

*An Overview of Grantmaking by*  
**Private and Community Foundations**

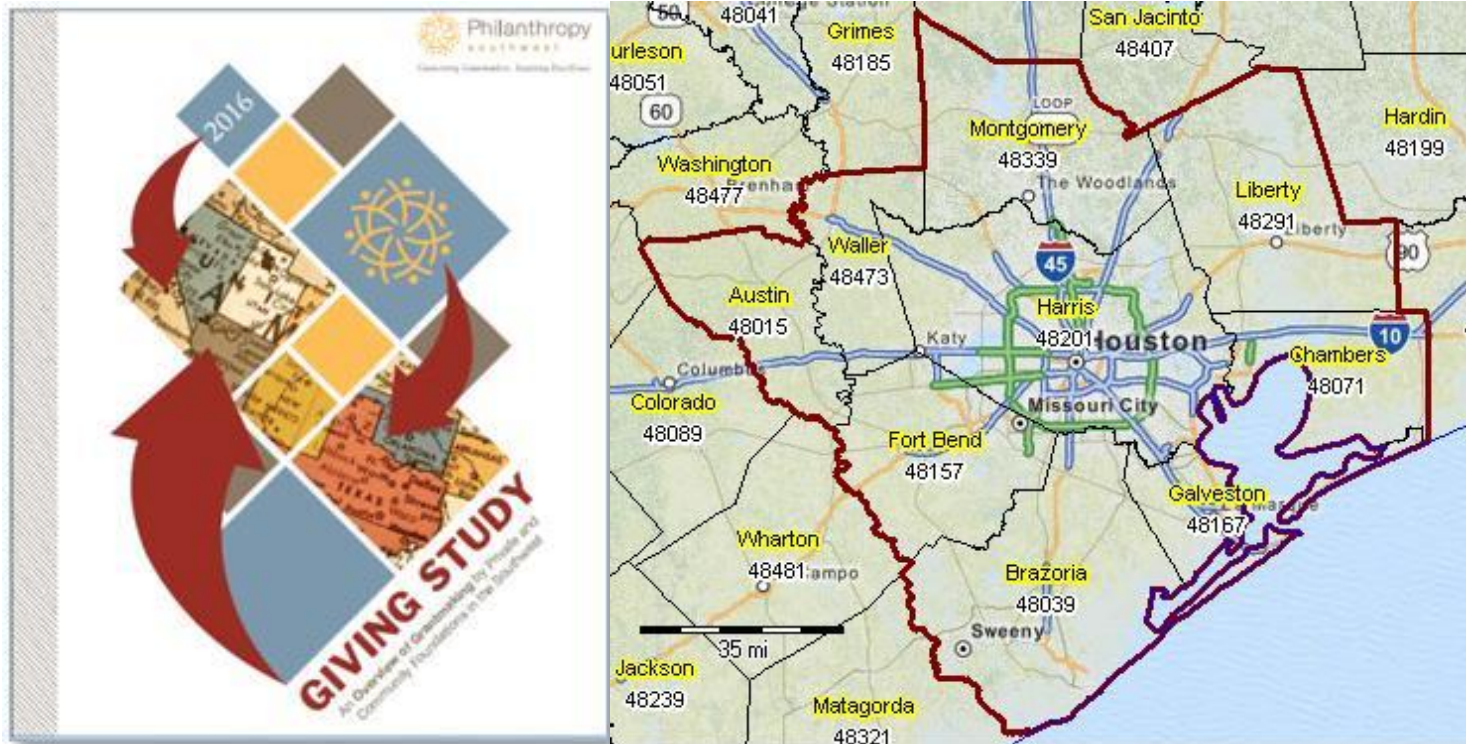


*in Houston, Texas and the  
Southwest*



**Houston Federal Reserve Bank**  
**February 15, 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

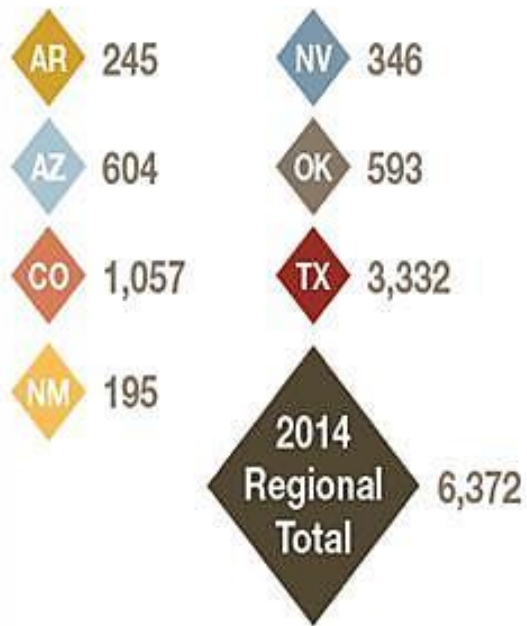
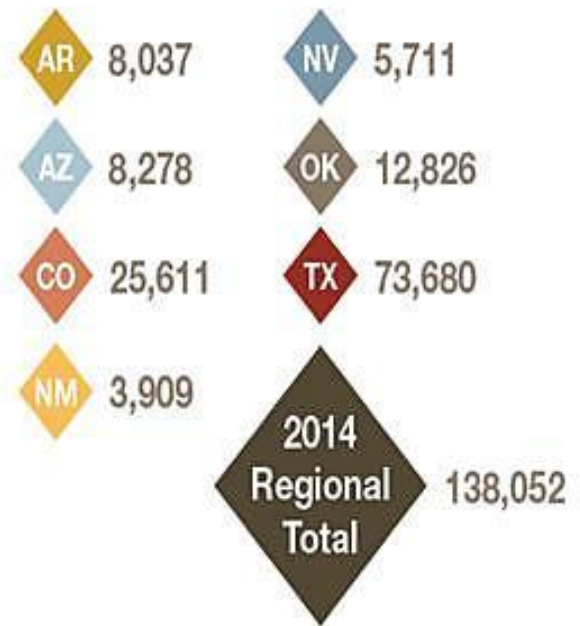


