

The Center on Philanthropy & Public Policy

CALIFORNIA FOUNDATIONS 2004: TRENDS AND PATTERNS

**James M. Ferris
Elizabeth A. Graddy
Anne Ferree**

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The California Endowment
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October 2006

**The Center on Philanthropy and Public Policy
University of Southern California**

*In Cooperation with
The Foundation Center*

About The Center on Philanthropy and Public Policy

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In order to make the research a catalyst for understanding and action, the Center encourages communication among the philanthropic, nonprofit, and policy communities. This is accomplished through a series of convenings and conversations around research findings and policy issues to help key decision makers work together more effectively to solve public problems and to identify strategies for action.

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To achieve our mission we:

- Collect, organize, and communicate information on U.S. philanthropy
- Conduct and facilitate research on trends in the field
- Provide education and training on the grantseeking process
- Ensure public access to information and services through our web site, print and electronic publications, five library/learning centers, and a national network of Cooperating Collections.

Founded in 1956, the Center is the nation's leading authority on philanthropy and is dedicated to serving grantseekers, grantmakers, researchers, policymakers, the media, and the general public.

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Contents

List of Figures	iv
List of Tables	v
List of Maps	vi
Foreward	vii
Executive Summary	viii
Introduction	1
<i>California Foundations: 1999-2004</i>	2
<i>Grantmaking of California Foundations: 1999-2004</i>	6
<i>Summary</i>	8
The Capacity of California Foundations	9
<i>Number of Foundations</i>	10
<i>Foundation Assets</i>	16
<i>Foundation Giving</i>	22
<i>Summary</i>	28
The Reach of Foundation Philanthropy in California	29
<i>Data</i>	29
<i>Methodology</i>	30
<i>Geographic Distribution of Grant Dollars Received</i>	31
<i>Differences in California and Non-California Foundations</i>	40
<i>Subject Area Distribution of Grants</i>	50
<i>Subject Area Grants by Region</i>	51
<i>Summary</i>	74
Conclusion	76
Appendices	
Appendix A. Map of California counties and regions	79
Appendix B. 100 Largest California Foundations by Assets, Circa 2004	80
Appendix C. 100 Largest California foundations by Total Giving, Circa 2004	83
Appendix D. Grant dollars received, 1999 and 2004	86
Appendix E. Average grant size received, 1999 and 2004	88
Appendix F. Grant dollars received per nonprofit from California and non-California foundations, 1999 and 2004	90

List of Figures

Figure 1.	Number of California foundations, 1999 – 2004	3
Figure 2.	California foundation assets, 1999 – 2004	3
Figure 3.	California foundation giving, 1999 – 2004	4
Figure 4.	California's share of all U.S. foundations: number, assets and total giving (nominal)	4
Figure 5.	Percent of grant dollars to California recipients, 1999 – 2004	6
Figure 6.	Distribution of California foundation grant dollars by subject area, 2004	7
Figure 7.	Distribution of California foundation grant dollars by subject area, 1999	7
Figure 8.	Distribution of grant dollars received by California recipients by subject area, 2004	51
Figure 9.	Distribution of grant dollars received by California recipients by subject area, 1999	51

List of Tables

Table 1.	The number of foundations, 1999 and 2004	14
Table 2.	Foundation assets, 1999 and 2004	18
Table 3.	Foundation giving, 1999 and 2004	24
Table 4.	2004 grants to California recipients by grants size	30
Table 5.	Grant dollars received per capita and per nonprofit, 1999 and 2004	34
Table 6.	Grant dollars received per capita from California and non-California foundations, 1999 and 2004	42
Table 7.	Percentage of grant dollars received from California foundations, 1999 and 2004	44
Table 8.	Arts and culture grant dollars received per capita, 1999 and 2004	52
Table 9.	Education grant dollars received per capita, 1999 and 2004	53
Table 10.	Environment and animals grant dollars received per capita, 1999 and 2004	54
Table 11.	Health grant dollars received per capita, 1999 and 2004	55
Table 12.	Human services grant dollars received per capita, 1999 and 2004	56
Table 13.	International affairs/human rights grant dollars received per capita, 1999 and 2004	57
Table 14.	Public/societal benefit grant dollars received per capita, 1999 and 2004	58
Table 15.	Science and technology grant dollars received per capita, 1999 and 2004	59
Table 16.	Social science grant dollars received per capita, 1999 and 2004	60
Table 17.	Religion grant dollars received per capita, 1999 and 2004	61

List of Maps

Map 1.	The location of California foundations, 2004	11
Map 2.	Number of foundations, 2004	12
Map 3.	Change in number of foundations, 1999 to 2004	13
Map 4.	Foundation assets, 2004	20
Map 5.	Change in foundation assets, 1999 to 2004 (in 1999 dollars)	21
Map 6.	Foundation giving, 2004	26
Map 7.	Change in foundation giving, 1999 to 2004 (in 1999 dollars)	27
Map 8.	Grant dollars received per capita, 2004	36
Map 9.	Change in grant dollars received per capita, 1999 to 2004 (in 1999 dollars)	37
Map 10.	Grant dollars received per nonprofit, 2004	38
Map 11.	Change in grant dollars received per nonprofit, 1999 to 2004 (in 1999 dollars)	39
Map 12.	Grant dollars received per capita from California foundations, 2004	46
Map 13.	Change in grant dollars received per capita from California foundations, 1999 to 2004 (in 1999 dollars)	47
Map 14.	Grant dollars received per capita from non-California foundations, 2004	48
Map 15.	Change in grant dollars received per capita from non-California foundations, 1999 to 2004 (in 1999 dollars)	49
Map 16.	Arts and culture grant dollars received per capita, 2004	63
Map 17.	Change in arts and culture grant dollars received per capita, 1999 to 2004 (in 1999 dollars)	64
Map 18.	Education grant dollars received per capita, 2004	66
Map 19.	Change in education grant dollars received per capita, 1999 to 2004 (in 1999 dollars)	67
Map 20.	Health grant dollars received per capita, 2004	69
Map 21.	Change in health grant dollars received per capita, 1999 to 2004 (in 1999 dollars)	70
Map 22.	Human services grant dollars received per capita, 2004	72
Map 23.	Change in human services grant dollars received per capita, 1999 to 2004 (in 1999 dollars)	73

Foreward

The last decade and a half has been a period of increased scale, pace, and complexity of philanthropy. Since its inception, The Center on Philanthropy and Public Policy has been working to document, track, and understand the changing philanthropic landscape in California. A critical element of that effort has been to understand the capacity of California foundations and the impact of foundation philanthropy on the people and communities of California.

While there are a number of new institutions and structures for philanthropy, the philanthropic foundation has been, is, and will continue to be one of the focal points of philanthropy. The Center developed a baseline analysis of California foundations in 1999 to better understand California foundations — their size, scope, and reach, and to surface challenges about how they might chart a future that increases the impact of their philanthropic assets.

In the intervening years, there have been a number of events that have slowed the momentum that existed a mere five years ago. The decline in the fortunes of the high tech industry and the recession of the early part of this decade served to break the unbridled optimism that existed for future growth, and the ideals and enthusiasm of the venture philanthropy proponents have been tempered by experience. At the same time, a series of large scale disasters, both from terrorism and from natural causes, has focused the public's attention on philanthropy and their nonprofit partners and what the sector can and cannot accomplish, and corporate scandals have cast a shadow on the accountability of philanthropic and nonprofit organizations, attracting the scrutiny of the media and public policy makers.

In order to appreciate the possibilities and the opportunities for philanthropy today and in the future, it is imperative to have a firm grasp of the patterns and trends as best as we can measure them. That is precisely the purpose of updating the 1999 baseline analysis of California's foundation sector through 2004.

This project updating the baseline analysis has been done in collaboration with The Foundation Center and funded by The California Endowment, The James Irvine Foundation, and The David and Lucile Packard Foundation. The Center would like to acknowledge the contributions of Steven Lawrence and Loren Renz of The Foundation Center and Eric Becker and Lili Wang for their research assistance. In addition, a special thanks to members of the project's advisory committee: Lucy Bernholz, Elizabeth Bremner, Flo Green, Nancy Jamison, Colin Lacon, Charles Slosser, Judy Spiegel, and Caroline Tower. They gave invaluable advice in the conceptualization and implementation of the project, and generously shared their insights on California's foundation community.

James M. Ferris, Ph.D.
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CALIFORNIA FOUNDATIONS 2004: TRENDS AND PATTERNS

California has experienced phenomenal growth in the scale, pace, and complexity of philanthropy in the past twenty-five years. In 1999 we conducted a baseline analysis of California foundations and foundation philanthropy to document the sector and its growth. At that time, we were in the midst of a particularly robust and dynamic period in philanthropy in California and the West, as well as across the United States. In the intervening years there have been a number of events that have slowed the momentum that existed a mere five years ago. In order to appreciate the possibilities and the opportunities for philanthropy today and in the future, we update the baseline analysis in this report. We examine changes that have unfolded over the 1999-2004 period, with a focus on aggregate state level changes in the foundation industry and their grantmaking patterns and priorities as well as the distribution of foundation capacity and the reach of foundation capacity across the regions and counties of the state.

State Foundation Trends

The analysis of California foundations in 1999 revealed a sector that had undergone significant growth and that was distinct in its structure and composition. The portrait of California foundations in 2004 reinforces some of the distinctive features that the baseline analysis revealed, but there are also some important changes from the early period that are noteworthy.

The assets and giving of California foundations more than tripled during the 1990s and more than doubled from 1995 to 1999, while the number of foundations increased by slightly more than half during the decade. Since the 1999 baseline analysis there have been changes in the rate of growth. The expansion of the number of foundations has been robust. In 2004, the state was home to 6,242 grantmaking foundations with assets of \$77.4 billion and giving of over \$4 billion. The number of foundations across the state has increased 48 percent since 1999.

The downturn in the high tech industry that was such a significant spur to foundation growth in the 1990s coupled with the decline in stock market values created a dip in foundation assets and slowed the growth of foundation giving. After foundation assets peaked in 2000, the fortunes of California foundations declined and have only recently surpassed levels from five years earlier in nominal dollars. The real value of assets has yet to fully recover. California foundations increased their assets 13 percent from \$68.3 billion in 1999 to \$77.4 billion in 2004. When adjusted for inflation, this represents a 2 percent decrease in value. Foundation giving, however, has continued to grow over the past five years, though at a slower rate than in the 1990s. Giving by California foundations increased 40 percent from \$2.9 billion in 1999 to \$4.1 billion in 2004. Adjusted for inflation, this represents a 21 percent increase.

As the finances of California foundations recover, the prognosis for growth in foundation assets and giving in the next few years is cautiously optimistic with assets expected to fully recover their real value. The longer term prospects are even better, given the fact that the creation of new foundations since 1999, while not as great as during the 1990s, is

still outpacing the growth in the number of foundations nationally, 48 percent in California versus 35 percent nationwide for the 1999-2004 period. A quarter of California foundations have been created since 1999, and 72 percent of the state's foundations have been established since 1990. It is important to remember that while some of these new foundations are remarkably large in terms of their assets and giving, most are relatively small. Yet, these relatively young foundations have considerable potential to grow in size as founding donors move through their life cycle and transfer their wealth into the foundation's endowment. In addition, the expansion of community foundations across the state provides an infrastructure for giving. Thus, despite some of the short term fluctuations in foundations assets such as we have seen in the past five years, the long term prospects for foundation capacity are quite strong.

Aside from the changes in size and growth of the California foundations, several of the structural dimensions of the sector remain five years later. California foundations remain highly concentrated in size, even more so than foundations nationally, with a small number of foundations holding the majority of assets and accounting for a substantial share of giving in the state. Community foundations continue to play a prominent role in California's foundation sector, and corporate foundations less so, when compared to national patterns.

In terms of grantmaking patterns and priorities of California foundations, based on a sample of grants from over 100 of California's largest foundations in 1999 and 2004, we observe that funders continue to focus a majority of their grantmaking dollars, 64 percent, on the state though this has been trending down since the early 1990s. In terms of funding priorities, health and education remain the top two funding areas with 24 percent and 19 percent of total grant dollars, respectively. The most notable changes between 1999 and 2004 are the increase in the relative share of grant dollars for public/societal benefit which encompasses civil rights, community development, philanthropy and volunteerism, and public affairs from 7.7 percent to 11.3 percent; and the decrease in the relative share of grant dollars going to human services from 15 percent to 11 percent.

Foundation Capacity

Foundation capacity across the regions and counties of California, as measured by the number of foundations, foundations assets, and foundation giving, is examined based on the location of foundations headquartered in the state. Foundations, of course, are not limited to practicing their philanthropy in the communities where they are located, but many foundations focus their work in or near their communities. For this analysis we rely on data collected by the Foundation Center, which includes information on all California foundations – independent, corporate, operating and community – with giving of at least \$1 in the latest fiscal year.

Philanthropic capacity in the state is highly concentrated in two regions, as it was five years earlier. The Bay Area and Los Angeles headquarter 68 percent of all California foundations. The foundations in these two regions hold 89 percent of the assets and account for 85 percent of giving of all California foundations in 2004, a slight decline from 91 percent of assets and 87 percent of giving in 1999.

