352 million in 2013, from a total of 78 CT residents; this is an increase from the \$199 million bequeathed in 2012. This \$199 million in 2012 was from 46 residents, making the average bequest per return in 2013 slightly higher at \$4,514 than it was in 2012 at \$4,321.

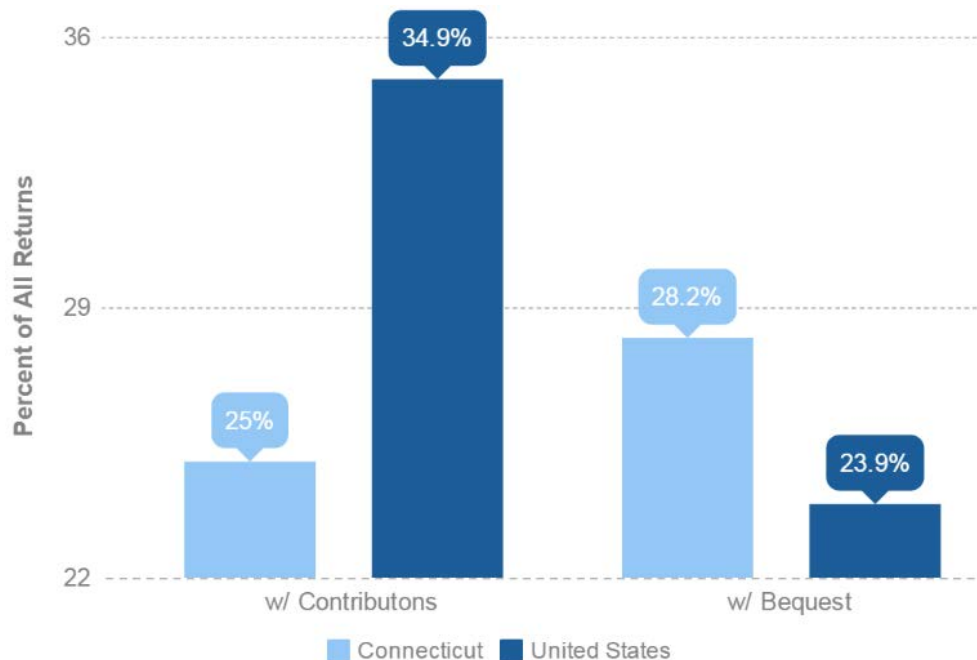
When compared to the 2013 national data, Connecticut's percentage of bequests is slightly higher than the average. 28.2% of Connecticut estate tax returns included a charitable bequest compared to the national average of 23.9%.

**Table 3: Giving in Connecticut According to Income**

		<50K	\$50-75K	\$75-100K	\$100-200K	\$200-500K	\$500-1.0M	>\$1.0M
Total # of Returns	<b>611,470</b>	99,340	98,340	97,040	211,520	79,860	15,640	9,540
Total \$ of Returns	<b>\$3,303,461</b>	\$153,378	\$176,960	\$199,460	\$557,449	\$421,046	\$204,392	\$1,590,776
% of Total #	<b>100%</b>	16.3%	16.1%	15.9%	34.6%	13.1%	2.6%	1.6%
% of Total \$	<b>100%</b>	4.6%	5.4%	6.0%	16.9%	12.7%	6.2%	48.2%
Average Contribution*	<b>\$5,402</b>	\$1,541	\$1,799	\$2,055	\$2,635	\$5,272	\$13,069	\$9,170

Source: IRS, 2015. \*Average contribution (per return).

### Return Characteristics: Returns with Contributions/Bequests



# Foundation Giving



Foundation giving in Connecticut totaled \$999 million in 2013, a 1% or \$10 million decrease from 2012. Connecticut foundation assets totaled \$10.9 billion in 2013, representing a \$2 billion or 22.6% increase from 2012.

**Table 4: Total Giving Percentage Change**

	2012 US	2013 US	Change
Foundations	\$51,823,844	\$55,262,883	6.6%
Individuals	\$198,552	\$195,802	-1.4%
Bequests	\$14,358	\$13,928	-3%
<b>Total</b>	<b>\$52,036,754</b>	<b>\$55,472,613</b>	<b>6.6%</b>

Source: Foundation Center, 2015. IRS, 2015. Dollars in thousands.

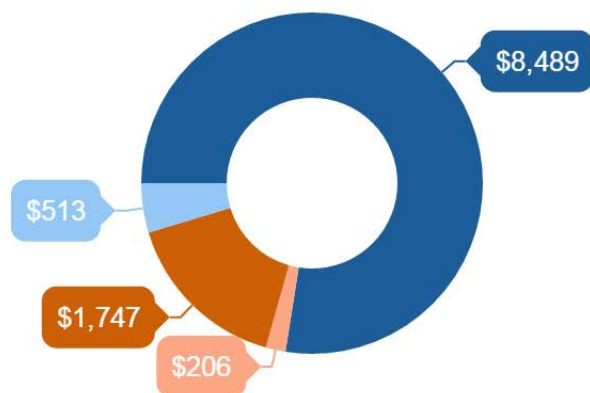
In 2013 Connecticut foundations' grantmaking represented 1.8% of the total US foundation grantmaking and 1.8% of the total number of foundations in the country while representing only 1.4% of the total US foundation assets. The portion of assets held by Connecticut Foundations compared to the US has increased from 1.2% in 2012.

In 2013, Connecticut was home to 1,607 grantmaking foundations, 15% more than 2012. From 2012 to 2013 the number of grantmaking foundations in the US increased by 1.1%. The majority of these foundations are unstaffed with limited assets.

Connecticut's total giving in 2013 primarily came from a relatively small number of grantmakers—the top five Connecticut grantmakers (by giving) provided almost half (49.2%) of the grants awarded. The top five Connecticut foundations by total giving in 2013 were: Boehringer Ingelheim Cares Foundation, Inc., GE Foundation, Dalio Foundation, Inc., Steven A. and Alexandra M. Cohen Foundation, and The Zoom Foundation. All five of these top grantmakers are located in Fairfield County.

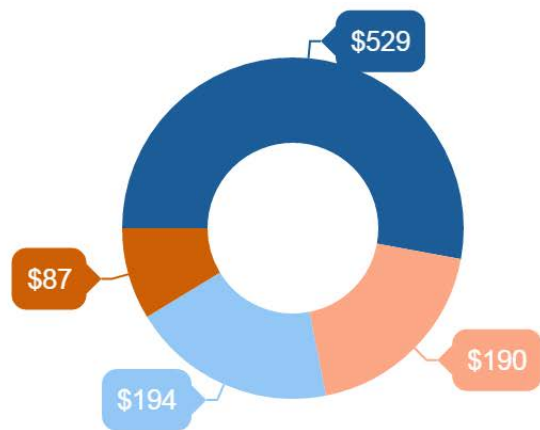
The majority of Connecticut grantmakers (89.4%) had grant portfolios that represented \$500,000 or less in total grant dollars and only accounted for 12.1% of the total foundation grants and 19.9% of total foundation assets (see Table 5 on page 6).

Connecticut Foundations: \$10.9 Billion in Assets



■ Private (77%) ■ Operating (2%) ■ Community (16%)  
■ Corporate (5%)

Connecticut Foundations: \$999.8 Million in Giving



■ Private (53%) ■ Operating (19%) ■ Corporate (19%)  
■ Community (9%)

Dollars in millions



**Table 5: Connecticut Foundations by Total Giving Category**

Total Grants Paid	# of Foundations	% of Total Foundations	Total Giving	% of Total Giving	Total Assets	% of Total Assets
\$25 Million+	8	0.5%	498,000,358	49.8%	2,776,486,568	25.3%
\$10 Million to \$25 Million	5	0.3%	92,925,728	9.3%	1,340,758,235	12.2%
\$5 Million to \$10 Million	15	0.9%	95,887,132	9.6%	1,537,267,809	14%
\$1 Million to \$5 Million	65	4%	139,003,304	13.9%	2,153,197,178	19.7%
\$500,000 to \$1 Million	78	4.9%	453,642,139	5.4%	962,223,807	8.8%
\$100,000 to \$500,000	381	23.7%	86,756,093	8.7%	1,537,048,314	14%
\$50,000 to \$100,000	271	16.9%	18,935,853	1.9%	318,301,486	2.9%
\$25,000 to \$50,000	269	16.7%	9,501,217	1%	175,098,767	1.6%
\$5,000 to \$25,000	358	22.3%	4,826,561	0.5%	131,848,891	1.2%
Under \$5,000	157	9.8%	290,851	0%	25,433,004	0.2%
<b>Total</b>	<b>1,607</b>	<b>100%</b>	<b>\$999,769,236</b>	<b>100%</b>	<b>\$10,957,664,059</b>	<b>100%</b>

Source: Foundation Center, 2015

## Connecticut's Largest Foundations

In 2013, there were 87,142 foundations in the US, with \$55,262,883,393 in total giving, and \$798,176,136,705 in total assets.

Connecticut was ranked 14<sup>th</sup> in the US by number of foundations (1,607) and 10<sup>th</sup> in gifts received. Gifts received is a figure that represents all cash and in-kind contributions made by donors to foundations. In 2013, CT foundations received a fair market value estimate of \$1,406,400,570 from donors. This represents a steady increase from \$602,274,341 in 2009.

Of the 50 largest foundations in the US in 2013, 2 CCP members made the list: Bill and Melinda Gates Foundation was #1 with a total giving figure of \$3,320,725,374, and Boehringer Ingelheim Cares Foundation was #34 with a total giving figure of \$179,977,010.

Source: Foundation Center, 2015.

## Number of Foundations

In 2013, Fairfield County was home to 55.6% of the grantmaking foundations in Connecticut and accounted for nearly 73.8% of the total giving. For the other seven counties combined, the percentage of the number of foundations (44.2%) was higher than the percentage of total giving (26.1%).

Giving in New Haven and Hartford counties increased, while giving in Fairfield and Litchfield counties decline. The remaining counties hovered at relatively the same number. Most notably, Litchfield County's total giving decreased almost a percent.

Without Fairfield County, foundations' total giving would decrease from \$999 million to \$261 million and the state's foundations would only hold \$4.4 billion in assets as opposed to \$10.9 billion. Without Fairfield County, Connecticut would be home to only 713 foundations.

Source: Foundation Center, 2015.

