

*An Overview of Grantmaking by*

# Private and Community Foundations



# in Dallas/Fort Worth, Texas and the Southwest



Texas Scottish Rite  
Hospital for Children  
Fort Worth Botanic Garden  
April 6, 2017

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



**[philanthropysouthwest.org/philanthropy-southwests-2016-giving-study](http://philanthropysouthwest.org/philanthropy-southwests-2016-giving-study)**

# The Data Set



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

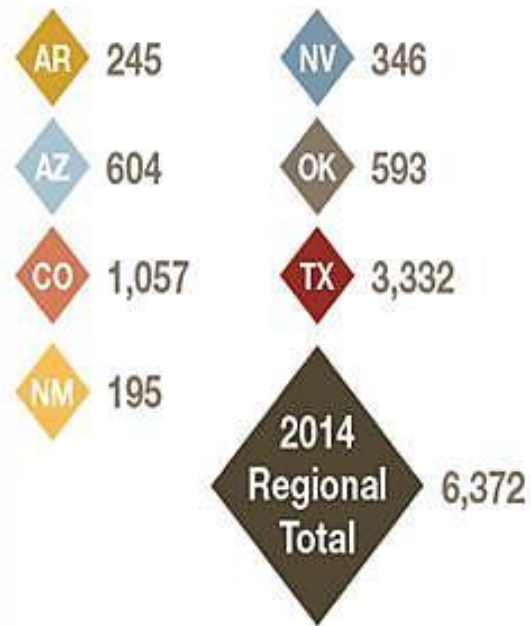


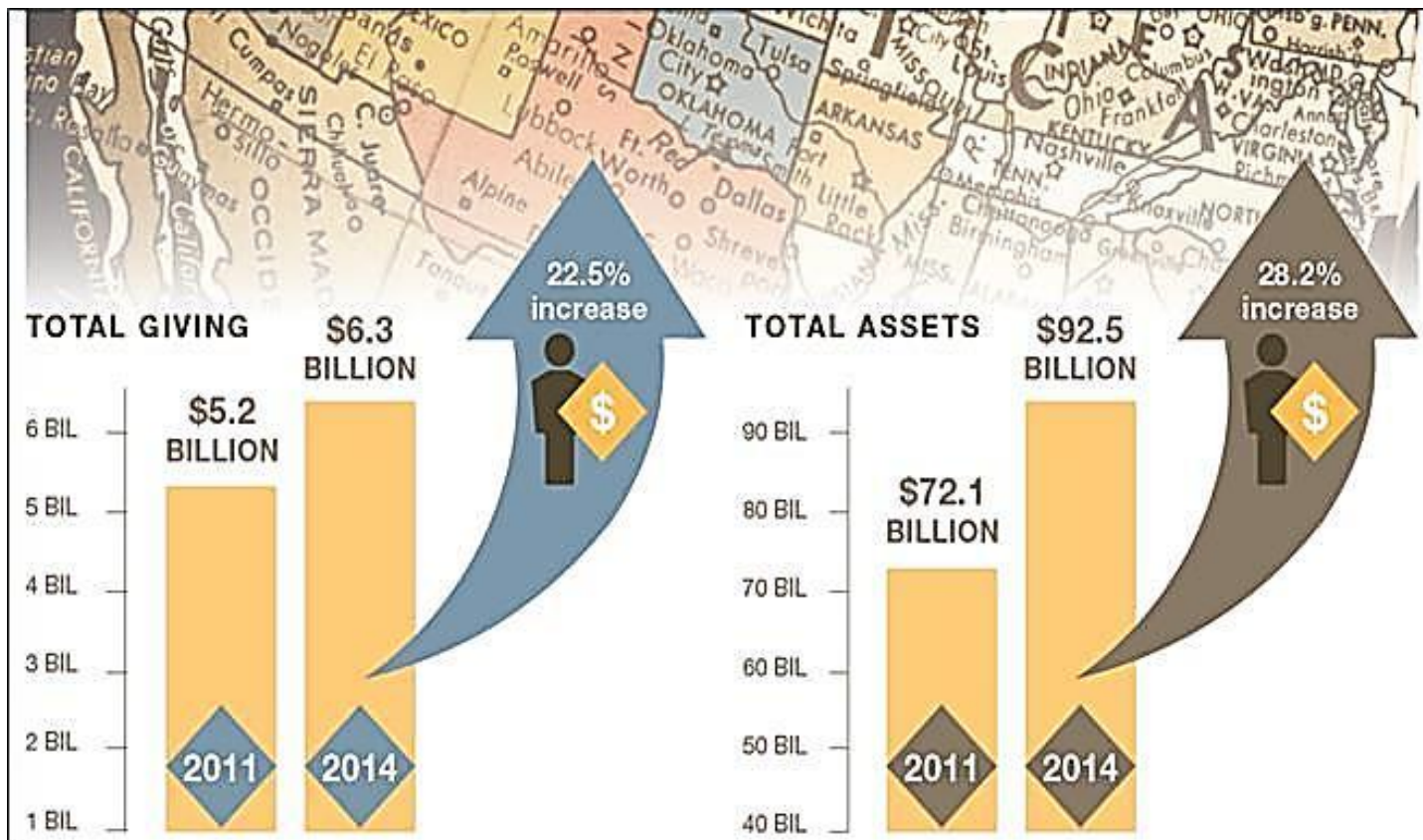
Table A.2: Number of foundation grants in the region and states