The Los Angeles and North Coast & State regions generally declined in relative capacity over this five-year period. Los Angeles' share of the number of foundations declined 3 percent from 37 percent to 34 percent, while giving declined 7 percent from 38 percent to 31 percent. Its relative share of assets remained constant at 40 percent. For the North Coast & State region, its share in the number of foundations and in assets decreased slightly, but had a notable decline in giving, albeit on a small base, as North Coast & State foundations decreased giving 19 percent, compared to a state-wide giving increase of 21 percent.

Two regions demonstrated general growth in capacity – the Central Coast and the Sierra regions. The Central Coast region increased its relative share in the number of foundations, in assets, and in giving. The largest increase was in giving, rising from 2.5 percent of the state in 1999 to 4.2 percent in 2004. There was a budding growth in capacity in the Sierra region, which saw large percentage increases in all measures, albeit on very small 1999 base levels. Even with asset increases of 285 percent and giving of 540 percent over the period, Sierra foundations still represent only about 1 percent of the capacity of California foundations.

The Reach of Foundation Philanthropy

The reach of foundation philanthropy in the state is best illustrated by analyzing where grants are received, both from California and non-California foundations. We examine the distribution of the 2004 grants as an indication of the current reach of foundation philanthropy in the state and compare it to the distribution of grants from five years earlier in 1999. To undertake this analysis, we rely on data obtained from the Foundation Center on the grants of a sample of over 1,000 larger foundations from across the United States for the two years, each of which represents half of the total giving by all U.S. foundations. The two samples include over 100 California foundations and represent approximately half of the giving of all California foundations in the two years.

Grant dollars, like philanthropic capacity, is concentrated in the Bay Area and in Los Angeles. Almost 77 percent of the grant dollars in the 2004 sample went to recipients in one of these two regions. Consequently, there is wide disparity across the state in grant dollars received per capita. Grant dollars received are very heavily concentrated in the Bay Area, with \$121 per resident, twice the \$61 per resident in Los Angeles. These two regions are the only ones that exceed the state average of \$52 per resident.

Three regions received substantially more grant dollars per capita relative to the state average in 2004 compared to 1999 – the Central Valley - North, the Inland Empire, and the Central Valley - South. Large grants to Shasta, Riverside, and Stanislaus counties were instrumental in this growth. Two regions suffered notable declines in their relative share of grant dollars in this period – the North Coast & State and the Central Coast regions. Reduced grants to Humboldt County and Monterey County recipients were the major reasons. The North Coast & State region also suffered a loss in foundation capacity during this period. The Central Coast, however, was increasing its relative share of foundation capacity while it suffered these losses in grant dollars per capita.

The patterns in grant dollars received per nonprofit are similar to those revealed in the per capita analysis, though the differences are somewhat muted. Only the Bay Area and Los Angeles regions received grant dollars per nonprofit at higher than state-wide average of \$51,785. Bay Area average nonprofits received \$81,265, 156 percent of the state average, and Los Angeles nonprofits received \$66,691, 128 percent of the state average. The Central Valley - North, the Inland Empire, and the Central Valley - South all made substantial improvements in their relative share of grant dollars per nonprofit between 1999 and 2004. The North Coast & State and Central Coast regions suffered the largest relative losses. Thus, the analysis of grant dollars per nonprofit analysis reinforces the patterns revealed earlier in the grant dollars per capita analysis.

Conclusion

California foundations have essentially weathered the decline in their fortunes in the intervening years since the baseline analysis was conducted. The number of foundations continues to grow, foundation giving is rebounding, and foundation assets are almost back in real terms. And the long term prospects are bright. With a quarter of California foundations having been created since 1999, and 72 percent since 1990, there is reason to be optimistic that these relatively young foundations will grow in the future as new additions are made to their endowments and the expanded presence of community foundations provide the infrastructure for philanthropy across the regions of the state. However, the growth trajectory of philanthropy is unlikely to be smooth and the changes in the structure and composition of the foundation sector are likely to be at the margin rather than major shifts. Actions to realize the full potential of foundations, especially the emerging foundations, and to ensure a better spatial match between philanthropy and community needs are likely to have a payoff in realizing the promise of philanthropy. But that will require strategic and concerted action by the philanthropic community.

Introduction

California has experienced phenomenal growth in the scale, pace, and complexity of philanthropy in the past twenty-five years. The state's foundations have outpaced the growth in foundation numbers, assets, and giving since the late 1970s. During this time California foundations have emerged as an important force within the state and on the national scene.

A baseline analysis of California foundations and foundation philanthropy in 1999 was conducted to document the changes. At that time, we were in the midst of a particularly robust and dynamic period in philanthropy in California and the West, as well as across the United States. While the rate of foundation creation and the growth of foundation assets and giving had been quite remarkable since 1980, the trends accelerated in the 1990s, particularly in the later part of the decade. Three distinct themes dominated the analysis of California foundations in the 1990s: record growth in foundation numbers, assets, and giving; manifestations of new philanthropic resources such as health conversion foundations, community foundations, and family foundations; and a concentration of foundation capacity and grantmaking in the Bay Area and Los Angeles County.

In the intervening years there have been a number of events that have slowed the momentum that existed a mere five years ago. The decline in the fortunes of the high tech industry and the recession of the early part of this decade served to break the unbridled optimism that existed for future growth and tempered the ideals and enthusiasm of new entrants to the philanthropic field. At the same time, a series of large scale disasters, both from terrorism and natural causes, have focused public attention on philanthropy and their nonprofit partners and what the sector can and cannot accomplish. Finally, the corporate scandals have cast a shadow on the accountability of philanthropic and nonprofit organizations and have attracted the scrutiny of the media and public policy makers.

In order to appreciate the possibilities and the opportunities for philanthropy today and in the future, it is imperative to have a firm grasp of the trends and patterns as best we can measure them. That is precisely the purpose of updating the 1999 baseline analysis of California's foundation sector through 2004. While foundations are only part of the philanthropic landscape, they continue to be one of the most critical. Foundations, with the power of their endowments, can provide resources to nonprofits in a sustained and substantial way. This enables foundations to play an independent role in influencing agendas of nonprofits, as well as governments, and to look beyond the election cycle to a longer time frame for solving pressing public problems. And just as importantly, foundations are in a better position to shape the future of the philanthropic landscape and the nonprofit sector through investments in nonprofit capacity building, public policy engagement, and the sector's infrastructure.

In the remainder of this section we provide a brief overview of the aggregate changes in California foundations and their grantmaking from 1999 through 2004. Then in the following sections we consider the capacity of California foundations in the regions and counties of the state, and the reach of foundation philanthropy, both from foundations within and outside of the state, in terms of the grant dollars received by California recipients.

California Foundations: 1999-2004

The analysis of California foundations in 1999 revealed a sector that had undergone significant growth and that was distinct in its structure and composition.¹ The portrait of California foundations in 2004 reinforces some of the distinctive features that the baseline analysis revealed, but there are also some important changes from the early period that are noteworthy.

The assets and giving of California foundations more than tripled during the 1990s and more than doubled from 1995 to 1999, while the number of foundations increased by slightly more than half during the decade. This growth was spurred by the creation of new family foundations, the increasing popularity of community foundations and their donor-advised funds, the emergence of new health foundations created from nonprofit to for-profit conversions of health care organizations, and the rising values of foundation endowments.² The growth of California foundation assets and giving outpaced nationwide growth during the 1990s, creating a westward tilt in the nation's foundation resources.

Since the 1999 baseline analysis there have been changes in the rate of growth. The expansion of the number of foundations has been robust in both absolute and relative terms (Figure 1). In 2004, the state was home to 6,242 grantmaking foundations with assets of \$77.4 billion and giving of over \$4 billion. The number of foundations across the state has increased 48 percent since 1999, compared to a 35 percent increase in U.S. foundations over the same period.³

While foundation numbers have steadily increased in the 1999 to 2004 period, the growth of foundation assets and giving slowed and even dipped. The downturn in the high tech industry that was such a significant spur to foundation growth in the 1990s coupled with the decline in stock market values created a dip in foundation assets and slowed the growth of foundation giving.

After foundation assets peaked in 2000, the fortunes of California foundations declined and have only recently surpassed levels from five years earlier in nominal dollars. The real value of assets has yet to fully recover. California foundations increased their assets

¹ The Center on Philanthropy and Public Policy, *California Foundations: Trends and Patterns*, University of Southern California, 2002.

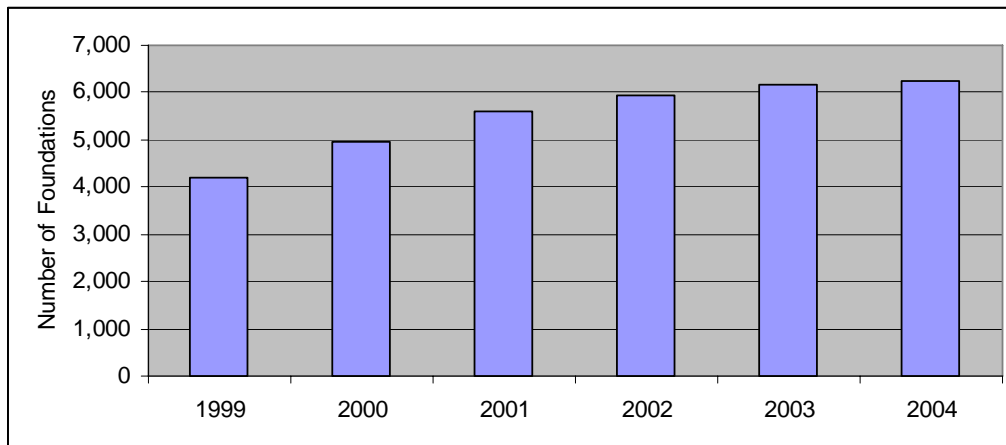
² The other facet that was in the analysis of the composition of the foundation sector in 1999 was the decreasing relative role of corporate foundations, compared to the composition of foundations at the national level.

³ The Foundation Center, *California Foundations*, 2006.

13 percent from \$68.3 billion in 1999 to \$77.4 billion in 2004 (Figure 2). When adjusted for inflation, this represents a 2 percent decrease in value.

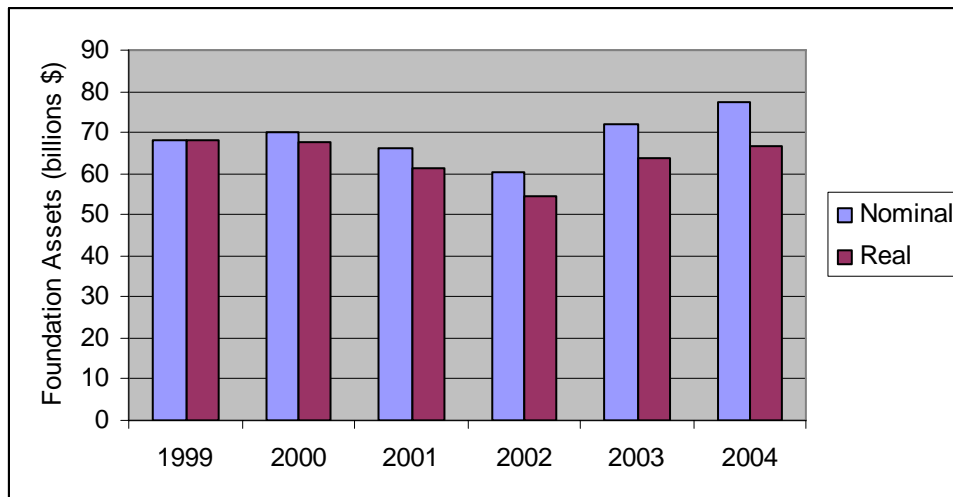
In their giving, however, the pattern over the past five years is generally positive. Giving by California foundations increased 40 percent from \$2.9 billion in 1999 to \$4.1 billion in 2004 (Figure 3). Adjusted for inflation, this represents a 21 percent increase.

Figure 1. Number of California foundations, 1999 – 2004.



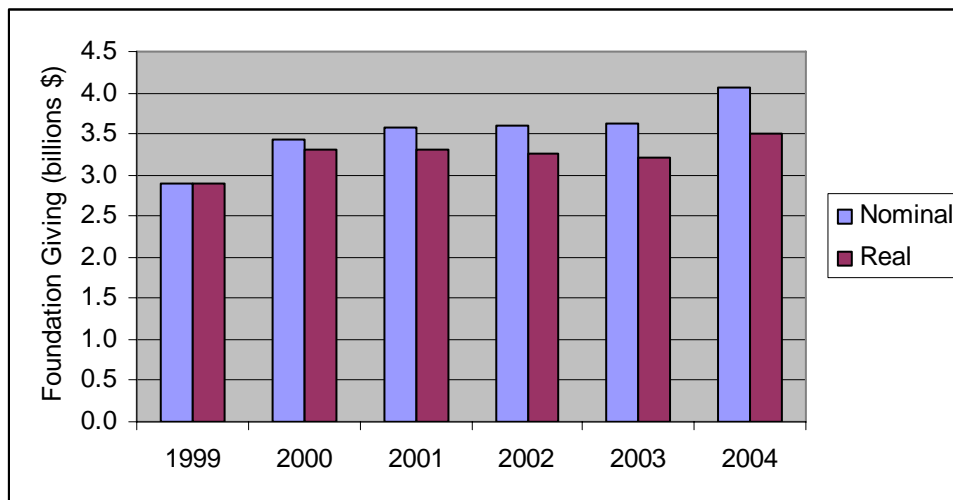
Source: The Foundation Center, *Foundation Yearbook*, 2001 - 2006.