**Table 6: CT-based Foundation Giving by County**

County	#	%	Total Giving	%
Fairfield	894	55.6	738,185,273	73.8
Hartford	306	19	142,234,441	14.2
Litchfield	81	5	12,283,931	1.2
Middlesex	36	2.2	5,378,729	0.5
New Haven	193	12	87,070,800	8.7
New London	61	3.8	9,278,522	0.9
Tolland	20	1.2	688,252	0.1
Windham	16	1	4,649,288	0.5
<b>Total</b>	<b>1,607</b>	<b>100%</b>	<b>\$999,769,236</b>	<b>100%</b>

Source: Foundation Center, 2015.

**Foundation Giving: With & Without Fairfield County**

## Grantmaking by Foundation Type

Of the \$999 million granted in 2013 by Connecticut foundations, 53% was given by private (independent and family) foundations, 38% by operating and corporate foundations, and 9% by community foundations.

Although community foundations represent one percent of grantmakers in Connecticut, in 2013, they accounted for 9% of the total grants due to the nature of community foundations' organizational makeup. In 2013 Connecticut was home to 20 active community foundations and nine were included in the state's Top 100 Grantmakers by assets and eight included by total giving (See Appendices A and B).

Corporate foundations represented 4% of the state's grantmakers, gave 19% of the state's grant dollars, and represented 5% of the assets in 2013.

Operating foundations giving declined from 2012 to 2013, showing the first decline in giving since just after the 2008 financial crisis. The 85 Connecticut operating foundations' assets are barely rising, showing just about a third of a percent increase since 2012; operating foundations' assets in 2013 were \$206.4 million.

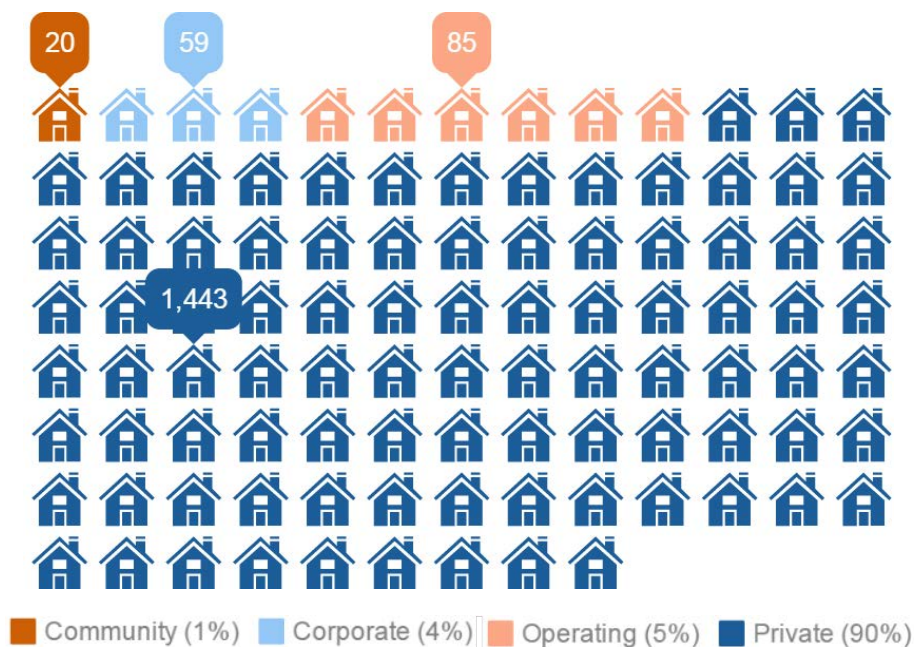
Private foundations represented the vast majority of Connecticut foundations (90%) and they accounted for just over half (53%) of the state's total grant dollars in 2013. Private foundations represented 78% of the state's assets, or nearly

Private foundations have seen slight increases in their figures since 2012, when private foundations represented 52% of grant dollars, and 75% of held assets. Private foundation giving is on the rise (independent foundations figures rising since 2010, and family foundation figures rising since 2009).

### Foundation Types

<b>Independent</b> (Private)	Includes most of the nation's largest foundations. Generally established by individual or family donors, but are no longer governed by individual or family members.
<b>Family</b> (Private)	Established by a family member for grantmaking purposes and governed by a board which includes family members
<b>Operating</b>	Primarily run their own programs, but some also make grants. Generally established by individual donors or donor families or institutions.
<b>Corporate</b>	Established by businesses ranging from major corporations to family-owned shops, although legally separate entities.
<b>Community</b>	Raise funds from the public. Engage in grantmaking primarily within a defined geographic area.

1,607 Connecticut Foundations: By Type



# Community Foundation Giving

Community foundations raise funds from the public and engage in grantmaking focused primarily within a defined geographic area. Connecticut is home to 20 community foundations covering all 169 towns.

In 2013, the combined assets for these community foundations were \$1.7 billion dollars. The 20 community foundations serving Connecticut vary as evidenced by their assets ranging from \$100 thousand to \$810 million. In 2013, their total giving represented \$86.9 million and received \$75.8 million in gifts. Community foundation assets have been steadily increasing over the last 10 years.

Of the 20 Connecticut community foundations 16 have already self-reported their 2014 giving. In 2014, these 16 held \$1.9 billion in assets; just over \$1 billion was unrestricted permanent endowment dollars, \$518.9 million was designated permanent

endowment dollars, and \$112.7 million was permanent endowment scholarship dollars. These 16 community foundations reported just over \$85 million in total giving in 2014.

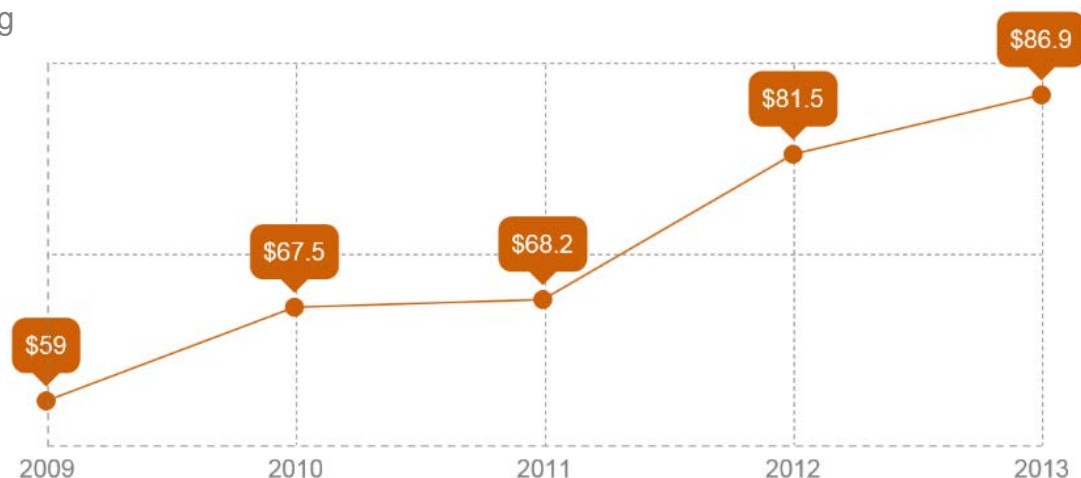
In 2014, donor advised funds granted \$12.5 billion nationally. Donor advised funds are included in community foundation designated permanent endowment dollars and permanent endowment scholarship dollars. Similarly, contributions to donor-advised funds also hit a record high of \$19.7 billion nationally. A donor advised fund is a separately identified fund or account that is maintained, operated, and legally controlled by a sponsoring organization which may include a community foundation, public charity, or a charitable fund associated with a commercial organization such as an investment firm.

Community Foundations in Connecticut

Assets



Giving



Source: Foundation Center, 2015.

Dollars in millions

Giving in Connecticut



## Connecticut Network of Community Foundations

Together 12 CCP members form the [Connecticut Network of Community Foundations \(CNCF\)](#). Membership in this network requires compliance with the Community Foundation National Standards or that the foundation is working towards meeting the standards. The CEOs of these 12 organizations meet regularly to share best practices, build capacity and awareness, and advance a culture of philanthropy statewide.

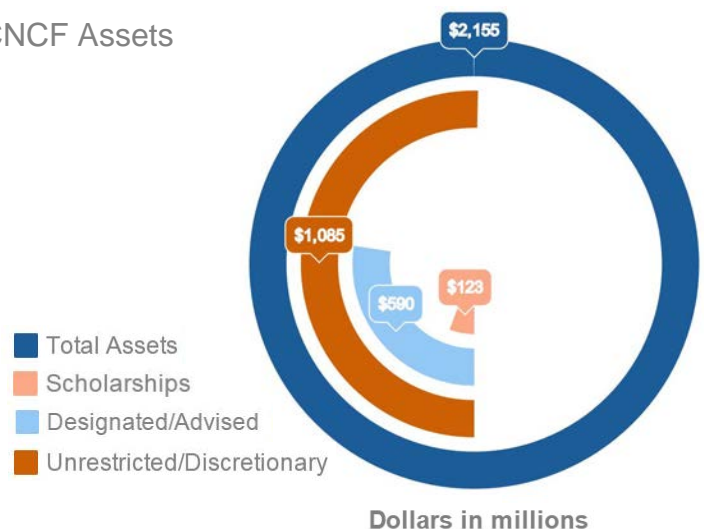
The following analysis of these 12 members uses their 2014 self-reported data. In 2014, the network held \$2.2 billion in assets, and the average percentage of permanently endowed assets 44%.

These community foundations held nearly \$1.1 billion in permanent unrestricted endowment dollars, \$590 million in permanent designated endowments, and \$23 million in scholarship endowment dollars.

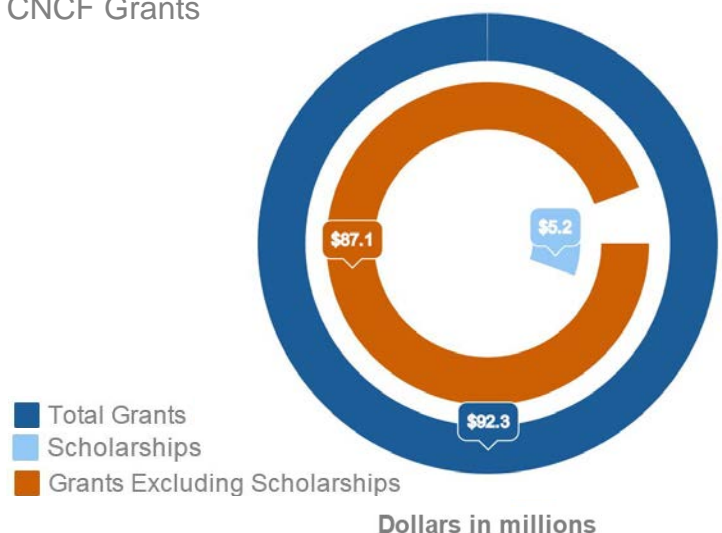
In 2014, \$92.3 million was paid in grants, including \$5.2 million dollars in scholarships. This \$5.2 million was paid across 2,439 scholarships. Grants paid (excluding scholarships) ranged from \$912 thousand, to \$31 million.