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

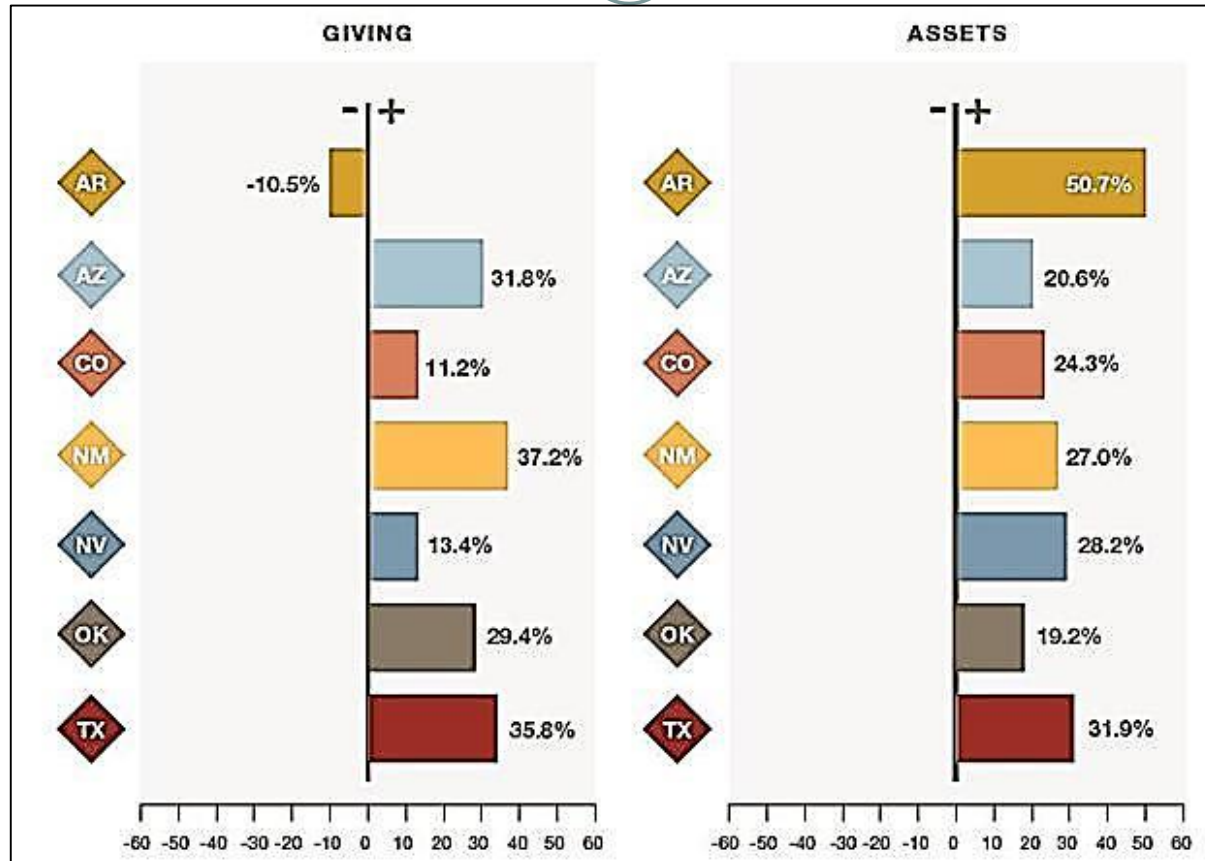
*Giving Study page 4*

# Overall Trends



*Giving Study page 4*

# Assets and Giving Trends by State



*Giving Study page 5*

# 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

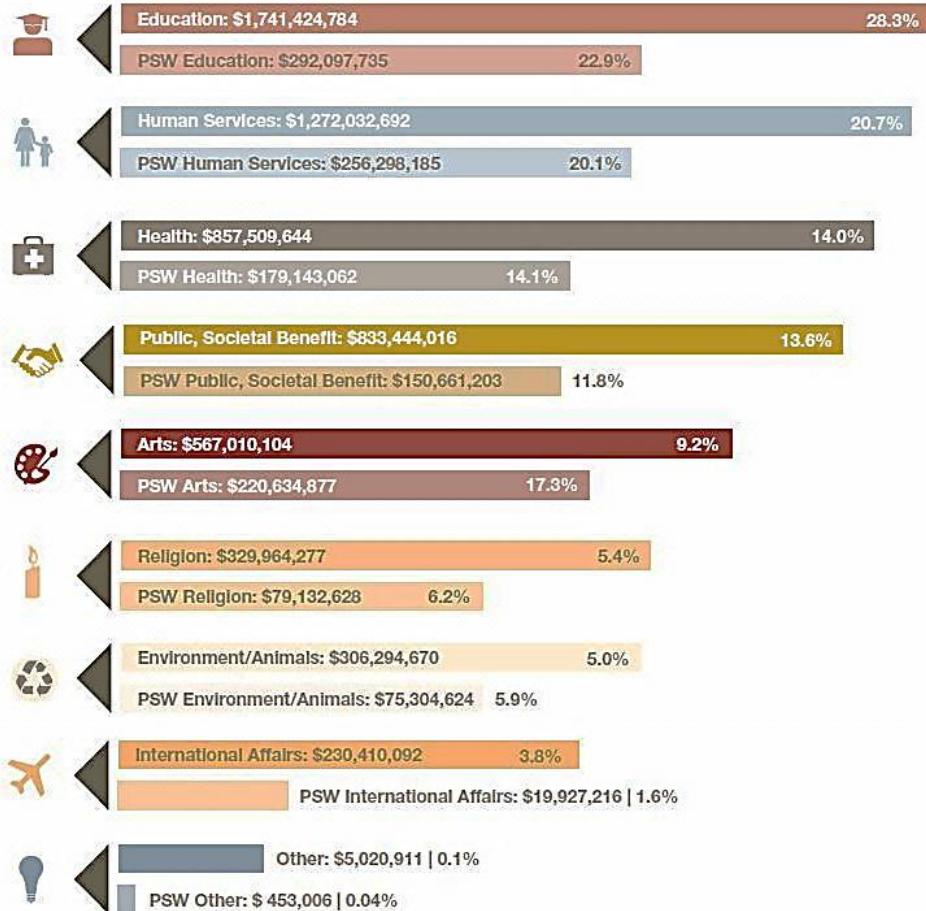


Table E.7: Texas grants by societal issues

Texas	Dollars Granted	Number of Grants
Arts, Culture, and Humanities	\$324,111,818	7,235
Educational Institutions and Related Activities	\$864,892,183	19,395
Environment/Animals	\$144,600,248	3,349
Health	\$471,245,328	9,002
Human Services	\$526,011,719	19,350
International, Foreign Affairs, and National Security	\$127,186,311	2,000
Public Societal Benefit	\$383,419,369	6,556
Religion Related, Spiritual Development	\$172,204,454	6,056
Other	\$2,789,799	737
<b>Total</b>	<b>\$3,016,461,229</b>	<b>73,680</b>

