

An Overview of Grantmaking by
Private and Community Foundations

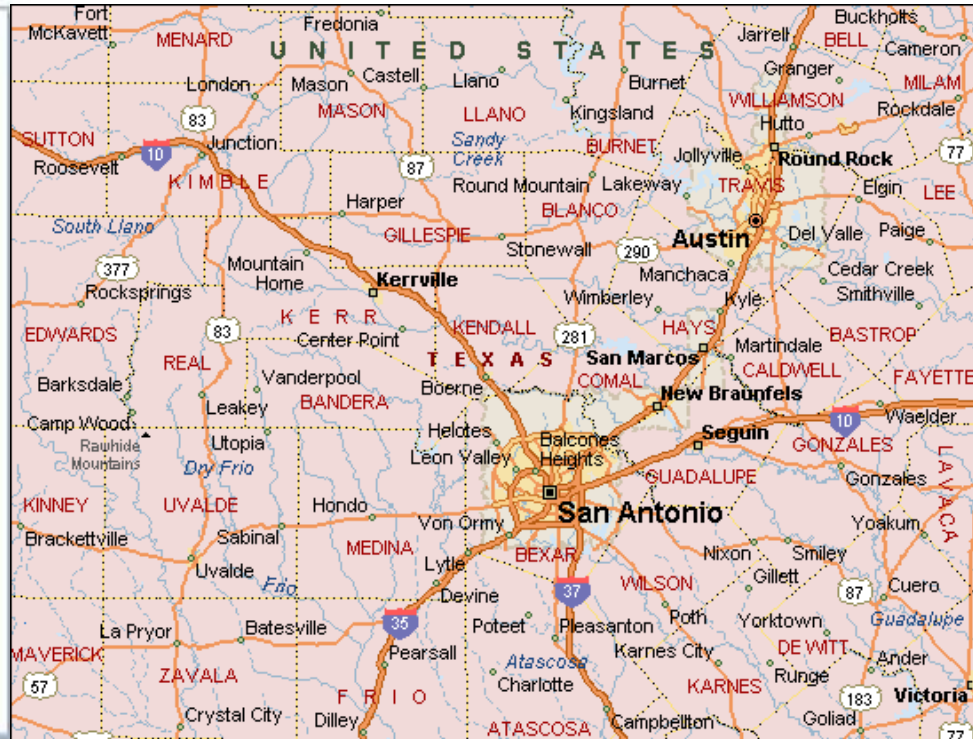
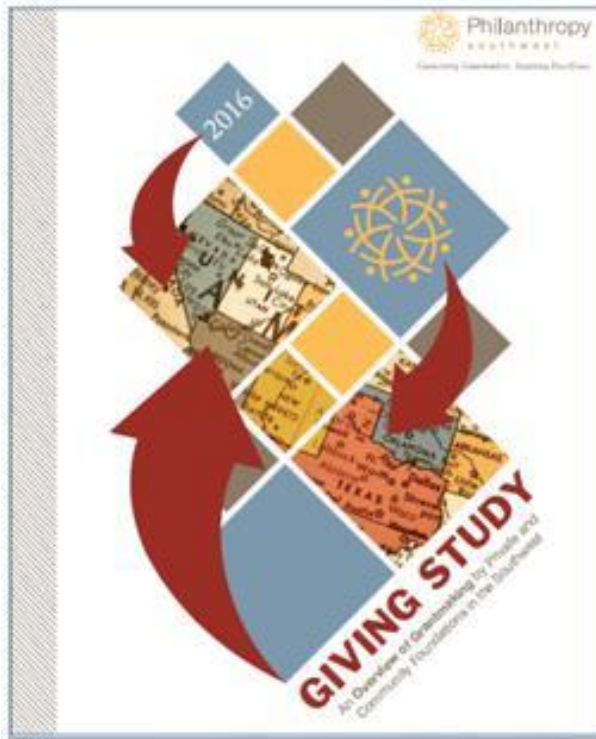


