



# Donor Advised Funds—

## State Specific Information on Funds Held by Community Foundations and Grantmaking in 2008 and Expectations for 2009

Results of a Survey by the Council on Foundations

July 6, 2009

### Introduction

Donor advised funds are integral to how community foundations operate. A Council report looking at the amount and use of donor advised funds by community foundations in 2007 found that roughly 60 percent of community foundation grant dollars came from donor advised funds; these funds pay out about 16 percent of their assets annually.<sup>1</sup> In March 2009, the Council surveyed community foundations again to determine their assets at the end of 2008, their assets held in donor advised funds, their grantmaking in 2008, and their expectations for 2009. In addition, the Council sought to determine the extent to which community foundations' donor advised funds are supporting human services during the economic downturn. This report highlights those findings in both narrative and table form. In addition, appendices provide state specific information for total assets, community foundation assets, donor advised assets, and support for human services.

### Findings

Based on data from the 260 community foundations that responded to the Council's 2009 survey, these community foundations had assets of about \$29 billion; of this amount, \$8.7 billion (30 percent) was held in donor advised funds (table 1). There was little variation by asset group in the proportion of assets held in donor advised funds. However, the smallest foundations—those with less than \$5 million in assets—had a higher proportion of their assets in donor advised funds (36 percent), and community foundations with between \$10 million and \$25 million in assets and with between \$50 million and \$100 million in assets had a lower proportion of their assets in donor advised funds (24 percent). See Appendix 1 for a state-by-state breakdown.

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<sup>1</sup> *Donor Advised Funds Provide the Majority of Grant Funds Awarded by Community Foundations*, Council on Foundations. January 13, 2009.

**Table 1—Total Assets and Assets Held in Donor Advised Funds by Community Foundations at the end of 2008**

Asset Group	Total Assets (millions)	Donor Advised Fund Assets (millions)	Donor Advised Fund Assets as a Percent of Total Assets	Number of Respondents
\$250 million or more	\$18,920.2	\$5,835.6	30.8	26
\$100 million—\$249.9 million	\$4,944.6	\$1,494.9	30.2	31
\$50 million—\$99.9 million	\$2,107.1	\$500.7	23.8	30
\$25 million—\$49.9 million	\$1,875.9	\$575.4	30.7	52
\$10 million—\$24.9 million	\$832.3	\$202.4	24.3	47
\$5 million—\$9.9 million	\$192.7	\$60.9	31.6	27
Less than \$5 million	\$113.6	\$40.4	35.6	47
<b>Total</b>	<b>\$28,986.4</b>	<b>\$8,710.3</b>	<b>30.0</b>	<b>260</b>

Overall, the majority (56 percent) of funds for community foundations’ grants for 2008 came from donor advised funds. Smaller community foundations—those with assets between \$5 million and \$24.9 million—had a smaller proportion (41 to 43 percent) of grant dollars come from donor advised funds (table 2). The smallest and largest community foundations—those with less than \$5 million and more than \$250 million in assets, respectively—had the largest share of grant funds come from donor advised funds in 2008, roughly 60 percent.

**Table 2—Total Value of Grants and Grants from Donor Advised Funds by Community Foundations, 2008**

Asset Group	Total Grants (millions)	Donor Advised Fund Grants (millions)	Donor Advised Fund Grants as a Percent of Total Grants
\$250 million or more	\$1,963.6	\$1,169.5	59.6
\$100 million—\$249.9 million	\$517.3	\$258.7	50.0
\$50 million – \$99.9 million	\$214.0	\$107.5	50.2
\$25 million—\$49.9 million	\$176.7	\$91.0	51.5
\$10 million—\$24.9 million	\$105.7	\$43.3	41.0
\$5 million—\$9.9 million	\$22.5	\$9.7	43.1
Less than \$5 million	\$12.0	\$7.1	59.6
<b>Total</b>	<b>\$3,011.7</b>	<b>\$1,686.8</b>	<b>56.0</b>

More than a third (37 percent) of donor advised fund grant dollars went to support human services in 2008 (table 3). Medium sized community foundations—those with between \$10 million and \$100 million in assets—and the smallest community foundations—those with less than \$5 million in assets—had a higher proportion of their donor advised fund grant dollars go to support human services; for some, the amount was as much as 56 percent. See Appendix 2 for a state-by-state breakdown.