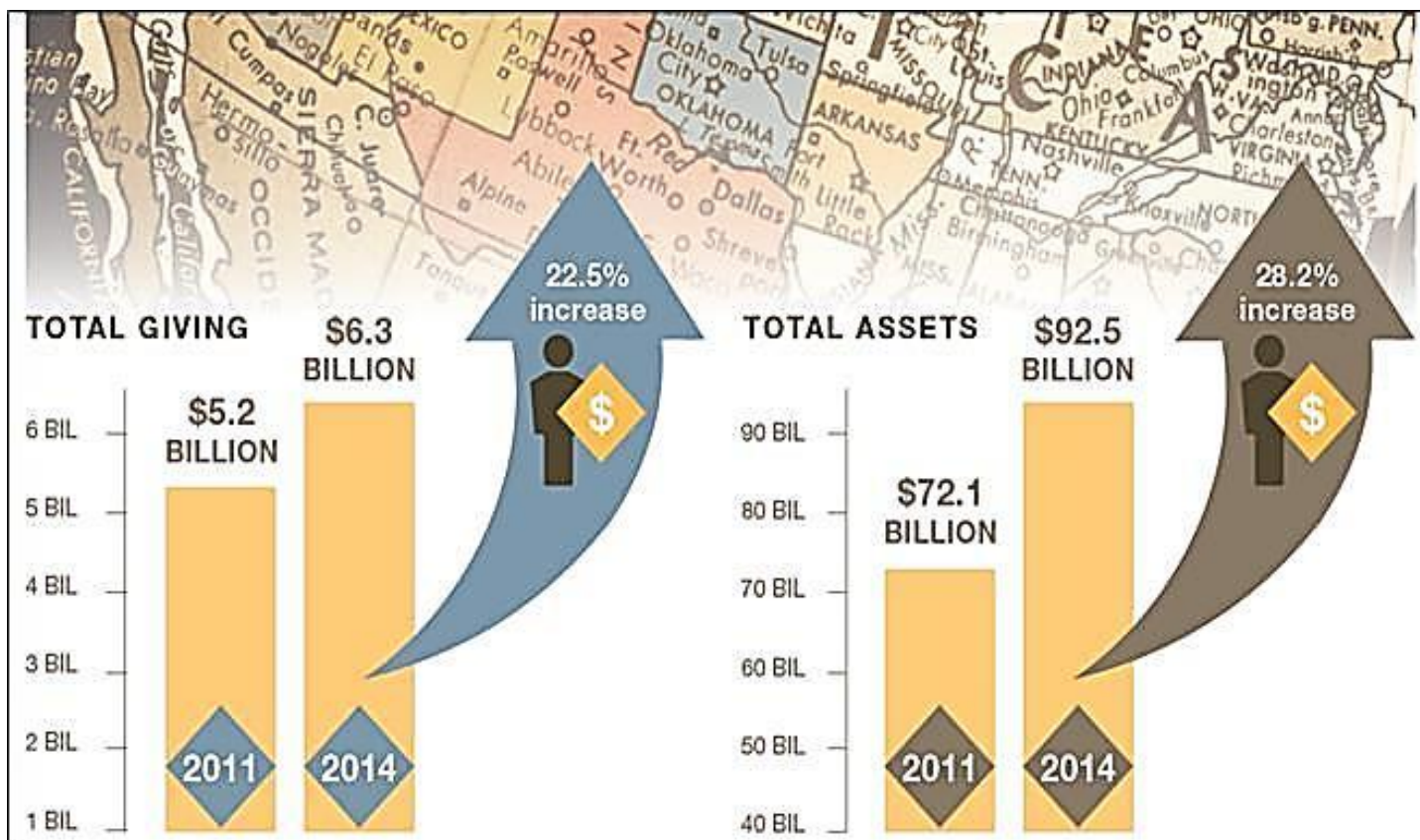
Table A.2: Number of foundation grants in the region and states



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

*Giving Study page 4*

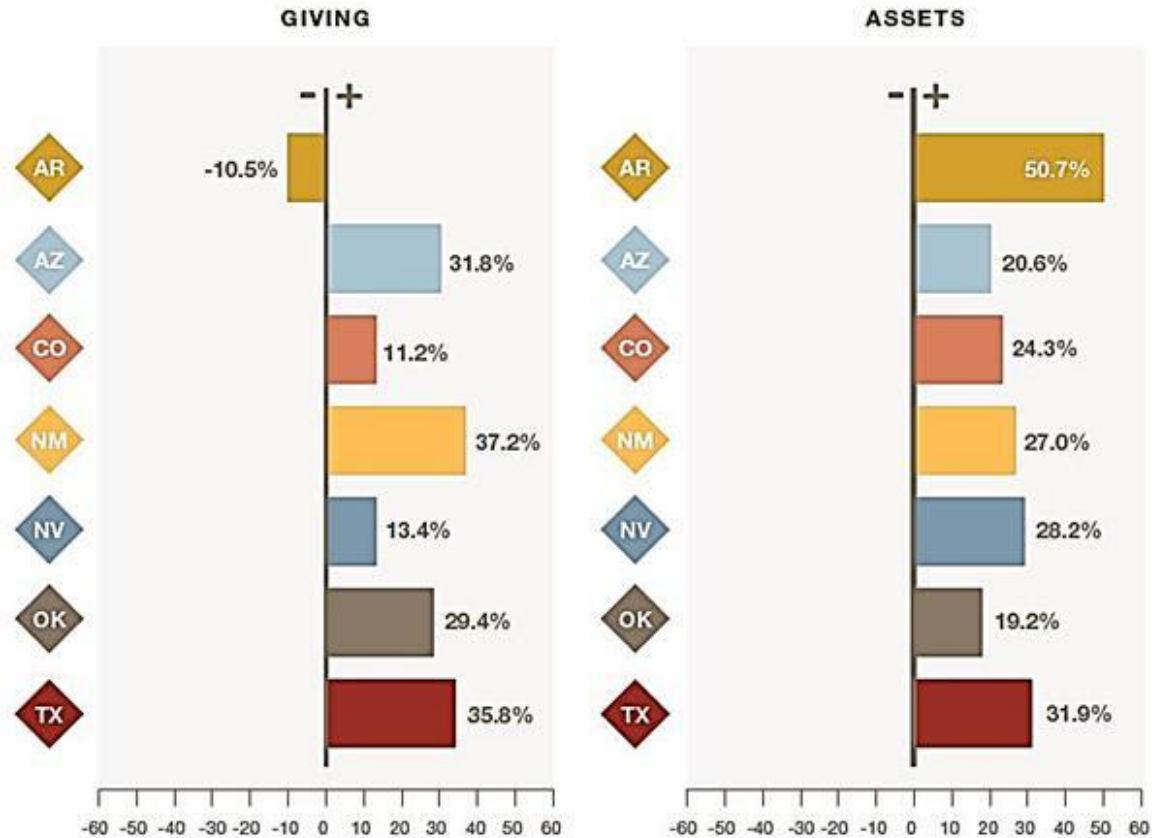
# Overall Trends



*Giving Study page 4*



# Assets and Giving Trends by State



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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%