These 12 community foundations received \$96.6 million in new gifts, involved 1,809 volunteers throughout the year and created a total of 313 new funds.

CNCF Assets



CNCF Grants



## Corporate Giving

### Corporate Foundation Grantmaking

In 2013, there were 59 corporate foundations in Connecticut. Together these 59 foundations held \$513.9 million in assets, and received \$156.9 million in gifts. On average each corporate foundation held \$8.7 million in assets; this is much higher than the average assets held by independent foundations in 2013 (\$5.8 million). In 2013, corporate foundations giving in Connecticut totaled \$193.9 million.

Connecticut is home to 2.3% of the U.S.'s 2,577 corporate foundations which held \$25.5 billion in assets in 2013 and gave \$5.38 billion in grants. 2013 represents the first year corporate giving has declined in the U.S. in more than 10 years. Giving dropped 1.3% from \$5.46 billion in 2012. These numbers do not represent all corporations, merely those which use foundations as giving vehicles.

Source: Foundation Center, 2015.

### Corporate Industry Stand-Outs

Certain stand-out program allocations occurred in 2014 amongst corporate foundations. The corporate communications industry gave 39% of their dollars to K-12 education compared to an average across corporate industries of 17%. Technology was the corporate industry with the highest median total cash giving to the environment in 2014. However, the utilities industry gave 10% to the environment compared to an average of 4% across corporate industries. Source: CECP, 2015.

### Connecticut Corporation Giving in Whole

68% of corporations in Connecticut have said decisions about corporate giving are made by one person. In terms of issue area, 16% of Connecticut corporations predominantly give to youth organizations. The two main ways corporations engaged locally in Connecticut are by donating time and/or money to local charities (85%) and through donation of company products or services (59%). Source: Liberty Bank, 2015.



## Grantmaking by Subject Area

The top 5 subjects (by dollar value awarded) were education, health, philanthropy and nonprofit management, human services, and arts and culture. The second most popular subject area for grantmaking, health, received \$95 million dollars across 329 grants. By dollar amount, the next three subject areas that benefited from philanthropic dollars (largest to smallest) were: philanthropy and nonprofit management, human services, and arts and culture.

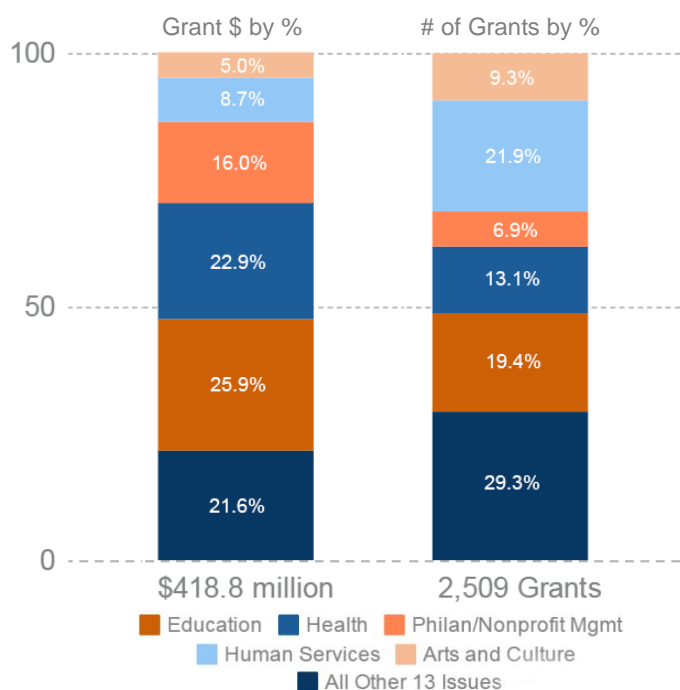
While education continues to receive the highest dollar amount by grantmakers, 2013 highlights that human services is the subject which now receives the highest number of grants. In 2013, Connecticut foundations gave 25.89% of their grantmaking dollars (\$108 million) and 19.4% of their grants (288 grants) to education. In contrast, human services were awarded \$36 million (8.7% of grantmaking dollars) across 549 grants (21.9% of grants).

The subject area that received the highest number of grants was human services with 549 grants awarded in 2013. The next 9 subject areas that received the highest number of grants (largest to smallest) were: Education (488 grants), health (329), arts and culture (233), philanthropy and nonprofit management (174), community and economic development (147), environment and animals (126), and sports and recreation (100). See appendix D for more information.

This analysis is based on all grants of \$10,000 or more awarded by a sample of larger Connecticut foundations. In 2015 the Foundation Center completed their transition to a more inclusive taxonomy for categorizing total giving, adding several major subject categories. Examples of new subject categories are: social sciences, community and economic development, science and engineering and information and communications.

Learn more about the [Foundation Center's Philanthropy Classification System >>](#)

Top 5 Grantmaking Subjects

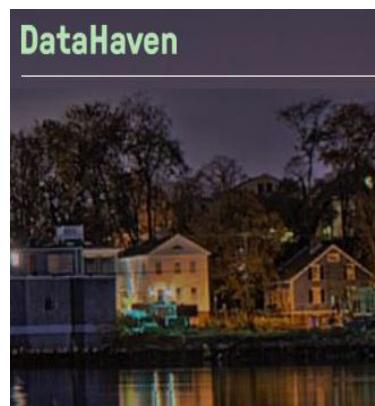


## Data Shapes Philanthropy

The Connecticut Council for Philanthropy along with 36 other funding partners invested in the first ever state-wide [Community Well Being Survey](#).

The report will provide timely, powerful knowledge about challenges and the quality of life across Connecticut inform and shape the work of philanthropy.

In 2015 and 2016, [DataHaven, will release survey results and new reports](#), including an updated and significantly expanded Community Index.



## CCP Members 'On the Map'!

28 CCP members have joined the Get on the Map (GOTM) campaign and have eReported their grants data to the Foundation Center. GOTM captures grantmaking data which is more detailed than reported on the Form 990. GOTM is a partnership between CCP, the Foundation Center, and the Forum of Regional Associations of Grantmakers. A beta version of the map is now available for eReporting members, and all CCP members will have access beginning in early 2016. [Learn more >>](#)

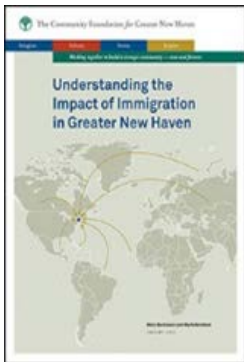


# Funders Making A Difference

## Immigrant Strategic Funders Collaborative

4 CCP members, Fairfield County Community Foundation, Hartford Foundation for Public Giving, Perrin Family Foundation, and the Progreso Latino Fund (a committee-advised fund of The Community Foundation of Greater New Haven) along with two other funding partners, and 14 nonprofit practitioners have recently formed the Immigrant Strategic Funders Collaborative. Together, these 20 organizations are working to enhance their statewide and local efforts to support Connecticut's immigrant families. They were recently granted \$100K from the Open Society Foundation to fund their efforts to prepare for the implementation of DAPA and the expansion of DACA.

## Immigrant Integration



The Community Foundation for Greater New Haven has [a long history of supporting organizations](#) working with immigrants and their families, and as part of this commitment commissioned DataHaven to produce a report.

[Understanding the Impact of Immigration in Greater New Haven \(2015\)](#) highlights the

rapid demographic shift of the region driven by immigration in the past 2 decades and the significant economic contributions, particularly in small business creation, of this diverse population.

Do You Know  
**ALICE?**



## United Way Alice Report

According to the [United Way ALICE Report](#) commissioned by [Connecticut United Ways](#), in partnership with five other states, there are 474,445 households unable to pay for the costs of basic household needs in Connecticut. The ALICE (Asset Limited, Income Constrained, Employed) Report places a spotlight on a large population of residents who work hard, but still struggle to make ends meet. The Report is the most comprehensive depiction of financial need in the state, using data from a variety of sources, including the U.S. Census and the American Community Survey.

- All counties in Connecticut have more than 25 percent of their households living below the ALICE threshold.
- 70 percent of Connecticut towns and cities have more than 20 percent of their households living below the threshold.
- 74 percent of the state's ALICE households are white, though female-headed households, blacks, Hispanics, the disabled, and unskilled recent immigrants are still overrepresented

[Learn more >>](#)

## Rapid Re-Housing + Jobs = Secure Jobs Connecticut



An innovative, collaborative effort to end family homelessness in Connecticut, *Secure Jobs Connecticut*, began this summer across the state. **The Melville Charitable Trust**, along with more than [two dozen funders](#) awarded \$500,000 in grants, with an additional \$200,000 from the Connecticut Department of Housing, to help formerly homeless families obtain and maintain employment. The grants, made as part of the *Secure Jobs Connecticut* two-year pilot initiative, represent state-of-the-art policies set forth to end homelessness by connecting homeless families to housing and to education, training, and support programs that are designed to increase family income through stable, competitive

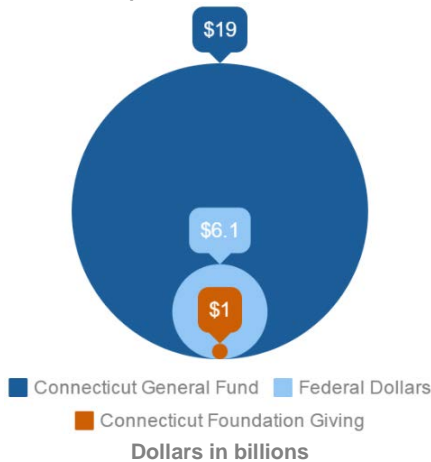
employment. The initiative is projected to help 150 families in the Southwest, South Central, Southeast, Northwest and North Central regions of Connecticut. The *Secure Jobs Connecticut* initiative will enable families to make ends meet and avoid returning to homelessness by supplementing rapid re-housing efforts with the opportunity for a steady income. [Read more >>](#)

# Cross-Sector Collaboration

In times of need the public, private and social profit sectors must all come to the table. Yet, as noted below it is important to remember the proportion of financial resources accessible to each sector. The sharing of knowledge across sectors has raised the level of understanding about each field and enhances collaboration between the sectors.

