

An Overview of Grantmaking by
Private and Community Foundations



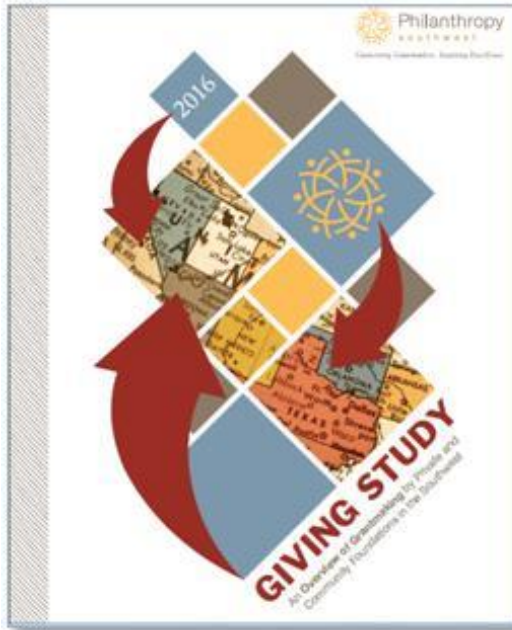
Oklahoma and the Southwest



Connecting Grantmakers. Inspiring Excellence.

March 23, 2017

Philanthropy Southwest's Third *Giving Study* Released in October 2016