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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**

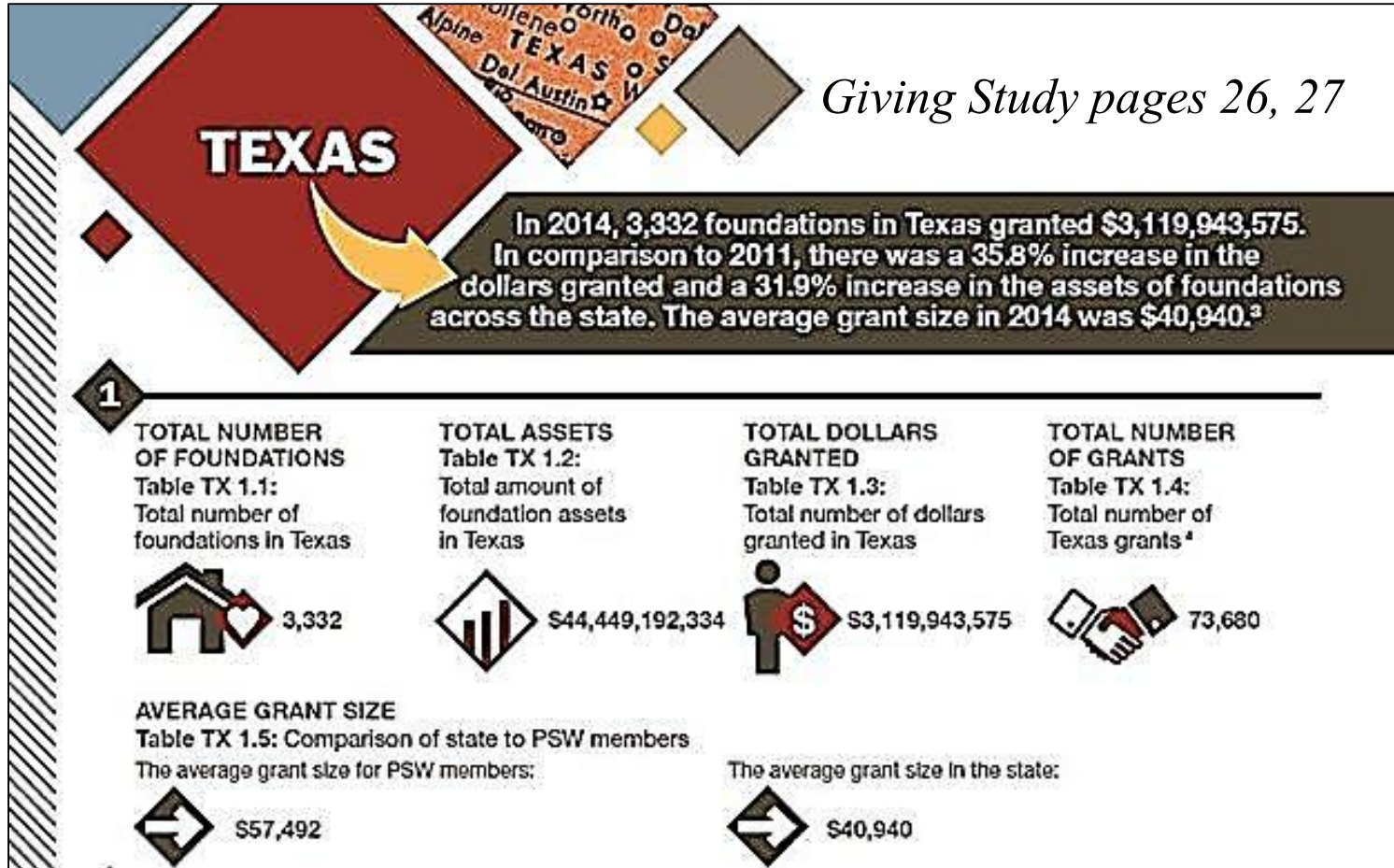
	2014	2011	CHANGE
AR	\$290,339,294	\$182,476,075	59.1%
AZ	\$579,230,857	\$415,182,836	39.5%
CO	\$1,513,805,028	\$897,331,457	68.7%
NM	\$202,500,993	\$153,745,937	31.7%
NV	\$266,362,869	\$130,008,045	104.9%
OK	\$5,109,334,128	\$4,396,451,111	16.2%
TX	\$2,955,530,466	\$2,118,027,266	39.5%
PSW Region	\$10,917,103,635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



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# Texas Profile



# Texas Profile



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**TOTAL Assets of the Top 20 Foundations:**  
\$14,698,996,315 (In alphabetical order)

Table TX 2.1:

Albert and Bessie Mae Kronkosky Charitable Foundation	San Antonio	TX
<b>Amon G. Carter Foundation</b>	<b>Fort Worth</b>	<b>TX</b>
Brown Foundation	Houston	TX
<b>Burnett Foundation</b>	<b>Fort Worth</b>	<b>TX</b>
Communities Foundation of Texas	Dallas	TX
<b>Ed Rachal Foundation</b>	<b>Corpus Christi</b>	<b>TX</b>
George Foundation	Richmond	TX
<b>Greater Houston Community Foundation</b>	<b>Houston</b>	<b>TX</b>
Houston Endowment	Houston	TX
<b>Laura and John Arnold Foundation</b>	<b>Houston</b>	<b>TX</b>
Mays Family Foundation	San Antonio	TX
<b>Meadows Foundation</b>	<b>Dallas</b>	<b>TX</b>
Michael and Susan Dell Foundation	Austin	TX
<b>Moody Foundation</b>	<b>Galveston</b>	<b>TX</b>
Rees-Jones Foundation	Dallas	TX
<b>Robert A. Welch Foundation</b>	<b>Houston</b>	<b>TX</b>
Sid W. Richardson Foundation	Fort Worth	TX
<b>St. David's Foundation</b>	<b>Austin</b>	<b>TX</b>
T. L. L. Temple Foundation	Lufkin	TX
<b>Terry Foundation</b>	<b>Houston</b>	<b>TX</b>

<sup>3</sup> Researchers captured more than 138,000 grants paid by foundations in the data set, with a minimum grant size of \$1,000, totaling \$6.14 billion, or 97% of total contributions.