There are four main ways federal dollars come to the state: direct benefits to individuals, federal dollars in the state budget, payments to vendors for federal contracts, and salaries paid to federal employees working in the state. In fiscal year 2013, expenditures for the Connecticut general fund were \$19 billion, clearly dwarfing the \$999 million given by Connecticut foundations.

State Dollars Surpass Foundation Giving 19 x 1



## Public Policy/Advocacy Trainings

You might know the definition of “Philanthropy,” but do you know what a foundation is? To help policy makers understand the field of philanthropy, CCP President Maggie Osborn, held a skill-building class, *Being Grounded in Philanthropy*, for elected and government officials, their staff, colleagues and partners. The session provided an overview of the role of philanthropy in society to 40 officials. They learned about key events in the development and diversification of the sector, had a look at support infrastructure and reviewed current issues and trends.

Others have benefited from cross-sector trainings. Legislators helped nonprofits hone their advocacy skills at the Fairfield County’s Advocacy Day held this fall. Organized by Connecticut Association of Nonprofits and Fairfield County’s Community Foundation’s Center for Nonprofit Excellence, the event engaged more than 100 nonprofit staff and trustees. [Learn more](#) [#speakupfairfieldcounty >>](#)



Photo: Fairfield County’s Advocacy Day: State Senator Beth Bye; Fairfield County’s Community Foundation President & CEO Juanita James; State Senate Majority Leader Bob Duff.

## 10 Ways Foundations Can Work With the Public Sector

While Foundations cannot replace state funding, the foundation community and CCP partner with government on issues such as regional economic development, energy and climate, workforce development and early childhood issues.

1. Foundations have knowledge and experience on many issues that are of interest to the public sector.
2. Foundations can also support nonpartisan research and analysis, to provide an independent and objective review of a public issue.
3. State and local government and foundations can leverage impact by aligning financial resources and avoid duplication.
4. Foundations can be neutral conveners.
5. Foundations can support and provide technical assistance to state and local policy leaders.
6. Foundations can help states measure and evaluate impact and results.
7. Foundations can provide training for public leadership and skills development for practitioners.
8. When, because of their position or politics, government administrators cannot speak, foundation professionals and trustees can speak for them.
9. Foundations can help in developing strategies for systemic change.
10. Foundations can complement new policy initiatives by supporting valuable community services.



# CCP Members

Connecticut Council for Philanthropy (CCP) has 113 members as of December 2015. Members regularly exchange ideas, experiences, information, and expertise to leverage resources and make their philanthropic efforts more effective. During 2013, the most recent financial year reported, our members held more than \$47.6 billion in assets and paid more than \$4 billion in grants.

## Members by Location

CCP's membership increased 3.7% since last December. The largest concentration of members is in Hartford County at 44.2%, followed by New Haven County at 18.6%. Currently there are no members in Tolland County. 11.6% of CCP's membership is made up of grantmakers located out of state.



Photo: CCP's 2015 Annual Luncheon and Philanthropy Awards. Kathy Luria, Webster Bank; Mary Harrison and Delia Arellano-Weddleton, Nellie Mae Education Foundation.

## Associate and Professional Membership

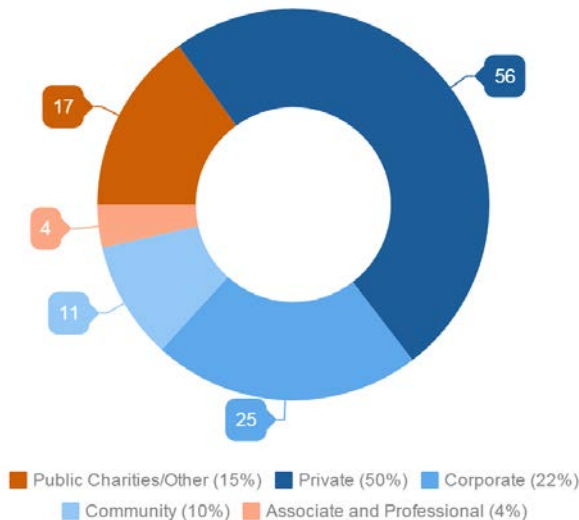
Starting in 2015 CCP began offering an associate and professional membership open to professionals and organizations serving the philanthropic sector. In 2015 3.5% of CCP's membership was made up of associate and professional members.

CCP growth plans aim to increase membership in this category as partnerships across sectors become increasingly important. The more complex our challenges become, the more strategic our strategies must be. The associate and professional membership is CCP's response to an increasing need for cross-sector collaboration.

## Expanding Reach from Hartford

CCP was founded in Hartford in 1969, and became a regional association in partnership with the Forum of Regional Associations of Grantmakers in 1995. CCP's focus now, through membership, leadership, and sustainability is to draw in more philanthropic colleagues from Fairfield County.

## Members by Funder Type



## Members by Location





# Quick Facts: Giving in Connecticut

**\$999.8  
Million  
Granted by  
Connecticut  
Foundations**

**Connecticut  
Foundation  
Assets Up  
22.6% to  
\$10.9 Billion**

**\$352.1  
Million in  
Gifts via  
78  
Estates**

**#1  
Average  
Household  
Income**

**\$3.3  
Billion  
Given via  
611,470  
Returns**

## What do Connecticut Foundations look like?

Source: Foundation Center, 2015 research of 2013 data. Compared with 2014 research of 2012 data.

- 1,607** Number of foundations in Connecticut – ↑15 from 2012
- \$86.9 million** Total giving by all (20) community foundations in Connecticut
- \$1.7 billion** Total assets held by all (20) community foundation in Connecticut
- \$10.9 billion** Assets of Connecticut foundations (1.4% of \$798 billion in the US) ↑ from \$8.9 billion in 2013
- \$1.4 billion** Gifts received by Connecticut foundations (2.5% of the nearly \$49 billion in the US) – ↑ 0.7% (\$952.7 million) in 2012
- \$999.8 million** Total giving by Connecticut foundations (1.8% of the \$55 billion in the US)
  - #15** in total giving (includes grants paid to organizations/individuals, and employee matching gifts)
  - #20** in total assets
  - #10** in gifts received (includes all cash and in-kind contributions made by donors to foundations)
- \$3.8 billion** Assets of 15 highest ranked (by assets) Connecticut-based CCP members
- \$439.5 million** Total giving of 15 highest ranked (by total giving) Connecticut-based CCP members

## What do Connecticut individuals give through their estates?

Based on IRS returns for estates settled in 2013, compared with 2012 information.

- \$352.1 million** Charitable gifts made through 78 Connecticut estates (28% of 277 filers – US average 23.9%)
- \$13.9 million** Average estate settled in Connecticut (US average \$13.1 million)
- \$4.5 million** Average bequest of individuals who included a bequest in their estate (US average \$5.5 million)

## What do Connecticut individuals give?

Based on the itemizer information from 2013 IRS tax returns, compared with 2012 information.

- #1** in average household income (CT \$88,804 – US \$61,806) – CT ↓ 2.8% (\$91,371 in 2012) (Adjusted gross income divided by # of returns reporting contributions)
- #2** per capita income (CT \$47,972 – US \$31,368)
- #3** in percent of returns with itemized contribution deductions (34.9%)
- #22** in average contribution (CT \$5,401 – US \$5,342)
- #16** in average contribution for those with income greater than \$200,000 (CT \$22,099 – US \$18,910)
- #24** in amount contributed as a percent of Adjusted Gross Income
- \$3.3 billion** Charitable giving in Connecticut by a total of 611,470 returns reporting contributions (34.9% of 1.75 million CT filers – US average 25%) – CT ↓ 1.5% CT from 2012

# Afterword

## Where We Are

The definition of philanthropy is “the desire to promote the welfare of others, expressed especially by the generous donation of money to good causes.” So if in fact a foundation or individual is donating to any cause that is promoting the welfare of others and serving the public good then they are meeting the definition of philanthropy.

The mission of the Connecticut Council for Philanthropy is to go beyond that definition and ask our members to think about the effectiveness of their philanthropy, to go beyond just doing good but to do the most good possible. CCP’s members are foundations (private, corporate, community), business and corporate giving programs, federated funds, bank trusts, donor-advised funds, individual philanthropists and those serving the philanthropic sector. Our members share a commitment to promoting philanthropy, fostering collaboration and advancing public policy by Connecticut, in Connecticut. The only way this is feasible for individuals, partners and philanthropic organizations is for them to engage in the work together—learning, leveraging and challenging one another.

### Is Making Some Impact, Enough Impact?

CCP welcomes its members and partners to continue to come together, build relationships with one another, and weave resources and investments together for greater impact for the public good. We need to know one another, our communities and our work to do better work.

“The numbers represented in this report all have faces and stories...”

The numbers represented in this report all have faces and stories whether it be the family who now has medical care or safe housing, the artist who seeks joy in music shared with others or the family philanthropist inspired by their forefathers sacrifices and their great fortune.

These are the stories of immigrants, workers, families, communities and the people of

Connecticut with whom we seek to do some good. Let us work hard to do more than just good, let us seek to do the most good.

### You Will Help Us Get There

Knowing who is doing what and where with their grantmaking is a basic way to begin and yet this still remains a challenge for the field. We have been working to improve the reporting and tracking of data through the *Get on the Map* campaign in partnership with the Foundation Center, our national data partner. We celebrate the almost 30 CCP members who are on our CT Grantmaking Map.

“Knowing who is doing what and where is a basic way to begin and yet still remains a challenge for the field.”

If you are a foundation and are not yet on the map or would like to know more about this national data project, please [visit our website](#). This along with other work being engaged in by the Forum of Regional Associations of Grantmakers will enable future giving reports to pull from more detailed and timely data to understand the impact of our grantmaking and to benchmark our local work against others. This weaving of resources requires foundations to not only think about their work’s impact, but also the work of others. We must recognize the complexity of issues where we seek to have impact. In the words of Audre Lorde, “There is no single-issue struggle because we do not live single-issue lives.” These types of issues—workforce, immigration, and economic sustainability—are important and that’s why good, really isn’t good enough.

“‘There is no single-issue struggle because we do not live single-issue lives.’ These types of issues—workforce, immigration and economic sustainability—are important and that’s why good, really isn’t good enough.”