Figure 2. California foundation assets, 1999 – 2004



Source: The Foundation Center, *Foundation Yearbook*, 2001 - 2006.

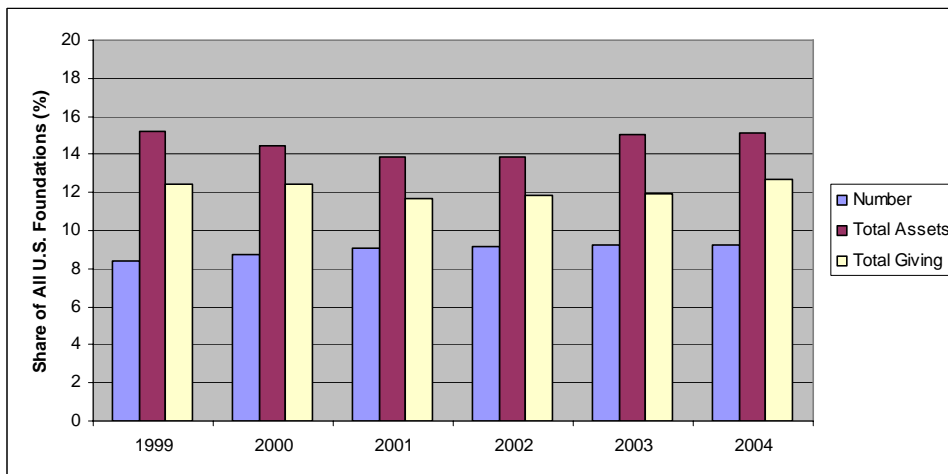
Figure 3. California foundation giving, 1999 - 2004



Source: The Foundation Center, *Foundation Yearbook*, 2001 - 2006.

Placing this growth in a national context, California foundations are recovering from a greater jolt to their assets over the past five years than their counterparts nationally. However, California's share of foundation numbers, assets, and giving remains quite substantial, second only to New York. In 2004, California foundations represented 9.2 percent of U.S. foundations, 15.2 percent of the assets of U.S. foundations, and 12.7 percent of the total giving of U.S. foundations (Figure 4).

Figure 4. California's share of all U.S. foundations: number, assets and total giving (nominal)



Source: The Foundation Center, *Foundation Yearbook*, 2001 - 2006.

As the finances of California foundations recover, the prognosis for growth in foundation assets and giving in the next few years is cautiously optimistic.⁴ The longer term prospects are even better, given the fact that the creation of new foundations since 1999, while not as great as during the 1990s, is still outpacing the growth in the number of

⁴ The Foundation Center, *California Foundations*, 2006.

foundations nationally (48 percent in California versus 35 percent nationwide for the 1999-2004 period). As expected, the comeback has been sparked by the continued creation of family foundations, the endowing of existing family foundations, the continued expansion of the state's community foundations,⁵ and improving economic conditions.

A quarter of California foundations have been created since 1999, and 72 percent of the state's foundations have been established since 1990.⁶ It is important to remember that while some of these new foundations are remarkably large in terms of their assets and giving, most are relatively small. Yet, these relatively young foundations have considerable potential to grow in size as founding donors move through their life cycle and transfer their wealth into the foundation's endowment. This underscores that, despite some of the short term fluctuations in foundations assets such as we have seen in the past five years, the long term prospects for foundation capacity are quite strong.

Aside from the changes in size and growth of the California foundations, several of the structural dimensions of the sector remain five years later. California foundations remain highly concentrated in size, even more so than foundations nationally. A small number of foundations hold the majority of assets and account for a substantial share of giving in the state, although the degree of concentration has declined slightly.

In 2004, there were 35 foundations with assets of \$250 million or more. These foundations accounted for 63.2 percent of assets and 47.5 percent of giving. Five years earlier, there were two fewer foundations in this asset range, and these accounted for 68.3 percent of assets and 52.9 percent of giving among all California foundations. At the other end of the spectrum, there were 3,831 foundations with assets of \$1 million or less in 2004. These foundations accounted for 1.3 percent of assets and 9.1 percent of giving of all California foundations. In 1999, the comparable 2,428 foundations with assets of \$1 million or less accounted for 1 percent of assets and 5.9 percent of giving.

The distinctive role of community foundations in the composition of California foundations discovered in the 1999 analysis continues in 2004.⁷ Community foundations represented less than 1 percent of all California foundations in 2004, yet accounted for over 6.9 percent of assets and 13.9 percent of giving among all foundations in the state, compared to 6.2 and 13.3 percent respectively, five years earlier.

As before, corporate foundations in the state continue to play a more modest role. In 2004, like 1999, corporate foundations account for 5 percent of all foundation giving in the state, half of that of their counterparts nationally, just as five years earlier.

⁵ The Foundation Center, *California Foundations*, 2001 and 2006.

⁶ Based on data on foundations with at least \$1 million in assets or making grants of \$100,000 or more (The Foundation Center, *Foundation Yearbook*, 2001 - 2006).

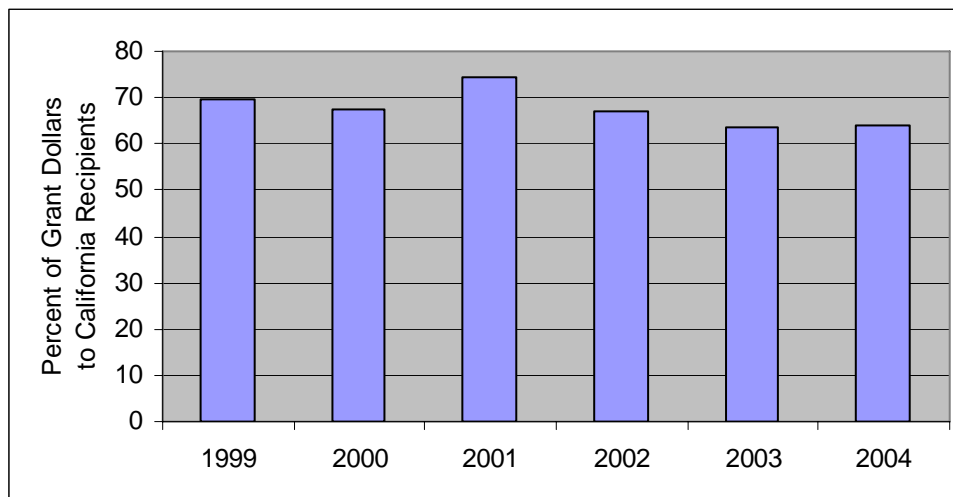
⁷ The number of community foundations within the state increased from 34 to 50, with total assets increasing nearly 27 percent, and their giving by 46 percent, both exceeding the growth of other segments of the foundations sector

Grantmaking of California Foundations: 1999-2004

Foundation philanthropy in California in the 1999 baseline analysis exhibited some distinctive elements reflecting the importance of the composition and structure of California foundations. And these patterns, based on a sample of grants from over 100 of California's larger foundations continue to be reflected in the grantmaking of the state's foundations five years later in terms of geographic focus as well as subject area priorities.

California foundations focus the majority of their grantmaking on the state, although the trend for the share going to recipients outside of the state is increasing. In 2004, California foundations made 64 percent of their grants to California recipients, down from 70 percent five years earlier (Figure 5). This compares with 74 percent in 1991. This trend is moderated by the importance of community foundations and new health foundations which are focused on communities and regions of the state. Nevertheless, this overall pattern reflects the important role that a few of the state's largest, established foundations play on the national and international scene, such as The David and Lucile Packard Foundation and The William and Flora Hewlett Foundation, as well as the emergence of some larger foundations with national and international missions such as the Broad Foundations, the Omidyar Network, and the Gordon and Betty Moore Foundation.

Figure 5. Percent of grant dollars to California recipients, 1999 – 2004



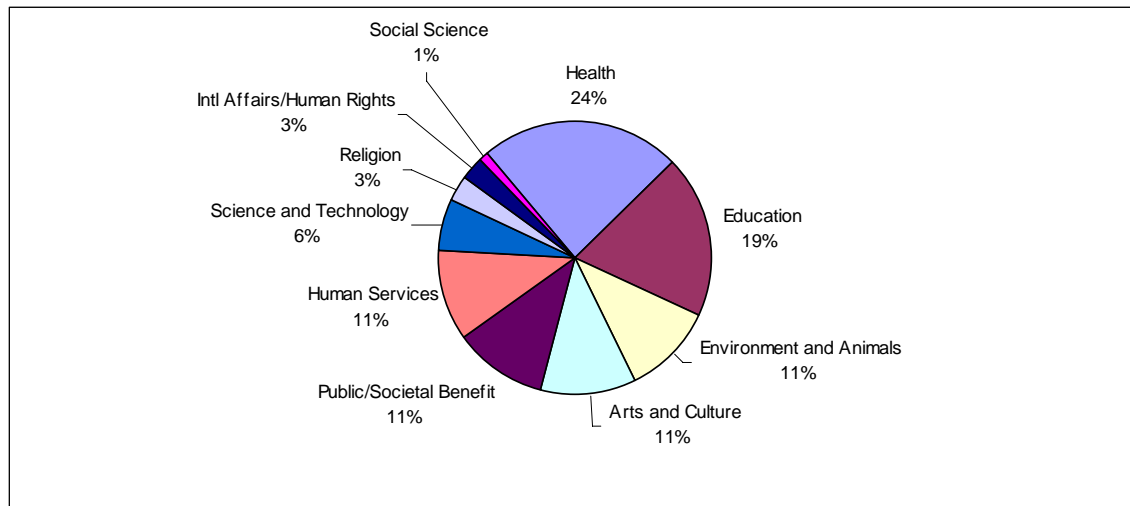
Source: The Foundation Center, *California Foundations*, 2001 - 2006.

In terms of funding priorities, health and education were the top two funding priorities among California foundations in 2004, followed by a clustering of the environment and animals, arts and culture, public/societal benefit, and human services in the third through sixth spots (Figure 6). All account for at least 10 percent of the grant dollars in the grants sample.

There are two notable differences in the funding priorities of California foundations from five years ago (Figure 7). Grant dollars for public/societal benefit (which encompasses civil rights, community development, philanthropy and volunteerism, and public affairs) increased to 11.3 percent of all grants dollars in 2004, up from 7.7 percent in 1999. And,

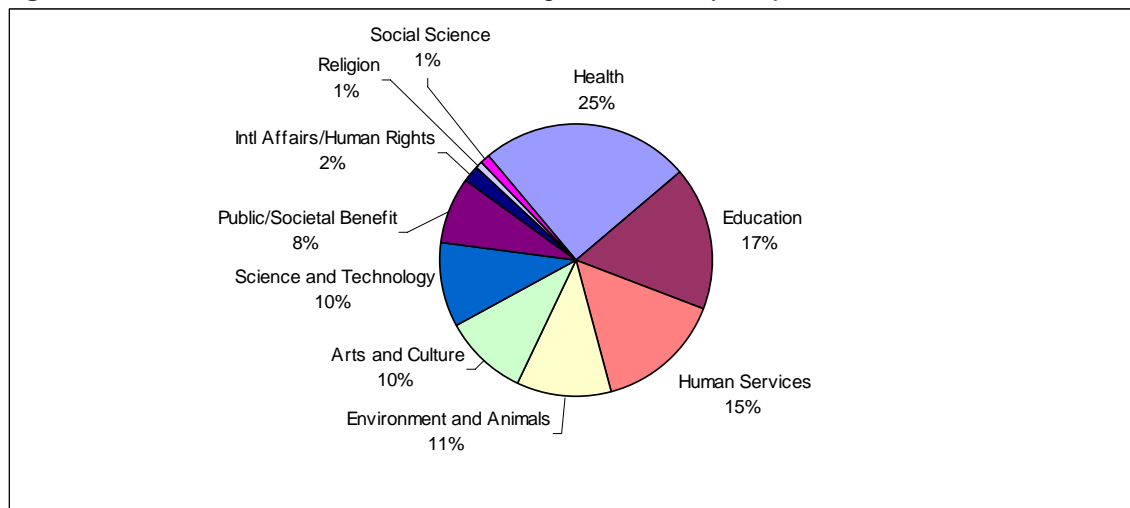
human services declined in its relative share of grant dollars to 11 percent, down from 15 percent five years earlier.

Figure 6. Distribution of California foundation grant dollars by subject area, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Figure 7. Distribution of California foundation grant dollars by subject area, 1999



Source: The Foundation Center, *California Foundations*, 2001.

In terms of relative importance between the funding priorities of California foundations and all U.S. foundations, health has remained the top priority in the state with education second, while nationally, education has consistently been the top priority with health second.⁸ In addition, the environment and animals continues to be a distinct priority of California foundations and, to a lesser extent, science and technology.⁹

⁸ Health as the top priority among California foundations reflects, in part, the distinctive role of two large health foundations in the state that were created in the health care conversions of the 1990s – The California Endowment and The California Wellness Foundation.