**Total Grants Paid by the Top 20 Foundations:**  
\$1,036,144,919 (In alphabetical order)

Table TX 2.2:

Amon G. Carter Foundation	Fort Worth	TX
<b>Austin Community Foundation for the Capital Area</b>	<b>Austin</b>	<b>TX</b>
Brown Foundation	Houston	TX
<b>Communities Foundation of Texas</b>	<b>Dallas</b>	<b>TX</b>
Dallas Foundation	Dallas	TX
<b>ExxonMobil Foundation</b>	<b>Houston</b>	<b>TX</b>
Greater Houston Community Foundation	Houston	TX
<b>Houston Endowment</b>	<b>Houston</b>	<b>TX</b>
Kinder Foundation	Houston	TX
<b>Laura and John Arnold Foundation</b>	<b>Houston</b>	<b>TX</b>
Meadows Foundation	Dallas	TX
<b>Michael and Susan Dell Foundation</b>	<b>Austin</b>	<b>TX</b>
Moody Foundation	Galveston	TX
<b>Rainwater Charitable Foundation</b>	<b>Fort Worth</b>	<b>TX</b>
Rees-Jones Foundation	Dallas	TX
<b>Robert A. Welch Foundation</b>	<b>Houston</b>	<b>TX</b>
St. David's Foundation	Austin	TX
<b>T. L. L. Temple Foundation</b>	<b>Lufkin</b>	<b>TX</b>
Terry Foundation	Houston	TX
<b>Valero Energy Foundation</b>	<b>San Antonio</b>	<b>TX</b>

<sup>4</sup> In Texas, 73,680 grants were captured, which represents 96.6% of total grants paid by foundations headquartered in TX.

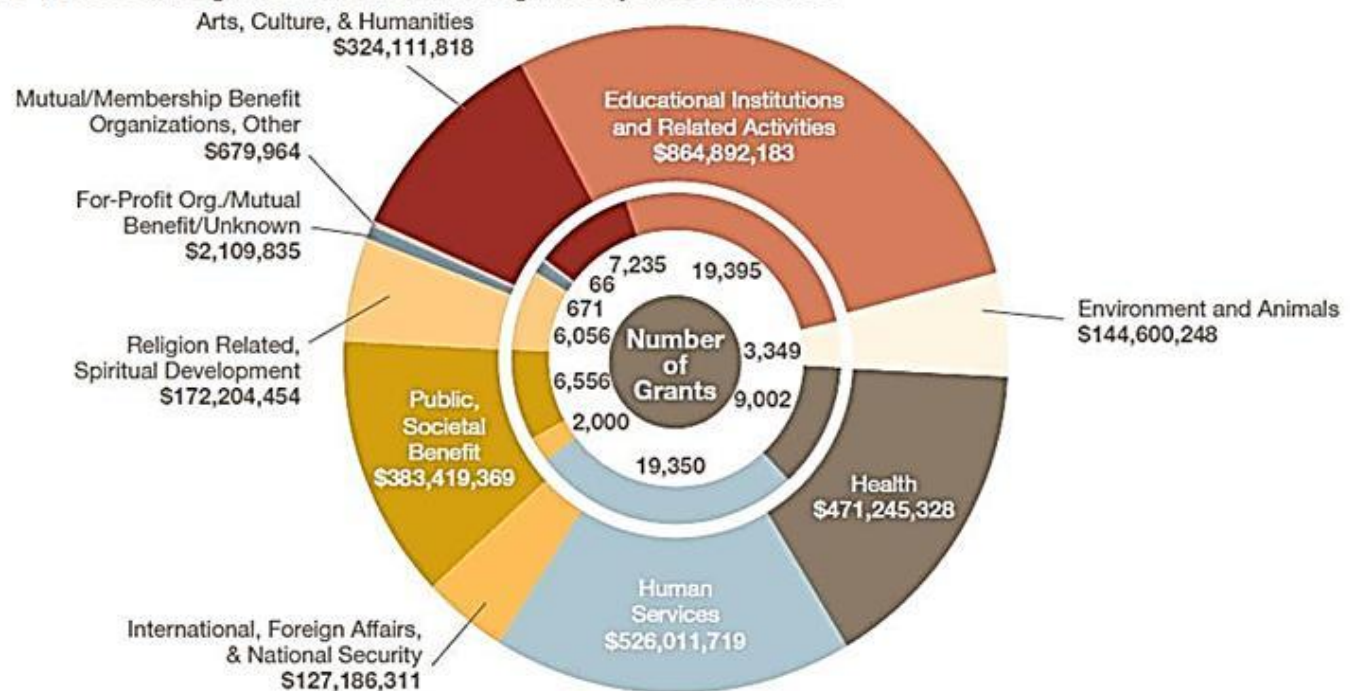
# Texas Profile

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3

## STATE ISSUE FOCUS BREAKDOWN

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



<sup>3</sup> Researchers captured more than 138,000 grants paid by foundations in the data set, with a minimum grant size of \$1,000, totaling \$6.14 billion, or 97% of total contributions.

<sup>4</sup> In Texas, 73,680 grants were captured, which represents 96.6% of total grants paid by foundations headquartered in TX.

# Texas Profile



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## FOUNDATION GIVING BY RECIPIENT METRO AREA: Table TX 4: Dollar amount for each metro area