## Appendix A: Top 100 Connecticut Grantmakers by Total Giving, 2013 [1-50]

Grantmaker	Total Giving	County	Fiscal Year End
1. <b>Boehringer Ingelheim Cares Foundation, Inc.</b>	<b>\$179,977,010</b>	<b>Fairfield</b>	<b>12/31/2013</b>
2. GE Foundation	\$124,512,065	Fairfield	12/31/2013
3. Dalio Foundation, Inc.	\$108,725,643	Fairfield	12/31/2013
4. Steven A. and Alexandra M. Cohen Foundation	\$43,548,162	Fairfield	12/31/2013
5. <b>The ZOOM Foundation</b>	<b>\$35,000,000</b>	<b>Fairfield</b>	<b>6/30/2013</b>
6. <b>Newman's Own Foundation</b>	<b>\$30,054,000</b>	<b>Hartford</b>	<b>12/31/2013</b>
7. <b>Hartford Foundation for Public Giving</b>	<b>\$29,473,176</b>	<b>Hartford</b>	<b>12/31/2013</b>
8. <b>Seedlings Foundation</b>	<b>\$26,105,163</b>	<b>New Haven</b>	<b>12/31/2013</b>
9. <b>The Community Foundation for Greater New Haven</b>	<b>\$23,670,346</b>	<b>New Haven</b>	<b>12/31/2013</b>
10. Smith Richardson Foundation, Inc.	\$20,695,903	Fairfield	12/31/2013
11. <b>United Way of Central &amp; Northeastern Connecticut</b>	<b>\$22,478,344</b>	<b>Hartford</b>	<b>6/30/2013</b>
12. <b>Travelers &amp; the Travelers Foundation</b>	<b>\$19,643,894</b>	<b>Hartford</b>	<b>12/31/2013</b>
13. <b>Fairfield County's Community Foundation, Inc.</b>	<b>\$18,587,793</b>	<b>Fairfield</b>	<b>6/30/2013</b>
14. <b>Connecticut Bar Foundation</b>	<b>\$15,662,008</b>	<b>Hartford</b>	<b>12/31/2013</b>
15. <b>The Tow Foundation, Inc.</b>	<b>\$12,349,166</b>	<b>Fairfield</b>	<b>12/31/2013</b>
16. Deloitte Foundation	\$7,524,321	Fairfield	6/1/2013
17. The Sage Foundation, Inc.	\$7,297,388	Fairfield	12/31/2013
18. Royce Family Fund, Inc.	\$7,238,041	Fairfield	12/31/2013
19. <b>The Grossman Family Foundation</b>	<b>\$7,131,021</b>	<b>Fairfield</b>	<b>12/31/2013</b>
20. <b>The Louis Calder Foundation</b>	<b>\$7,126,367</b>	<b>Fairfield</b>	<b>10/31/2013</b>
21. Say Yes To Education Foundation	\$7,123,500	Hartford	12/31/2013
22. The Seidenberg Family Foundation, Inc.	\$6,801,315	Fairfield	12/31/2013
23. The Smart Family Foundation, Inc.	\$6,663,076	Fairfield	12/31/2013
24. <b>The Melville Charitable Trust</b>	<b>\$6,206,183</b>	<b>New Haven</b>	<b>12/31/2013</b>
25. <b>Aetna Foundation, Inc.</b>	<b>\$6,022,392</b>	<b>Hartford</b>	<b>12/31/2013</b>
26. The Brightwater Fund	\$5,900,787	Fairfield	6/30/2013
27. The Children's Investment Fund Foundation	\$5,848,686	Hartford	12/31/2013
28. Halvorsen Family Foundation	\$5,814,570	Fairfield	11/30/2013
29. <b>Lone Pine Foundation, Inc.</b>	<b>\$5,555,113</b>	<b>Fairfield</b>	<b>12/31/2013</b>
30. The Educational Foundation of America	\$5,363,354	Fairfield	12/31/2013
31. <b>United Way of Coastal Fairfield County</b>	<b>\$5,218,868</b>	<b>Fairfield</b>	<b>6/30/2013</b>
32. Stanley Family Foundation	\$5,140,000	Fairfield	12/31/2013
33. The Bauer Foundation	\$4,682,500	Fairfield	12/31/2013
34. The Tudor Foundation, Inc.	\$4,641,518	Fairfield	12/31/2013
35. S&L Marx Foundation, Inc.	\$4,139,300	Fairfield	12/31/2013
36. <b>United Way of Greater New Haven</b>	<b>\$3,908,247</b>	<b>Hartford</b>	<b>12/31/2013</b>
37. <b>CIGNA Foundation</b>	<b>\$3,709,214</b>	<b>Hartford</b>	<b>12/31/2013</b>
38. The Jane Coffin Childs Memorial Fund for Medical Research	\$3,750,662	New Haven	6/30/2013
39. <b>Community Foundation of Eastern Connecticut</b>	<b>\$3,490,099</b>	<b>New London</b>	<b>12/31/2013</b>
40. The Pitney Bowes Foundation	\$3,450,417	Fairfield	12/31/2013
41. <b>The Connecticut Community Foundation</b>	<b>\$3,448,784</b>	<b>New Haven</b>	<b>12/31/2013</b>
42. <b>William Caspar Graustein Memorial Fund</b>	<b>\$3,393,127</b>	<b>New Haven</b>	<b>12/31/2013</b>
43. <b>Emily Hall Tremain Foundation, Inc.</b>	<b>\$3,369,269</b>	<b>New Haven</b>	<b>12/31/2013</b>
44. <b>American Savings Foundation</b>	<b>\$3,197,509</b>	<b>Hartford</b>	<b>12/31/2013</b>
45. The William H. Pitt Foundation, Inc.	\$3,114,210	Fairfield	9/30/2013
46. 1772 Foundation, Inc.	\$3,066,490	Windham	12/31/2013
47. Maranatha Foundation, Inc.	\$2,974,250	Fairfield	12/31/2013
48. The Maximilian E. & Marion O. Hoffman Foundation, Inc.	\$2,859,950	Hartford	6/30/2014
49. <b>The Community Foundation of Northwest Connecticut, Inc.</b>	<b>\$2,858,397</b>	<b>Litchfield</b>	<b>12/31/2013</b>
50. <b>Connecticut Health Foundation, Inc.</b>	<b>\$2,776,817</b>	<b>Hartford</b>	<b>12/31/2013</b>

CCP members are bolded.

## Appendix A: Top 100 Connecticut Grantmakers by Total Giving, 2013 [51-100]

Grantmaker	Total Giving	County	Fiscal Year End
<b>51. Bank of America</b>	<b>\$2,721,185</b>	<b>Hartford</b>	<b>12/31/2013</b>
52. The Bok Family Foundation	\$2,677,500	Litchfield	12/31/2013
<b>53. Jewish Community Foundation of Greater Hartford</b>	<b>\$2,622,966</b>	<b>Hartford</b>	<b>6/30/2013</b>
54. The Chester Kitchings Family Foundation	\$2,506,000	Middlesex	12/31/2013
55. The Lawrence A. Bossidy Foundation	\$2,465,716	Fairfield	12/31/2013
56. Joel E. Smilow Charitable Trust	\$2,297,931	Fairfield	12/31/2013
57. James R. and Frances H. Berger Foundation	\$2,159,006	Fairfield	12/31/2013
58. Hamm Family Foundation Inc.	\$2,141,637	New London	12/31/2013
59. Twenty-Seven Foundation	\$2,127,000	Hartford	12/31/2013
<b>60. The People's United Community Foundation, Inc.</b>	<b>\$2,126,944</b>	<b>Fairfield</b>	<b>12/31/2013</b>
<b>61. SBM Charitable Foundation, Inc.</b>	<b>\$2,109,543</b>	<b>Hartford</b>	<b>12/31/2013</b>
62. The William T. Morris Foundation, Inc.	\$2,100,500	Fairfield	6/30/2013
63. The Vranos Family Foundation	\$2,089,480	Fairfield	12/31/2013
64. Rosenthal Family Foundation	\$2,060,373	Fairfield	12/31/2013
<b>65. The Donaghue Foundation</b>	<b>\$2,051,989</b>	<b>Hartford</b>	<b>12/31/2013</b>
66. The Elinor Patterson Baker Foundation	\$1,870,000	Fairfield	5/31/2013
67. The Meredith and Whitney George Family Foundation, Inc.	\$1,826,000	Fairfield	10/31/2013
68. The Harold W. McGraw, Jr. Family Foundation, Inc.	\$1,820,488	Fairfield	12/31/2013
69. Vince & Linda McMahon Family Foundation, Inc.	\$1,804,155	Fairfield	12/31/2013
70. Richard and Ellen Richman Private Family Foundation	\$1,771,093	Fairfield	12/31/2013
71. Silver Family Foundation	\$1,762,696	Fairfield	6/30/2013
72. The ALFA Foundation	\$1,758,333	Fairfield	12/31/2013
73. The Lehrman Institute	\$1,739,500	Fairfield	7/31/2013
74. Viking Global Foundation Inc.	\$1,724,085	Fairfield	12/31/2013
<b>75. The Per and Astrid Heidenreich Family Foundation</b>	<b>\$1,689,750</b>	<b>Fairfield</b>	<b>12/31/2013</b>
76. The Huisking Foundation, Inc.	\$1,646,000	New Haven	12/31/2013
77. The John and Polly Sparks Foundation	\$1,569,638	Hartford	11/30/2013
78. Alexion Complement Foundation	\$1,489,970	New Haven	12/31/2013
79. Henry E. Niles Foundation	\$1,472,000	Fairfield	12/31/2013
80. The Meriden Foundation	\$1,471,646	New Haven	12/31/2013
81. Charles R. Wood Foundation	\$1,469,319	Fairfield	12/31/2013
82. Frank Loomis Palmer Fund	\$1,418,046	Hartford	7/31/2013
<b>83. Valley Community Foundation</b>	<b>\$1,375,388</b>	<b>New Haven</b>	<b>12/31/2013</b>
<b>84. Children's Fund of Connecticut</b>	<b>\$1,358,200</b>	<b>Hartford</b>	<b>9/30/2013</b>
85. The Robbins Family Foundation	\$1,283,365	Fairfield	12/31/2013
<b>86. The Hampshire Foundation</b>	<b>\$1,265,758</b>	<b>Hartford</b>	<b>12/31/2013</b>
87. William & Lynda Steere Foundation	\$1,240,650	Fairfield	12/31/2013
88. The Orchard Farm Foundation	\$1,237,780	Fairfield	12/31/2013
89. Barnes Group Foundation Inc.	\$1,210,440	Hartford	12/31/2013
<b>90. Main Street Community Foundation</b>	<b>\$1,209,538</b>	<b>Hartford</b>	<b>12/31/2013</b>
91. Allison Foundation Inc.	\$1,200,000	Fairfield	5/31/2013
<b>92. NewAlliance Foundation, Inc.</b>	<b>\$1,190,000</b>	<b>New Haven</b>	<b>12/31/2013</b>
93. The Aronson Family Foundation	\$1,175,287	Fairfield	12/31/2013
94. The Daphne Seybolt Culpeper Memorial Foundation, Inc.	\$1,122,670	Fairfield	12/31/2013
95. Laura J. Niles Foundation	\$1,120,500	Fairfield	12/31/2013
96. The George Link, Jr. Charitable Trust	\$1,101,660	Fairfield	12/31/2013
97. Betsy and Jesse Fink Foundation	\$1,094,500	Fairfield	12/31/2013
98. John & Evelyn Kossak Foundation Inc.	\$1,083,000	Fairfield	12/31/2013
99. The October Hill Foundation	\$1,078,228	Fairfield	12/31/2013
100. The Goldstone Family Foundation	\$1,056,775	Fairfield	12/31/2013

CCP members are bolded.