**Table 3—Value of Grants from Donor Advised Funds for Human Services, 2008**

<b>Asset Group</b>	<b>Total Donor Advised Fund Grants (millions)</b>	<b>Human Services Grants from Donor Advised Funds (millions)</b>	<b>Value of Donor Advised Fund Grants for Human Services as a Percent of All Donor Advised Fund Grants</b>
<b>\$250 million or more</b>	\$882.5	\$317.7	36.0
<b>\$100 million–\$249.9 million</b>	\$204.1	\$62.7	30.7
<b>\$50 million – \$99.9 million</b>	\$85.8	\$39.6	46.1
<b>\$25 million–\$49.9 million</b>	\$68.1	\$32.2	47.2
<b>\$10 million–\$24.9 million</b>	\$39.0	\$21.7	55.7
<b>\$5 million–\$9.9 million</b>	\$9.1	\$2.8	30.9
<b>Less than \$5 million</b>	\$6.5	\$2.8	42.7
<b>Total</b>	\$1,295.0	\$479.4	37.0

Note: Based on 221 community foundations that provided data for human services grants.

More than half (51 percent) of community foundations reported that they will maintain or increase their grantmaking to support human services from their donor advised funds in 2009 (table 4). Three-quarters (77 percent) of the largest community foundations —those with assets of \$250 million or more—reported that they will maintain or increase support for human services.

**Table 4—Proportion of Community Foundations that will Maintain or Increase Support for Human Services Assistance in 2009, from all Sources and from Donor Advised Funds**

<b>Asset Group</b>	<b>All Funds (percent)</b>	<b>Donor Advised Funds (percent)</b>
\$250 million or more	73.1	77.0
\$100 million–\$249.9 million	51.6	48.4
\$50 million–\$99.9 million	48.4	45.2
\$25 million–\$49.9 million	57.7	59.7
\$10 million–\$24.9 million	25.0	45.9
\$5 million–\$9.9 million	35.7	35.7
Less than \$5 million	46.8	46.8
<b>Total</b>	<b>47.1</b>	<b>51.0</b>

# Appendices

## Appendix 1—State Specific Information

### Alabama

Based on information from 3 of Alabama's community foundations:

- In 2008, 56 percent of these community foundations' grant dollars came from donor advised funds.
- 30 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, all of Alabama's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Community Foundation of Greater Birmingham in 2008, 53 percent of grant funds came from the foundation's donor advised funds and 27 percent of donor advised grant funds addressed human service needs. In 2009, support of human services will increase from its donor advised funds.

### Arkansas

Based on information from 3 of Arkansas' community foundations:

- In 2008, 27 percent of these community foundation grant dollars came from donor advised funds.
- 45 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- In December 2008, the Arkansas Community Foundation communicated with several of its donor advisors about the dire situation faced by food pantries across the state. Skyrocketing demand for services had created critical needs among pantries for funds to purchase food and keep their doors open. Several donor advisors stepped forward to recommend significant grants and issue match challenges to raise emergency funds. In one week, thanks to the donor advised funds, more than \$300,000 was made available to hunger relief agencies state-wide.

### Arizona

Based on information from 2 of Arizona's community foundations:

- In 2008, 36 percent of these community foundations' grant dollars came from donor advised funds.
- 22 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, half of Arizona's community foundations will maintain or increase funding from donor advised funds to address human service needs.

- The Community Foundation for Southern Arizona in Tucson has a donor who has had a donor advised fund for a number of years. Each year, she recommends most of her grants based on projects and programs the community foundation identifies in the community. This year, as she turned 98, she turned the advisory role over to the community foundation, noting that, “You know the community better than I do. I trust you to distribute this in the right areas.”

## California

Based on information from 20 of California’s community foundations:

- In 2008, 73 percent of these community foundations’ grant dollars came from donor advised funds (\$412 million).
- 26 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 60 percent of California community foundations will maintain or increase funding from donor advised funds to address human services needs.
- Contributions from donor advised funds have helped to maintain food banks and homeless shelters in Ventura County, Napa Valley, the Riverside area, and Monterey County. Many of these programs have been facing increased demand and shrinking contributions from other sources.
- In Encinitas, grants have helped prevent homelessness by youth aging out of the foster care system and supported math and language programs at local elementary and secondary schools facing budget cuts.
- In Marin County, donor advised funds have supported community clinics that provide primary health care to more than 15,000 patients annually.

## Connecticut

Based on information from 5 of Connecticut’s community foundations:

- In 2008, 20 percent of these community foundations’ grant dollars came from donor advised funds.
- 26 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 20 percent of Connecticut community foundations will increase funding from donor advised funds to address human service needs.
- In late 2008, the Main Street Community Foundation in Bristol made a grant to a local YMCA to support early childcare services, demand for which had increased due to job loss in the community.