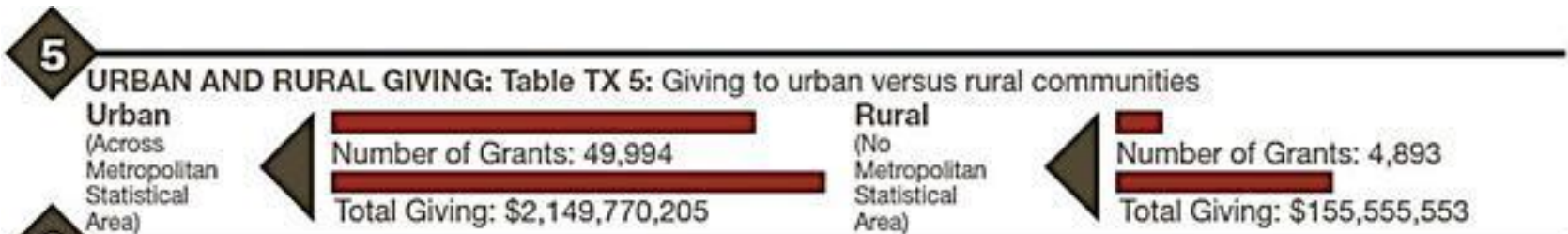
Metropolitan Area	# of Grants	Total Giving
<b>Houston - Sugar Land - Baytown</b>	<b>15,446</b>	<b>\$705,500,948</b>
Dallas - Fort Worth - Arlington	15,337	\$682,031,553
<b>Austin - Round Rock</b>	<b>4,930</b>	<b>\$263,500,737</b>
San Antonio	4,956	\$175,675,976
<b>Rural – No Metropolitan Statistical Area</b>	<b>4,893</b>	<b>\$155,555,553</b>
Lubbock	779	\$54,542,400
<b>Midland</b>	<b>1,063</b>	<b>\$37,660,484</b>
Abilene	683	\$31,315,626
<b>Tyler</b>	<b>839</b>	<b>\$22,502,280</b>
Corpus Christi	875	\$20,678,564
<b>San Angelo</b>	<b>231</b>	<b>\$18,420,648</b>
Waco	529	\$18,151,158

<b>El Paso</b>	<b>520</b>	<b>\$17,347,669</b>
Wichita Falls	707	\$15,407,617
<b>Amarillo</b>	<b>721</b>	<b>\$15,088,235</b>
Beaumont - Port Arthur	453	\$11,823,069
<b>Laredo</b>	<b>143</b>	<b>\$9,577,833</b>
Odessa	210	\$9,007,929
<b>Killeen - Temple - Fort Hood</b>	<b>168</b>	<b>\$8,104,259</b>
Victoria	357	\$7,530,091
<b>McAllen - Edinburg - Mission</b>	<b>234</b>	<b>\$6,184,286</b>
Texarkana	124	\$6,130,373
<b>Longview</b>	<b>275</b>	<b>\$5,774,486</b>
Sherman - Denison	207	\$4,296,250
<b>Brownsville - Harlingen</b>	<b>187</b>	<b>\$3,203,084</b>
College Station - Bryan	20	\$314,650

# Texas Profile



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**6 GIVING IN AND OUT OF STATE, AND INTERNATIONALLY**  
Table TX 6.1: Grants given to each recipient area

Distribution of Grants	Number of Grants	Amount
In State	53,814	\$2,257,274,991
PSW States	2,616	\$72,109,314
Out of State	15,382	\$598,519,467
Outside US	544	\$66,287,456

**GIVING TO SOUTHWEST MEMBER STATES**  
Table TX 6.2: Grants given to each recipient state

	# of Grants	Amount			
			NM	431	\$15,691,929
AR	299	\$7,376,243	NV	67	\$1,082,904
AZ	333	\$14,524,644	OK	483	\$9,010,013
CO	1,003	\$24,423,581	<b>Total</b>	<b>2,616</b>	<b>\$72,109,314</b>

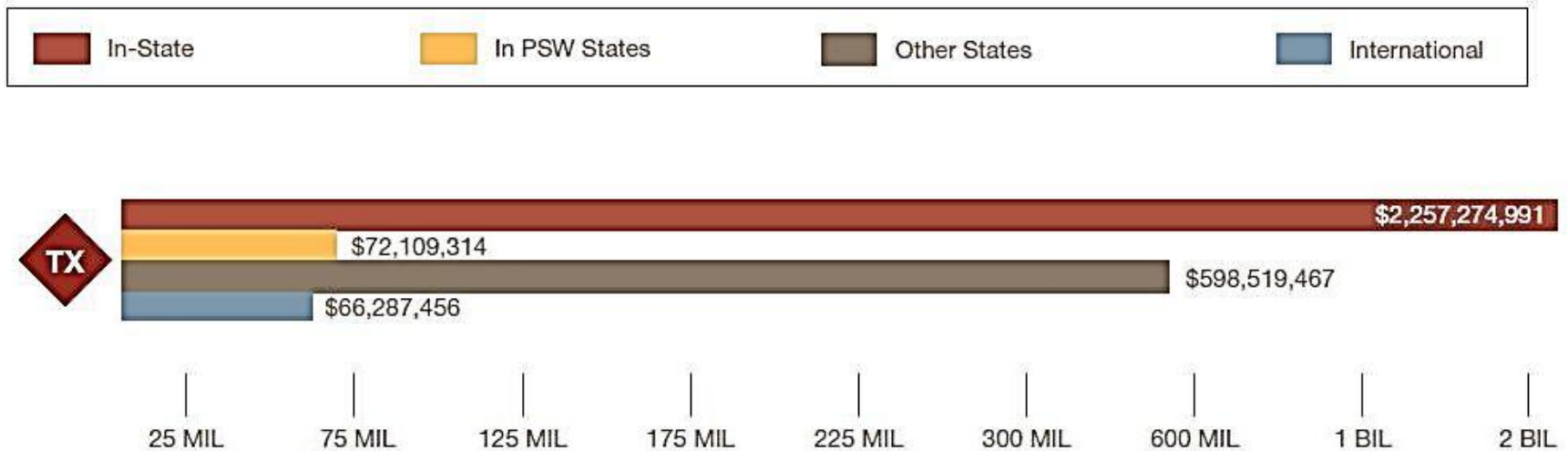
# Geography of Giving



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**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



# Geography of Giving



**Table F.2: Concentration of giving in urban and rural areas**

	Urban	Rural
AR Foundations	\$151,733,800	\$27,551,677
AZ Foundations	\$210,712,630	\$2,653,420
CO Foundations	\$578,400,499	\$68,066,389
NM Foundations	\$55,444,237	\$23,402,992
NV Foundations	\$105,519,599	\$3,296,116
OK Foundations	\$557,292,587	\$46,443,779
TX Foundations	\$2,149,770,205	\$155,555,553
PSW Region Foundations	\$3,808,873,557	\$326,969,926