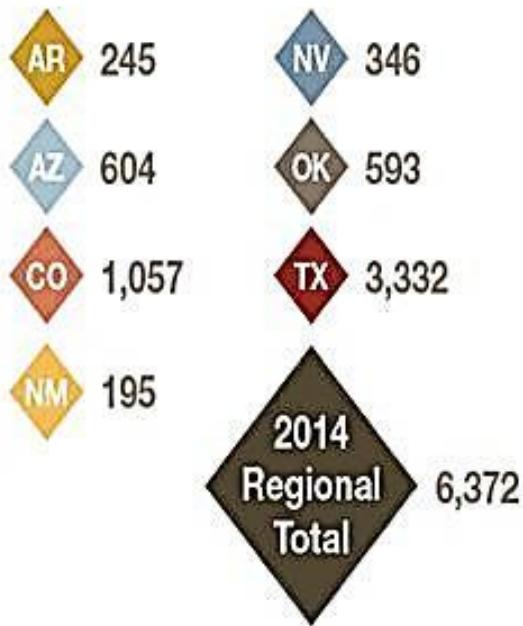


philanthropysouthwest.org/philanthropy-southwests-2016-giving-study

The Data Set



Table A.1: Number of foundations in the region and states



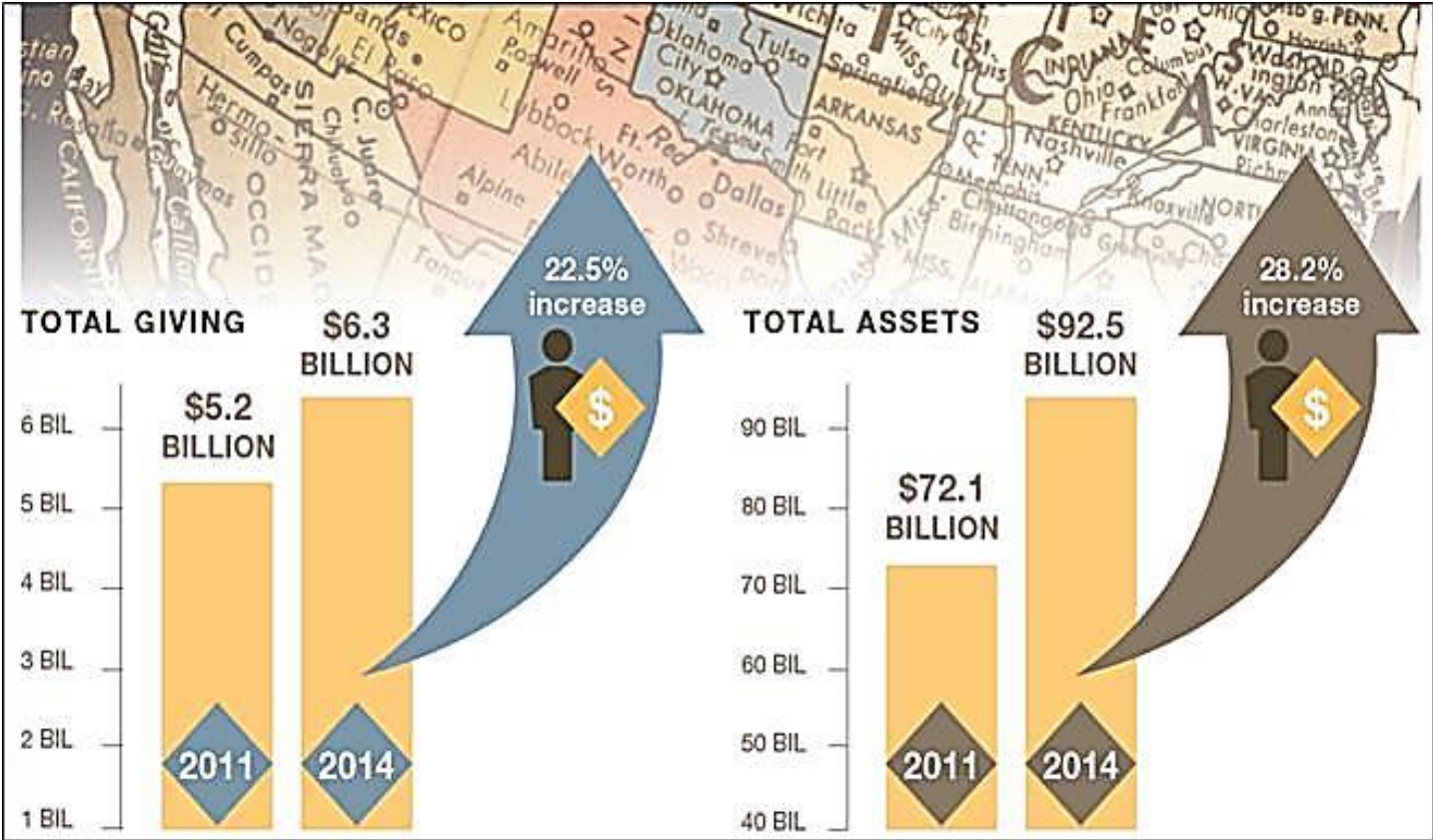
16%
of grants made in the PSW Region were made by PSW members