## Delaware

Based on information from 1 of Delaware’s community foundations:

- In 2008, 97 percent of this community foundation’s grant dollars came from donor advised funds.
- 7 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, this community foundation expects to increase funding from donor advised funds to address human service needs.

## Florida

Based on responses from 14 of Florida's community foundations:

- In 2008, 55 percent of these community foundations' grant dollars came from donor advised funds (\$41 million).
- 13 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- 50 percent of Florida community foundations said they will maintain or increase funding from donor advised funds in 2009 to address human service needs.
- The Community Foundation of Collier County in Naples guides donor funding based on ongoing gaps it identifies in the community, including needs for human services, housing, and hunger relief.
- The Gulf Coast Community Foundation of Venice provides supplemental assistance from its donor advised funds to families with critical needs caused by job loss or who are facing foreclosure.
- In Jacksonville, the Community Foundation raised \$1 million—half from their donor advised funds—to support the Community Safety Net Fund established to aid those affected by the economic downturn.

## Georgia

Based on information from 7 of Georgia's community foundations:

- In 2008, 81 percent of these community foundations' grant dollars came from donor advised funds (\$87 million).
- 53 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 71 percent of Georgia's community foundations will maintain or increase funding from donor advised funds to address human service needs
- In November 2008, The Community Foundation for Greater Atlanta launched "Impact Philanthropy," an engagement series to educate more than 650 donors on ways they can help local nonprofits during these difficult times.
- Grants from the Community Foundation of Central Georgia's donor advised funds support nonprofit organizations that work directly with individuals in need. One local food bank stated that contributions from the foundation's donors always seem to come at the perfect time.

## Iowa

Based on information from 4 of Iowa's community foundations:

- In 2008, 34 percent of these community foundations' grant dollars came from donor advised funds.
- 19 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.

- For 2009, 25 percent of Iowa's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- After experiencing a strong tornado and severe flooding in the summer of 2008, the Community Foundation of Northeast Iowa in Waterloo tapped donor advised funds for its Flood and Tornado Relief Fund. This fund pooled resources from a variety of sources to address the area's long-term recovery.

## Idaho

Based on information from 1 of Idaho's community foundations:

- In 2008, 62 percent of this community foundation's grant dollars came from donor advised funds.
- 24 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, this community foundation expects to decrease funding from donor advised funds to address human service needs.

## Illinois

Based on information from 5 of Illinois' community foundations:

- In 2008, 49 percent of these community foundations' grant dollars came from donor advised funds (\$55 million).
- 75 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 20 percent of Illinois community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At The Chicago Community Trust and Affiliates, donor advised funds made contributions that totaled more than \$500,000 to "Unity Challenge." This initiative will enable the Trust to support organizations working to meet the growing food and shelter needs of Chicago area residents.

## Kansas

Based on information from 9 of Kansas' community foundations:

- In 2008, 60 percent of these community foundations' grant dollars came from donor advised funds.
- 11 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 56 percent of Kansas' community foundations will maintain or increase funding from donor advised funds to address human service needs.
- The Greater Salina Community Foundation responded to a call for matching funds from their donor advised funds in 24 hours to support emergency help for the unemployed to pay their rent and utility bills. The Parsons Area Community Foundation had a similar experience getting support from donor advised funds for help with utility payments.

- The Wichita Community Foundation and the Topeka Community Foundation have seen increased support from donor advised funds for food banks, health clinics and other agencies to help those adversely affected by the recession.

## Kentucky

Based on information from 3 of Kentucky's community foundations:

- In 2008, 40 percent of these community foundations' grant dollars came from donor advised funds.
- 69 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 33 percent of Kentucky's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- The Community Foundation of West Kentucky in Paducah addressed the increased demand for assistance at the local food bank by going to their donor advised funds to help offset decreased donations to the food bank and stock its shelves.
- At the Foundation for the Tri-State Community in Ashland, one donor couple chose to make gifts to local nonprofits in their names rather than give Christmas gifts to family and friends. These gifts included contributions to a local mission that provides food and clothing, a hospital that serves families from surrounding rural counties, and the American Heart Association.

## Louisiana

Based on information from 4 of Louisiana's community foundations:

- In 2008, 54 percent of these community foundations' grant dollars came from donor advised funds.
- 18 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 75 percent of Louisiana's community foundations will maintain or increase funding from donor advised funds to address human service needs.