# Spotlight on Community Foundations



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

	2014	2011	CHANGE
AR	\$17,016,663	\$12,950,264	31.4%
AZ	\$42,034,207	\$33,339,429	26.1%
CO	\$160,600,149	\$110,954,122	44.8%
NM	\$18,432,866	\$14,365,834	28.1%
NV	\$14,741,963	\$13,851,694	6.4%
OK	\$325,151,387	\$120,622,481	169.6%
TX	\$383,947,060	\$249,631,567	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	\$415,162,836	39.5%
CO	\$1,513,605,028	\$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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# Societal Issues Addressed

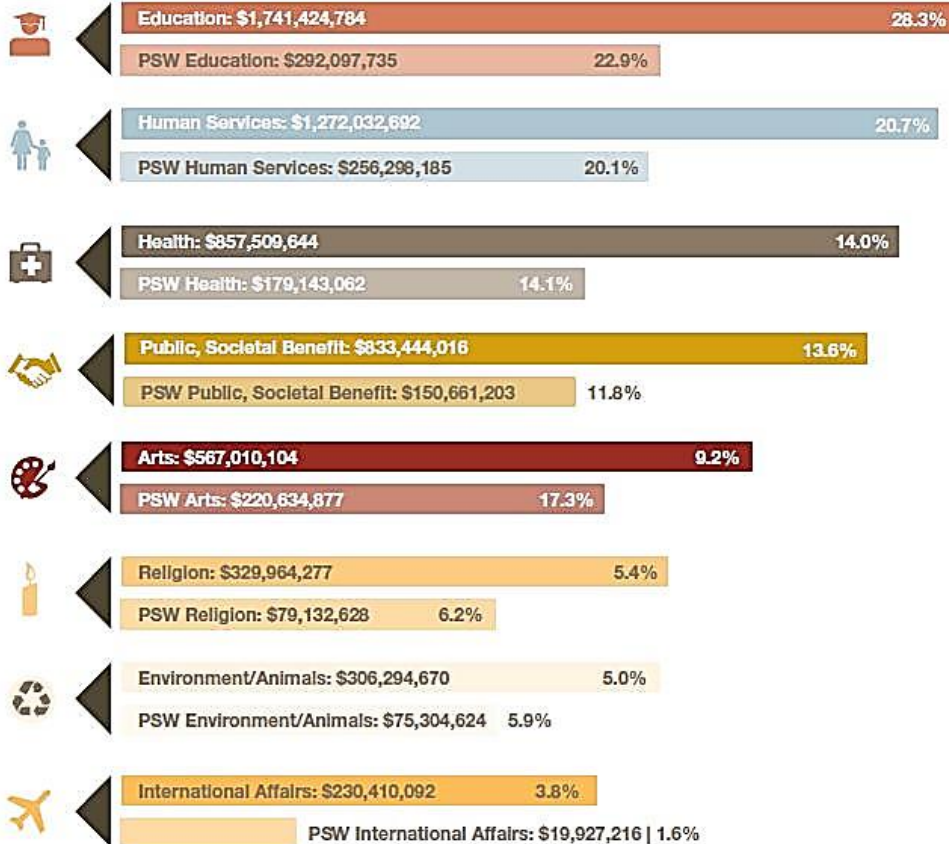


Table E.7: Texas grants by societal issues

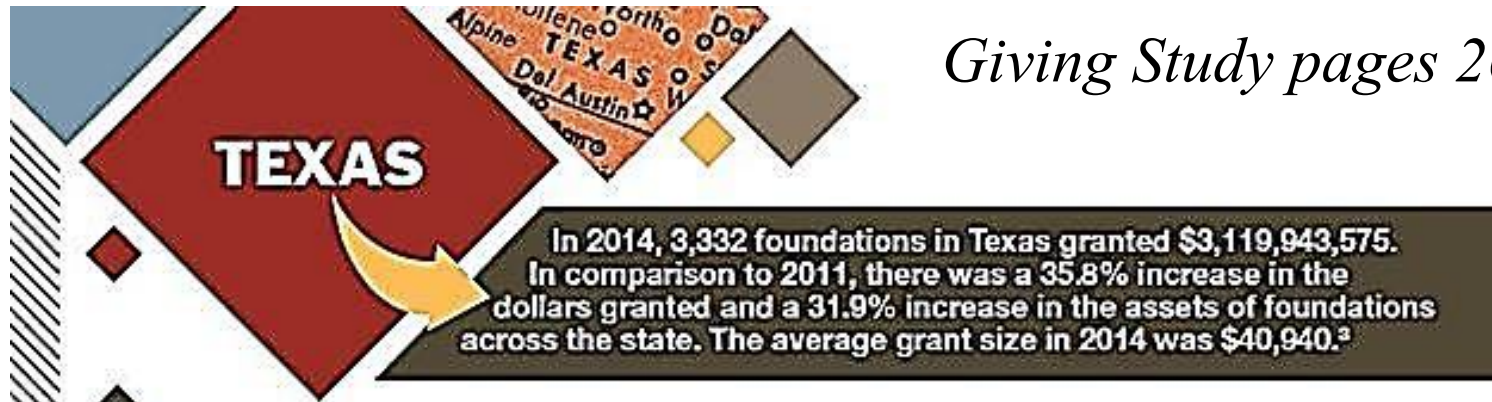
Texas	Dollars Granted	Number of Grants
Arts, Culture, and Humanities	\$324,111,818	7,235
Educational Institutions and Related Activities	\$864,892,183	19,395
Environment/Animals	\$144,600,248	3,349
Health	\$471,245,328	9,002
Human Services	\$526,011,719	19,350
International, Foreign Affairs, and National 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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# Texas Profile

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**1**

**TOTAL NUMBER OF FOUNDATIONS**  
Table TX 1.1:  
Total number of foundations in Texas



3,332

**TOTAL ASSETS**  
Table TX 1.2:  
Total amount of foundation assets in Texas



\$44,449,192,334

**TOTAL DOLLARS GRANTED**  
Table TX 1.3:  
Total number of dollars granted in Texas



\$3,119,943,575

**TOTAL NUMBER OF GRANTS**  
Table TX 1.4:  
Total number of Texas grants<sup>4</sup>



73,680

**AVERAGE GRANT SIZE**  
Table TX 1.5: Comparison of state to PSW members  
The average grant size for PSW members:



\$57,492

The average grant size in the state:



\$40,940

# Texas Profile



2

**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.

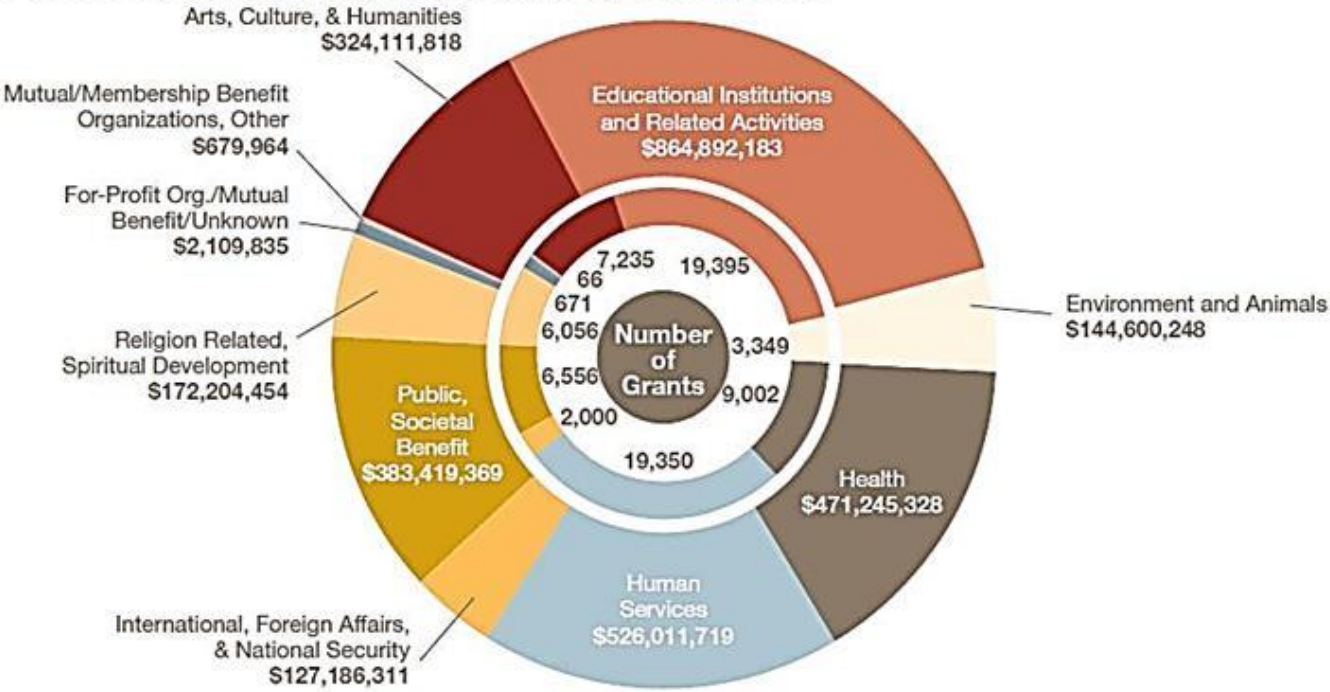
# Texas Profile



**3**

## STATE ISSUE FOCUS BREAKDOWN

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



<sup>1</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>2</sup> In Texas, 73,690 grants were captured, which represents 96.6% of total grants paid by foundations headquartered in TX.



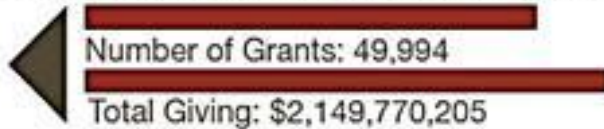
# Texas Profile



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

**Urban**  
(Across Metropolitan Statistical Area)



**Rural**  
(No Metropolitan Statistical Area)



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>

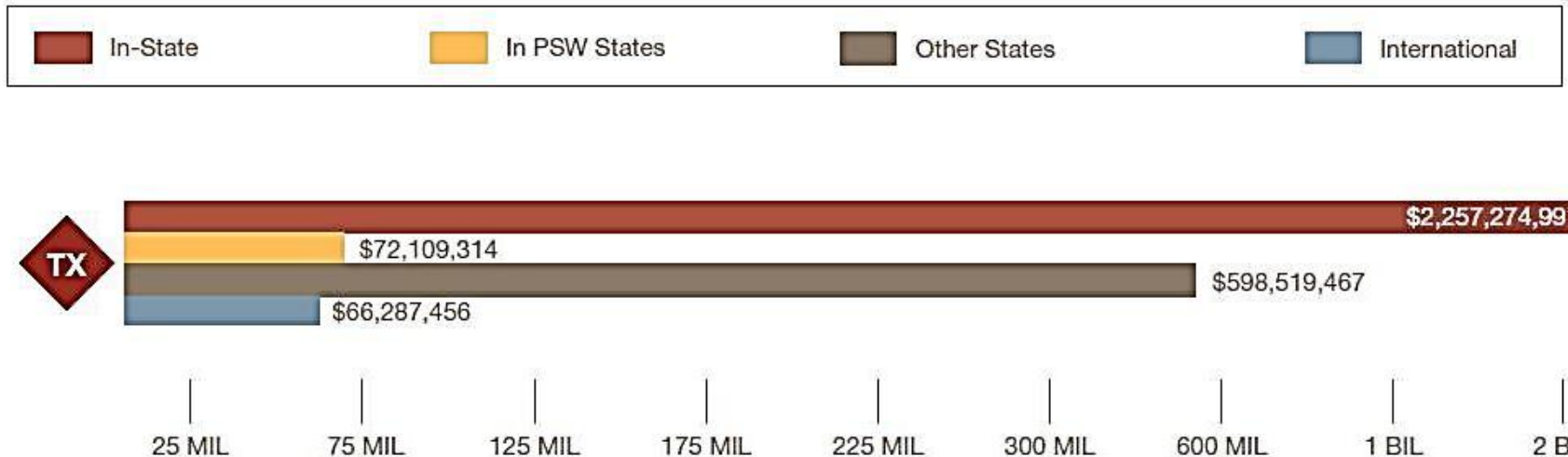


# Geography of Giving



**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

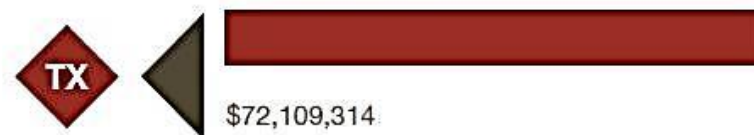


**Table F.2: Concentration of giving in urban and rural areas**

	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
1,022	Dallas-Fort Worth-Arlington	\$11,174,569,028	\$882,752,276
255	Austin-Round Rock	\$3,605,430,897	\$276,296,821
293	San Antonio	\$3,374,299,565	\$233,129,952
325	Rural - No MSA	\$2,798,099,187	\$149,555,722
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
50	Lubbock	\$601,629,164	\$45,210,651
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
29	Colorado Springs	\$331,320,806	\$30,792,042
21	Waco	\$316,734,588	\$17,179,031
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	Pine Bluff	\$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-Denison	\$67,023,480	\$1,888,547
27	College Station-Bryan	\$56,158,944	\$3,192,901
8	Odessa	\$55,342,174	\$3,266,284
18	McAllen-Edinburg-Mission	\$21,571,724	\$1,353,227
7	Fayetteville-Springdale-Rogers	\$7,965,749	\$402,351
2	Fort Smith	\$331,783	\$18,215
3,332		\$44,449,192,334	\$3,119,943,575