Table A.2: Number of foundation grants in the region and states



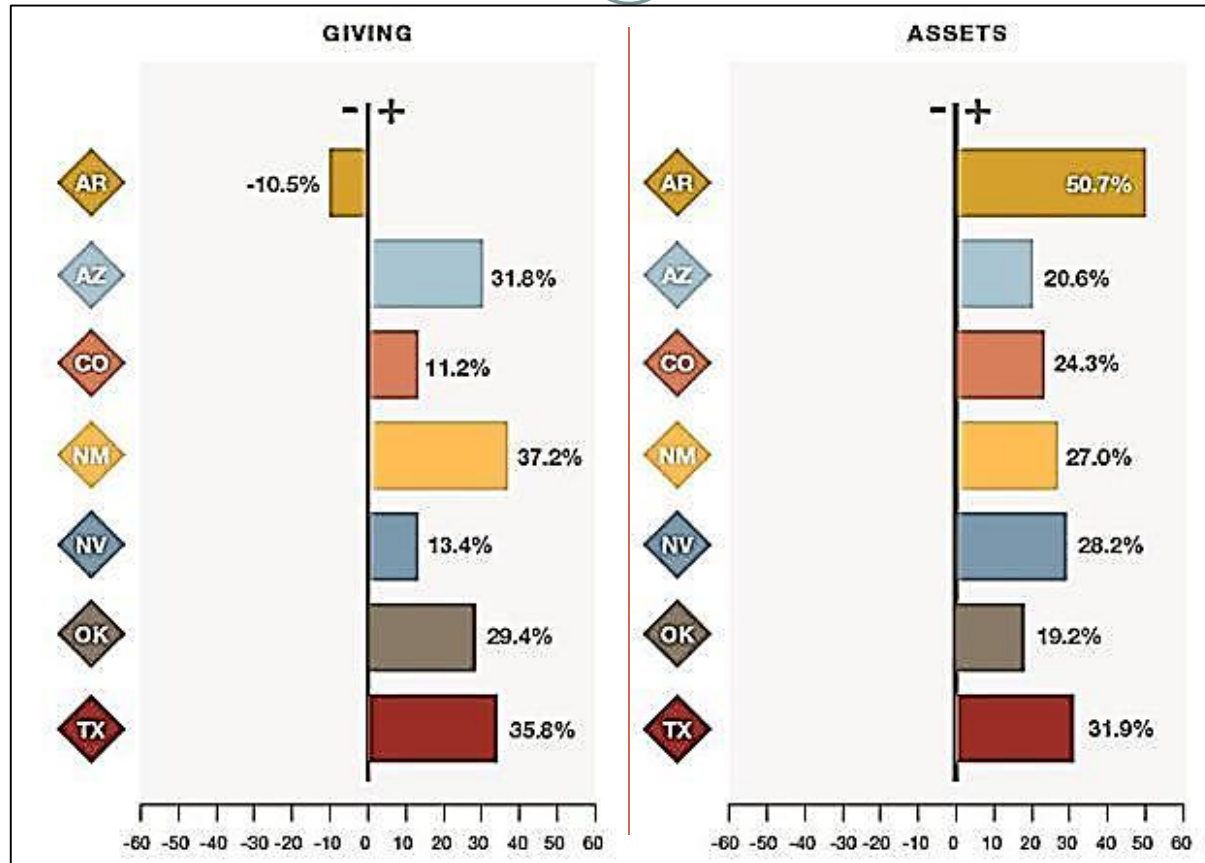
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Overall Trends



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Assets and Giving Trends by State



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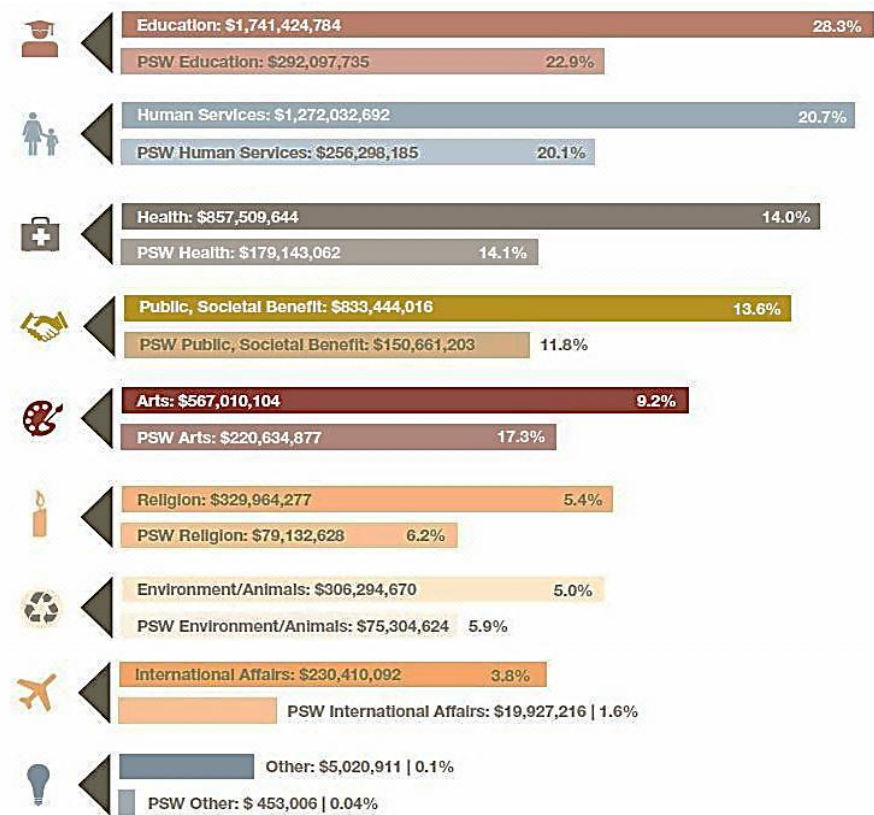
Trends 2014-2009