⁹ The relative importance of the environment and animals in California grantmaking reflects the programmatic interest of some of the state's largest foundations such as The David and Lucile Packard and

Summary

California foundations have essentially weathered the downturn in their fortunes in the intervening years since the baseline analysis was conducted. The number of foundations has continued to grow, foundation giving has rebounded, and foundation assets are almost back. And the long term prospects are bright. With a quarter of California foundations having been created since 1999, and 72 percent since 1990, there is reason to be optimistic that these relatively young foundations will grow in the future as new additions are made to their endowments.

Several of the distinctive features of California's foundation sector identified in the 1999 baseline analysis continue to be observed in 2004, such as the importance of community foundations and their growing share of foundation assets and giving, the continuing legacy of health care conversions on health philanthropy in the state, and the priority given to the environment and animals by foundations in the state, particularly some of the largest.

These aggregate trends and patterns are important to understand the resources of California foundations and their capacity to use their philanthropy to help address the most pressing problems of the state's residents. This analysis provides the information that is needed to understand the context in which philanthropy can address these problems within the communities and regions of the state. Yet, to fully appreciate the possibilities and opportunities for philanthropy, it is important to understand how foundation resources are distributed across the state's regions as well as the reach of foundation philanthropy across the vast expanse of California.

That is precisely what the following two sections do. We explore the implications of this growth in California's foundation sector over the past five years for the lives of Californians. We consider both the capacity of foundations and the reach of philanthropic activity across the regions of the state in 2004, and how these have changed since the 1999 baseline analysis. Specifically we examine:

- the *capacity* of California foundations as measured by their number, assets, and total giving in 2004, and changes in the spatial dimensions of this capacity since 1999.
- the *reach* of foundation philanthropy in 2004 as revealed by the geographic and subject area distribution of grants to the counties and regions of the state, and changes in these distributions since 1999.

The Capacity of California Foundations

Foundations represent an important philanthropic resource for the state and its communities. The capacity of this sector is measured here on several dimensions – number of foundations, foundations assets, and foundation giving.

Our analysis of the capacity of California foundations is based on the location of foundations headquartered within the state.¹⁰ Foundations, of course, are not limited to practicing their philanthropy in the communities where they are located, but many foundations focus their work in or near their communities.

We rely on data collected by the Foundation Center, which includes information on all California foundations – independent, corporate, operating and community – with giving of at least \$1 in the latest fiscal year.¹¹ Our spatial analysis focuses on ten regions of the state and the counties that comprise them.¹² Analysis at the regional level helps us to more readily identify broad patterns and trends that characterize the changing capacity of foundations across the state, and much of our narrative is so focused. At the same time, many will find county-specific information more useful in understanding the context of philanthropy in their communities. Therefore, the mapping is at the county level. The tables in this report include data for both regions and counties.

We assess the capacity of California foundations by examining the patterns of foundation numbers, assets, and giving as of 2004, and changes in these patterns since 1999. We specifically consider the following three questions and their implications:

- What is the number and spatial distribution of foundations in the state, and how has this changed over time?
- How are foundation assets distributed across the state and to what extent has this distribution changed?
- How is total foundation giving distributed across the state and how has this distribution changed over time?

¹⁰ For our purposes, a foundation is defined as a California foundation if it is incorporated in the state. Its location within the state is determined by the county in which its headquarters is located.

¹¹ The Foundation Center collects information from a variety of sources including: questionnaires mailed out to more than 25,000 foundations, foundation Web sites, and 990-PF data from the IRS. Since community foundations do not file 990-PF forms, data for these entities are gathered from surveys and foundation publications. Given the variation in reporting times across data sources, the fiscal picture of the 67,736 active U.S. foundations usually contains data spanning three to four years. For this analysis, 80 percent or 54,254 foundation listings contained 2004 or early 2005 fiscal data, representing 86 percent of the total assets and 80 percent of the total giving reported. For additional information see: The Foundation Center, *Foundation Yearbook*, 2006.

¹² A map of the state with the regions used in this report is provided in Appendix A.

Number of Foundations

California foundations numbered 6,242 foundations in 2004, a 48 percent increase over the 4,208 incorporated in the state in 1999. The spatial distribution of these foundations throughout the state and how that distribution has changed since 1999 is presented in Maps 1, 2, and 3, and the data are summarized in Table 1.

Foundations are heavily concentrated in two regions of the state – Los Angeles and the Bay Area.¹³ Los Angeles and the Bay Area each housed 34 percent of the state’s foundations in 2004. Thus, 68 percent of all California foundations are located in these two regions. This combined percentage of these two regions has decreased slightly in five years, but the Bay Area has increased its relative share from 32 percent in 1999, while Los Angeles’ share has decreased from 37 percent. The next largest concentration is in the South Coast & Border region, which houses 15 percent of the state’s foundations. No other region houses over 10 percent.

Los Angeles was the only region that experienced a notable decline in its relative share of the number of California foundations, even though it added 599 new foundations over the period. This indicates a lower rate of growth of new foundations in that county, compared to the rest of the state.

The remaining regions of the state were largely unchanged in their relative share of California foundations, indicating that their growth rate was comparable to that of the state overall.

¹³ The term “Los Angeles” is used throughout this document to refer to the Los Angeles region, which includes only Los Angeles County.

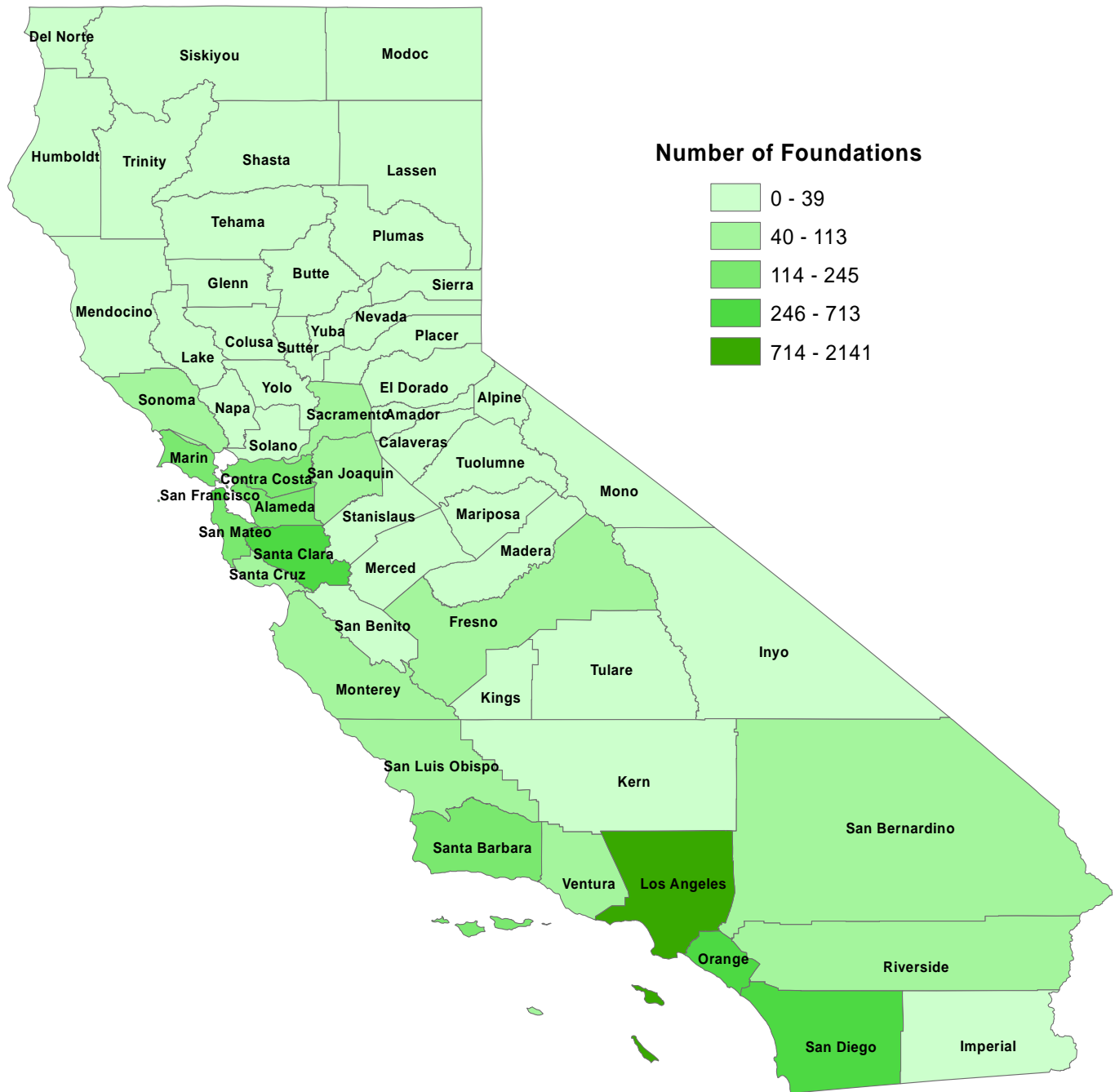
Map 1. The location of California foundations, 2004



Note: Overlapping points may occur
in high-density urban locations

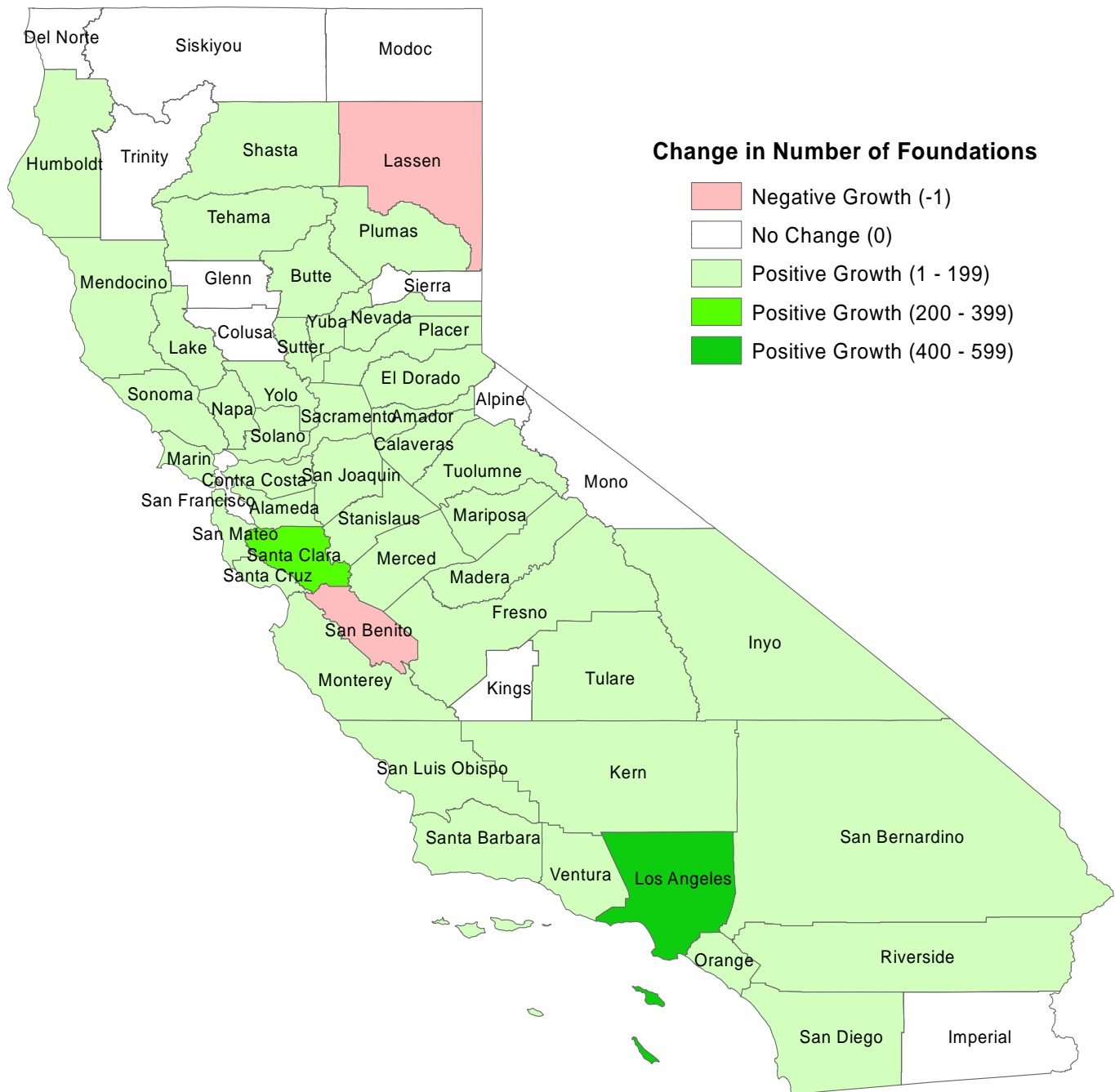
Source: The Foundation Center, *Foundation Yearbook*, 2006.

Map 2. Number of foundations, 2004



Source: The Foundation Center, *Foundation Yearbook*, 2006.

Map 3. Change in number of foundations, 1999 to 2004



Source: The Foundation Center, *Foundation Yearbook*, 2001 and 2006.