# Houston MSA: Foundations by Giving Range



# of Fdns	Giving Range	Assets	Giving
44	\$5 million or more	\$12,539,399,664	\$910,142,607
85	\$1 million to \$4.9 million	\$2,188,784,847	\$172,640,685
64	\$500,000 to \$999,999	\$756,587,471	\$44,530,303
96	\$250,000 to \$499,000	\$593,043,241	\$33,774,520
213	\$100,000 to \$249,000	\$698,621,959	\$33,928,947
148	\$50,000 to \$99,999	\$176,251,114	\$10,525,785
129	\$25,000 to \$49,000	\$96,384,650	\$4,679,110
129	less than \$25,000	\$83,747,237	\$1,581,085
<b>908</b>		<b>\$17,132,820,183</b>	<b>\$1,211,803,042</b>



# Houston MSA: Foundations by Asset Range



<b># of Fdns</b>	<b>Asset Range</b>	<b>Assets</b>	<b>Giving</b>
50	\$50 million or more	\$13,550,038,240	\$847,307,081
99	\$10 million to \$49.9 million	\$2,115,684,381	\$150,465,841
92	\$5 million to \$9.9 million	\$610,419,851	\$44,708,644
298	\$1 million to \$4.9 million	\$714,874,116	\$85,921,502
132	\$500,000 to \$999,999	\$97,818,402	\$18,801,390
80	\$250,000 to \$499,999	\$30,645,748	\$3,652,579
59	\$100,000 to \$249,999	\$10,622,200	\$8,084,255
98	less than \$100,000	\$2,717,245	\$52,861,750
<b>908</b>		<b>\$17,132,820,183</b>	<b>\$1,211,803,042</b>

# Texas Giving in each MSA



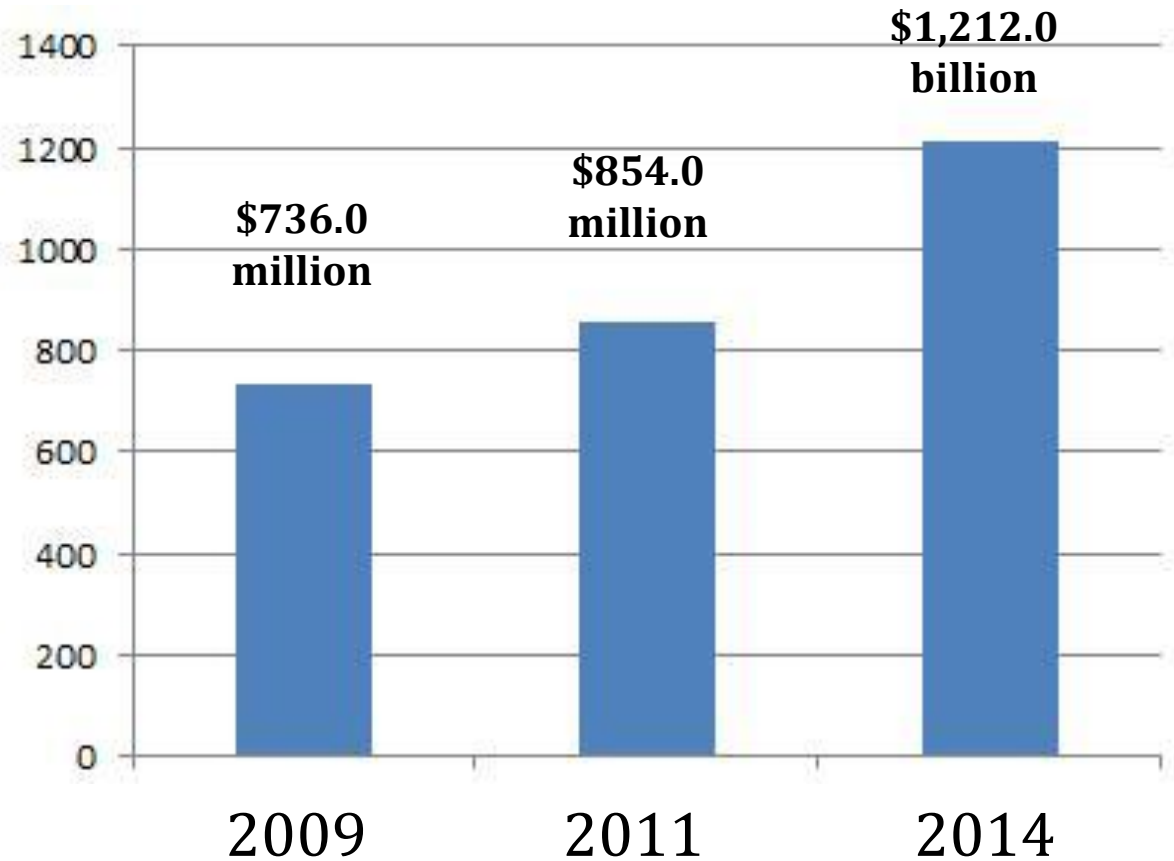
STATE	MSA	# Grants	Amount	Percent
TX	Houston - Sugar Land - Baytown	15,446	\$705,500,948	30.6%
	Dallas - Fort Worth - Arlington	15,337	\$682,031,553	29.6%
	Austin - Round Rock	4,930	\$263,500,737	11.4%
	San Antonio	4,956	\$175,675,976	7.6%
	Rural – No Metropolitan Statistical Area	4,893	\$155,555,553	6.7%
	Lubbock	779	\$54,542,400	2.4%
	Midland	1,063	\$37,660,484	1.6%
	Abilene	683	\$31,315,626	1.4%
	Tyler	839	\$22,502,280	1.0%
	Corpus Christi	875	\$20,678,564	0.9%
	San Angelo	231	\$18,420,648	0.8%
	Waco	529	\$18,151,158	0.8%
	El Paso	520	\$17,347,669	0.8%
	Wichita Falls	707	\$15,407,617	0.7%
	Amarillo	721	\$15,088,235	0.7%
	Beaumont - Port Arthur	453	\$11,823,069	0.5%
	Laredo	143	\$9,577,833	0.4%
	Odessa	210	\$9,007,929	0.4%
	Killeen - Temple - Fort Hood	168	\$8,104,259	0.4%
	Victoria	357	\$7,530,091	0.3%
	Mc Allen - Edinburg - Mission	234	\$6,184,286	0.3%
	Texarkana	124	\$6,130,373	0.3%
	Longview	275	\$5,774,486	0.3%
	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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# Houston MSA Change in Giving