*in San Antonio, Texas and the
Southwest*



**Whitley Theological
Seminary**
April 7, 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

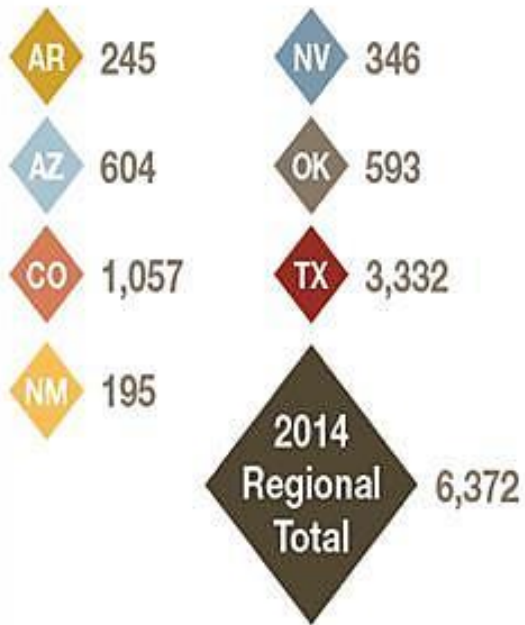


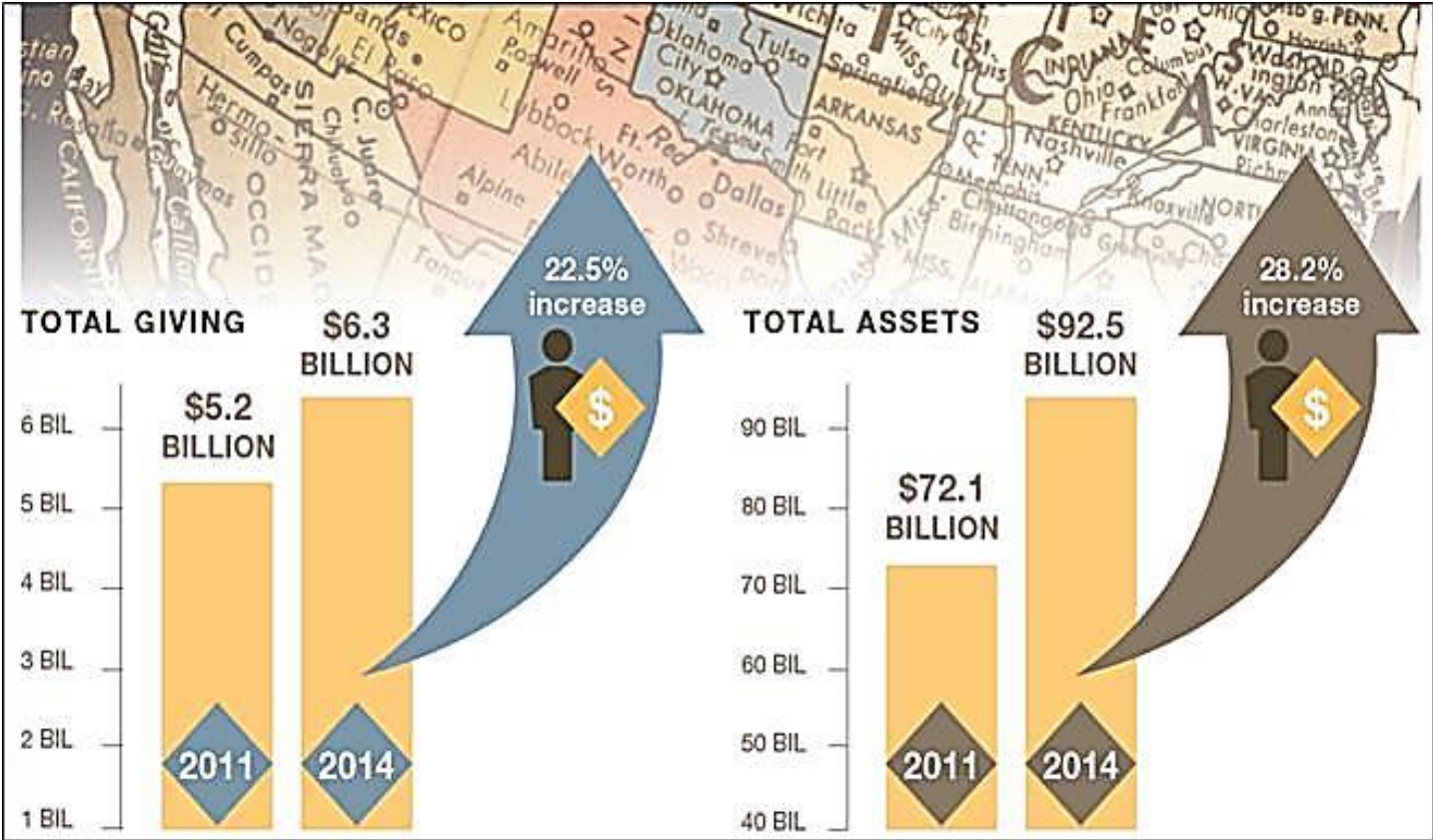
Table A.2: Number of foundation grants in the region and states



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

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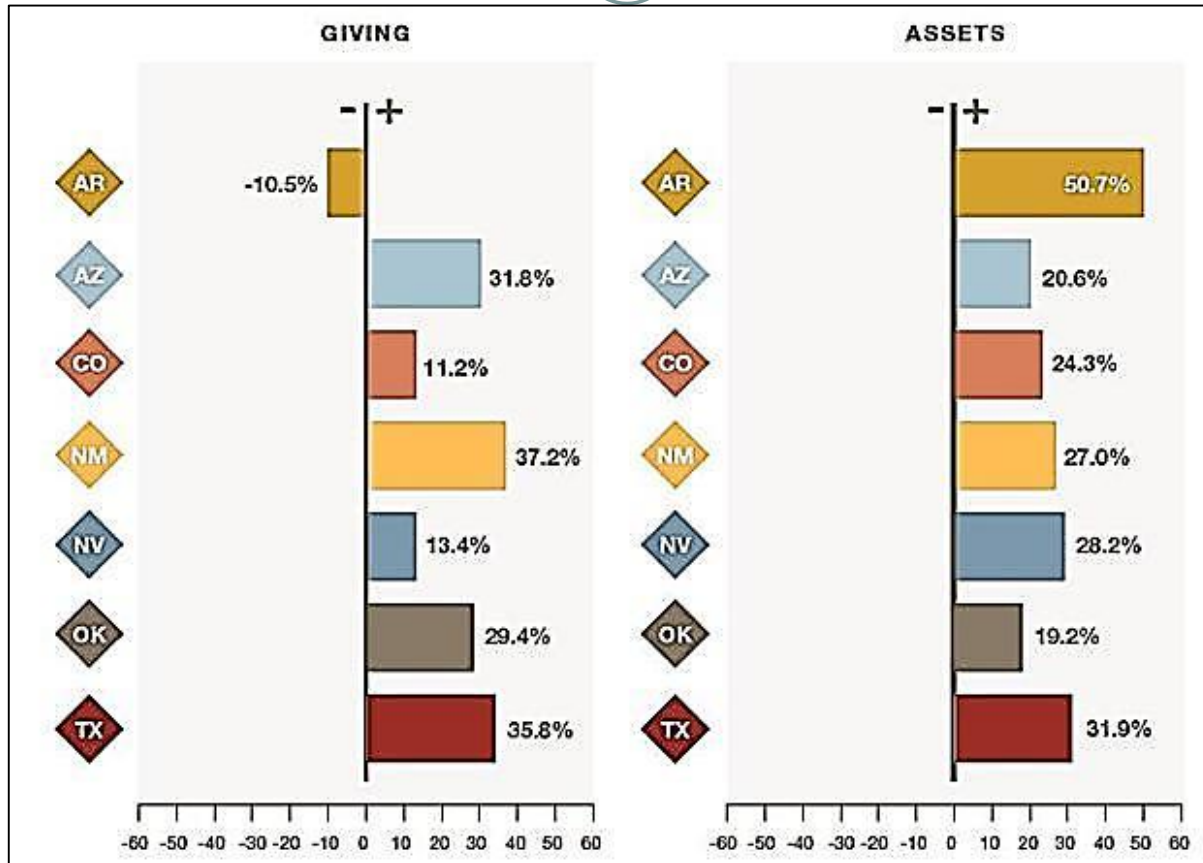
Overall Trends