Trends in Assets and Giving, 2014 Compared to 2009

	ASSETS 2014	ASSETS 2009	% Change	GIVING 2014	GIVING 2009	% Change
TOTAL	\$92,513,778,354	\$63,045,914,230	46.7%	\$6,336,838,298	\$4,379,813,887	44.7%
AR	\$4,764,001,842	\$3,608,903,525	32.0%	\$690,266,687	\$649,657,855	6.3%
AZ	\$4,324,363,857	\$3,320,999,224	30.2%	\$328,465,413	\$218,233,980	50.5%
CO	\$14,812,874,100	\$10,055,380,750	47.3%	\$816,428,015	\$614,158,880	32.9%
NM	\$1,728,866,217	\$1,198,013,823	44.3%	\$95,152,275	\$56,883,132	67.3%
NV	\$7,081,622,249	\$5,190,911,674	36.4%	\$508,188,535	\$354,919,585	43.2%
OK	\$15,352,857,755	\$10,211,517,125	50.3%	\$778,393,798	\$408,289,652	90.6%
TX	\$44,449,192,334	\$29,460,188,109	50.9%	\$3,119,943,575	\$2,077,670,803	50.2%

Societal Issues Addressed



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Spotlight on Community Foundations



Table G.2: Giving by Community Foundations by State in the PSW Region

	2014	2011	CHANGE
AR	\$17,016,663	\$12,950,284	31.4%
AZ	\$42,034,207	\$33,339,429	26.1%
CO	\$160,660,149	\$110,954,122	44.8%
NM	\$18,432,866	\$14,385,834	28.1%
NV	\$14,741,963	\$13,851,694	6.4%
OK	\$325,151,387	\$120,622,481	169.6%
TX	\$383,947,080	\$249,831,567	53.7%
PSW Region	\$961,984,315	\$555,935,411	73.0%