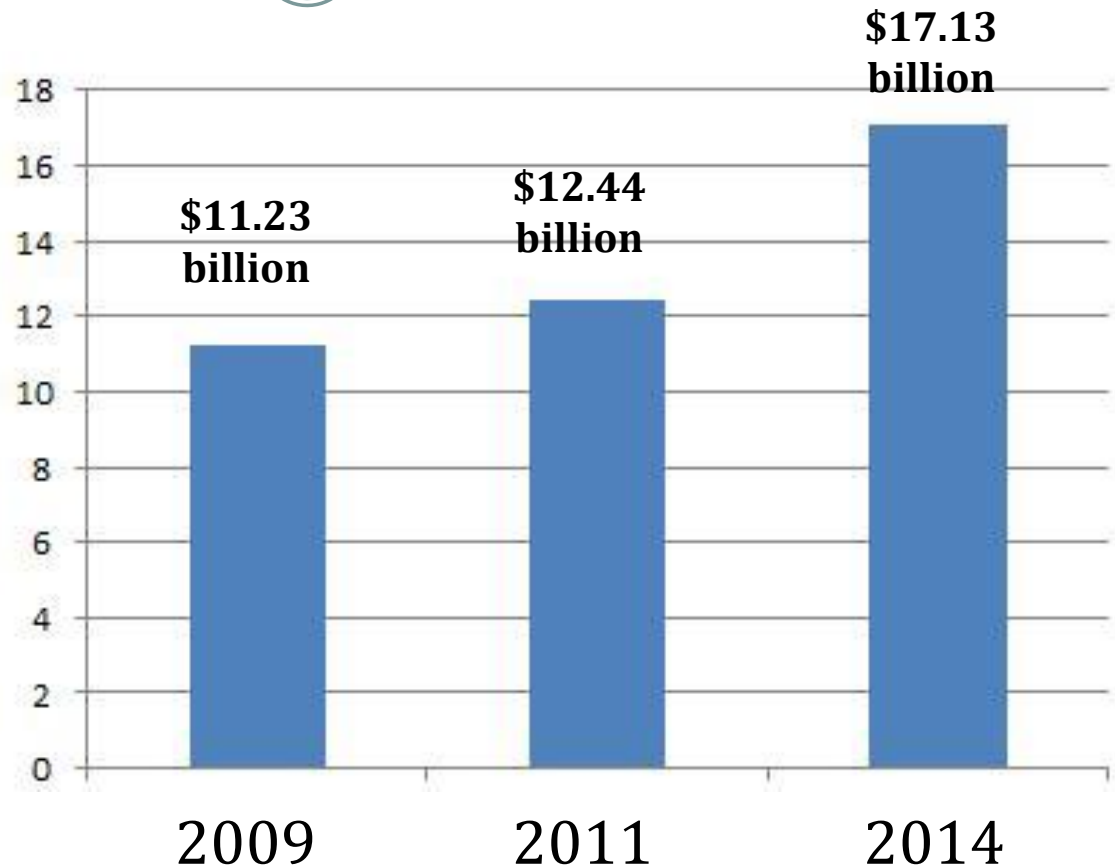
- 41.9% increase in giving since 2011
- 64.6% increase in giving since 2009



# Houston MSA Change in Assets



- 37.7% increase in assets since 2011
- 52.5% increase in assets since 2009





# Houston MSA: Top 10 Foundations by Giving



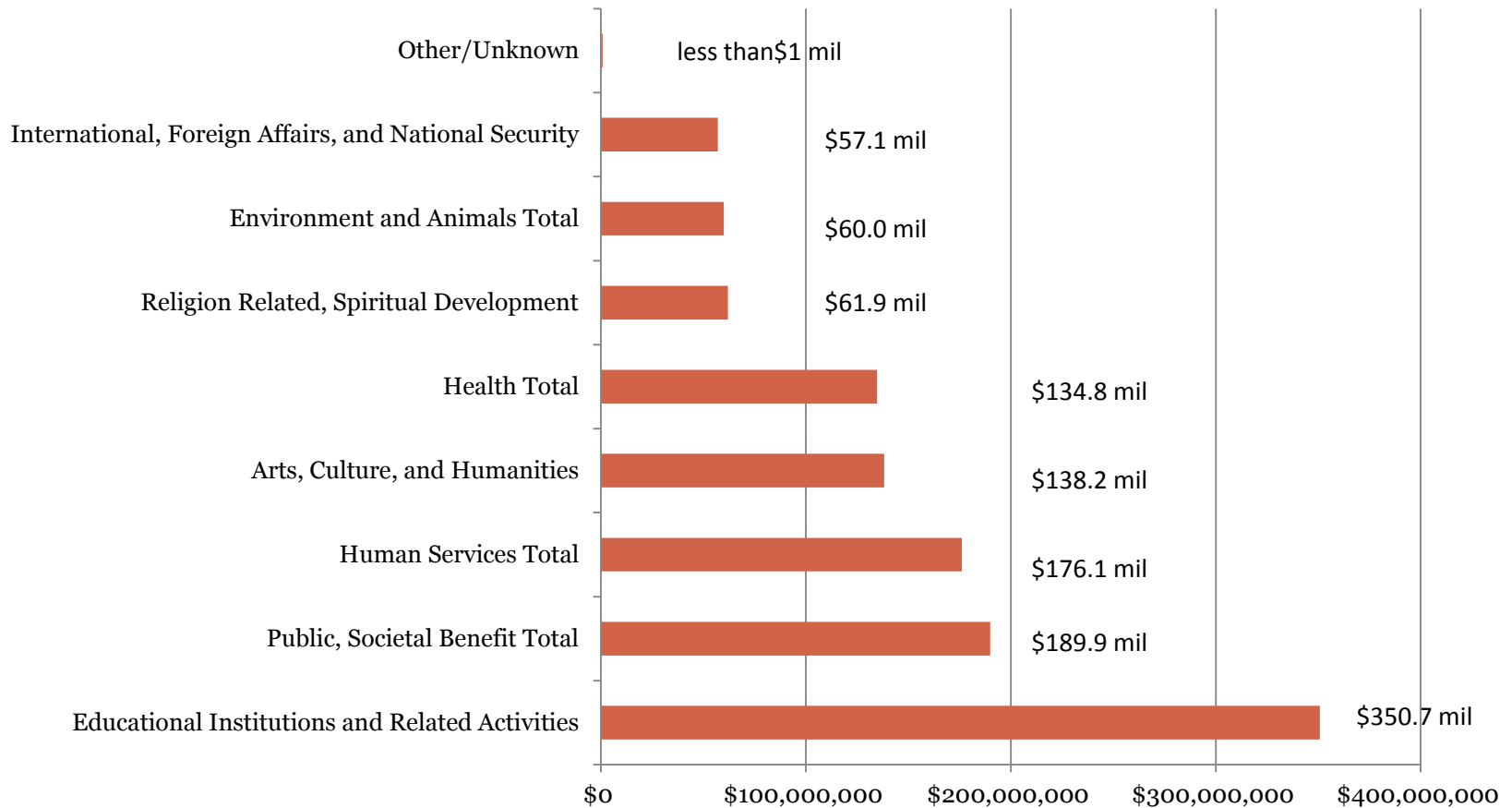
<b>Foundation</b>	<b>Contributions</b>	<b>Disclosure</b>
Laura and John Arnold Foundation	\$85,348,365	12/31/2014
Brown Foundation	\$63,704,116	06/30/2015
ExxonMobil Foundation	\$75,212,563	12/31/2014
Greater Houston Community Foundation	\$94,455,749	12/31/2014
Houston Endowment	\$85,843,061	12/31/2014
Kinder Foundation	\$42,650,633	12/31/2014
Joe Levit Family Foundation	\$18,019,667	12/31/2014
Moody Foundation	\$65,994,027	12/31/2014
Terry Foundation	\$20,614,322	12/31/2014
Robert A. Welch Foundation	\$29,117,084	08/31/2014