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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

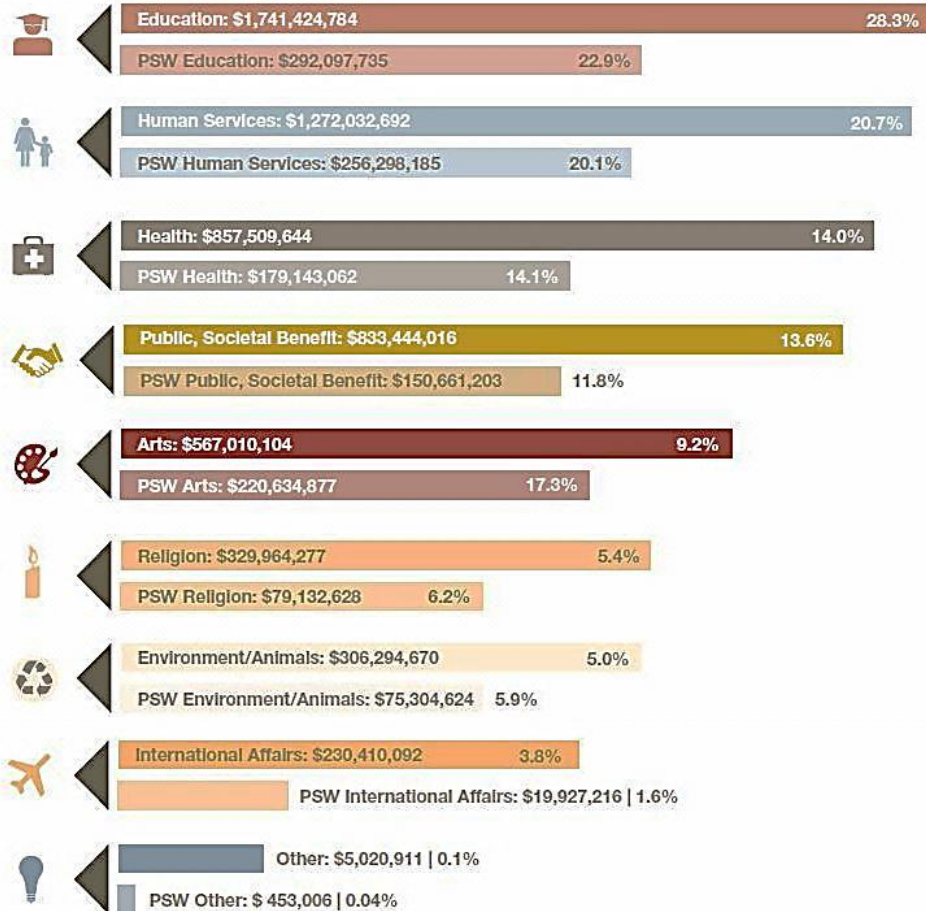


Table E.7: Texas grants by societal issues

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
Total	\$3,016,461,229	73,680



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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%