Table 1. The number of foundations, 1999 and 2004

Region/County		Number of Foundations		Change	
		1999	2004	Absolute	Percent
Bay Area		1,358	2,097	739	54.42%
	Alameda	125	206	81	64.80%
	Contra Costa	89	151	62	69.66%
	Marin	110	169	59	53.64%
	Napa	22	37	15	68.18%
	San Francisco	586	713	127	21.67%
	San Mateo	168	245	77	45.83%
	Santa Clara	197	489	292	148.22%
	Solano	16	18	2	12.50%
	Sonoma	45	69	24	53.33%
Central Coast		282	452	170	60.28%
	Monterey	53	77	24	45.28%
	San Benito	3	2	-1	-33.33%
	San Luis Obispo	25	51	26	104.00%
	Santa Barbara	117	180	63	53.85%
	Santa Cruz	28	50	22	78.57%
	Ventura	56	92	36	64.29%
Central Valley – Central		80	126	46	57.50%
	El Dorado	6	9	3	50.00%
	Placer	11	20	9	81.82%
	Sacramento	45	72	27	60.00%
	Sutter	3	6	3	100.00%
	Yolo	15	18	3	20.00%
	Yuba	0	1	1	n/a
Central Valley – North		18	29	11	61.11%
	Butte	3	9	6	200.00%
	Colusa	0	0	0	0.00%
	Glenn	0	0	0	0.00%
	Shasta	13	16	3	23.08%
	Tehama	2	4	2	100.00%
Central Valley – South		138	200	62	44.93%
	Fresno	41	57	16	39.02%
	Kern	33	39	6	18.18%
	Kings	2	2	0	0.00%
	Madera	1	2	1	100.00%
	Merced	4	7	3	75.00%
	San Joaquin	29	50	21	72.41%
	Stanislaus	16	27	11	68.75%
	Tulare	12	16	4	33.33%

Table 1. (continued) The number of foundations, 1999 and 2004

Region/County		Number of Foundations		Change	
		1999	2004	Absolute	Percent
Inland Empire		105	163	58	55.24%
	Riverside	71	113	42	59.15%
	San Bernardino	34	50	16	47.06%
Los Angeles		1,542	2,141	599	38.85%
	Los Angeles	1,542	2,141	599	38.85%
North Coast & State		32	40	8	25.00%
	Del Norte	1	1	0	0.00%
	Humboldt	10	12	2	20.00%
	Lake	3	4	1	33.33%
	Lassen	1	0	-1	-100.00%
	Mendocino	10	16	6	60.00%
	Modoc	1	1	0	0.00%
	Siskiyou	3	3	0	0.00%
	Trinity	3	3	0	0.00%
Sierra		14	34	20	142.86%
	Alpine	0	0	0	0.00%
	Amador	1	2	1	100.00%
	Calaveras	1	4	3	300.00%
	Inyo	2	3	1	50.00%
	Mariposa	0	1	1	n/a
	Mono	0	0	0	0.00%
	Nevada	6	14	8	133.33%
	Plumas	1	4	3	300.00%
	Sierra	0	0	0	0.00%
	Tuolumne	3	6	3	100.00%
South Coast & Border		639	960	321	50.23%
	Imperial	1	1	0	0.00%
	Orange	293	486	193	65.87%
	San Diego	345	473	128	37.10%
STATE		4,208	6,242	2,034	48.34%

Source: The Foundation Center, *Foundation Yearbook*, 2001 and 2006.

Foundation Assets

California foundations had assets of \$77.4 billion in 2004 up from \$68.3 billion in 1999. This represents an increase of 13 percent in nominal dollars over this five-year period; but, when adjusted for inflation, the value of assets decreased 2 percent.¹⁴ The spatial distribution of foundation assets and their changes over time are described in Table 2 and Maps 4 and 5.¹⁵

The regional concentration of foundation assets is even more pronounced than is the number of foundations. Bay Area foundations hold 49 percent of all California foundation assets, while Los Angeles foundations hold 40 percent. Thus, in 2004, 89 percent of the state's foundation assets were concentrated in foundations headquartered in these two regions.

The concentration of foundation assets has declined slightly from that observed five years earlier. In 1999, 91 percent of all California foundation assets were held by foundations headquartered in the Bay Area and Los Angeles regions. This reduction reflects a decline in the relative share of assets held by Bay Area foundations from 51 percent to 49 percent. Moreover, a general measure of the concentration of foundation assets by county confirms that they are highly concentrated, but that concentration declined slightly over the five-year period.¹⁶ The change, however, is small and primarily reflects the reduction in assets of the Packard foundation over this period which decreased from \$13.1 billion in 1999 to \$5.3 billion in 2004.

As noted previously, the value of California foundation assets declined in real (inflation-adjusted) terms over the five-year period. In 1999 dollars, total foundation assets in the state declined 2 percent over the period from \$68.3 billion to \$66.8 billion. The largest dollar decline was recorded in the Bay Area region, which suffered a \$2.2 billion decline in real dollars over the five-year period, or 6 percent of its 1999 assets.

All three Central Valley regions experienced percentage losses in the value of their foundation assets that exceed the state average – a 12 percent decline in the Central Valley - Central, a 13 percent decline in the Central Valley - North, and a 10 percent in the Central Valley - South. The North Coast & State and Los Angeles regions suffered more modest declines in real assets (less than 5 percent from 1999 levels).

In contrast, the Central Coast, Inland Empire, and Sierra regions enjoyed substantial real gains – 52 percent, 31 percent, and 285 percent respectively. The South Coast & Border region enjoyed a more modest real gain of 9 percent.

¹⁴ Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

¹⁵ A list of the 100 largest California foundations by assets, circa 2004 is included in Appendix B.

¹⁶ A Herfindahl-Hirschman Index revealed considerable concentration in foundation assets at the county level (2261 in 2004), but at a lower level than we observed in 1999 (2421). Values above 1800 are considered concentrated (U.S. Department of Justice, 2006).

Taken together, these changes suggest some notable shifts in foundation resources among the regions of the state. Although the impacts of the changes are difficult to predict as foundations may support activities outside their region, five counties - San Mateo, San Francisco, Ventura, San Diego, and Alameda - enjoyed real dollar gains in foundation assets in excess of \$250 million over this five-year period. Increases of such magnitude are likely to be reflected in some increased grantmaking to recipients in these counties.

Table 2. Foundation assets, 1999 and 2004

Region/County		Foundation Assets		Nominal		Adjusted	
		1999	2004	Change	Percent Change	Change	Percent Change
Bay Area		\$35,128,578,703	\$38,189,334,405	\$3,060,755,702	8.71%	-\$2,171,183,111	-6.18%
	Alameda	1,096,189,176	1,615,025,258	518,836,082	47.33%	297,577,622	27.15%
	Contra Costa	707,750,557	893,179,897	185,429,340	26.20%	63,063,694	8.91%
	Marin	1,790,602,109	2,079,941,524	289,339,415	16.16%	4,387,426	0.25%
	Napa	233,938,248	163,574,060	-70,364,188	-30.08%	-92,773,834	-39.66%
	San Francisco	9,033,285,071	14,141,186,240	5,107,901,169	56.55%	3,170,558,654	35.10%
	San Mateo	5,348,648,843	9,896,601,564	4,547,952,721	85.03%	3,192,118,307	59.68%
	Santa Clara	16,666,476,114	8,947,217,401	-7,719,258,713	-46.32%	-8,945,027,497	-53.67%
	Solano	77,690,749	67,097,560	-10,593,189	-13.64%	-19,785,555	-25.47%
	Sonoma	173,997,836	385,510,901	211,513,065	121.56%	158,698,072	91.21%
Central Coast		\$1,199,730,497	\$2,117,486,251	\$917,755,754	76.50%	\$627,660,138	52.32%
	Monterey	234,350,261	413,560,097	179,209,836	76.47%	122,552,103	52.29%
	San Benito	145,524	190,763	45,239	31.09%	19,104	13.13%
	San Luis Obispo	16,500,127	46,699,288	30,199,161	183.02%	23,801,359	144.25%
	Santa Barbara	795,698,836	987,287,135	191,588,299	24.08%	56,329,962	7.08%
	Santa Cruz	39,916,354	135,659,160	95,742,806	239.86%	77,157,501	193.30%
	Ventura	113,119,395	534,089,808	420,970,413	372.15%	347,800,109	307.46%
Central Valley – Central		\$419,920,807	\$428,607,537	\$8,686,730	2.07%	-\$50,032,503	-11.91%
	El Dorado	2,548,416	16,522,753	13,974,337	548.35%	11,710,720	459.53%
	Placer	12,758,994	36,272,450	23,513,456	184.29%	18,544,130	145.34%
	Sacramento	318,612,314	312,631,167	-5,981,147	-1.88%	-48,811,617	-15.32%
	Sutter	4,638,833	4,340,493	-298,340	-6.43%	-892,988	-19.25%
	Yolo	81,362,250	58,783,772	-22,578,478	-27.75%	-30,631,855	-37.65%
	Yuba	0	56,902	56,902	n/a	49,106	n/a
Central Valley - North		\$389,376,439	\$392,189,870	\$2,813,431	0.72%	-\$50,916,581	-13.08%
	Butte	1,790,538	9,827,626	8,037,088	448.86%	6,690,703	373.67%
	Colusa	0	0	0	0.00%	0	0.00%
	Glenn	0	0	0	0.00%	0	0.00%
	Shasta	387,417,340	382,021,515	-5,395,825	-1.39%	-57,732,773	-14.90%
	Tehama	168,561	340,729	172,168	102.14%	125,488	74.45%
Central Valley - South		\$364,334,195	\$379,673,708	\$15,339,513	4.21%	-\$36,675,785	-10.07%
	Fresno	90,288,841	120,191,888	29,903,047	33.12%	13,436,758	14.88%
	Kern	48,526,546	41,862,604	-6,663,942	-13.73%	-12,399,119	-25.55%
	Kings	3,987,466	3,885,230	-102,236	-2.56%	-634,513	-15.91%
	Madera	38,831	85,274	46,443	119.60%	34,760	89.52%
	Merced	3,145,389	3,406,581	261,192	8.30%	-205,510	-6.53%
	San Joaquin	25,060,560	68,802,666	43,742,106	174.55%	34,316,141	136.93%
	Stanislaus	177,430,203	116,027,069	-61,403,134	-34.61%	-77,298,842	-43.57%
	Tulare	15,856,359	25,412,396	9,556,037	60.27%	6,074,539	38.31%

Table 2. (continued) Foundation assets, 1999 and 2004

Region/County	Foundation Assets		Nominal		Adjusted	
	1999	2004	Change	Percent Change	Change	Percent Change
Inland Empire	\$584,717,554	\$885,519,745	\$300,802,191	51.44%	\$179,485,986	30.70%
Riverside	551,612,759	842,779,165	291,166,406	52.78%	175,705,660	31.85%
San Bernardino	33,104,795	42,740,580	9,635,785	29.11%	3,780,326	11.42%
Los Angeles	\$27,018,385,664	\$30,977,438,649	\$3,959,052,985	14.65%	-\$284,856,110	-1.05%
Los Angeles	27,018,385,664	30,977,438,649	3,959,052,985	14.65%	-284,856,110	-1.05%
North Coast & State	\$100,105,893	\$110,272,718	\$10,166,825	10.16%	-\$4,940,537	-4.94%
Del Norte	69,741	181,970	112,229	160.92%	87,299	125.18%
Humboldt	86,558,359	77,436,167	-9,122,192	-10.54%	-19,730,947	-22.79%
Lake	1,862,692	1,820,585	-42,107	-2.26%	-291,527	-15.65%
Lassen	7,127	0	-7,127	-100.00%	-7,127	-100.00%
Mendocino	7,596,886	26,799,438	19,202,552	252.77%	15,531,029	204.44%
Modoc	134,863	158,195	23,332	17.30%	1,659	1.23%
Siskiyou	1,044,216	3,686,927	2,642,711	253.08%	2,137,602	204.71%
Trinity	2,832,009	189,436	-2,642,573	-93.31%	-2,668,526	-94.23%
Sierra	\$16,926,113	\$75,412,270	\$58,486,157	345.54%	\$48,154,676	284.50%
Alpine	0	0	0	0.00%	0	0.00%
Amador	126,987	903,849	776,862	611.76%	653,035	514.25%
Calaveras	1,322,055	1,228,519	-93,536	-7.08%	-261,843	-19.81%
Inyo	374,287	874,603	500,316	133.67%	380,495	101.66%
Mariposa	0	7,376	7,376	n/a	6,365	n/a
Mono	0	0	0	0.00%	0	0.00%
Nevada	3,440,682	61,123,074	57,682,392	1676.48%	49,308,531	1433.10%
Plumas	2,332,743	1,726,873	-605,870	-25.97%	-842,452	-36.11%
Sierra	0	0	0	0.00%	0	0.00%
Tuolumne	9,329,359	9,547,976	218,617	2.34%	-1,089,456	-11.68%
South Coast & Border	\$3,075,022,698	\$3,873,291,845	\$798,269,147	25.96%	\$267,628,164	8.70%
Imperial	499,426	560,111	60,685	12.15%	-16,050	-3.21%
Orange	1,690,821,998	1,886,435,791	195,613,793	11.57%	-62,827,910	-3.72%
San Diego	1,383,701,274	1,986,295,943	602,594,669	43.55%	330,472,125	23.88%
STATE	\$68,297,098,563	\$77,429,226,998	\$9,132,128,435	13.37%	-\$1,475,675,664	-2.16%