**Table F.3: Largest donor and grant recipient states in the region.**

**Gave the most:** Texas foundations made the most grants to other states in the southwest region.



**Received the most:** Texas received the most grants from foundations in other states in the southwest region.



# Texas Foundations by MSA

<b># of Fdns</b>	<b>Metropolitan Area</b>	<b>Assets</b>	<b>Contributions</b>
908	Houston-Sugar Land-Baytown	\$17,132,820,183	\$1,211,803,042
1,018	Dallas-Fort Worth-Arlington	\$11,153,511,061	\$881,726,040
255	Austin-Round Rock	\$3,605,430,897	\$276,296,821
293	San Antonio	\$3,374,299,565	\$233,129,952
284	TX-RURAL	\$2,534,896,680	\$114,453,321
46	Midland	\$964,504,232	\$56,576,176
18	Abilene	\$638,854,092	\$38,111,687
42	Corpus Christi	\$624,597,632	\$25,091,940
48	Lubbock	\$600,520,580	\$45,150,280
33	Wichita Falls	\$473,688,597	\$24,313,003
43	Tyler	\$430,920,587	\$23,669,709
45	Amarillo	\$351,791,882	\$18,918,954
81	Files in other state	\$349,345,654	\$39,481,829
29	El Paso	\$331,320,806	\$30,792,042
20	Waco	\$316,727,302	\$17,167,185
13	San Angelo	\$276,098,481	\$20,827,492
20	Victoria	\$244,430,226	\$9,202,921
11	Laredo	\$217,460,290	\$10,860,029
27	Beaumont-Port Arthur	\$171,513,712	\$12,367,583
24	Longview	\$166,434,750	\$7,262,701
10	Brownsville-Harlingen	\$134,242,393	\$2,355,167
11	Texarkana	\$117,462,485	\$8,695,433
15	Killeen-Temple-Fort Hood	\$93,895,703	\$4,849,718
9	Sherman-Derison	\$67,023,480	\$1,888,547
8	Odessa	\$55,342,174	\$3,266,284
18	Mc Allen-Edinburg-Mission	\$21,571,724	\$1,353,227
3	College Station-Bryan	\$487,166	\$332,492
<b>3,332</b>		<b>\$44,449,192,334</b>	<b>\$3,119,943,575</b>





# Texas Giving in each MSA



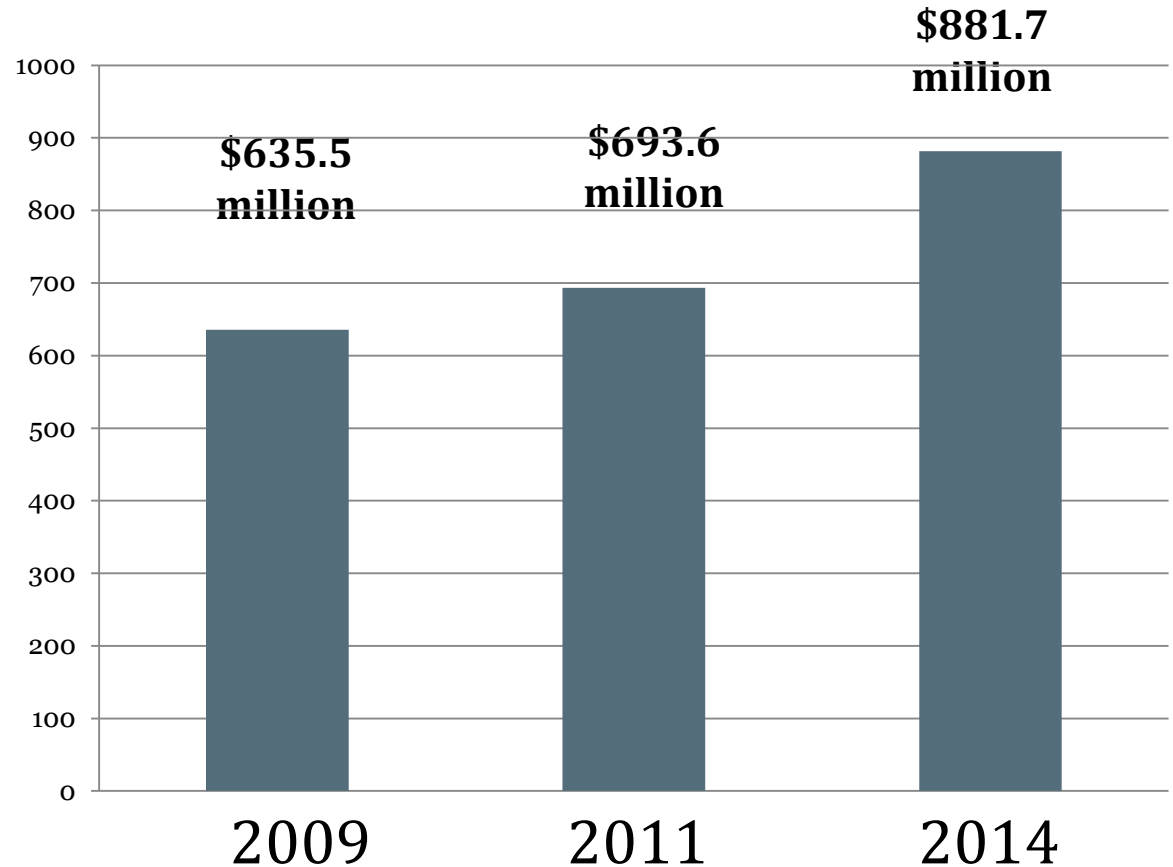
STATE	MSA	# Grants	Amount	Percent
TX	Houston - Sugar Land - Baytown	15,446	\$705,500,948	30.6%
	Dallas - Fort Worth - Arlington	15,337	\$682,031,553	29.6%
	Austin - Round Rock	4,930	\$263,500,737	11.4%
	San Antonio	4,956	\$175,675,976	7.6%
	Rural – No Metropolitan Statistical Area	4,893	\$155,555,553	6.7%
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	Laredo	143	\$9,577,833	0.4%
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	Sherman - Denison	207	\$4,296,250	0.2%
	Brownsville - Harlingen	187	\$3,203,084	0.1%
	College Station - Bryan	20	\$314,650	0.0%

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# Dallas-Forth Worth MSA Change in Giving