## Massachusetts

Based on information from 8 of Massachusetts' community foundations:

- In 2008, 54 percent of these community foundations' grant dollars came from donor advised funds (\$67 million).
- 42 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 63 percent of Massachusetts community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Boston Foundation, donors increased total grants and grantmaking, including special funding to help address the food and fuel crisis faced by many vulnerable residents in the Greater Boston area during the severe winter.

- As the local unemployment rate hit 16 percent, the Community Foundation of Southeastern Massachusetts in New Bedford used donor advised funds to expand an adult literacy programs for the unemployed.
- The community foundations of North Central Massachusetts in Fitchburg and Western Massachusetts in Springfield increased grants to food banks and homeless shelters in response to declines in other resources.

## Maryland

Based on information from 5 of Maryland's community foundations:

- In 2008, 36 percent of these community foundations' grant dollars came from donor advised funds.
- 66 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, obtaining food, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 40 percent of Maryland's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Community Foundation for the National Capital Region, which serves the state's Montgomery and Prince George's counties, 73 percent of its grantmaking came from donor advised funds in 2008.

## Maine

Based on information from 1 of Maine's community foundations:

- In 2008, 49 percent of this community foundation's grant dollars came from donor advised funds.
- 20 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, the community foundation will maintain or increase its funding from donor advised funds to address human service needs.
- At the Maine Community Foundation in Ellsworth, donor advised funds have provided \$1 million for heating fuel assistance for low-income residents over the past two years. In addition, in 2008 donor advised funds provided \$50,000 in grants to local food pantries.
- In 2008, several donor advised funds provided \$500,000 to act as "seed money" for a revolving loan administered through the Maine Farmland Trust to buy Maine farmland, put a protective farming easement on the property, and resell it.

## Michigan

Based on information from 15 of Michigan's community foundations:

- In 2008, 39 percent of these community foundations' grant dollars came from donor advised funds (\$40 million).
- 39 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger assistance, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.

- For 2009, 53 percent of Michigan's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- The Battle Creek, Berrien, and Kalamazoo community foundations and the Community Foundation for Muskegon County all have seen increased support from their donor advised funds for human service needs—especially emergency food pantries, soup kitchens, and homeless shelters—as the economy has turned down.
- At the Lenawee Community Foundation in Tecumseh, donor advised funds have allowed donors to give larger amounts when the economy is weak and nonprofits are struggling to serve the increased need. Similarly, at the Battle Creek Foundation, many donors have refocused their giving toward human services.

## Montana

Based on information from 1 of Montana's community foundations:

- In 2008, 92 percent of this community foundation's grant dollars came from donor advised funds.
- 68 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, this community foundation will maintain or increase funding from donor advised funds to address human service needs.
- The Whitefish Community Foundation holds an annual grants award event, during which some of their donor advised funds also hand out funds. This year, a local food bank received several awards. As a result of the publicity surrounding the event, the food bank unexpectedly received additional donations.
- Additionally, a new donor advised fund is supporting a local clinic that offers free health care to uninsured individuals who do not qualify for Medicare or Medicaid.

## North Carolina

Based on information from 6 of North Carolina's community foundations:

- In 2008, 69 percent of these community foundations' grant dollars came from donor advised funds (\$22 million).
- 30 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 50 percent of North Carolina's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Cumberland Community Foundation in Fayetteville, donor advised funds represent only 18 percent of the foundation's assets, however, in 2008 these funds provided 68 percent of the resources to support the foundation's grantmaking.
- In 2008, 11 percent of grants from donor advised funds supported human services needs; in 2009, the foundation expects to maintain the same level of grantmaking.

## North Dakota

Based on information from 3 of North Dakota's community foundations:

- In 2008, 44 percent of these community foundations' grant dollars came from donor advised funds.
- 37 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 33 percent of North Dakota's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Fargo-Moorhead Area Foundation, 46 percent of grant funds come from donor advised funds; of that amount, 39 percent is for human services needs.
- At the Community Foundation of Grand Forks, East Grand Forks and Region, 36 percent of their grant funds come from donor advised funds; of that amount, 47 percent supports human services activities.
- At the Minot Community Foundation, 43 percent of its grant funds come from donor advised funds; of that amount, 25 percent addresses human services needs.

## New Jersey

Based on information from 2 of New Jersey's community foundations:

- In 2008, 74 percent of these community foundations' grant dollars came from donor advised funds (\$37 million).
- 48 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, both of these community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Community Foundation of New Jersey in Morristown, 76 percent of grant funds in 2008 came from the foundation's donor advised funds. Half of the foundation's grantmaking from donor advised funds went to support human services activities.
- The foundation expects to increase its funding from its donor advised funds to address the area's human services needs in 2009.