## Appendix B: Top 100 Connecticut Grantmakers by Total Assets, 2013 [1-50]

Grantmaker	Assets	County	Fiscal Year End
1. <b>Hartford Foundation for Public Giving</b>	<b>\$922,682,005</b>	<b>Hartford</b>	<b>12/31/2013</b>
2. Dalio Foundation, Inc.	\$842,052,652	Fairfield	12/31/2013
3. <b>The ZOOM Foundation</b>	<b>\$738,246,659</b>	<b>Fairfield</b>	<b>6/30/2013</b>
4. Smith Richardson Foundation, Inc.	\$521,570,780	Fairfield	12/31/2013
5. <b>The Community Foundation for Greater New Haven</b>	<b>\$434,050,752</b>	<b>New Haven</b>	<b>12/31/2013</b>
6. Stanley Family Foundation	\$297,125,778	Fairfield	12/31/2013
7. Steven A. and Alexandra M. Cohen Foundation	\$283,079,949	Fairfield	12/31/2013
8. <b>Newman's Own Foundation</b>	<b>\$222,822,875</b>	<b>Hartford</b>	<b>12/31/2013</b>
9. <b>The Tow Foundation, Inc.</b>	<b>\$215,396,249</b>	<b>Fairfield</b>	<b>12/31/2013</b>
10. The Smart Family Foundation, Inc.	\$200,592,245	Fairfield	12/31/2013
11. The Educational Foundation of America	\$174,755,412	Fairfield	12/31/2013
12. <b>The Louis Calder Foundation</b>	<b>\$166,483,274</b>	<b>Fairfield</b>	<b>10/31/2013</b>
13. <b>The Grossman Family Foundation</b>	<b>\$160,631,222</b>	<b>Fairfield</b>	<b>12/31/2013</b>
14. <b>Fairfield County's Community Foundation, Inc.</b>	<b>\$159,971,017</b>	<b>Fairfield</b>	<b>6/30/2013</b>
15. <b>The Melville Charitable Trust</b>	<b>\$156,847,227</b>	<b>New Haven</b>	<b>12/31/2013</b>
16. The Children's Investment Fund Foundation	\$141,031,139	Hartford	12/31/2013
17. <b>William Caspar Graustein Memorial Fund</b>	<b>\$113,687,201</b>	<b>New Haven</b>	<b>12/31/2013</b>
18. The Sage Foundation, Inc.	\$113,116,717	Fairfield	12/31/2013
19. <b>Connecticut Health Foundation, Inc.</b>	<b>\$112,680,825</b>	<b>Hartford</b>	<b>12/31/2013</b>
20. Royce Family Fund, Inc.	\$109,988,546	Fairfield	12/31/2013
21. <b>The Connecticut Community Foundation</b>	<b>\$92,717,899</b>	<b>New Haven</b>	<b>12/31/2013</b>
22. <b>Jewish Community Foundation of Greater Hartford</b>	<b>\$88,819,486</b>	<b>Hartford</b>	<b>6/30/2013</b>
23. <b>American Savings Foundation</b>	<b>\$87,111,382</b>	<b>Hartford</b>	<b>12/31/2013</b>
24. <b>Emily Hall Tremain Foundation, Inc.</b>	<b>\$86,804,932</b>	<b>New Haven</b>	<b>12/31/2013</b>
25. S&L Marx Foundation, Inc.	\$86,243,940	Fairfield	12/31/2013
26. The William H. Pitt Foundation, Inc.	\$84,175,785	Fairfield	9/30/2013
27. 1772 Foundation, Inc.	\$81,241,891	Windham	12/31/2013
28. <b>The Community Foundation of Northwest Connecticut, Inc.</b>	<b>\$80,715,242</b>	<b>Litchfield</b>	<b>12/31/2013</b>
29. <b>Seedlings Foundation</b>	<b>\$73,172,449</b>	<b>New Haven</b>	<b>12/31/2013</b>
30. Daniel P. and Grace I. Tully Charitable Trust	\$71,025,456	Fairfield	11/30/2013
31. <b>The Donaghue Foundation</b>	<b>\$69,209,336</b>	<b>Hartford</b>	<b>12/31/2013</b>
32. The Maximilian E. & Marion O. Hoffman Foundation, Inc.	\$65,203,294	Hartford	6/30/2014
33. Grace Farms Foundation Inc.	\$58,646,637	Fairfield	12/31/2011
34. The Chester Kitchings Family Foundation	\$57,890,643	Middlesex	12/31/2013
35. The John and Polly Sparks Foundation	\$55,906,315	Hartford	11/30/2013
36. The Harold W. McGraw, Jr. Family Foundation, Inc.	\$55,872,719	Fairfield	12/31/2013
37. The Bok Family Foundation	\$54,439,101	Litchfield	12/31/2013
38. The Jane Coffin Childs Memorial Fund for Medical Research	\$53,070,898	New Haven	6/30/2013
39. The William T. Morris Foundation, Inc.	\$52,380,352	Fairfield	6/30/2013
40. <b>Community Foundation of Eastern Connecticut</b>	<b>\$51,695,447</b>	<b>New London</b>	<b>12/31/2013</b>
41. <b>The People's United Community Foundation, Inc.</b>	<b>\$50,922,963</b>	<b>Fairfield</b>	<b>12/31/2013</b>
42. Twenty-Seven Foundation	\$50,401,692	Hartford	12/31/2013
43. <b>Aetna Foundation, Inc.</b>	<b>\$47,109,231</b>	<b>Hartford</b>	<b>12/31/2013</b>
44. <b>Community Foundation of Greater New Britain</b>	<b>\$44,652,863</b>	<b>Hartford</b>	<b>12/31/2013</b>
45. The Elinor Patterson Baker Foundation	\$43,963,294	Fairfield	5/31/2013
46. Say Yes To Education Foundation	\$42,236,409	Hartford	12/31/2013
47. <b>Lone Pine Foundation, Inc.</b>	<b>\$40,469,764</b>	<b>Fairfield</b>	<b>12/31/2013</b>
48. <b>SBM Charitable Foundation, Inc.</b>	<b>\$40,043,759</b>	<b>Hartford</b>	<b>12/31/2013</b>
49. The Meredith and Whitney George Family Foundation, Inc.	\$38,591,767	Fairfield	10/31/2013
50. Halvorsen Family Foundation	\$38,150,429	Fairfield	11/30/2013

CCP members are bolded.