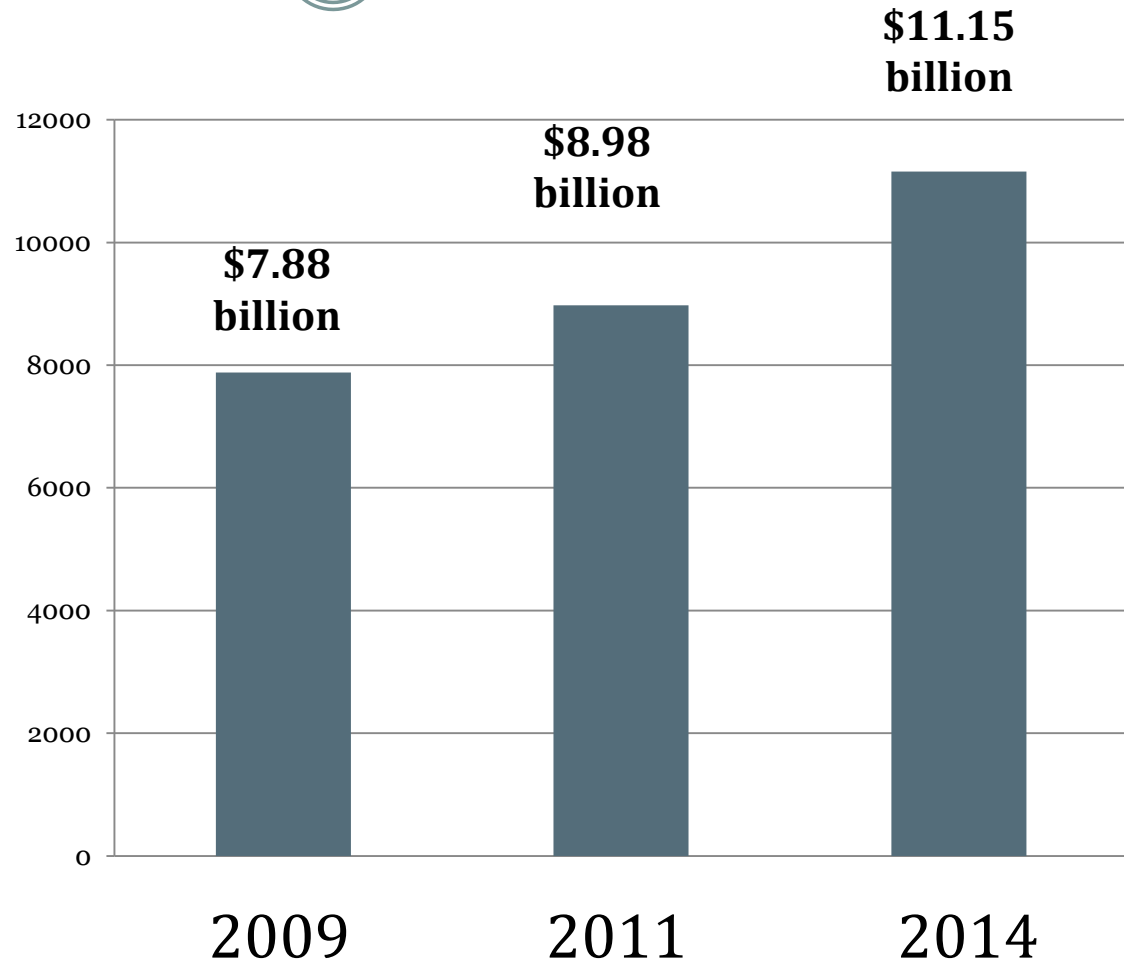
- 27.1% increase in giving since 2011
- 38.7% increase in giving since 2009



# Dallas-Forth Worth MSA Change in Assets



- 24.2% increase in assets since 2011
- 41.0% increase in assets since 2009



# Dallas MSA: Top 10 Foundations by Giving



<b>Foundation</b>	<b>Assets</b>	<b>Giving</b>	<b>Disclosure Period</b>
Communities Foundation of Texas	\$589,750,064	\$90,327,063	06/2014
Dallas Foundation	\$230,461,017	\$55,325,777	12/2014
Rees-Jones Foundation	\$583,708,507	\$34,601,036	12/2014
Amon G. Carter Foundation	\$625,588,237	\$26,139,782	12/2014
Meadows Foundation	\$712,449,077	\$25,214,769	12/2014
Community Foundation of North Texas	\$207,715,119	\$19,692,919	12/2014
Sid W. Richardson Foundation	\$564,112,257	\$16,360,784	12/2014
Burnett Foundation	\$289,111,707	\$10,744,613	12/2014
Morris Foundation	\$172,209,380	\$7,149,976	12/2014
Hillcrest Foundation	\$150,787,256	\$6,821,000	05/2014

# Dallas MSA: Top 10 Foundations by Assets



<b>Foundation</b>	<b>Assets</b>	<b>Giving</b>	<b>Disclosure Period</b>
Meadows Foundation	\$712,449,077	\$25,214,769	12/2014
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# Dallas-Forth Worth MSA: Foundations by Giving Range