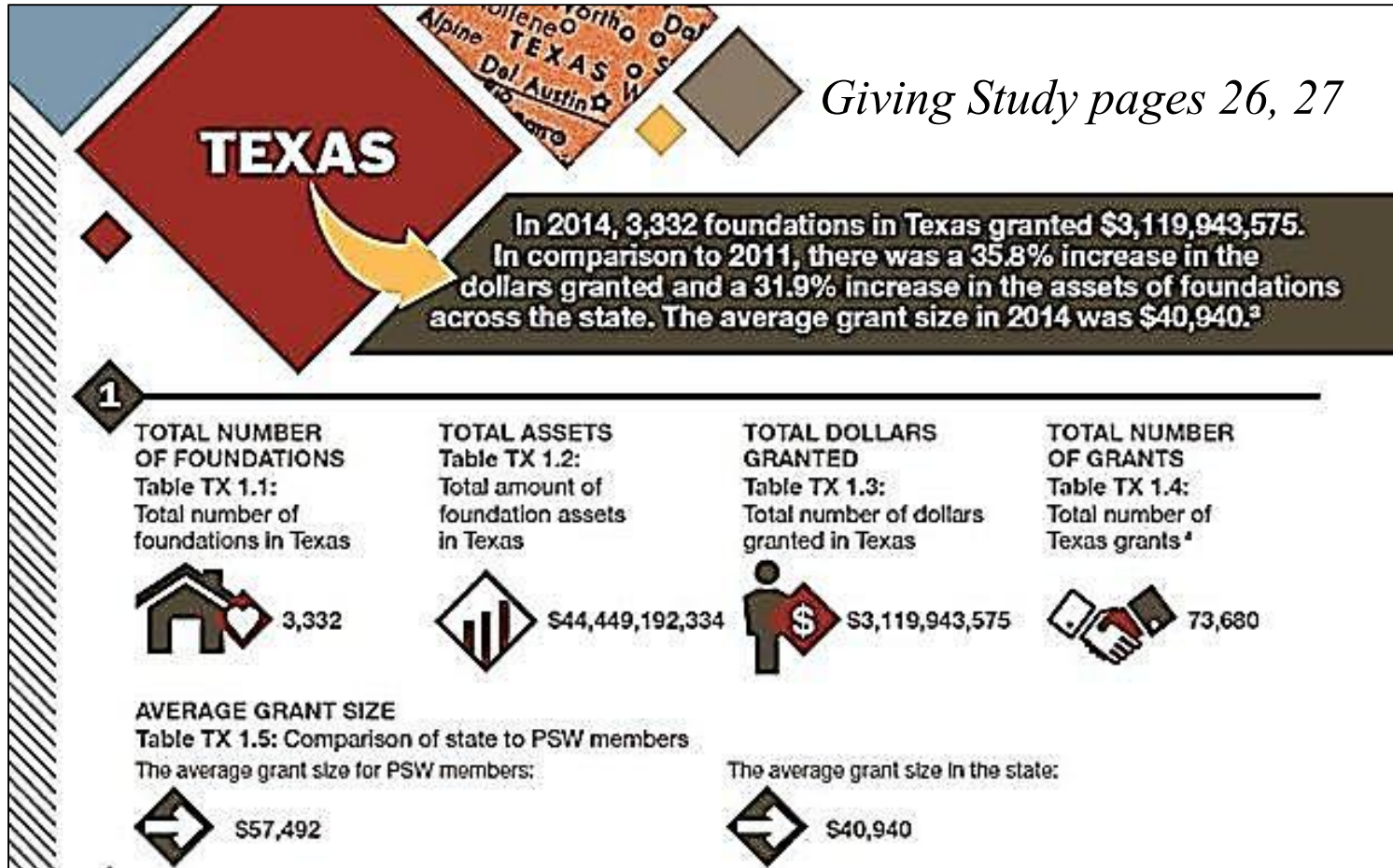
Table G.3: Assets of Community Foundations by State in the PSW Region

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

³ 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
Austin Community Foundation for the Capital Area	Austin	TX
Brown Foundation	Houston	TX
Communities Foundation of Texas	Dallas	TX
Dallas Foundation	Dallas	TX
ExxonMobil Foundation	Houston	TX
Greater Houston Community Foundation	Houston	TX
Houston Endowment	Houston	TX
Kinder Foundation	Houston	TX
Laura and John Arnold Foundation	Houston	TX
Meadows Foundation	Dallas	TX
Michael and Susan Dell Foundation	Austin	TX
Moody Foundation	Galveston	TX
Rainwater Charitable Foundation	Fort Worth	TX
Rees-Jones Foundation	Dallas	TX
Robert A. Welch Foundation	Houston	TX
St. David's Foundation	Austin	TX
T. L. L. Temple Foundation	Lufkin	TX
Terry Foundation	Houston	TX
Valero Energy Foundation	San Antonio	TX

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

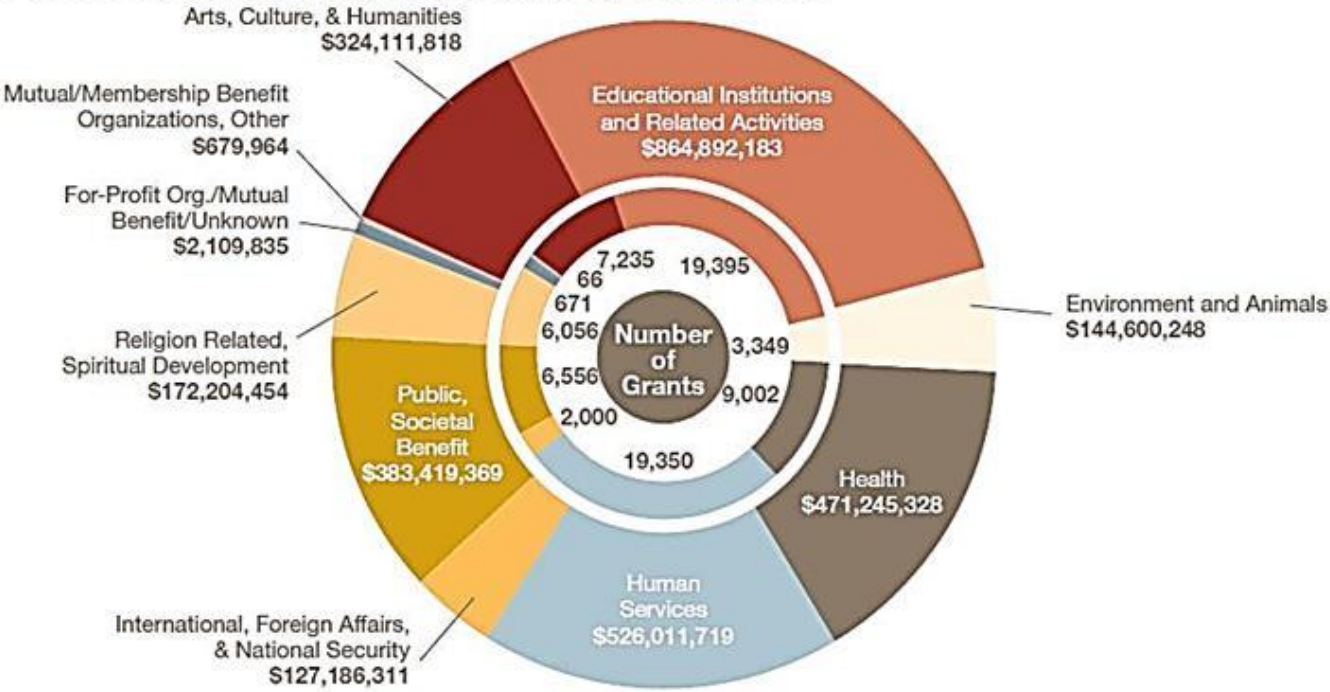
Texas Profile

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STATE ISSUE FOCUS BREAKDOWN

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



³ 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.