## New Mexico

Based on information from 2 of New Mexico's community foundations:

- In 2008, 47 percent of these community foundations' grant dollars came from donor advised funds.
- 66 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 50 percent of New Mexico's community foundations will maintain or increase funding from donor advised funds to address human service needs .

- At the Santa Fe Community Foundation, many donor advised funds support Homewise, a nonprofit organization that helps Northern New Mexico residents purchase affordable homes. For the last two years, the foundation has helped the organization expand its services to the area's Spanish-speaking and growing immigrant community. Between April 2007 and March 2008, Homewise helped 180 families become homeowners.

## Nevada

Based on information from 2 of Nevada's community foundations:

- In 2008, 82 percent of these community foundations' grant dollars came from donor advised funds.
- 11 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 50 percent of Nevada's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- The Parasol Tahoe Community Foundation in Incline Village used donor advised funds to support the North Lake Tahoe Family Resource Center. The center supports and educates those hit by economic challenges and promotes volunteerism as a way to give back to the community.
- At the Community Foundation of Western Nevada in Reno, 96 percent of its grant funds come from the foundation's donor advised funds.

## New York

Based on information from 12 of New York's community foundations:

- In 2008, 68 percent of these community foundations' grant dollars came from donor advised funds (\$148 million).
- 22 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 58 percent of New York community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the New York Community Trust, while 44 percent of its assets are held in donor advised funds, 72 percent of its funding for grants in 2008 came from donor advised funds; 22 percent of grant funding from donor advised funds went to address the area's human services needs. In 2009, the foundation expects to maintain the same level of grantmaking to address human services needs.
- In Binghamton, some donors to The Community Foundation for South Central New York shifted their giving in response to the economic downturn, giving out significant grants to human services organizations such as Meals on Wheels to purchase food, the Boys and Girls Club to support a seniors program, and the local Free Clinic to provide increased demand for health services.
- At the Community Foundation for Greater Buffalo, only 22 percent of its funds are held in donor advised funds. Yet, 52 percent of the funds used by the foundation to make grants in 2008 came from donor advised funds.

## Ohio

Based on information from 11 of Ohio's community foundations:

- In 2008, 22 percent of these community foundations' grant dollars came from donor advised funds (\$50 million).
- 25 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 55 percent of Ohio community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Columbus Foundation, 33 percent of the funds used for grantmaking in 2008 came from the foundation's donor advised funds; 17 percent of grantmaking from donor advised funds went to support the area's human services needs.
- With the increased demand for basic needs assistance, foundation donors initiated a \$100,000 challenge grant to match 50 cents for every dollar contributed to food pantries, homeless shelters, and other similar programs. Other donor advised funds joined the effort, which resulted in grants and donations of more than \$1 million for nonprofit agencies that provide basic services to individuals in central Ohio.

## Oregon

Based on information from 1 of Oregon's community foundations:

- In 2008, 47 percent of this community foundation's grant dollars came from donor advised funds.
- 43 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, this community foundation will maintain or increase funding from donor advised funds to address human service needs.
- At the Oregon Community Foundation in Portland, donors are increasing their support for food banks throughout the state. One donor made an anonymous \$1 million donation to a local emergency service network of food banks.

## Pennsylvania

Based on information from 13 of Pennsylvania's community foundations:

- In 2008, 41 percent of these community foundations' grant dollars came from donor advised funds (\$19.5 million).
- 23 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, percent of community foundations will maintain or increase funding from donor advised funds to address human service needs.

- In 2008, 42 percent of grant funds at The Philadelphia Foundation came from its donor advised funds. One of its donor advised funds provided general operating support to a community made up of young adults with developmental disabilities and their full-time residential volunteers and families. Another made a grant to the Breathing Room Foundation to support families affected by cancer.

## Tennessee

Based on information from 3 of Tennessee's community foundations:

- In 2008, 73 percent of these community foundations' grant dollars came from donor advised funds.
- 38 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 67 percent of Tennessee community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Community Foundation of Greater Memphis, one donor advised fund awarded more than \$500,000 to local nonprofits in the fall of 2008, with the bulk of the money going to social service organizations providing health care, meals, and housing.
- In 2008, 85 percent of grant funds at the Community Foundation for Greater Memphis came from its donor advised funds, half of which went to support human services. The foundation expects to increase this support in 2009.