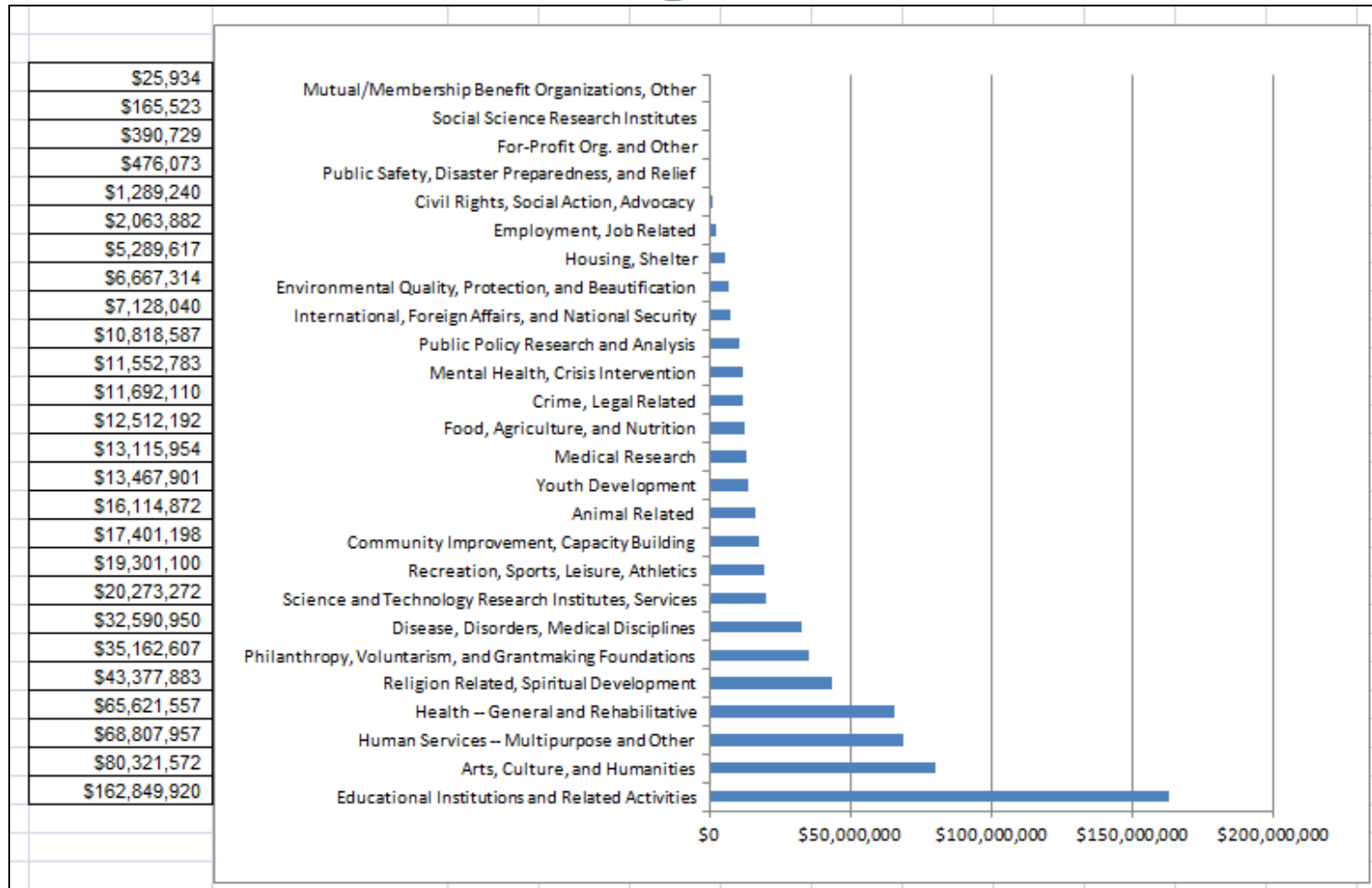
<b># of <u>Fdns</u></b>	<b>Giving Range</b>	<b>Assets</b>	<b>Giving</b>
30	\$5 million or more	\$5,245,820,853	\$497,774,102
108	\$1 million to \$4.9 million	\$3,238,184,444	\$227,893,658
88	\$500,000 to \$999,999	\$891,909,137	\$61,100,119
118	\$250,000 to \$499,000	\$741,452,239	\$43,190,176
202	\$100,000 to \$249,000	\$570,519,057	\$31,859,172
175	\$50,000 to \$99,999	\$229,785,221	\$12,337,438
163	\$25,000 to \$49,000	\$122,496,568	\$5,847,843
134	less than \$25,000	\$113,343,542	\$1,723,532
<b>1,018</b>		<b>\$11,153,511,061</b>	<b>\$881,726,040</b>

# Dallas-Forth Worth MSA: Foundations by Asset Range



# of Fdns	Asset Range	Assets	Giving
38	\$50 million or more	\$6,488,645,432	\$416,559,821
126	\$10 million to \$49.9 million	\$2,967,602,227	\$224,171,473
117	\$5 million to \$9.9 million	\$815,463,613	\$96,292,299
310	\$1 million to \$4.9 million	\$712,669,044	\$71,819,621
163	\$500,000 to \$999,999	\$119,805,691	\$12,520,108
95	\$250,000 to \$499,999	\$35,289,405	\$9,386,622
64	\$100,000 to \$249,999	\$10,983,572	\$8,064,930
105	less than \$100,000	\$3,052,077	\$42,911,166
<b>1,018</b>		<b>\$11,153,511,061</b>	<b>\$881,726,040</b>

# Societal Issues Addressed





# Education Funding Priorities



Adult Basic Education Total	\$54,609
Adult, Continuing Education Total	\$20,000
Alumni Associations Total	\$54,673
Business, Management School, Education Total	\$1,190,830
Child Development, Educational Activities Total	\$5,766,788
Community College, Jr. College Total	\$1,059,404
Cooperative, Community Education Total	\$1,309,252
Drop-Out Prevention, Retention Services Total	\$273,500
Education Total	\$17,386,651
Educational Services and Schools Total	\$923,157
Educational Testing Total	\$20,000
Elementary, Secondary Education Total	\$31,824,829
Engineering School, Education Total	\$9,568
Fund Raising and/or Fund Distribution Total	\$93,000
Graduate, Professional Schools Total	\$20,000
Health Sciences School, Education Total	\$800,196
Law School, Education Total	\$506,200
Libraries, Library Science Total	\$394,247
Medical School, Education Total	\$1,065,167
Nursery School, Early School Admissions, Kindergarten	\$1,148,244

Parent-Teacher Associations Total	\$326,803
Primary, Elementary School Total	\$438,132
Public Libraries Total	\$1,103,162
Remedial Reading, Reading Encouragement Programs	\$1,997,459
Research Institutes and/or Public Policy Analysis Total	\$10,000
Scholarships, Student Financial Aid Services Total	\$19,229,455
Secondary, High School Total	\$5,437,765
Special Education Institutions, Programs Total	\$343,000
Special Libraries Total	\$330,000
Student Sororities, Fraternities Total	\$135,191
Teaching School, Education Total	\$4,910,992
Theological School, Education Total	\$5,361,869
Undergraduate College (4-year) Total	\$6,222,493
University or Technological Institute Total	\$52,320,612
	\$162,849,920

4,011 grants totaling \$162.8 million

“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*