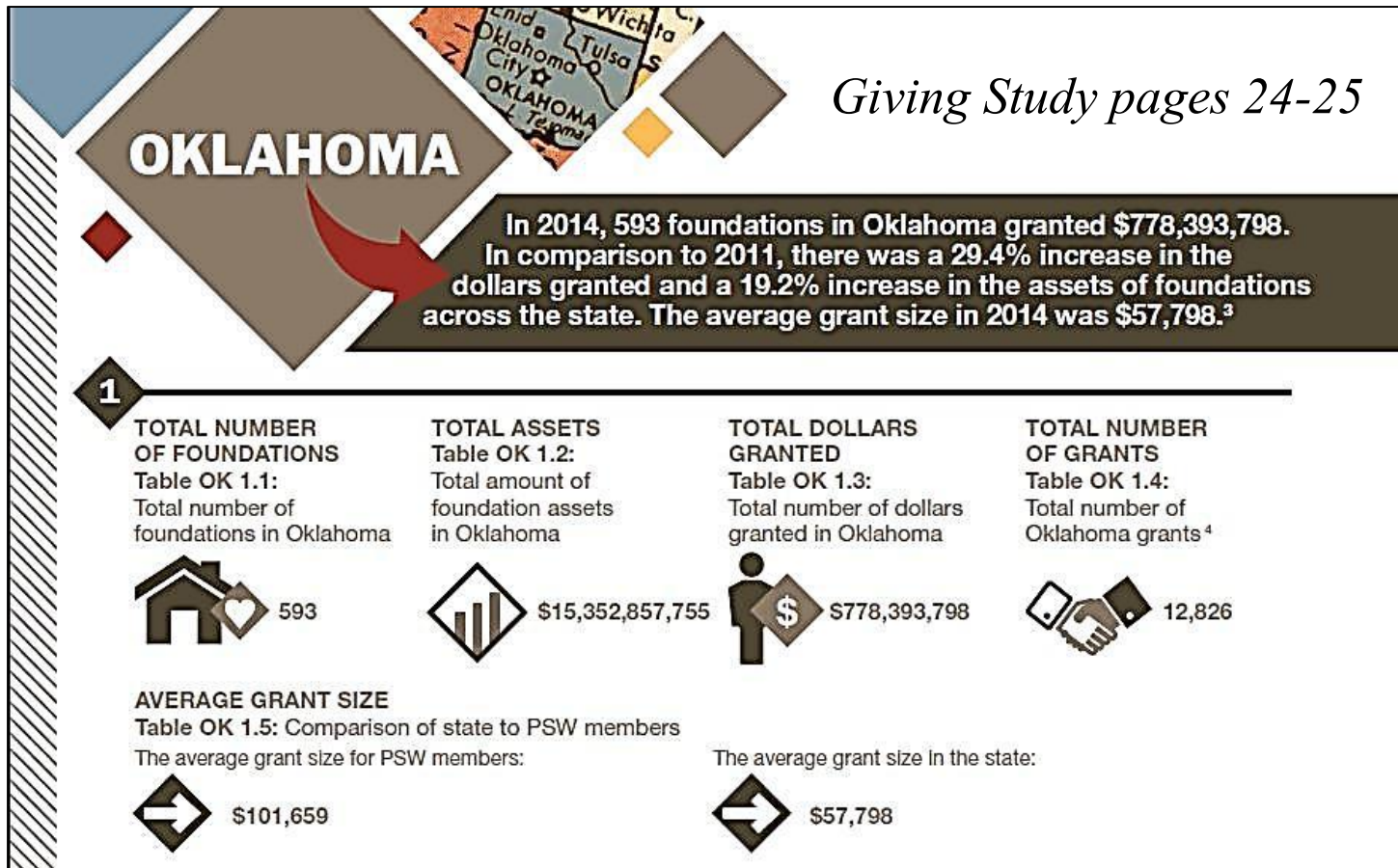
Table G.3: Assets of Community Foundations by State in the PSW Region

	2014	2011	CHANGE
AR	\$290,339,294	\$182,476,075	59.1%
AZ	\$579,230,857	\$415,182,836	39.5%
CO	\$1,513,805,028	\$897,331,457	68.7%
NM	\$202,500,993	\$153,745,937	31.7%
NV	\$266,362,869	\$130,008,045	104.9%
OK	\$5,109,334,128	\$4,396,451,111	16.2%
TX	\$2,955,530,466	\$2,118,027,266	39.5%
PSW Region	\$10,917,103,635	\$8,293,222,727	31.6%



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Oklahoma Profile



Oklahoma Profile



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TOTAL Assets of the Top 20 Foundations:
\$12,102,814,824 (in alphabetical order)

Table OK 2.1:

Anne and Henry Zarrow Foundation	Tulsa	OK
Avedis Foundation	Shawnee	OK
Charles and Lynn Schusterman Family Foundation	Tulsa	OK
Charles and Peggy Stephenson Family Foundation	Tulsa	OK
Communities Foundation of Oklahoma, Inc.	Oklahoma City	OK
E. L. and Thelma Gaylord Foundation	Oklahoma City	OK
George Kaiser Family Foundation	Tulsa	OK
Hardesty Family Foundation	Tulsa	OK
Helmerich Trust	Tulsa	OK
Inasmuch Foundation	Oklahoma City	OK
J. E. and L. E. Mabee Foundation	Tulsa	OK
Kirkpatrick Family Fund	Oklahoma City	OK
Mary K. Chapman Foundation	Tulsa	OK
Oklahoma City Community Foundation, Inc.	Oklahoma City	OK
Presbyterian Health Foundation	Oklahoma City	OK
Samuel Roberts Noble Foundation	Ardmore	OK
Sarkeys Foundation	Norman	OK
Southern Oklahoma Memorial Foundation	Ardmore	OK
Tulsa Community Foundation	Tulsa	OK
William K. Warren Foundation	Tulsa	OK

Total Grants Paid by the Top 20 Foundations:
\$563,979,406 (in alphabetical order)

Table OK 2.2:

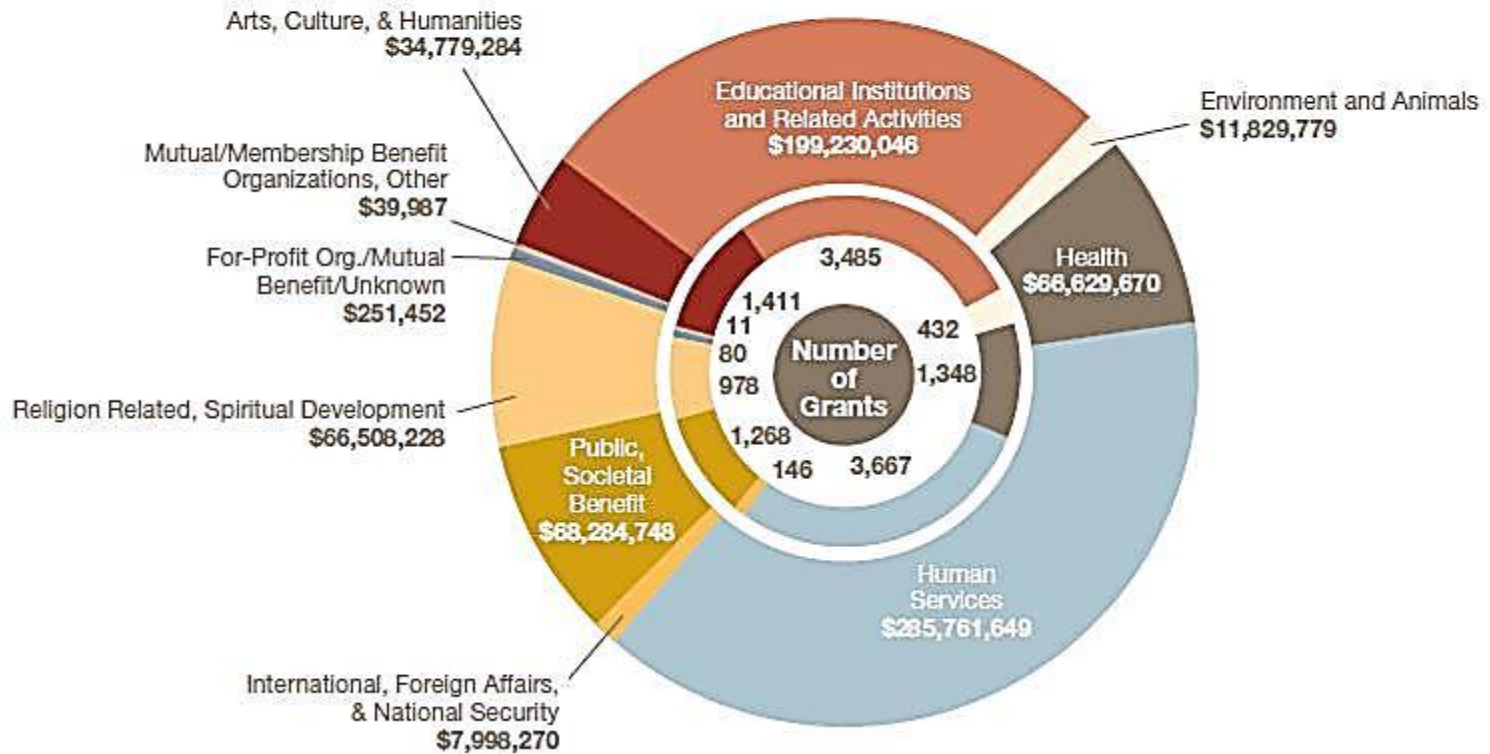
Anne and Henry Zarrow Foundation	Tulsa	OK
Charles and Lynn Schusterman Family Foundation	Tulsa	OK
Charles and Peggy Stephenson Family Foundation	Tulsa	OK
Communities Foundation of Oklahoma, Inc.	Oklahoma City	OK
E. L. and Thelma Gaylord Foundation	Oklahoma City	OK
Ethics and Excellence In Journalism Foundation	Oklahoma City	OK
George Kaiser Family Foundation	Tulsa	OK
Hardesty Family Foundation	Tulsa	OK
Inasmuch Foundation	Oklahoma City	OK
J. E. and L. E. Mabee Foundation	Tulsa	OK
Kirkpatrick Family Fund	Oklahoma City	OK
Margery Mayo Bird Foundation	Tulsa	OK
Mary K. Chapman Foundation	Tulsa	OK
Oklahoma City Community Foundation, Inc.	Oklahoma City	OK
Presbyterian Health Foundation	Oklahoma City	OK
Records-Johnston Family Foundation	Oklahoma City	OK
Ruth Nelson Family Foundation	Tulsa	OK
Tulsa Community Foundation	Tulsa	OK
William K. Warren Foundation	Tulsa	OK
Williams Companies Foundation	Tulsa	OK