## Texas

Based on information from 14 of Texas' community foundations:

- In 2008, 61 percent of these community foundations' grant dollars came from donor advised funds (\$171 million).
- 22 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 36 percent of Texas community foundations will maintain or increase funding from donor advised funds to address human service needs.
- The East Texas Communities Foundation in Tyler noted the expansion of giving from their donor advised funds to support human services as the recession has deepened.
- At the Austin Community Foundation, 96 percent of its grantmaking in 2008 came from the foundation's donor advised funds; 44 percent of the donor advised fund grantmaking went to address the area's human services needs.
- In 2009, a large donor advised fund decided to use its dollars to fund human services rather than the usual broad spectrum of activities. The first round of grants went to help elderly citizens stay in their homes, provide clothing for low-income individuals looking for jobs, and help adults get their high school equivalency diplomas.
- The Dallas Community Foundation and Wichita Falls Area Community Foundation expanded their giving to human services, emergency assistance, community health clinics, and other programs that are experiencing increased demand for services.

- The Communities Foundation of Texas supports the Food-4-Kids program, which provides kid-friendly, self-serve food on the weekends to elementary school children most at risk of going hungry. It currently serves over 200 schools in 17 school districts, providing food every weekend to approximately 4,400 children in the greater Dallas area.
- Donors at the Dallas Foundation helped to establish the Safety Net Fund, which considers urgent requests from nonprofits meeting local critical needs associated with the downturn in the economy. The fund has awarded \$500,000 in grants for food, clothing, shelter, safety, and health activities.

## Utah

Based on information from 1 of Utah's community foundations:

- In 2008, 67 percent of this community foundation's grant dollars came from donor advised funds.
- 50 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, this community foundation will maintain or increase funding from donor advised funds to address human service needs.
- The Park City Foundation—a relatively new foundation established in June 2007—reports seeing more families getting involved in thoughtful philanthropy through donor advised funds. These funds have encouraged more giving in their communities, allowing families that are not millionaires or billionaires to manage their philanthropic dollars like a private foundation.

## Virginia

Based on information from 7 of Virginia's community foundations:

- In 2008, 45 percent of these community foundations' grant dollars came from donor advised funds.
- 38 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 57 percent of Virginia's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Northern Virginia Community Foundation, several donor advised funds made grants to the foundation's Community Investment Grant cycle in January 2009 to help the foundation increase its grantmaking to nonprofits providing basic needs assistance.
- The Piedmont Community Foundation in Middleburg supports the local hospice and local health clinic, which saw more than 5,000 patients last year. The numbers continue to rise. A new donor advised fund also wants to make a significant impact on hunger in the community. The foundation projects that both health care and hunger assistance will receive more donor advised funds in 2009.

## Washington

Based on information from 10 of Washington's community foundations:

- In 2008, 55 percent of these community foundations' grant dollars came from donor advised funds (\$37 million).
- 50 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 80 percent of Washington community foundations will maintain or increase funding from donor advised funds to address human service needs.
- In response to the current economic downturn, the Bainbridge Community Foundation is increasing its focus on affordable housing.
- Donor advised funds at both the Greater Everett Community Foundation and the Kitsap Community Foundation in Silverdale are funding a range of human services, such as the Beds for Children program, food banks, and assistance to the homeless.
- At the Three Rivers Community Foundation in Richland, a donor advised fund spent out its entire \$150,000 to aid those hurt by the economic downturn. The gift was used as seed money and, consequently, had a multiplier effect on other donations.
- At the Seattle Foundation, 57 percent of its grantmaking in 2008 came from donor advised funds; half of its donor advised fund grantmaking went to support human services. In 2009, the foundation expects to maintain the same level of human services funding.
- At the Greater Tacoma Community Foundation, 27 percent of its grantmaking in 2008 came from donor advised funds; 68 percent of its grantmaking from donor advised funds addressed the area's human services needs. In 2009, the foundation expects to increase its funding from donor advised funds for human services

## Wisconsin

Based on information from 8 of Wisconsin's community foundations:

- In 2008, 40 percent of these community foundations' grant dollars came from donor advised funds.
- 51 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 38 percent of Wisconsin's community foundations will maintain or increase funding from donor advised funds to address human service needs.
- At the Community Foundation of Southern Wisconsin in Janesville, 24 percent of grant funding in 2008 came from donor advised funds; 37 percent of its donor advised funds went to support human services. In 2009, the foundation expects the support for human services funding from its donor advised funds to decrease.
- In 2008, more than 80 percent of grant funding at the Eau Claire Community Foundation and the St. Croix Valley Community Foundation in Hudson came from donor advised funds.