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

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

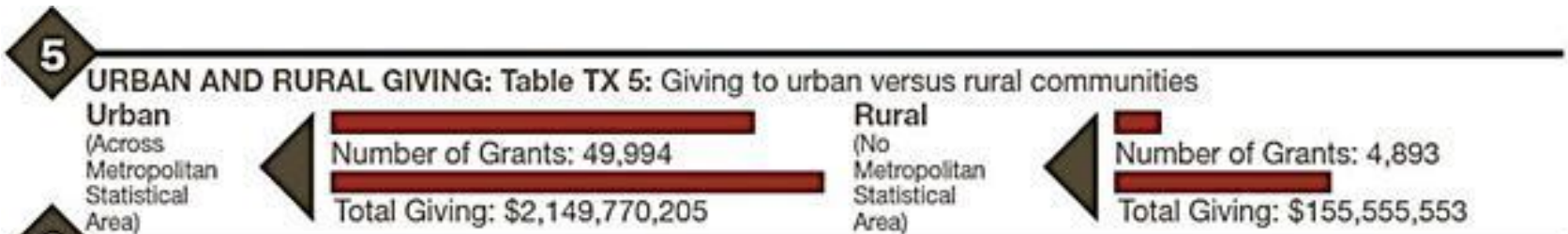
Metropolitan Area	# of Grants	Total Giving
Houston - Sugar Land - Baytown	15,446	\$705,500,948
Dallas - Fort Worth - Arlington	15,337	\$682,031,553
Austin - Round Rock	4,930	\$263,500,737
San Antonio	4,956	\$175,675,976
Rural – No Metropolitan Statistical Area	4,893	\$155,555,553
Lubbock	779	\$54,542,400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

El Paso	520	\$17,347,669
Wichita Falls	707	\$15,407,617
Amarillo	721	\$15,088,235
Beaumont - Port Arthur	453	\$11,823,069
Laredo	143	\$9,577,833
Odessa	210	\$9,007,929
Killeen - Temple - Fort Hood	168	\$8,104,259
Victoria	357	\$7,530,091
McAllen - Edinburg - Mission	234	\$6,184,286
Texarkana	124	\$6,130,373
Longview	275	\$5,774,486
Sherman - Denison	207	\$4,296,250
Brownsville - Harlingen	187	\$3,203,084
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	Total	2,616	\$72,109,314

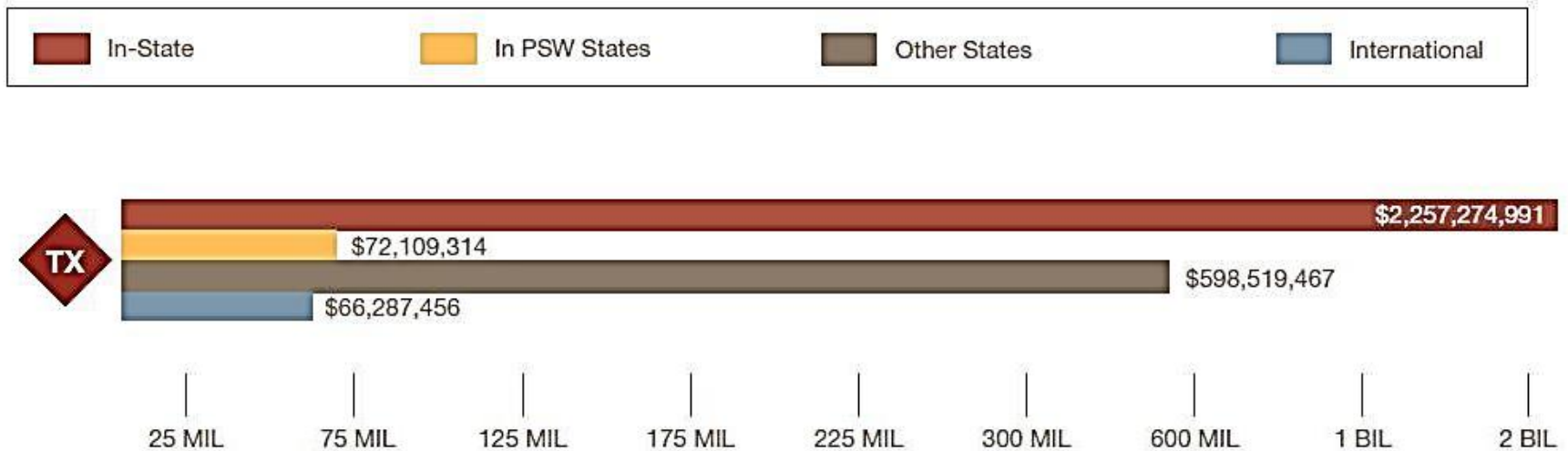
Geography of Giving



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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

# of Fdns	Metropolitan Area	Assets	Contributions
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
3,332		\$44,449,192,334	\$3,119,943,575