Oklahoma Profile

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STATE ISSUE FOCUS BREAKDOWN

Table NV 3: Dollars granted and number of grants by area of interest



Oklahoma Profile



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FOUNDATION GIVING BY RECIPIENT METRO AREA

Table OK 4: Dollar amount for each metro area

Metropolitan Area	# of Grants	Total Giving
Tulsa	3,880	\$371,042,951
Oklahoma City	4,257	\$182,244,467

Rural – No Metropolitan Statistical Area	1,743	\$46,443,779
Lawton	101	\$3,857,769
Fort Smith	13	\$147,400

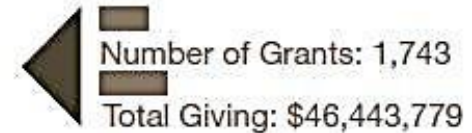
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URBAN AND RURAL GIVING: Table OK 5: Giving to urban versus rural communities

Urban
(Across Metropolitan Statistical Area)



Rural
(No Metropolitan Statistical Area)



Geography of Giving



64% of giving in the Philanthropy Southwest Region went to the home state of the foundation. Two-thirds of giving from foundations in the southwest stayed in the southwest.

Table F.1: Break out of giving in-state, in other states, in the Southwest region, and internationally



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Oklahoma Foundations by Giving Range



Giving Range	# Fdns. in Range	Percent in Range	Total Assets	Percent of Total Assets	Total Giving	Percent of Total Giving
\$5 million or more	22	3.7%	\$10,757,833,352	70.1%	\$574,159,066	73.8%
\$1 million to \$4.9 million	58	9.8%	\$3,103,165,971	20.2%	\$125,397,879	16.1%
\$500,000 to \$999,999	39	6.6%	\$535,810,993	3.5%	\$27,897,926	3.6%
\$250,000 to \$499,000	55	9.3%	\$328,777,464	2.1%	\$19,569,123	2.5%
\$100,000 to \$249,000	126	21.2%	\$356,126,876	2.3%	\$19,613,074	2.5%
\$50,000 to \$99,999	95	16.0%	\$129,727,094	0.8%	\$6,746,973	0.9%
\$25,000 to \$49,000	107	18.0%	\$91,534,804	0.6%	\$3,938,373	0.5%
Less than \$25,000	91	15.3%	\$49,881,201	0.3%	\$1,071,384	0.1%
TOTAL	593	100.0%	\$15,352,857,755	100.0%	\$778,393,798	100.0%