- At the Greater Menomonie Area Community Foundation, 23 percent of grant funding came from donor advised funds; 64 percent was used to support the area's human service needs.
- Donor advised funds at the Menomonie Area Community Foundation have mainly assisted the Free Clinic, the Interfaith Volunteers food pantry, and education and training workshops for nonprofit directors. The food pantry saw a dramatic increase in clients in 2008.

## West Virginia

Based on information from 5 of West Virginia's community foundations:

- In 2008, 45 percent of these community foundations' grant dollars came from donor advised funds.
- 34 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- For 2009, 40 percent of West Virginia community foundations will maintain or increase funding from donor advised funds to address human service needs
- The Community Foundation of the Virginias in Bluefield has donor advised funds that provide services to children and economically disadvantaged families through support for after-school programs in low-income neighborhoods.
- In response to a request for pass-through gifts, the Eastern West Virginia Community Foundation in Martinsburg raised additional funds from its donor advised funds to increase support to those most in need.

## Wyoming

Based on information from 1 of Wyoming's community foundations:

- In 2008, 37 percent of this community foundation's grant dollars came from donor advised funds.
- 27 percent of grantmaking from donor advised funds addressed critical human service needs of local communities in 2008, including assistance for hunger relief, health care, education, housing, foreclosure prevention, emergency shelter, and utilities.
- At the Community Foundation of Jackson Hole, a donor issued a \$50,000 matching challenge to the community's primary daycare and preschool provider to provide scholarships for children whose parents have lost jobs. The foundation has also recently launched an Economic Response Initiative that targets nonprofits addressing critical human needs. Many of the initial gifts to this fund have come from donor advised funds.

## Appendix 2

**Table 1—Community Foundation Assets and Donor Advised Fund Assets by State, End of 2008.**

State	Number of Respondents	Total Assets (dollars)	Donor Advised Fund Assets (dollars)	Donor Advised Fund Assets as a Percent of Total Assets	Total Grants (dollars)	Donor Advised Fund Grants (dollars)	Donor Advised Fund Grants as a Percent of Total Grants
AK	1	40,307,459	21,349,838	53.0	5,117,678	767,093	15.0
AL	3	172,430,099	59,361,980	34.4	24,506,694	13,625,417	55.6
AR	3	240,202,659	31,867,939	13.3	14,058,430	3,774,505	26.8
AZ	2	473,345,017	112,724,225	23.8	38,678,502	13,983,875	36.2
CA	20	4,670,088,539	1,620,006,202	34.7	566,957,093	412,538,147	72.8
CO	9	725,600,000	221,442,562	30.5	92,223,267	41,328,118	44.8
CT	5	662,986,071	89,676,678	13.5	33,181,910	6,769,700	20.4
DC	1	339,000,000	270,000,000	79.6	75,000,000	55,000,000	73.3
DE	1	1,400,000	1,120,000	80.0	375,000	365,000	97.3
FL	14	911,014,841	258,894,434	28.4	74,141,727	40,574,222	54.7
GA	7	788,953,565	366,945,042	46.5	107,617,947	87,032,724	80.9
HI	1	311,000,000	31,800,000	10.2	26,000,000	4,100,000	15.8
IA	4	241,100,000	92,242,830	38.3	36,775,650	12,635,000	34.4
ID	1	55,100,000	31,300,000	56.8	6,800,000	4,200,000	61.8
IL	5	1,468,850,413	268,449,263	18.3	113,290,824	55,247,135	48.8
IN	18	992,774,018	274,043,384	27.6	75,819,463	24,508,621	32.3
KS	9	159,454,600	53,071,404	33.3	22,853,753	13,794,880	60.4
KY	3	50,122,997	15,874,482	31.7	5,204,632	2,080,110	40.0
LA	4	784,000,000	185,880,000	23.7	42,528,092	22,943,691	53.9
MA	8	1,069,285,393	310,224,883	29.0	124,872,933	67,125,466	53.8
MD	5	81,609,851	18,320,657	22.4	5,186,475	1,857,396	35.8
ME	1	185,139,000	71,099,000	38.4	15,563,000	7,546,000	48.5
MI	15	1,410,534,951	267,368,172	19.0	102,653,676	40,146,371	39.1
MN	6	1,520,500,766	536,948,464	35.3	119,883,023	78,940,353	65.8
MO	2	1,062,736,052	450,684,939	42.4	160,000,212	90,122,360	56.3
MS	2	47,342,693	842,826	1.8	3,167,300	1,000,634	31.6
MT	1	1,500,000	600,000	40.0	480,000	440,000	91.7
NC	6	304,102,366	123,561,569	40.6	31,808,907	21,843,732	68.7
ND	3	49,648,772	23,195,781	46.7	2,353,024	1,044,204	44.4
NE	5	71,275,964	9,726,251	13.6	6,164,598	1,961,981	31.8
NJ	2	215,726,000	125,664,937	58.3	34,138,988	25,378,330	74.3
NM	2	31,262,935	8,749,342	28.0	3,016,604	1,417,435	47.0
NV	2	64,000,000	37,911,516	59.2	7,716,647	6,297,530	81.6
NY	12	2,118,456,628	808,216,040	38.2	217,147,863	147,816,725	68.1
OH	11	2,776,273,332	298,789,218	10.8	231,960,414	49,928,580	21.5
OK	1	23,067,856	1,886,346	8.2	13,565,693	3,165,415	23.3
OR	1	850,000,000	231,000,000	27.2	60,000,000	28,000,000	46.7
PA	13	638,183,646	103,016,616	16.1	47,861,550	19,516,867	40.8