Texas Giving in each MSA



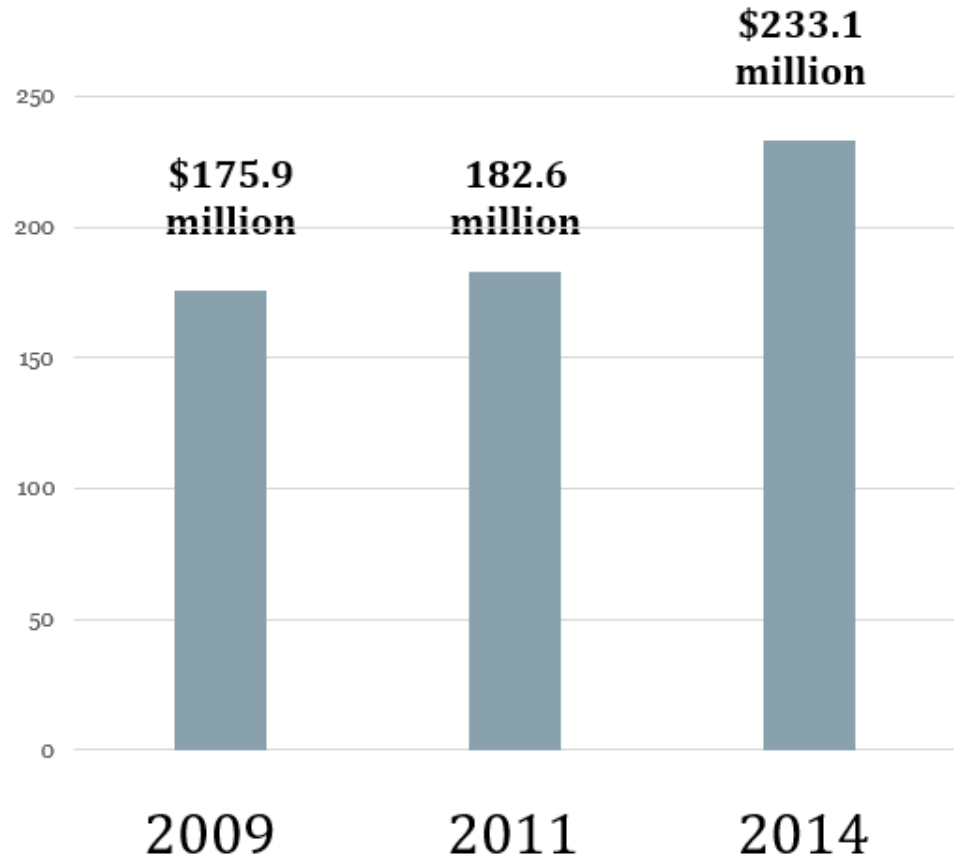
STATE	MSA	# Grants	Amount	Percent
TX	Houston - Sugar Land - Baytown	15,446	\$705,500,948	30.6%
	Dallas - Fort Worth - Arlington	15,337	\$682,031,553	29.6%
	Austin - Round Rock	4,930	\$263,500,737	11.4%
	San Antonio	4,956	\$175,675,976	7.6%
	Rural – No Metropolitan Statistical Area	4,893	\$155,555,553	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%
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San Antonio MSA Change in Giving



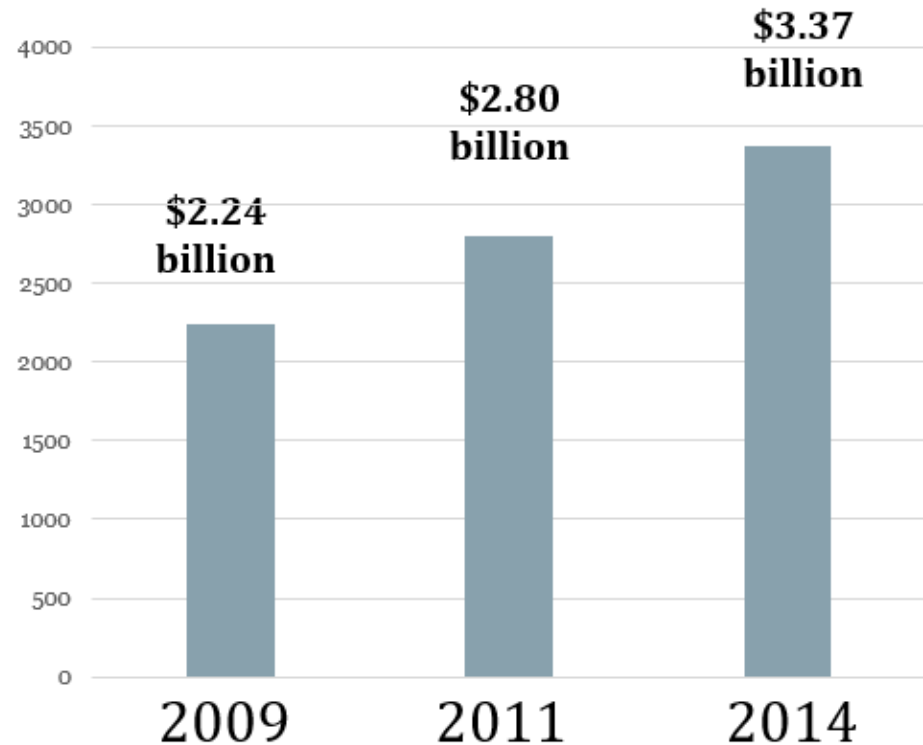
- 27.7% increase in giving since 2011
- 32.5% increase in giving since 2009