## Appendix B: Top 100 Connecticut Grantmakers by Total Assets, 2013 [51-100]

Grantmaker	Assets	County	Fiscal Year End
51. The ALFA Foundation	\$36,952,656	Fairfield	12/31/2013
52. Charles R. Wood Foundation	\$35,903,519	Fairfield	12/31/2013
53. <b>United Way of Central &amp; Northeastern Connecticut</b>	<b>\$35,195,933</b>	<b>Hartford</b>	<b>6/30/2013</b>
54. The Huisling Foundation, Inc.	\$35,090,372	New Haven	12/31/2013
55. Frank Loomis Palmer Fund	\$33,463,416	Hartford	7/31/2013
56. <b>Children's Fund of Connecticut</b>	<b>\$33,457,109</b>	<b>Hartford</b>	<b>9/30/2013</b>
57. <b>Main Street Community Foundation</b>	<b>\$33,334,109</b>	<b>Hartford</b>	<b>12/31/2013</b>
58. The Michael & Carol Lowenstein Foundation Inc.	\$32,487,566	Fairfield	10/31/2013
59. <b>NewAlliance Foundation, Inc.</b>	<b>\$31,592,866</b>	<b>New Haven</b>	<b>12/31/2013</b>
60. The Diebold Foundation, Inc.	\$31,417,587	Litchfield	12/31/2013
61. Henry E. Niles Foundation	\$30,716,372	Fairfield	12/31/2013
62. <b>The Common Sense Fund</b>	<b>\$30,641,671</b>	<b>Fairfield</b>	<b>12/31/2013</b>
63. <b>Boehringer Ingelheim Cares Foundation, Inc.</b>	<b>\$30,640,335</b>	<b>Fairfield</b>	<b>12/31/2013</b>
64. The George Link, Jr. Charitable Trust	\$30,509,668	Fairfield	12/31/2013
65. The Shumway Foundation	\$28,467,915	Fairfield	12/31/2013
66. <b>The Goodnow Fund</b>	<b>\$27,767,807</b>	<b>Fairfield</b>	<b>12/31/2013</b>
67. Rosenthal Family Foundation	\$27,540,761	Fairfield	12/31/2013
68. <b>Foundation for Community Health</b>	<b>\$26,695,293</b>	<b>Litchfield</b>	<b>12/31/2013</b>
69. The Goldstone Family Foundation	\$26,528,920	Fairfield	12/31/2013
70. <b>Universal Health Care Foundation of Connecticut</b>	<b>\$26,322,485</b>	<b>New Haven</b>	<b>12/31/2013</b>
71. Arthur W. Perdue Foundation, Inc.	\$25,842,754	Fairfield	12/31/2013
72. <b>Eversource and Eversource Energy Foundation</b>	<b>\$25,687,383</b>	<b>Hartford</b>	<b>12/31/2013</b>
73. The Bauer Foundation	\$24,610,065	Fairfield	12/31/2013
74. Laura J. Niles Foundation	\$24,463,572	Fairfield	12/31/2013
75. Garden Homes Fund	\$24,335,032	Fairfield	12/31/2013
76. <b>J. Walton Bissell Foundation, Inc.</b>	<b>\$24,210,431</b>	<b>Hartford</b>	<b>12/31/2013</b>
77. GE Foundation	\$24,057,981	Fairfield	12/31/2013
78. The Daniell Family Foundation Inc.	\$23,935,711	Hartford	12/31/2013
79. The Meriden Foundation	\$23,899,208	New Haven	12/31/2013
80. <b>The Hampshire Foundation</b>	<b>\$22,928,294</b>	<b>Hartford</b>	<b>12/31/2013</b>
81. The Goldring Family Foundation, Inc.	\$22,550,568	Fairfield	12/31/2013
82. The Goergen Foundation, Inc.	\$22,234,799	Fairfield	12/31/2013
83. <b>Ensworth Charitable Foundation</b>	<b>\$21,787,410</b>	<b>Hartford</b>	<b>5/31/2013</b>
84. Bridgemill Foundation	\$21,753,578	Fairfield	12/31/2013
85. Ner Tzion Foundation	\$21,673,224	Fairfield	12/31/2013
86. <b>Tauck Family Foundation, Inc.</b>	<b>\$21,346,803</b>	<b>Fairfield</b>	<b>12/31/2013</b>
87. The Martino Family Foundation	\$21,008,973	Fairfield	12/31/2013
88. The E. Matilda Ziegler Foundation for the Blind, Inc.	\$20,798,259	Fairfield	12/31/2013
89. Robert E. Leet & Clara Guthrie Patterson Trust	\$20,456,217	Hartford	1/31/2014
90. <b>Katharine Matthies Foundation</b>	<b>\$19,268,574</b>	<b>Hartford</b>	<b>12/31/2013</b>
91. Betsy and Jesse Fink Foundation	\$19,266,039	Fairfield	12/31/2013
92. Silver Family Foundation	\$19,213,061	Fairfield	6/30/2013
93. Yvette & Arthur Eder Charitable Foundation Trust	\$19,013,550	New Haven	12/31/2013
94. John T. and Jane A. Wiederhold Foundation	\$18,584,465	Litchfield	6/30/2013
95. The Daphne Seybolt Culpeper Memorial Foundation, Inc.	\$18,203,261	Fairfield	12/31/2013
96. <b>The Perrin Family Foundation</b>	<b>\$17,946,305</b>	<b>Fairfield</b>	<b>12/31/2013</b>
97. <b>Valley Community Foundation</b>	<b>\$17,755,188</b>	<b>New Haven</b>	<b>12/31/2013</b>
98. <b>The Fund for Greater Hartford</b>	<b>\$17,415,043</b>	<b>Hartford</b>	<b>12/31/2013</b>
99. James R. and Frances H. Berger Foundation	\$17,298,260	Fairfield	12/31/2013
100. The Pascualano Foundation	\$17,197,983	Fairfield	12/31/2013

CCP members are bolded.

# Appendix C: Connecticut Council for Philanthropy Members [A-H]

Members are listed alphabetically as of December, 2015.

Grantmaker	Assets	Total Giving	County	Fiscal Year End
1. Aetna Foundation & Aetna	\$47,109,231	\$6,022,392	Hartford	12/31/2013
2. Ahearn Family Foundation	\$8,849,325	\$237,223	*	12/31/2013
3. Paul J. Aicher Foundation (Everyday Democracy)	\$7,470,570	\$20,000	Hartford	12/31/2013
4. American Savings Foundation	\$87,111,382	\$3,197,509	Hartford	12/31/2013
5. Aurora Women and Girls Foundation	\$467,929	\$75,000	Hartford	12/31/2013
6. Bank of America	—	\$2,721,185	Hartford	12/31/2013
7. The Barnes Foundation	\$9,409,178	\$315,000	Hartford	12/31/2013
8. BeFoundation	\$10,199,590	\$20,894	Fairfield	12/31/2013
9. Berkshire Taconic Community Foundation~	\$117,720,018	\$8,122,051	*	12/31/2013
10. J. Walton Bissell Foundation	\$24,210,431	\$895,300	Hartford	12/31/2013
11. Boehringer Ingelheim Cares Foundation	\$30,640,335	\$179,977,010	Fairfield	12/31/2013
12. The Peter and Carmen Lucia Buck Foundation	\$332,138,032	\$12,899,727	*	6/30/2013
13. The Louis Calder Foundation	\$166,483,274	\$7,126,367	Fairfield	10/31/2013
14. Elizabeth Carse Foundation	\$2,437,376	\$86,740	Hartford	6/30/2013
15. Children's Fund of Connecticut	\$33,457,109	\$1,358,200	Hartford	9/30/2013
16. CIGNA Foundation	\$394,608	\$3,709,214	Hartford	12/31/2013
17. Citizens Bank	—	—	New Haven	—
18. CohnReznick*	—	—	Hartford	—
19. Comcast	—	—	Hartford	—
20. The Common Sense Fund	\$30,641,671	\$1,007,000	Fairfield	12/31/2013
21. The Community Foundation for Greater New Haven~	\$434,050,752	\$23,670,346	New Haven	12/31/2013
22. The Community Foundation of Eastern Connecticut~	\$51,695,447	\$3,490,099	New London	12/31/2013
23. Community Foundation of Greater New Britain~	\$44,652,862	\$907,380	Hartford	12/31/2013
24. Community Foundation of Northwest Connecticut~	\$80,715,242	\$2,858,397	Litchfield	12/31/2013
25. Ruth S. Conant Trust	\$389,123	\$16,000	Hartford	12/31/2013
26. Connecticut Bar Foundation	\$8,196,519	\$15,662,008	Hartford	12/31/2013
27. Connecticut Community Foundation~	\$92,717,899	\$3,448,784	New Haven	12/31/2013
28. Connecticut Health and Educational Facilities Authority	—	—	Hartford	—
29. Connecticut Health Foundation	\$112,680,825	\$2,776,817	Hartford	12/31/2013
30. Connecticut Humanities	\$2,077,122	\$871,610	Middlesex	6/30/2013
31. Jessie B. Cox Charitable Trust	—	—	*	—
32. Cox Communications	—	—	*	—
33. Dime Bank Foundation	\$3,672,697	\$161,539	New London	12/31/2013
34. Dominion**	—	\$536,250	New London	12/31/2013
35. Donaghue Foundation	\$69,209,336	\$2,051,989	Hartford	12/31/2013
36. Doolittle Family Foundation	—	—	New London	—
37. The Eder Family Foundation	\$5,924,594	\$289,980	New Haven	9/30/2013
38. Ensworth Charitable Foundation	\$21,787,410	\$925,500	Hartford	5/31/2013
39. George H.C. Ensworth Memorial Fund	\$855,930	\$34,000	Hartford	5/31/2013
40. ESPN, Inc.	—	—	Hartford	—
41. Eversource and Eversource Energy Foundation	\$25,687,383	\$1,040,910	Hartford	12/31/2013
42. Fairfield County's Community Foundation~	\$159,971,017	\$18,587,793	Fairfield	6/30/2013
43. Farmington Bank Community Foundation	\$9,955,182	\$434,738	Hartford	12/31/2013
44. Fiduciary Investment Advisors, LLC*	—	—	Hartford	—
45. Foundation for Community Health	\$26,695,293	\$783,594	Litchfield	12/31/2013
46. The Fund for Greater Hartford	\$17,415,043	\$599,129	Hartford	12/31/2013
47. The Bill and Melinda Gates Foundation	\$41,310,207,525	\$3,320,725,374	*	12/31/2013
48. The Goodnow Fund	\$27,767,807	\$885,500	Fairfield	12/31/2013
49. William Caspar Graustein Memorial Fund	\$113,687,201	\$3,393,127	New Haven	12/31/2013
50. William C. Graustein	—	—	New Haven	—
51. The Grossman Family Foundation	\$160,631,222	\$7,131,021	Fairfield	12/31/2013
52. Newell D. Hale Foundation	\$2,416,784	\$12,600	Windham	12/31/2013
53. The Hampshire Foundation	\$22,928,294	\$1,265,758	Hartford	12/31/2013
54. Hartford Foundation for Public Giving~	\$922,682,005	\$29,473,176	Hartford	12/31/2013
55. Harvard Pilgrim Health Care Foundation	\$7,010,537	\$3,794,826	*	12/31/2013
56. Per and Astrid Heidenreich Family Foundation	\$10,896,028	\$1,689,750	Fairfield	12/31/2013

\*Located out of state \*\*CT figures only \*Associate member —Information not available/applicable ~Connecticut Network of Community Foundations

# Appendix C: Connecticut Council for Philanthropy Members [I-Z]

Members are listed alphabetically as of December, 2015.