*continued on page 20*

State	Number of Respondents	Total Assets (dollars)	Donor Advised Fund Assets (dollars)	Donor Advised Fund Assets as a Percent of Total Assets	Total Grants (dollars)	Donor Advised Fund Grants (dollars)	Donor Advised Fund Grants as a Percent of Total Grants
SC	4	145,805,679	23,882,332	16.4	14,587,860	5,745,790	39.4
SD	2	56,200,000	17,075,000	30.4	7,011,000	5,564,000	79.4
TN	3	511,898,634	202,931,954	39.6	63,258,793	46,134,941	72.9
TX	14	1,740,434,382	698,400,583	40.1	282,459,538	170,902,975	60.5
UT	1	1,000,000	750,000	75.0	300,000	200,000	66.7
VA	7	277,348,021	85,967,831	31.0	14,859,883	6,658,300	44.8
WA	10	609,470,821	197,541,842	32.4	67,082,011	36,816,613	54.9
WI	8	74,327,002	24,048,691	32.4	5,440,481	2,173,946	40.0
WV	5	54,458,104	16,541,305	30.4	3,350,928	1,519,584	45.3
WY	1	24,397,000	14,272,300	58.5	15,926,700	5,900,000	37.0
48	264	29,103,716,126	8,715,268,657	29.9	3,022,948,763	1,690,433,765	55.9

**Table 2—Donor Advised Fund Grants to Support Human Services by State, 2008**

State	Number of Respondents	Value of Donor Advised Fund Grants to Support Human Services (dollars)	Value of Donor Advised Fund Grants to Support Human Services as a Proportion of Total Value of Donor Advised Fund Grants (percent)
AK	1	70,000	9.1
AL	3	4,039,725	29.6
AR	3	1,700,000	45.0
AZ	2	3,000,000	21.5
CA	20	106,491,424	25.8
CO	9	1,303,000	3.2
CT	5	1,748,970	25.8
DE	1	25,000	6.8
FL	14	5,349,160	13.2
GA	7	46,270,912	53.2
HI	1	636,000	15.5
IA	4	2,350,000	18.6
ID	1	1,000,000	23.8
IL	5	41,134,000	74.5
IN	18	11,271,445	46.0
KS	9	1,478,300	10.7
KY	3	1,435,011	69.0
LA	4	4,173,163	18.2
MA	8	28,441,740	42.4
MD	5	1,217,660	65.6
ME	1	1,500,000	19.9
MI	15	15,481,459	38.6
MN	6	22,891,881	29.0
MO	2	6,700,000	7.4
MS	2	800	0.1
MT	1	300,000	68.2
NC	6	6,620,721	30.3
ND	3	381,510	36.5
NE	5	515,500	26.3
NJ	2	12,114,854	47.7
NM	2	933,950	65.9
NV	2	678,128	10.8
NY	12	32,260,005	21.8
OH	11	12,564,328	25.2
OK	1	3,165,415	100.0
OR	1	12,000,000	42.9
PA	13	4,564,053	23.4
SC	4	3,421,288	59.5
SD	2	200,000	3.6
TN	3	17,649,384	38.3
TX	14	38,273,143	22.4
UT	1	100,000	50.0
VA	7	2,497,852	37.5
WA	10	18,254,459	49.6
WI	8	1,116,280	51.3
WV	5	510,125	33.6
WY	1	1,600,000	27.1
47	263	479,430,645	28.4