San Antonio MSA Change in Assets



- 20.6% increase in assets since 2011
- 50.4% increase in assets since 2009



San Antonio: Top 10 Foundations by Giving



Foundation	Assets	Giving	Disclosure Period
Valero Energy Foundation	\$25,736,096	\$26,101,224	12/2014
San Antonio Area Foundation	\$214,846,567	\$19,815,730	12/2014
Albert and Bessie Mae Kronkosky Charitable Foundation	\$362,456,708	\$15,826,225	12/2014
Mays Family Foundation	\$294,605,784	\$13,118,892	12/2014
Robert J. Kleberg Jr. and Helen C. Kleberg Foundation	\$257,640,793	\$11,949,609	12/2014
Covenant Foundation	\$18,304,163	\$9,141,515	12/2014
USAA Foundation	\$127,948,519	\$8,959,750	06/2015
Greehey Family Foundation	\$199,202,072	\$8,556,338	12/2014
Ewing Halsell Foundation	\$171,329,380	\$8,501,515	06/2015
William and Ella Owens Medical Research Foundation	\$47,371,023	\$5,297,572	12/2014



San Antonio: Top 10 Foundations by Assets



Foundation	Assets	Giving	Disclosure Period
Albert and Bessie Mae Kronkosky Charitable Foundation	\$362,456,708	\$15,826,225	12/2014
Mays Family Foundation	\$294,605,784	\$13,118,892	12/2014
Robert J. Kleberg Jr. and Helen C. Kleberg Foundation	\$257,640,793	\$11,949,609	12/2014
San Antonio Area Foundation	\$214,846,567	\$19,815,730	12/2014
Greehey Family Foundation	\$199,202,072	\$8,556,338	12/2014
Ewing Halsell Foundation	\$171,329,380	\$8,501,515	06/2015
USAA Foundation	\$127,948,519	\$8,959,750	06/2015
Impetus Foundation	\$95,427,937	\$1,396,000	12/2014
Linda Pace Foundation	\$92,307,238	\$769,000	12/2014

San Antonio MSA: Foundations by Giving Range



#Fdns	Giving Range	Total Assets	Total Giving
10	\$5 million or more	\$1,719,441,105	\$127,268,370
26	\$1 million to \$4.9 million	\$740,165,363	\$58,354,488
27	\$500,000 to \$999,999	\$426,986,699	\$19,988,110
40	\$250,000 to \$499,000	\$226,372,361	\$14,134,870
52	\$100,000 to \$249,000	\$134,253,943	\$7,798,464
50	\$50,000 to \$99,999	\$78,091,474	\$3,556,377
40	\$25,000 to \$49,000	\$24,010,336	\$1,469,821
48	less than \$25,000	\$24,978,284	\$559,452
293		\$3,374,299,565	\$233,129,952

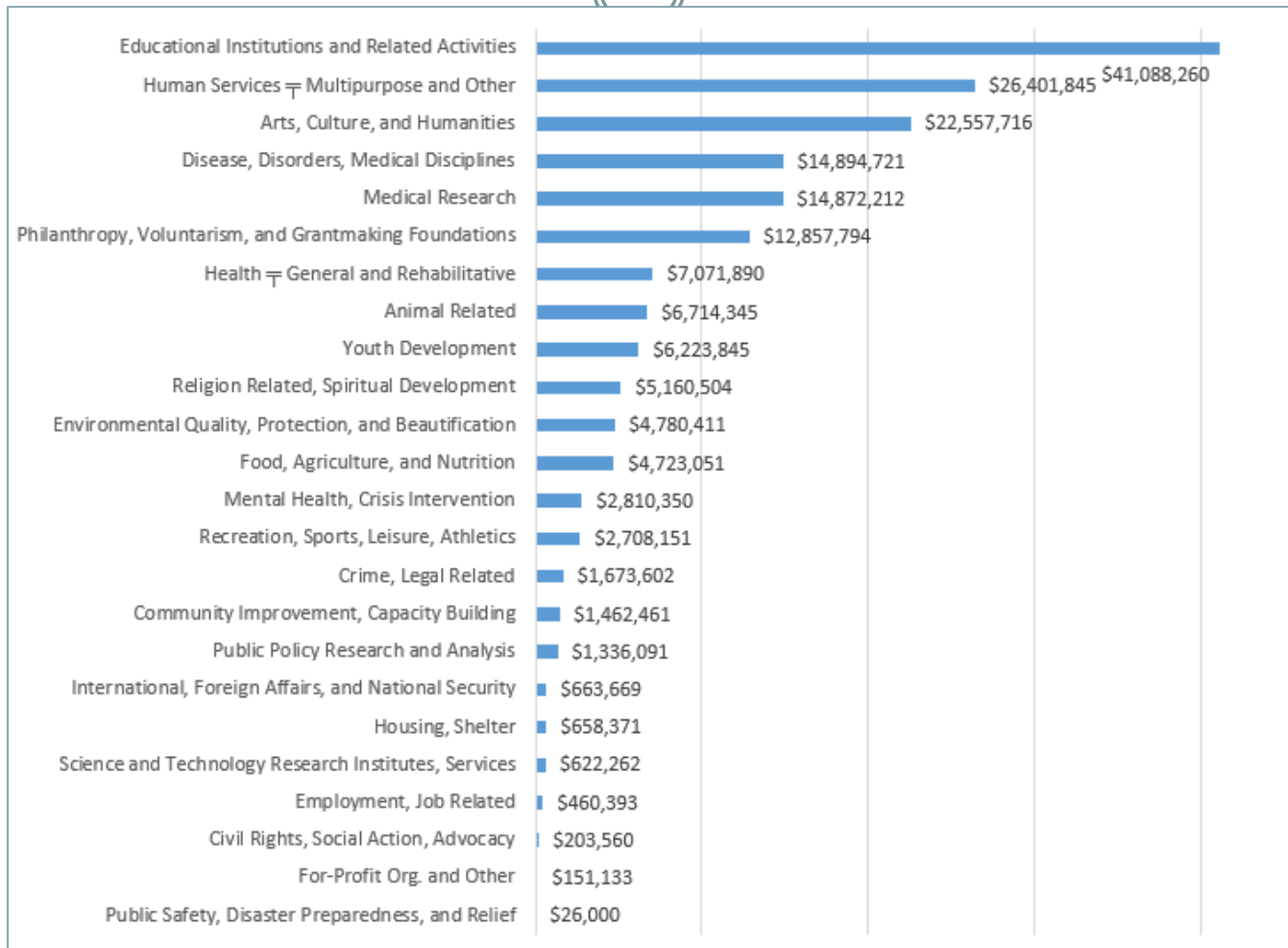
San Antonio MSA: Foundations by Asset Range