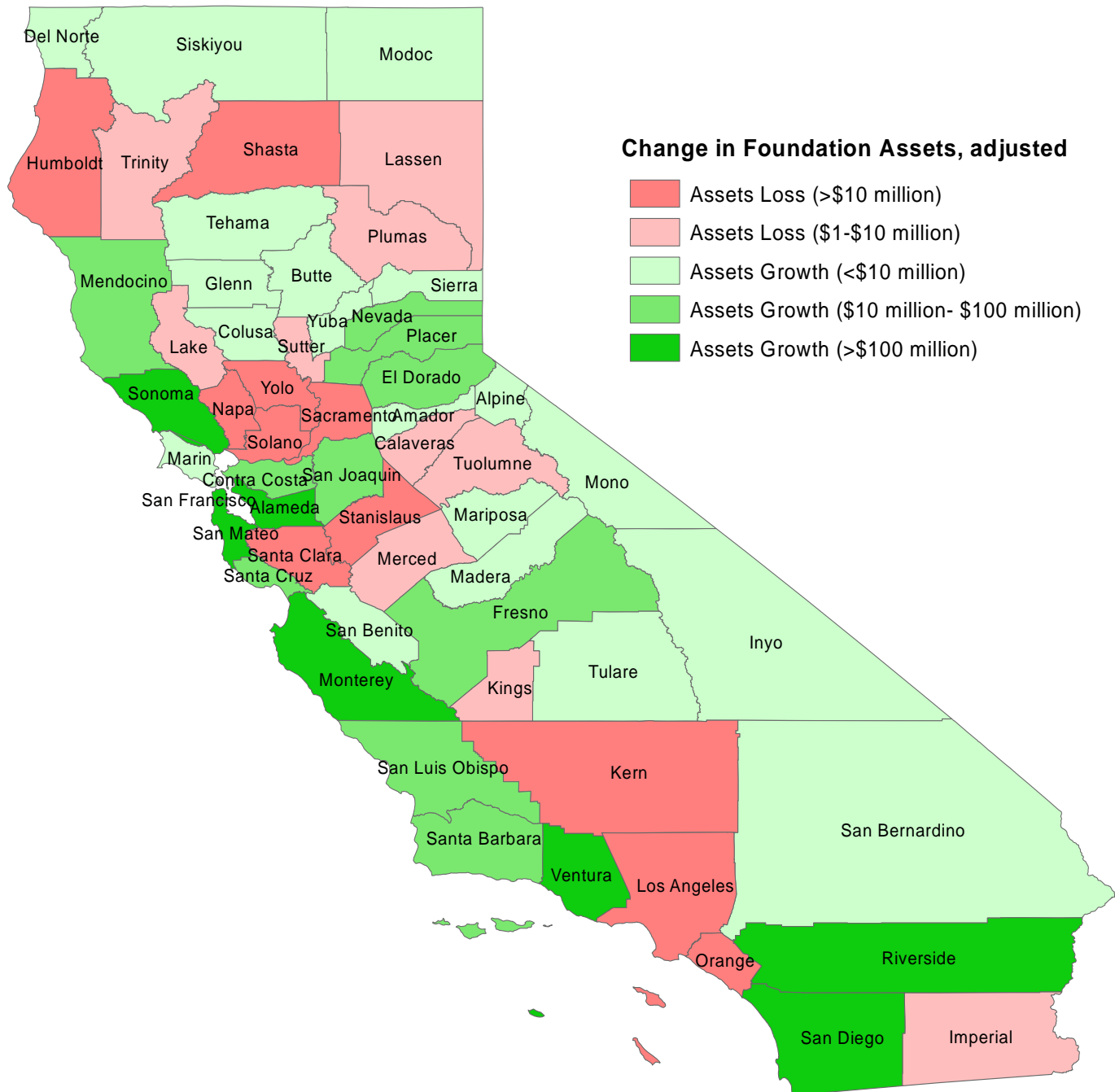
Source: The Foundation Center, *Foundation Yearbook*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Foundation Assets

- \$0 up to \$350 million
- \$350 million up to \$1 billion
- \$1 billion up to \$5 billion
- \$5 billion up to \$20 billion
- \$20 billion and greater

Source: The Foundation Center, *Foundation Yearbook*, 2006.

Map 5. Change in foundation assets, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *Foundation Yearbook*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Foundation Giving

Giving by California foundations exceeded \$4 billion in 2004, which represents 5.2 percent of their total assets.¹⁷ The spatial distribution of foundation giving based on the county and regions in which they are headquartered are presented in Table 3 and Maps 6 and 7. This mapping reflects the sources of California foundation giving.¹⁸

As would be expected, foundation giving reflects a similar pattern of concentration as we observed in the number of foundations and their assets. Bay Area foundations accounted for \$2.2 billion, or almost 54 percent of giving by the state's foundations in 2004, while Los Angeles foundations accounted for \$1.2 billion or 31 percent. Bay Area foundations, however, had a larger share of giving than their 49 percent asset share, while Los Angeles foundations had a smaller share than their 40 percent asset share. This reveals a higher average giving rate (relative to assets) by Bay Area foundations. A key source of this difference is the J. Paul Getty Trust. This foundation is the largest in terms of assets in Los Angeles, but as an operating foundation, it directs most of its resources to the actual expense of running programs rather than grantmaking.¹⁹

The next largest region in terms of giving is the South Coast & Border. Foundations headquartered there gave \$315 million in 2004 or about 8 percent of giving by the state's foundations. South Coast & Border foundations hold 5 percent of the state's foundation assets.

Foundation giving increased substantially between 1999 and 2004, with state totals increasing almost 21 percent in real dollars. Recall, this increase occurred as assets decreased 2 percent in real dollars. Increased giving in 1999 dollars was observed in all regions in the state except two - Los Angeles foundations decreased giving by 2.3 percent in real dollars, and North Coast & State foundations decreased giving by almost 19 percent. The North Coast & State decline was driven by Humboldt county foundations, which reduced giving by \$1.9 million (33 percent) in real dollars over the five years.

Levels of growth in giving were highest in the Bay Area (an increase of \$450 million in 1999 dollars over the five years), in the Central Coast region (an increase of \$74 million in 1999 dollars), and in the South Coast & Border region (an increase of \$66 million in 1999 dollars). In percentage terms, the Sierra region (up 540 percent), the Central Coast region (up 103 percent), and the Central Valley - North (up 68 percent) saw the largest increases.

All regions except Los Angeles and the North Coast & State increased their giving relative to their assets, meaning the percentage increase in real giving exceeded the percentage increase in real assets. For four regions, real giving increased despite a decrease in real assets. Bay Area foundations increased giving 32 percent while assets decreased 6 percent. Central Valley - Central foundations increased giving 28 percent

¹⁷ A list of the 100 largest California foundations by giving, circa 2004 is included in Appendix C.

¹⁸ In the next section, in contrast, we will analyze where the giving is received, based on a sample of grants.

¹⁹ In 2004, the Getty Trust had assets valued at \$9.6 billion and made grants totaling \$22.7 million.

while assets fell 12 percent (their giving/assets ratio rose from 4 percent in 1999 to 6 percent in 2004). Central Valley - North foundations increased their giving 68 percent while assets fell 13 percent (doubling their giving rate from 2 percent in 1999 to 4 percent in 2004). Central Valley - South foundations increased their giving 37 percent while assets fell 10 percent (increasing their giving rate from 9 percent to almost 14 percent).

This pattern of increased giving relative to asset growth may indicate that foundations are adjusting their giving rate to maintain giving levels in a period of falling assets. Alternatively, there may simply be a lag as foundations adjust giving levels in response to changing assets. The contrary patterns in Los Angeles and the North Coast & State regions are interesting. Los Angeles foundations decreased their real giving by 2 percent while assets fell 1 percent. North Coast & State foundations decreased their real giving 19 percent while their assets fell only 5 percent.

Table 3. Foundation giving, 1999 and 2004

Region/County		Foundation Giving		Nominal		Adjusted	
		1999	2004	Change	Percent Change	Change	Percent Change
Bay Area		\$1,427,231,830	\$2,175,338,418	748,106,588	52.42%	450,085,225	31.54%
	Alameda	62,369,421	107,034,218	44,664,797	71.61%	30,001,109	48.10%
	Contra Costa	37,742,486	48,559,725	10,817,239	28.66%	4,164,557	11.03%
	Marin	79,922,992	97,246,740	17,323,748	21.68%	4,000,945	5.01%
	Napa	7,547,503	8,638,895	1,091,392	14.46%	-92,137	-1.22%
	San Francisco	468,951,709	809,753,946	340,802,237	72.67%	229,865,946	49.02%
	San Mateo	223,059,899	540,375,789	317,315,890	142.26%	243,284,407	109.07%
	Santa Clara	534,332,339	532,309,945	-2,022,394	-0.38%	-74,948,856	-14.03%
	Solano	3,069,567	5,442,233	2,372,666	77.30%	1,627,080	53.01%
	Sonoma	10,235,914	25,976,927	15,741,013	153.78%	12,182,174	119.01%
Central Coast		\$71,599,856	\$168,654,805	97,054,949	135.55%	73,949,241	103.28%
	Monterey	16,122,929	17,254,048	1,131,119	7.02%	-1,232,686	-7.65%
	San Benito	29,534	24,667	-4,867	-16.48%	-8,246	-27.92%
	San Luis Obispo	1,445,012	4,060,443	2,615,431	181.00%	2,059,150	142.50%
	Santa Barbara	38,825,290	106,736,123	67,910,833	174.91%	53,287,984	137.25%
	Santa Cruz	3,946,841	9,559,702	5,612,861	142.21%	4,303,182	109.03%
	Ventura	11,230,250	31,019,822	19,789,572	176.22%	15,539,856	138.37%
Central Valley – Central		\$17,261,173	\$25,678,560	8,417,387	48.76%	4,899,424	28.38%
	El Dorado	674,531	671,452	-3,079	-0.46%	-95,068	-14.09%
	Placer	477,126	2,013,925	1,536,799	322.10%	1,260,891	264.27%
	Sacramento	13,177,704	20,046,669	6,868,965	52.13%	4,122,571	31.28%
	Sutter	68,330	444,676	376,346	550.78%	315,425	461.62%
	Yolo	2,863,482	2,501,413	-362,069	-12.64%	-704,763	-24.61%
	Yuba	0	425	425	n/a	367	n/a
Central Valley – North		\$8,864,931	\$17,232,360	8,367,429	94.39%	6,006,596	67.76%
	Butte	408,139	998,556	590,417	144.66%	453,615	111.14%
	Colusa	0	0	0	0.00%	0	0.00%
	Glenn	0	0	0	0.00%	0	0.00%
	Shasta	8,453,292	16,214,654	7,761,362	91.81%	5,539,954	65.54%
	Tehama	3,500	19,150	15,650	447.14%	13,026	372.18%
Central Valley – South		\$32,551,253	\$51,709,565	19,158,312	58.86%	12,074,102	37.09%
	Fresno	7,093,338	9,457,008	2,363,670	33.32%	1,068,060	15.06%
	Kern	6,064,690	9,950,198	3,885,508	64.07%	2,522,331	41.59%
	Kings	482,049	876,976	394,927	81.93%	274,781	57.00%
	Madera	3,200	79,188	75,988	2374.63%	65,139	2035.60%
	Merced	107,414	971,154	863,740	804.12%	730,692	680.26%
	San Joaquin	1,381,027	6,516,031	5,135,004	371.83%	4,242,308	307.18%
	Stanislaus	16,514,192	22,512,219	5,998,027	36.32%	2,913,853	17.64%
	Tulare	905,343	1,346,791	441,448	48.76%	256,938	28.38%

Table 3. (continued) Foundation giving, 1999 and 2004

Region/County		Foundation Giving		Nominal		Adjusted	
		1999	2004	Change	Percent Change	Change	Percent Change
Inland Empire		\$24,646,671	\$42,519,488	17,872,817	72.52%	12,047,647	48.88%
	Riverside	22,971,506	39,560,774	16,589,268	72.22%	11,169,442	48.62%
	San Bernardino	1,675,165	2,958,714	1,283,549	76.62%	878,205	52.42%
Los Angeles		\$1,100,780,751	\$1,246,596,799	145,816,048	13.25%	-24,967,713	-2.27%
	Los Angeles	1,100,780,751	1,246,596,799	145,816,048	13.25%	-24,967,713	-2.27%
North Coast & State		\$6,150,105	\$5,785,441	-364,664	-5.93%	-1,157,269	-18.82%
	Del Norte	5,000	5,000	0	0.00%	-685	-13.70%
	Humboldt	5,702,447	4,419,017	-1,283,430	-22.51%	-1,888,835	-33.12%
	Lake	48,250	53,704	5,454	11.30%	-1,903	-3.94%
	Lassen	600	0	-600	-100.00%	-600	-100.00%
	Mendocino	317,301	1,110,069	792,768	249.85%	640,689	201.92%
	Modoc	4,000	6,500	2,500	62.50%	1,610	40.24%
	Siskiyou	62,260	183,400	121,140	194.57%	96,014	154.21%
	Trinity	10,247	7,751	-2,496	-24.36%	-3,558	-34.72%
Sierra		\$709,201	\$5,259,063	4,549,862	641.55%	3,829,370	539.96%
	Alpine	0	0	0	0.00%	0	0.00%
	Amador	138,429	210,966	72,537	52.40%	43,635	31.52%
	Calaveras	40,500	67,727	27,227	67.23%	17,948	44.32%
	Inyo	71,684	108,500	36,816	51.36%	21,952	30.62%
	Mariposa	0	3,000	3,000	n/a	2,589	n/a
	Mono	0	0	0	0.00%	0	0.00%
	Nevada	94,915	3,863,849	3,768,934	3970.85%	3,239,587	3413.15%
	Plumas	135,000	171,320	36,320	26.90%	12,849	9.52%
	Sierra	0	0	0	0.00%	0	0.00%
	Tuolumne	228,673	833,701	605,028	264.58%	490,811	214.63%
South Coast & Border		\$205,752,498	\$314,944,345	109,191,847	53.07%	66,044,472	32.10%
	Imperial	15,383	10,200	-5,183	-33.69%	-6,580	-42.78%
	Orange	109,444,677	173,344,734	63,900,057	58.39%	40,151,828	36.69%
	San Diego	96,292,438	141,589,411	45,296,973	47.04%	25,899,224	26.90%
STATE		\$2,895,548,269	\$4,053,718,844	1,158,170,575	40.00%	602,811,093	20.82%