Oklahoma Foundations by Asset Range

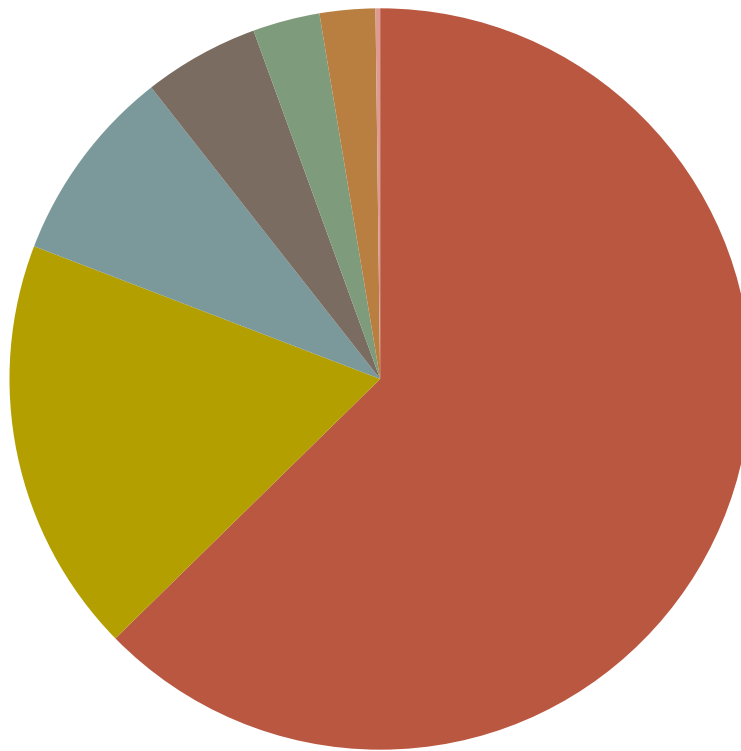


Asset Range	# Fdns. in Range	Percent in Range	Total Assets	Percent of Total Assets	Total Giving	Percent of Total Giving
\$50 million or more	32	5.4%	\$12,929,004,622	84.2%	\$588,972,101	75.7%
\$10 million to \$49.9 million	70	11.8%	\$1,536,685,507	10.0%	\$96,276,491	12.4%
\$5 million to \$9.9 million	43	7.3%	\$299,301,279	1.9%	\$28,262,005	3.6%
\$1 million to \$4.9 million	202	34.1%	\$488,453,512	3.2%	\$34,469,074	4.4%
\$500,000 to \$999,999	91	15.3%	\$68,999,012	0.4%	\$6,285,888	0.8%
\$250,000 to \$499,999	63	10.6%	\$23,611,433	0.2%	\$4,350,730	0.6%
\$100,000 to \$249,999	31	5.2%	\$5,135,194	0.0%	\$1,365,222	0.2%
Less than \$100,000	61	10.3%	\$1,667,196	0.0%	\$18,412,287	2.4%
TOTAL	593	100.0%	\$15,352,857,755	100.0%	\$778,393,798	100.0%

Community Foundations in Oklahoma



Number: 14 • Assets: \$5.1 billion • Giving: \$325.2 million



- Human Services - 62%
- Education - 18%
- Public, Societal Benefit - 8.5%
- Health- 5%
- Arts, Culture - 2.9%
- Religion Related 2.4%
- International, Foreign Affairs - <1%

“Life has taught us that **Love** does not consist of gazing at each other, but in looking outward **together** in the same direction.”

“Your task is not to foresee the future, but to enable it.”

~ *Antoine de Saint-Exupéry*