Grantmaker	Assets	Total Giving	County	Fiscal Year End
57. Jeniam Foundation	\$21,602,169	\$773,060	*	12/31/2013
58. Jewish Community Foundation of Greater Hartford~	\$88,819,486	\$2,622,966	Hartford	6/30/2013
59. JPMorgan Chase Foundation	\$239,805,080	\$154,000,000	*	12/31/2013
60. Knox Foundation	\$1,433,816	\$51,228	Hartford	12/31/2013
61. Ethel and Abe Lapides Foundation	\$1,725,137	\$64,150	New Haven	11/30/2013
62. Lawson Valentine Foundation	\$13,334,670	\$507,001	Hartford	12/31/2013
63. The Leever Foundation	\$14,262,405	\$616,513	New Haven	12/31/2013
64. Liberty Bank Foundation	\$11,187,135	\$689,246	Middlesex	12/31/2013
65. Lincoln Financial Foundation**	—	\$788,948	Hartford	12/31/2013
66. Linda F. SchlisseI*	—	—	*	—
67. Lone Pine Foundation	\$40,469,764	\$5,555,113	Fairfield	12/31/2013
68. George A. and Grace L. Long Foundation	\$11,015,519	\$384,080	Hartford	12/31/2013
69. The Lumpkin Family Foundation	\$48,752,384	\$1,872,718	*	12/31/2013
70. Main Street Community Foundation~	\$33,334,087	\$1,209,538	Hartford	12/31/2013
71. MassMutual Financial Group**	—	\$647,264	*	12/31/2013
72. Katharine Matthies Foundation	\$19,268,574	\$787,389	Hartford	12/31/2013
73. The Melville Charitable Trust	\$156,847,227	\$6,206,183	New Haven	12/31/2013
74. MetroHartford Alliance	\$5,210,171	—	Hartford	12/31/2013
75. MFUNd	\$2,175,598	\$94,015	New Haven	12/31/2013
76. Elizabeth Mitchell Family Foundation	\$98,421	\$2,000	Hartford	4/30/2013
77. Nellie Mae Education Foundation	\$543,288,540	\$16,756,915	*	12/31/2013
78. Leo & Libby Nevas Family Foundation	\$12,385,246	\$201,600	Middlesex	11/30/2013
79. NewAlliance Foundation	\$31,592,866	\$1,190,000	New Haven	12/31/2013
80. New Canaan Community Foundation~	\$16,423,088	\$1,040,691	Fairfield	12/31/2013
81. Newman's Own Foundation	\$222,822,875	\$30,054,000	Hartford	12/31/2013
82. The Nutmeg Foundation	\$2,853,668	\$152,750	Hartford	12/31/2013
83. Jeffrey P. Ossen Family Foundation	\$17,152,933	\$780,286	Windham	7/31/2013
84. Waring & Carmen Partridge Foundation	\$14,806,459	\$275,240	New Haven	12/31/2013
85. People's United Community Foundation	\$50,922,963	\$2,126,944	Fairfield	12/31/2013
86. Perrin Family Foundation	\$17,946,305	\$593,250	Fairfield	12/31/2013
87. Petit Family Foundation	\$3,751,066	\$286,310	Hartford	6/30/2013
88. Reid and Riege*	—	—	Hartford	—
89. Edward C. and Ann T. Roberts Foundation	\$7,333,780	\$298,000	Hartford	12/31/2013
90. Charles Nelson Robinson Fund	\$4,338,250	\$170,500	Hartford	6/30/2013
91. The Rockfall Foundation	\$4,704,416	\$24,255	Middlesex	6/30/2013
92. Sassafra Foundation	\$12,330,270	\$540,400	New Haven	12/31/2013
93. SBM Charitable Foundation	\$40,043,759	\$2,109,543	Hartford	12/31/2013
94. Seedlings Foundation	\$73,172,449	\$26,105,163	New Haven	12/31/2013
95. SI Financial Group Foundation	\$2,702,389	\$101,717	Windham	12/31/2013
96. Swindells Charitable Foundation	\$2,530,756	\$88,500	Hartford	2/28/2013
97. Louis F. and Mary A. Tagliatela Foundation	\$5,557,434	\$72,800	New Haven	12/31/2013
98. Tauck Family Foundation	\$21,346,803	\$474,368	Fairfield	12/31/2013
99. The Tow Foundation	\$215,396,249	\$12,349,166	Fairfield	12/31/2013
100. Travelers & the Travelers Foundation	\$160,892	\$19,643,894	Hartford	12/31/2013
101. Emily Hall Tremaine Foundation	\$86,804,932	\$3,369,269	New Haven	12/31/2013
102. UIL Holding Corporate Foundation	\$1,978,492	\$386,547	New Haven	12/31/2013
103. United Technologies Corporation	—	—	Hartford	—
104. United Way of Coastal Fairfield County	\$8,933,808	\$5,218,868	Fairfield	6/30/2013
105. United Way of Central & Northeastern Connecticut	\$35,195,933	\$22,478,344	Hartford	6/30/2013
106. United Way of Connecticut	\$4,014,301	—	Hartford	6/30/2013
107. United Way of Greater New Haven	\$5,937,920	\$3,908,247	New Haven	6/30/2013
108. Universal Health Care Foundation of Connecticut	\$26,322,485	\$594,662	New Haven	12/31/2013
109. Valley Community Foundation~	\$17,755,188	\$1,375,388	New Haven	12/31/2013
110. H. A. Vance Foundation	\$8,966,828	\$350,000	Hartford	12/31/2013
111. The Walker Group	\$1,370,693	\$84,000	Hartford	12/31/2013
112. Webster Bank	—	\$914,000	New Haven	12/31/2013
113. The ZOOM Foundation	\$738,246,659	\$35,000,000	Fairfield	6/30/2013

\*Located out of state \*\*CT figures only \*Associate member —Information not available/applicable ~Connecticut Network of Community Foundations



## Appendix D: Connecticut Foundation Awarded Grants by Subject

Based on all grants of \$10,000 or more awarded by a sample of larger Connecticut foundations.

Subject	Dollar Amount	%	No. of Grants	%
Education	\$108,280,474	25.9	488	19.4
Health	95,798,033	22.9	329	13.1
Philanthropy and Nonprofit Management	67,053,569	16.0	174	6.9
Human Services	36,294,170	8.7	549	21.9
Arts and Culture	20,793,883	5.0	233	9.3
Public Affairs	13,520,469	3.2	49	2.0
International Relations	10,567,006	2.5	45	1.8
Social Sciences	10,380,007	2.5	10	0.4
Sports and Recreation	9,766,955	2.3	100	4.0
Community and Economic Development	9,682,754	2.3	147	5.9
Environment and Animals	8,524,519	2.0	126	5.0
Science and Engineering	8,139,968	1.9	18	0.7
Information and Communications	6,341,880	1.5	87	3.5
Religion	4,856,552	1.2	30	1.2
Public Safety	4,049,486	1.0	45	1.8
Human Rights	1,733,399	0.4	36	1.4
Agriculture, Fishing, and Forestry	1,386,000	0.3	36	1.4
Other/Unknown	1,669,542	0.4	7	0.3
<b>Total</b>	<b>\$418,838,666</b>	<b>100%</b>	<b>2,509</b>	<b>100%</b>

For community foundations, only discretionary grants are included. Grant to individuals are not included.

# Methodology and Sources

## Sources of Information & Data

### Connecticut Foundation Giving

- The Foundation Center provided CCP with a database of financial data for Connecticut foundations, based on the 990 and 990-PF forms. CCP supplemented this data with additional research, primarily by researching 990 and 990-PF forms through the GuideStar database. Grants information was taken from page 1, line 13 (990) or page 1, line 25 (990-PF) and assets information was taken from page 1, line 20 (990) or page 2, line 16 (990-PF).
- Data on Connecticut foundation giving by subject area is based on the Foundation Center's coding and analysis of all grants of \$10,000 or more.

### Community Foundation Giving

- Analysis about national and Connecticut community foundation's came from the Foundation Center. Data about the CFCEO network was self-reported and prepared by CCP. Donor-advised fund statistics came from the National Philanthropic Trust's *2015 Donor Advised Fund Report*.

### Corporate Giving

- Analysis about national and state corporate foundations was from the Foundation Center. Further information came from Committee Encouraging Corporate Philanthropy (CECP)'s *Giving in Numbers: 2015 Edition*. Information about Connecticut corporations came from Liberty Bank and CBIA's *2015 Connecticut Corporate Giving Survey*. All corporate members had the opportunity to self-report their total giving and assets figures.

## Time Period

- To ensure consistency in the *Giving in Connecticut* report, CCP analyzes data that cover the same time period each year.\* This report analyzes Connecticut grantmaking data for the research year 2013, which CCP defines as the fiscal year of any Connecticut foundation or other grantmaker that ends between June 31, 2012 and December 31, 2013. This is the most recent time period for which complete data are available. The Connecticut grant dollars accounted for in this report have been distributed within Connecticut as well as across the U.S. and internationally. \*Page 9 contains self-reported community foundation data for 2014 and includes donor-advised fund data for 2014. \*Page 7 includes corporate giving data for 2014.

## Further Reading

- For more information and links to resources that informed this report please visit our [resource page >>](#)

### Context on CT giving

- Information about state and national tax collections came from *U.S. Census Bureau, 2013 Annual Survey of State Government Tax Collections*.

### Cross-Sector Collaboration

- Information for government and foundation giving came from *HB-5557 An Act Making Adjustments to State Expenditures for the Fiscal Year Ending June 30, 2013*. Additional data came from State Smart's Federal Funds in Connecticut resource using 2013 data from the *US Census Bureau State Government Finances*.

### Individual Giving

- Information on national and Connecticut individual giving came from the *IRS, Statistics of Income Division, Individual Master File System, December 2014* (publicly released August 2015) and was prepared by CCP. The number of returns and amounts may not add totals because of rounding. Table presents aggregates of all returns filed and processed through the individual master file (IMF) system during calendar year 2014, including any returns filed for tax years preceding 2013.
- National and Connecticut charitable bequest data came from the *IRS, Statistics of Income Division, Estate Tax Returns Study, October 2014* and prepared by CCP. Detail may not add to total due to taxpayer reporting discrepancies and rounding. In 2013, most returns were filed for deaths that occurred in 2012, for which the filing threshold was 5.12 million.

## Photo Sources

- Thank you to those who provided photos for this report: **Cover** (left to right; top to bottom): The Community Foundation for Greater New Haven, photo by Gerald Wenner; Tauck Family Foundation, Achievement First Bridgeport Academy Middle School; Hartford Foundation for Public Giving; Connecticut Community Foundation; Newman's Own Foundation - Connecticut Veterans Legal Center, photo by Desirea Stott-Rodgers; United Way of Greater New Haven; The Rockfall Foundation. **Page 6:** DataHaven. **Page 9:** The Melville Charitable Trust - Partnership for Strong Communities. **Page 10:** Fairfield County Community Foundation. **Page 13:** Connecticut Council for Philanthropy.



**MISSION:** The Connecticut Council for Philanthropy (CCP) is an association of grantmakers committed to promoting and supporting effective philanthropy for the public good.

**OUR COMMITMENTS:** The Connecticut Council for Philanthropy 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:** The Connecticut Council for Philanthropy 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.

**OUR MEMBERS:** The Connecticut Council for Philanthropy (CCP) is an association of grantmakers committed to promoting and supporting effective philanthropy for the public good. CCP's members are foundations (private, corporate, community), business and corporate giving programs, bank trusts, donor-advised funds, individual philanthropists, and those serving the philanthropic sector. CCP members granted more than \$720 million in 2013 from assets of more than \$6.3 billion.

**CONTRIBUTING REPORT STAFF:** Foundation Center - Reina Mukai, Research Manager. Connecticut Council for Philanthropy - Maggie Osborn, President; Laurie Allen, Communications Manager; Brooke E. Petit, Special Projects Manager.

For more information, contact CCP at 860-525-5585 or online at [www.CTphilanthropy.org](http://www.CTphilanthropy.org), and help to continue the conversation by using @CTphilanthropy and #CCPImpact.



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