Source: The Foundation Center, *Foundation Yearbook*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Total Giving

- Less than \$10 million
- \$10 million up to \$50 million
- \$50 million up to \$200 million
- \$200 million up to \$1 billion
- Greater than \$1 billion

26

Map 7. Change in foundation giving, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *Foundation Yearbook*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Summary

To summarize, our analysis of the capacity of California foundations in 2004 reveals several important trends and patterns:

- There are indications of continued growth in capacity despite a 2 percent fall in real assets since 1999. California foundations have increased their relative share of the number of U.S. foundations. Between 1999 and 2004, the number of foundations in the state increased 48 percent, compared to a 35 percent increase in U.S. foundations and total giving of California foundations has increased by 21 percent compared to 20 percent of all foundations nationwide.
- Philanthropic capacity in the state remains highly concentrated in two regions. The Bay Area and Los Angeles headquarter 68 percent of all California foundations, and these foundations hold 89 percent of the assets and account for 85 percent of giving in 2004. This concentration level, however, represent a slight decline from 91 percent of assets and 87 percent of giving in 1999.
- The average giving/assets ratio increased from 4.2 percent in 1999 to 5.2 percent in 2004. This may reflect efforts by foundations to maintain support to nonprofits in a period of declining real assets. It is also consistent with a lag in the ability of foundations to adjust giving in response to declining assets.
- The Los Angeles and North Coast & State regions generally declined in relative capacity over this five-year period.
 - ❖ Los Angeles' share of the number of foundations declined from 37 to 34 percent, while giving declined from 38 to 31 percent. Its relative share of assets remained constant (40 percent).
 - ❖ For the North Coast & State region, with a smaller base, its share in the number of foundations and in assets decreased slightly. But, the decline was most notable in giving, as North Coast & State foundations decreased giving 19 percent while state-wide giving increased 21 percent.
- Two regions demonstrated general growth in capacity – the Central Coast and the Sierra regions.
 - ❖ The Central Coast region increased its relative share in the number of foundations, in assets, and in giving. The largest increase was in giving, rising from 2.5 percent of the state in 1999 to 4.2 percent in 2004.
 - ❖ There was a budding growth in capacity in the Sierra region, which saw large percentage increases in all measures, albeit on very small 1999 base levels. Even with asset increases of 285 percent and giving of 540 percent over the period, Sierra foundations still represent only about 1 percent of the capacity of California foundations.

The Reach of Foundation Philanthropy in California

The reach of foundation philanthropy in the state is best illustrated by analyzing where grants are received.

In this section, we examine the distribution of the 2004 grants as an indication of the current reach of foundation philanthropy in the state, and then compare it to the distribution of grants from five years earlier in 1999. We consider three broad questions and their implications for foundation philanthropy in the state:

- What is the geographic distribution of 2004 grant dollars to California recipients and how has that distribution changed since 1999?
- Do the patterns in 2004 giving to California recipients by California and non-Californian foundations differ in important ways? Have these patterns changed since 1999?
- How are 2004 grant dollars in specific subject areas such as education and health distributed across the state? And, have these patterns changed since 1999?

Data

To undertake this analysis, we rely on data obtained from the Foundation Center on the grants of a sample of over 1,000 larger foundations from across the United States in 2004, as well as the sample for 1999.

In 2004, the grants database included information on 126,497 grants of \$10,000 or more awarded by a sample of 1,172 of the country's largest foundations, including 119 California foundations.²⁰ This sample represents 50 percent of the total giving of all U.S. foundations in 2004. The grants from the California foundations in the sample represent 46 percent of the giving of all California foundations for the reporting period.

Within this sample, there were 17,201 grants that were made to recipients in California, totaling \$1.9 billion. California foundations account for 63 percent of the grant dollars in the sample. The size of the grants varies from the \$10,000 threshold to \$46 million, with a mean of \$111,307 and a median of approximately \$23 million. Grant dollars are highly concentrated – a few very large grants (299 grants of \$1 million and above) account for a significant proportion of the total grant dollars (40.5 percent), while a significant number of relatively small grants (7086 grants under \$25,000) account for just 5 percent of the total grant dollars (see Table 4). This mirrors the high degree of concentration in foundation grantmaking – i.e. a small number of foundations account for a substantial majority of all foundation giving.

²⁰ The database does not include grants from donor-designated funds of community foundations or grants to individuals. For additional information see: The Foundation Center, *Foundation Giving Trends*, 2006.

Table 4. 2004 grants to California recipients by grants size

Grants Range	No. of Grants	%	Dollar Amount	%
\$10 million or more	9	0.1	207,288,147	10.8
\$5 million-under \$10 million	20	0.1	125,101,324	6.5
\$1 million-under \$5 million	270	1.6	443,237,317	23.2
\$500,000-under \$1 million	389	2.3	240,919,268	12.6
\$100,000-under \$500,000	2840	16.5	523,810,517	27.4
\$50,000-under \$100,000	2557	14.9	154,386,134	8.1
\$25,000-under \$50,000	4030	23.4	123,230,729	6.4
\$10,000-under \$25,000	7086	41.2	96,620,782	5.0
Total	17,201	100%	\$1,914,594,218	100%

Source: The Foundation Center, *California Foundations*, 2006.

Methodology

We compare patterns in the 2004 and 1999 grants samples to explore changes in the reach of grantmaking over the five-year period.²¹ Care must be taken, however, in drawing conclusions across samples. While the samples are similar in size and there is substantial overlap in the foundations included in the two samples, the inclusion of a single large foundation in one year and not the other can drive an observed change.

Both samples are heavily impacted by the behavior of the largest U.S. foundations, most of which are included in both samples. This increases our confidence in the trends that we identify in the analysis, given the highly concentrated nature of foundation giving. This is particularly the case at the state level or in regions and counties where there is substantial philanthropic activity. However, as one looks at areas with less activity, there is the possibility of trends being mere artifacts of the samples.

Thus, we focus our analysis on broad changes that are not likely to be seriously impacted by whether a specific foundation is or is not included in the foundation sample for 1999 or 2004. In terms of examining regional changes we concentrate on changes for a region *relative* to overall state activity in 1999 and 2004, rather than simply changes for a region across the two years. Such relative comparisons are more likely to accurately capture trends in the spatial and subject area distribution of grants over time.

²¹ The 1999 sample included information on 12,468 grants to California recipients made by 1,016 larger U.S. foundations. The 1999 grants totaled \$1.485 billion, 69 percent of which came from the 115 California foundations whose grants of \$10,000 or more were included in the database (see The Foundation Center, *California Foundations*, 2001).

Geographic Distribution of Grant Dollars Received

The foundations in the 2004 sample made \$1.9 billion in grants to California recipients in 2004. Bay Area recipients received 44.5 percent of these grant dollars, while Los Angeles recipients received 32 percent. Given the high concentration of foundation resources in the Bay Area and Los Angeles regions, this geographic concentration in grants is not surprising (76.5 percent). It is quite similar to the percentage observed in 1999, when these two regions received 78 percent of the grants in that year's sample. Yet, there has been a slight shift towards Los Angeles in relative terms. In 1999, Bay Area recipients received almost 49 percent of the grants from a similar sample of foundations, while Los Angeles recipients received fewer than 30 percent.²²

The state's regions vary substantially in population, and presumably in their needs and interests, as well as in the capacity (size) of the nonprofit sector which serves as the mechanism for foundation philanthropy to reach the community. Therefore, it is useful to standardize grant dollars to reflect some of these differences. Table 5 presents grant dollars received per capita and per nonprofit in both the 2004 and the 1999 samples. This information is presented spatially in four maps. Maps 8 and 10 present 2004 grant dollars received per capita and per nonprofit respectively. Maps 9 and 11 present changes in grant dollars received between 1999 and 2004 (in constant 1999 dollars) per capita and per nonprofit.²³ We focus our analysis on these standardized grant dollars data.

Grant Dollars Per Capita

The \$1.9 billion in 2004 grant dollars received by California recipients represents \$52 per California resident. Foundations in the 1999 sample gave \$1.5 billion in grants to California recipients, averaging \$44 per resident. Our per capita analysis will highlight regional differences with these state-wide averages.

The region receiving the largest amount of per capita grant dollars in the 2004 sample is the Bay Area – the region that also had the largest concentration of total grant dollars. The Bay Area region received \$121 in grant dollars per capita, over 230 percent of the state per capita average of \$52. The Los Angeles region had the second largest per capita level (as it did in total grant dollars), but the more populous Los Angeles region averaged only \$61 per capita, 116 percent of the state average.

No other region received more than the state per capita average. The regions receiving the fewest per capita grant dollars are Sierra, the Inland Empire, and the Central Valley - South – all received less than 22 percent of the state-wide average. Thus, there is wide disparity across the state's regions and counties in grant dollars received per capita in 2004. San Francisco County, part of the Bay Area region, leads the state in per capita grant dollars received with an extraordinary \$520 per resident. In contrast, eight counties averaged under \$1 per capita – Solano, Sutter, Yuba, Colusa, Tehama, Lake, Amador, and Sierra.

²² Overall grant dollars and the average grant size is included in Appendices D and E.

²³ Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006). Throughout this section all values are nominal unless otherwise specifically noted.

We find evidence of some interesting changes in the geographic distribution of grant dollars over the five-year period. The Central Valley - North region received substantially more per capita grant dollars in 2004 than in 1999. Its relative share increased from 12 percent of the state average in 1999 (\$5 per capita), to 46 percent of the state average in 2004 (\$24 per capita). Almost all this growth occurred in Shasta County where The McConnell Foundation gave six grants totaling \$8.5 million for the Turtle Bay Exploration Park (a natural history museum).

Two other regions substantially increased their relative share of per capita grant dollars – the Inland Empire, which went from 12 percent of the state average in 1999 to 22 percent in 2004, and the Central Valley - South, which went from 13 percent in 1999 to 22 percent in 2004. The Inland Empire increases were concentrated in Riverside County, where several large grants totaling over \$17 million were made to the Eisenhower Medical Center and its Foundation by the Annenberg Foundation, the H.N. & Frances C. Berger Foundation, and the Burnett Foundation. The Central Valley - South, in contrast, enjoyed increases throughout almost the entire region. Though, Stanislaus County notably benefited from \$12 million in grants to various nonprofits by the Mary Stuart Rogers Foundation.

These relative increases in the Inland Empire and the Central Valley - South regions are even more impressive given their increased population over the period. The Inland Empire's population increased almost 19 percent between 1999 and 2004, and the Central Valley - South's population increased 13 percent, both considerably more than the state-wide average of 7 percent.

Some regions also suffered significant losses in per capita grant dollars between 1999 and 2004. The North Coast & State region's relative share of grant dollars fell from 68 percent of the state average in 1999 (\$30 per capita) to 43 percent in 2004 (\$23 per capita). This decline was driven by reduced grants to Humboldt County. The Central Coast region also reduced its relative share, falling from 113 percent of the state average in 1999 (\$49 per capita) to 86 percent of that average in 2004 (\$45 per capita). This decline was driven by a substantial loss of grants to Monterey County recipients.

Grant Dollars Per Nonprofit

While foundation philanthropy in the state increased from 1999 to 2004, so did the number of nonprofit organizations, the principal recipients of foundation grants. In 2004, there were 36,972 nonprofits registered in California, up 27 percent from the 29,065 that were operating in 1999.²⁴ This growth rate substantially exceeded the 7 percent increase in the state's population over the same period.²⁵ There was virtually no change in the average grant dollars received per nonprofit across the two samples. In 2004, nonprofits

²⁴ The Urban Institute, National Center for Charitable Statistics, <http://nccsdataweb.urban.org/> ©2006. Retrieved 5/3/06. From Internal Revenue Service, Exempt Organizations Business Master File (501(c)(3) Public Charities, 1999 and 2004.