# Houston MSA: Top 10 Foundations by Assets

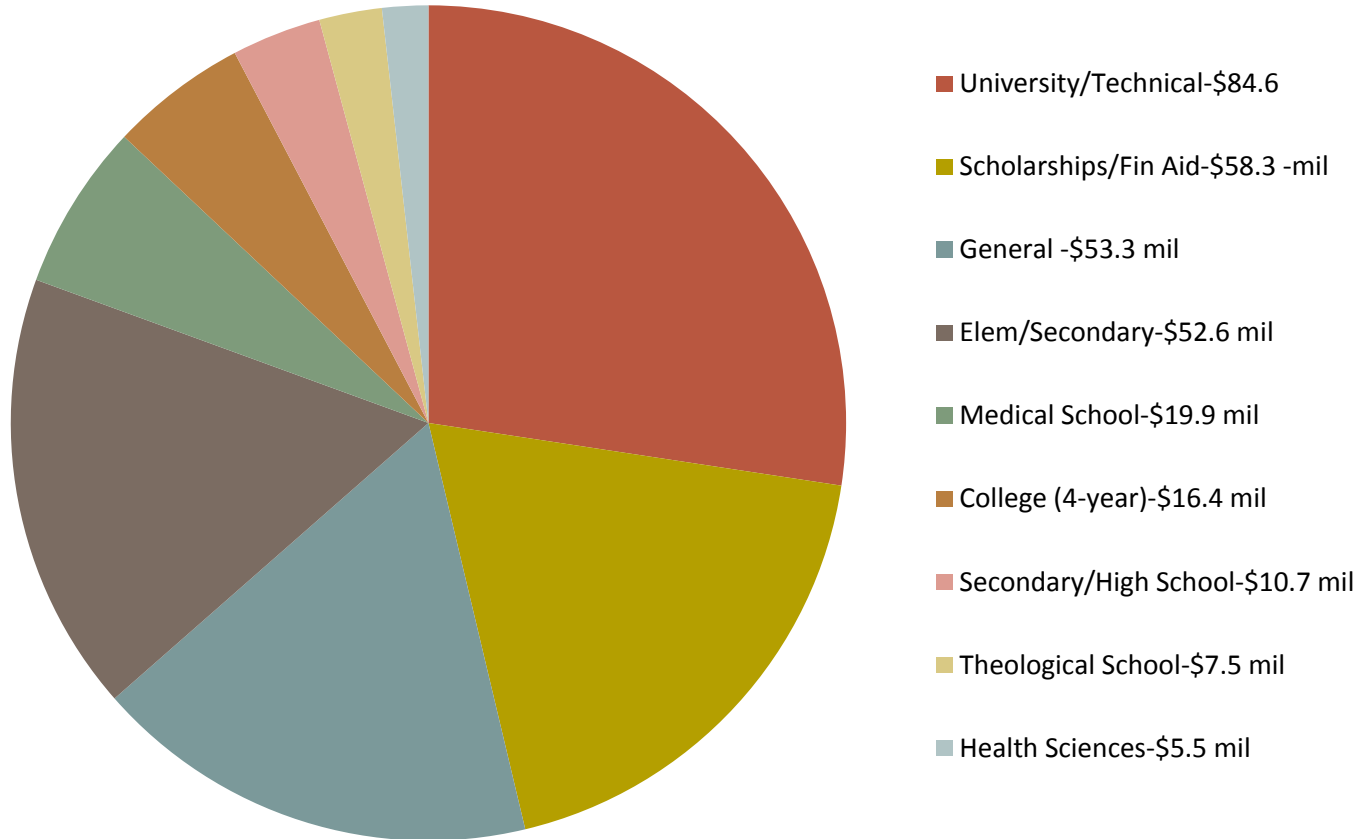


<b>Foundation</b>	<b>Assets</b>	<b>Disclosure</b>
Laura and John Arnold Foundation	\$1,766,641,213	12/31/2014
BHP Billiton Foundation	\$282,423,901	06/30/2015
Brown Foundation	\$1,303,245,651	06/30/2015
Cullen Foundation	\$281,536,194	12/31/2014
George Foundation	\$314,058,088	12/31/2014
Greater Houston Community Foundation	\$523,180,892	12/31/2014
Houston Endowment	\$1,742,374,990	12/31/2014
Moody Foundation	\$1,547,141,408	12/31/2014
Terry Foundation	\$365,331,240	12/31/2014
Robert A. Welch Foundation	\$699,916,142	08/31/2014