#Fdns	Assets Range	Total Assets	Total Giving
16	\$50 million or more	\$2,169,802,726	\$103,447,170
29	\$10 million to \$49.9 million	\$696,794,290	\$72,401,463
34	\$5 million to \$9.9 million	\$238,747,995	\$19,942,300
99	\$1 million to \$4.9 million	\$224,170,229	\$20,092,558
42	\$500,000 to \$999,999	\$30,044,393	\$7,867,804
30	\$250,000 to \$499,999	\$11,468,931	\$3,273,041
15	\$100,000 to \$249,999	\$2,516,834	\$701,178
30	less than \$100,000	\$754,167	\$5,404,438
293		\$3,374,299,565	\$233,129,952



Societal Issues Addressed



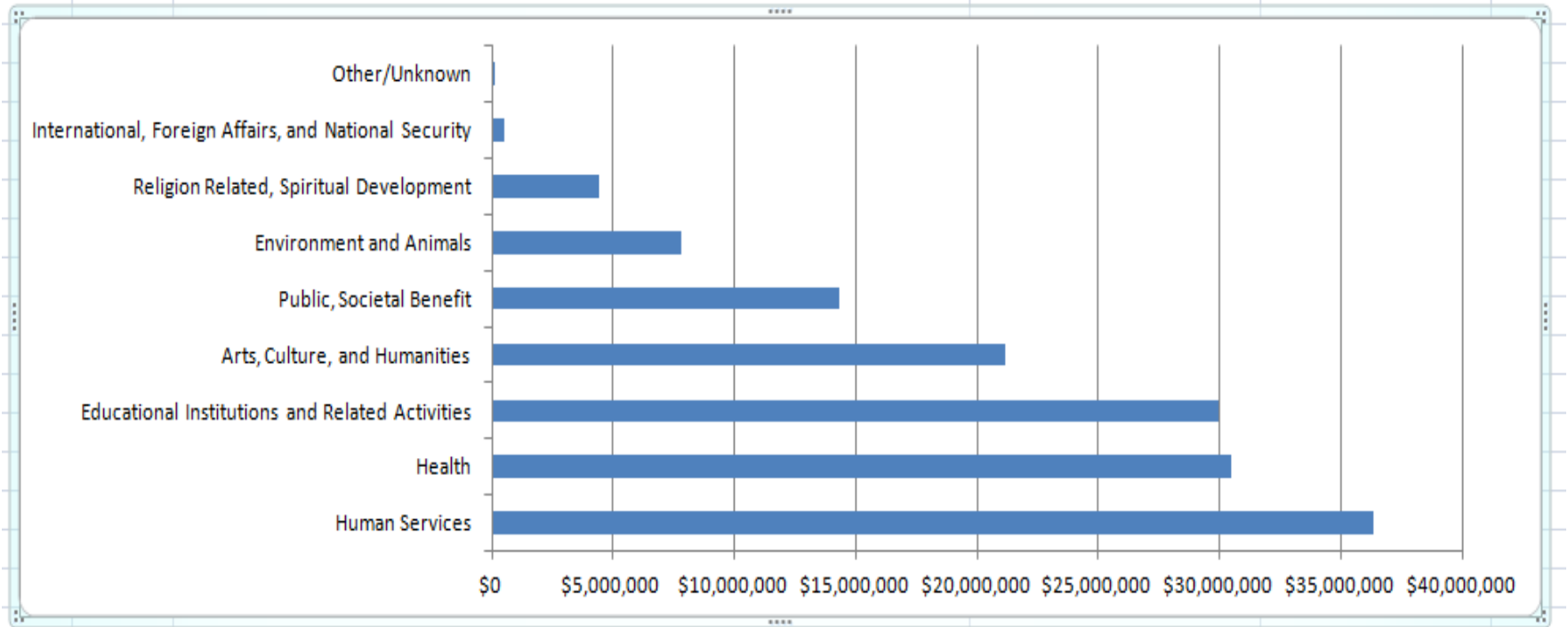
Societal Issues Addressed



Category	Amount	Percentage
Human Services	\$36,365,500	25%
Health	\$30,468,287	21%
Educational Institutions and Related Activities	\$29,990,761	21%
Arts, Culture, and Humanities	\$21,154,462	15%
Public, Societal Benefit	\$14,327,769	10%
Environment and Animals	\$7,812,396	5%
Religion Related, Spiritual Development	\$4,394,620	3%
International, Foreign Affairs, and National Security	\$480,469	<1%
Other/Unknown	\$105,703	<1%
Total	\$145,099,967	100%

Areas of interest for \$145.1 million in contributions made by San Antonio MSA foundations to organizations in San Antonio MSA

Societal Issues Addressed



Areas of interest for \$145.1 million in contributions made by San Antonio MSA foundations to organizations in the San Antonio MSA.

Questions for Conversation



Break up into groups of 3-4 and share:

1. One of the causes you care about and why
2. How you currently use philanthropic data
3. One way you will use the Giving Study to raise visibility
4. What are 1 or 2 key actions you would recommend to donors and funders in the San Antonio MSA to take to ensure nonprofit organizations reach the scaled needed to address community impact.

“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*

