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NEW STUDY SHOWS FOUNDATIONS, CHARITABLE GIVING CONTINUE TO GROW IN SOUTHWESTERN U.S.

Colorado Springs, CO – A new study released today by Philanthropy Southwest during its annual conference in Colorado Springs, Colorado shows the philanthropic sector in the southwest region of the United States continues to grow. The *2016 Giving Study: An Overview of Grantmaking by Private and Community Foundations in the Southwest* utilized the most current data available (2014 foundation tax returns), analyzing over 138,000 grants and identifying more than 97% of total giving in the geographic location.

The *2016 Giving Study* reports that:

- Foundations in the region contributed \$6.3 billion to charitable causes, representing a 22.5% increase since [the last study](#) was issued (which used 2011 foundation tax returns), while their assets totaled over \$92.5 billion, an increase of 28.2%.
- 604 new foundations were created and began making grants during this time period, suggesting a continuing post-recession economic recovery that encouraged increased philanthropic activity. While these new foundations accounted for 3% of assets and 3.9% of giving in this study, the fact that they comprise nearly 10% of the total number of foundations points to the possibility of even greater giving in the coming years.

The seven states included in the study are Arkansas, Arizona, Colorado, Nevada, New Mexico, Oklahoma and Texas. These states comprise the membership region for Philanthropy Southwest, the oldest membership association for grantmakers in the U.S.

“This study provides everyone in the field – from charitable organizations to funders and donors, and state and national leaders – with a comprehensive and detailed look at foundations and giving in the region,” said Lucille DiDomenico, Philanthropy Southwest Executive Director. “By capturing nearly all data on foundations and giving for the region, we provide a detailed map that can help like-minded philanthropies to connect, learn from one another, and significantly advance their combined efforts to address challenging societal needs.”

Adds lead researcher, Kathy Jankowski, Research Director for Jankowski Associates, Inc., “Philanthropy Southwest’s *Giving Study* is unparalleled by other giving studies in that its selection criteria goes beyond the largest foundations to also include small, regional, and family foundations. Including smaller foundations and smaller grants results in data that illuminates the commitments, activities, and investments foundations make at the local level.” This study is the third in a series conducted for Philanthropy Southwest by Jankowski Associates, Inc.

Societal issue areas supported and advanced through philanthropic giving in the southwest:

- **Trend:** The issue areas supported have largely remained stable since the first Philanthropy Southwest [Giving Study was conducted in 2012](#) (Note: This study was issued before the Conference of Southwest Foundations changed its name to Philanthropy Southwest.)
- **Largest Area of Giving:** The largest percentage of giving for the region as a whole has consistently been directed to improving and supporting education institutions and related activities. The 2016 study shows 28.3% of foundation giving as a whole to be focused on Education. Among the seven states, Arkansas had the highest percentage of gifts made in support of Education (38.9%), with the others ranging from 19.4% (Nevada) to 28.7% (Texas).
- **Other Large Support Areas:** Additional societal causes receiving significant support from southwestern foundations include Human Services (20.7%), Health (14.0%), and Public/Societal Benefit (13.6%).
- **Smaller Support Areas:** Smaller percentages of giving for the region as a whole were made in the areas of International Affairs (3.8%), Environment and Animals (5.0%), Religion (5.4%), and the Arts (9.2%). Of the seven states, New Mexico continued to devote the highest percentage of giving to the Arts (17.2%), with the other six states ranging from 4.7% (Oklahoma) to 10.7% (Texas).
- **Addition:** For the first time, this study included health conversion foundations, in addition to private and community foundations. This addition is the likely reason why Education funding fell below 30% for the first time, with Health and Human Services combined reaching 35% of contributions, more than \$2.1 billion.

Of the 6,372 foundations represented in the current study, 14 are health care conversion foundations with \$4.5 billion in assets and \$215.7 million in giving. Ninety are community foundations with \$10.9 billion in assets and giving of nearly \$962 million.

- **Community foundations** saw significant growth with their overall giving in the southwest region increasing by 73%. Led by foundations in Oklahoma, Texas, and Colorado, 9 community foundations each received \$100 million or more in gifts between 2012 and 2014. As well, the assets of community foundations in Nevada increased by 105% during this time period.

While equally detailed national data that compare to Philanthropy Southwest's 2016 Giving Study are not available, 2014 data from the [Foundation Center](#) show foundation assets nationally to be \$821.1 billion, with \$52.9 billion in total giving nationally. A comparison between these two reports suggests the southwest region holds about 11% of all foundation assets and is contributing about 12% of philanthropic dollars nationally.

The *2016 Giving Study: An Overview of Grantmaking by Private and Community Foundations in the Southwest* is available online at www.philanthropysouthwest.org. Philanthropy Southwest member foundations have access to complete, detailed findings for the region and for each state individually. For additional information about the study and Philanthropy Southwest, please visit our website or contact us directly at 214-740-1787.

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A membership organization for foundations in the southwestern United States, Philanthropy Southwest is dedicated to actively promoting opportunities to exchange ideas, build relationships and advance philanthropic excellence.