# Societal Issues Addressed

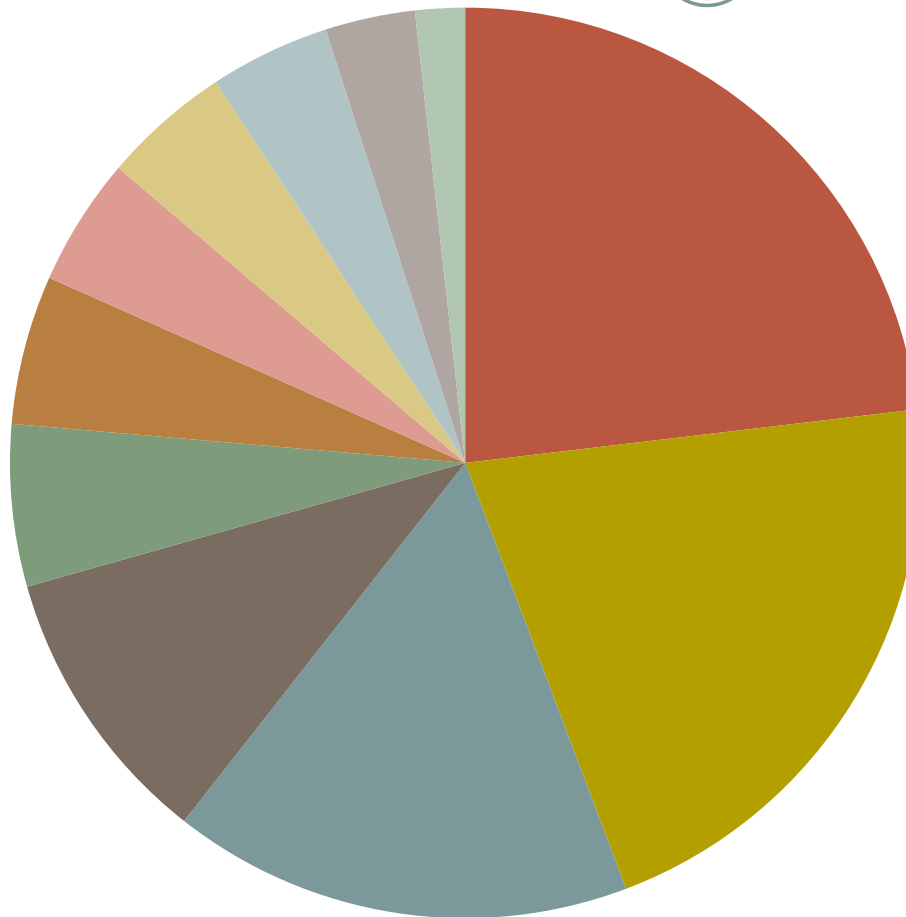


# Education Funding Priorities



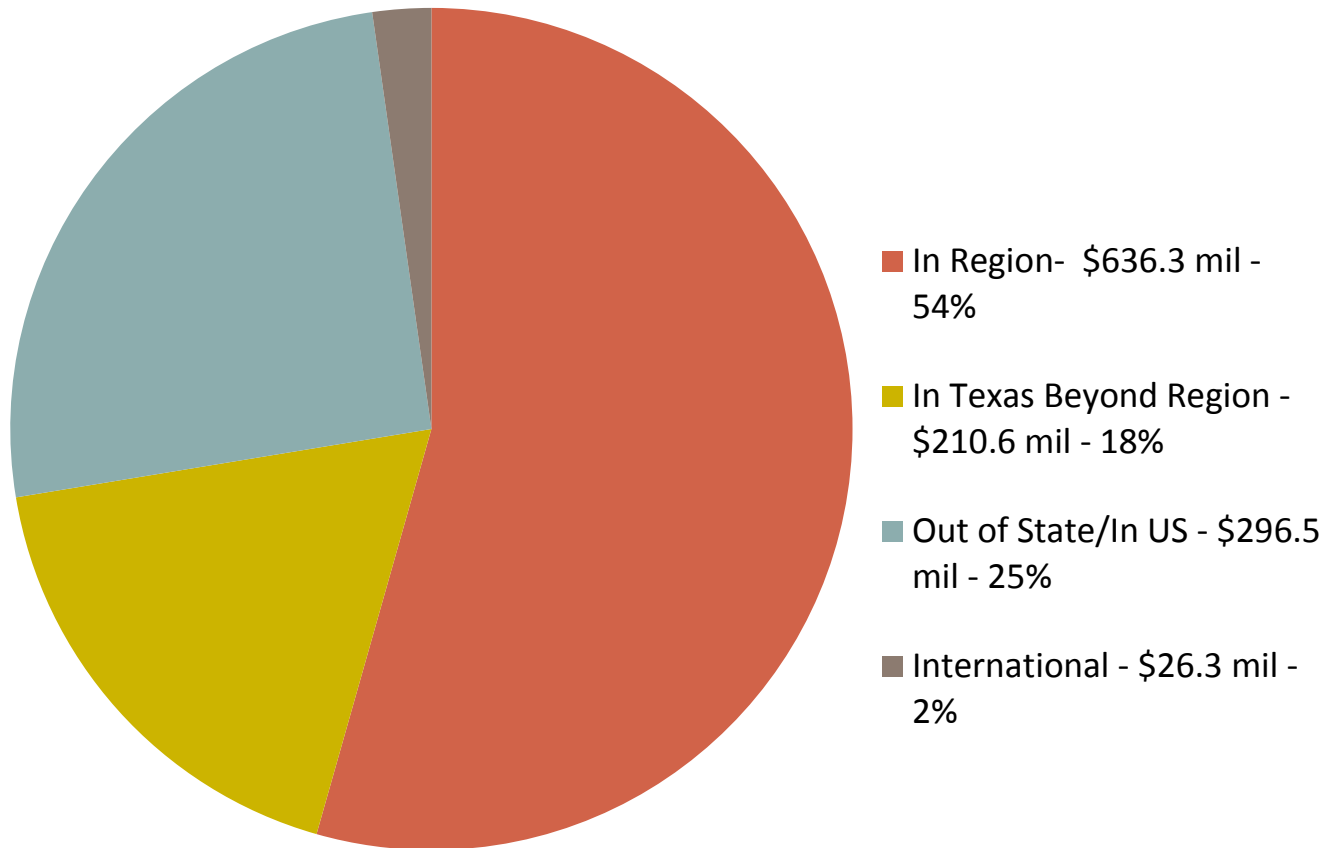


# Public/Societal Benefit Funding Priorities



- Philanthropy, Voluntarism, and Grantmaking Foundations-\$40.6 mil
- Community Foundations-\$37.1 mil
- Chemistry, Chemical Engineering-\$28.7 mil
- Research/Public Policy Institutes-\$17.6 mil
- Science - General -\$10.1 mil
- Fund-Raising Organizations that Cross Categories-\$9.3 mil
- Community, Neighborhood Development-\$8.0 mil
- Physics-\$8 mil
- Voluntarism Promotion-\$7.5 mil
- Nonprofit Management-\$5.6 mil
- Community Improvement-\$3.1 mil

# Geography of Giving



“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*