²⁵ During the same five-year period, total grant dollars increased 11%, and overall giving levels by California foundations increased 21%.

averaged \$51,785 in grant dollars from foundations in our sample; in 1999, they averaged \$51,107. When inflation over the five-year period is considered, the value of the grant dollars received per nonprofit declined 13 percent.

The patterns in grant dollars received per nonprofit are similar to those revealed in the per capita analysis, though the differences are somewhat muted. Only the Bay Area and Los Angeles regions received grant dollars per nonprofit at higher than state-wide averages. The Bay Area average is 156 percent of the state average (\$81,265), while Los Angeles' is 128 percent (\$66,691). The Central Valley - North, the Inland Empire, and the Central Valley - South all made substantial improvements in terms of grant dollars per nonprofit relative to the state-wide average between 1999 and 2004, increases of 37, 17, and 15 percent, respectively). The North Coast & State and Central Coast regions suffered the largest relative losses, decreases of 16 and 20 percent, respectively. Thus, the analysis of grant dollars per nonprofit analysis reinforces the patterns revealed earlier in the grant dollars per capita analysis.

Table 5. Grant dollars received per capita and per nonprofit, 1999 and 2004

Region/County		Grant Dollars Received Per Capita		Grant Dollars Received Per Nonprofit	
		1999	2004	1999	2004
Bay Area		\$105.49	\$121.04	\$85,695	\$81,265
	Alameda	110.49	112.04	87,993	74,228
	Contra Costa	11.29	11.29	12,103	10,476
	Marin	127.90	139.76	47,809	44,771
	Napa	14.73	20.86	10,164	11,546
	San Francisco	418.13	519.89	173,790	182,065
	San Mateo	37.50	81.64	40,894	68,695
	Santa Clara	87.58	89.02	98,250	78,752
	Solano	2.16	0.10	3,833	138
	Sonoma	11.63	20.94	9,491	13,464
Central Coast		\$49.26	\$45.12	\$45,500	\$35,494
	Monterey	177.46	108.24	171,708	99,778
	San Benito	2.52	5.37	4,310	7,497
	San Luis Obispo	9.57	7.59	7,720	5,080
	Santa Barbara	23.39	65.87	15,666	36,606
	Santa Cruz	56.41	46.50	36,744	25,622
	Ventura	10.04	15.76	14,032	17,724
Central Valley – Central		\$34.11	\$35.81	\$37,478	\$33,965
	El Dorado	15.14	3.32	16,964	2,864
	Placer	1.73	1.39	1,854	1,291
	Sacramento	44.15	47.93	49,008	46,702
	Sutter	0.32	0.99	490	1,381
	Yolo	49.03	62.43	40,581	43,744
	Yuba	10.61	0.65	18,184	995
Central Valley – North		\$5.15	\$24.18	\$6,079	\$25,171
	Butte	8.02	2.09	8,993	2,026
	Colusa	5.10	0.48	10,622	1,000
	Glenn	0.00	6.23	0	10,938
	Shasta	3.50	64.15	3,778	58,759
	Tehama	2.13	0.69	3,366	1,043
Central Valley – South		\$5.71	\$11.45	\$9,676	\$17,725
	Fresno	3.97	11.02	5,946	15,060
	Kern	1.90	6.90	3,450	11,414
	Kings	1.26	1.43	3,353	2,899
	Madera	0.37	2.42	768	4,663
	Merced	0.45	4.91	845	9,143
	San Joaquin	8.78	12.44	14,705	19,348
	Stanislaus	15.50	29.49	25,147	43,505
	Tulare	5.98	7.42	10,162	11,174

Table 5. (continued) Grant dollars received per capita and per nonprofit, 1999 and 2004

Region/County		Grant Dollars Received Per Capita		Grant Dollars Received Per Nonprofit	
		1999	2004	1999	2004
Inland Empire		\$5.14	\$11.41	\$9,802	\$18,859
	Riverside	6.48	18.25	12,775	30,832
	San Bernardino	3.94	4.83	7,293	7,833
Los Angeles		\$44.98	\$61.10	\$58,816	\$66,691
	Los Angeles	44.98	61.10	58,816	66,691
North Coast & State		\$29.82	\$22.68	\$21,272	\$13,689
	Del Norte	0.00	11.33	0	12,692
	Humboldt	69.04	39.63	44,875	21,763
	Lake	0.00	0.52	0	589
	Lassen	0.00	1.84	0	2,031
	Mendocino	20.43	27.88	9,870	11,174
	Modoc	15.87	9.47	13,818	8,463
	Siskiyou	20.72	15.86	15,627	8,966
	Trinity	19.46	38.26	11,543	22,042
Sierra		\$7.66	\$10.55	\$6,054	\$6,842
	Alpine	0.00	15.70	0	6,667
	Amador	0.00	0.00	0	0
	Calaveras	1.17	2.22	1,216	1,681
	Inyo	4.58	33.73	2,360	14,947
	Mariposa	0.00	5.84	0	4,375
	Mono	2.31	4.43	1,471	3,158
	Nevada	16.04	13.52	10,915	8,262
	Plumas	12.62	43.11	7,500	19,201
	Sierra	39.39	0.00	13,917	0
	Tuolumne	3.69	2.56	4,535	1,925
South Coast & Border		\$18.02	\$24.82	\$24,589	\$26,886
	Imperial	5.73	11.64	12,642	22,610
	Orange	13.57	15.17	18,992	16,502
	San Diego	22.98	35.19	30,048	37,098
STATE		\$43.64	\$52.45	\$51,107	\$51,785

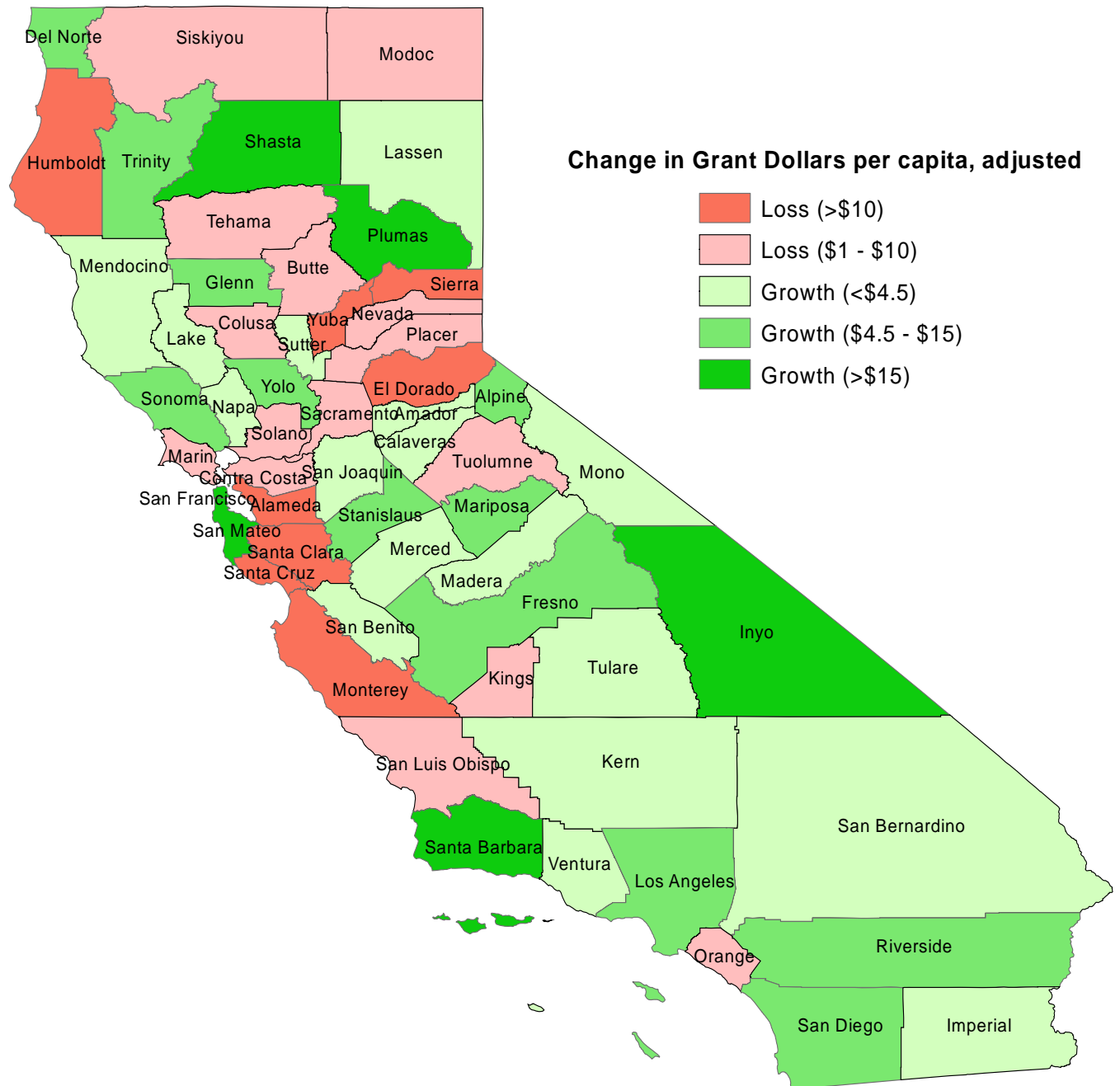
Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Map 8. Grant dollars received per capita, 2004



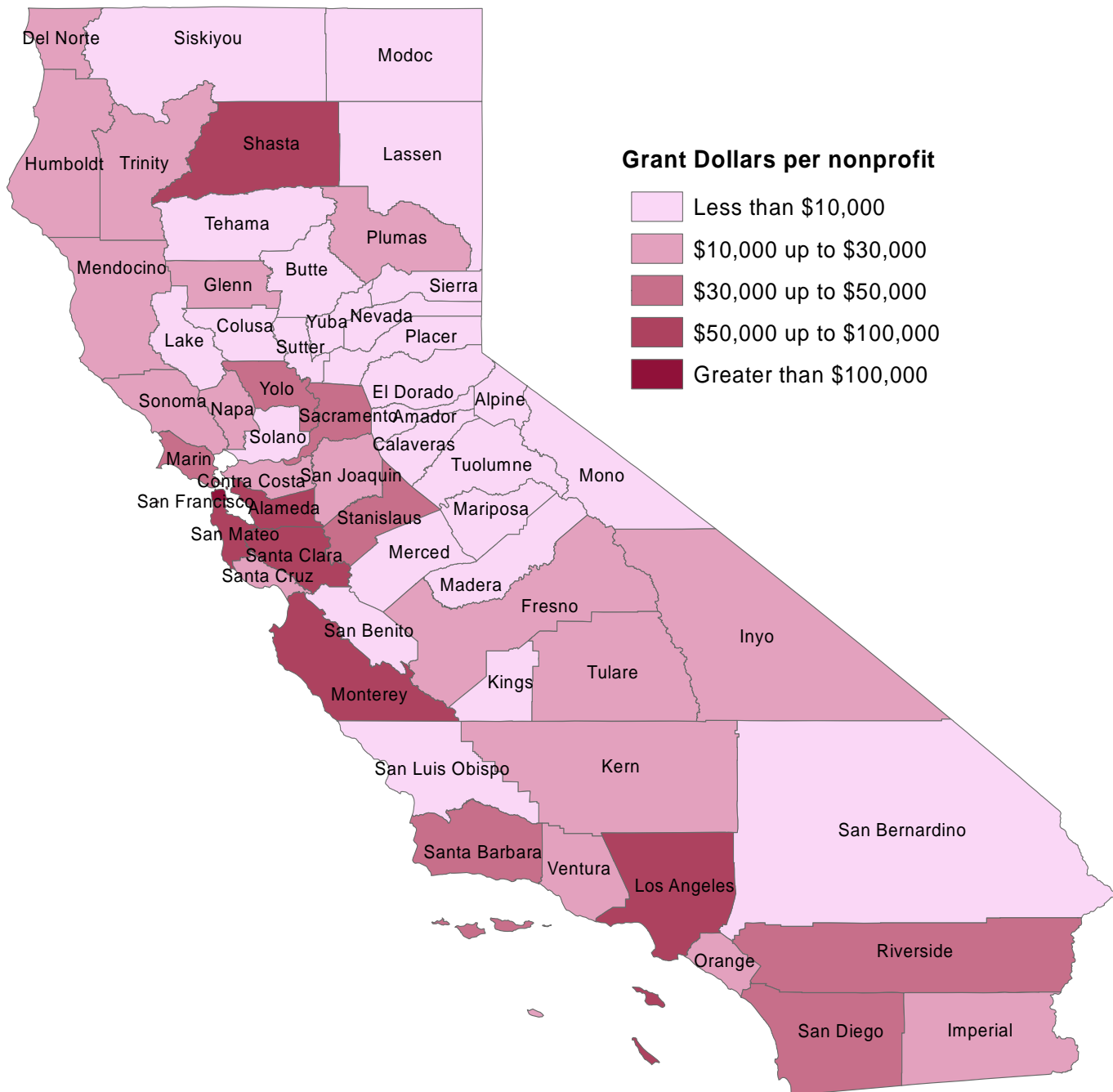
Source: The Foundation Center, *California Foundations*, 2006.

Map 9. Change in grant dollars received per capita, 1999 to 2004 (in 1999 dollars)



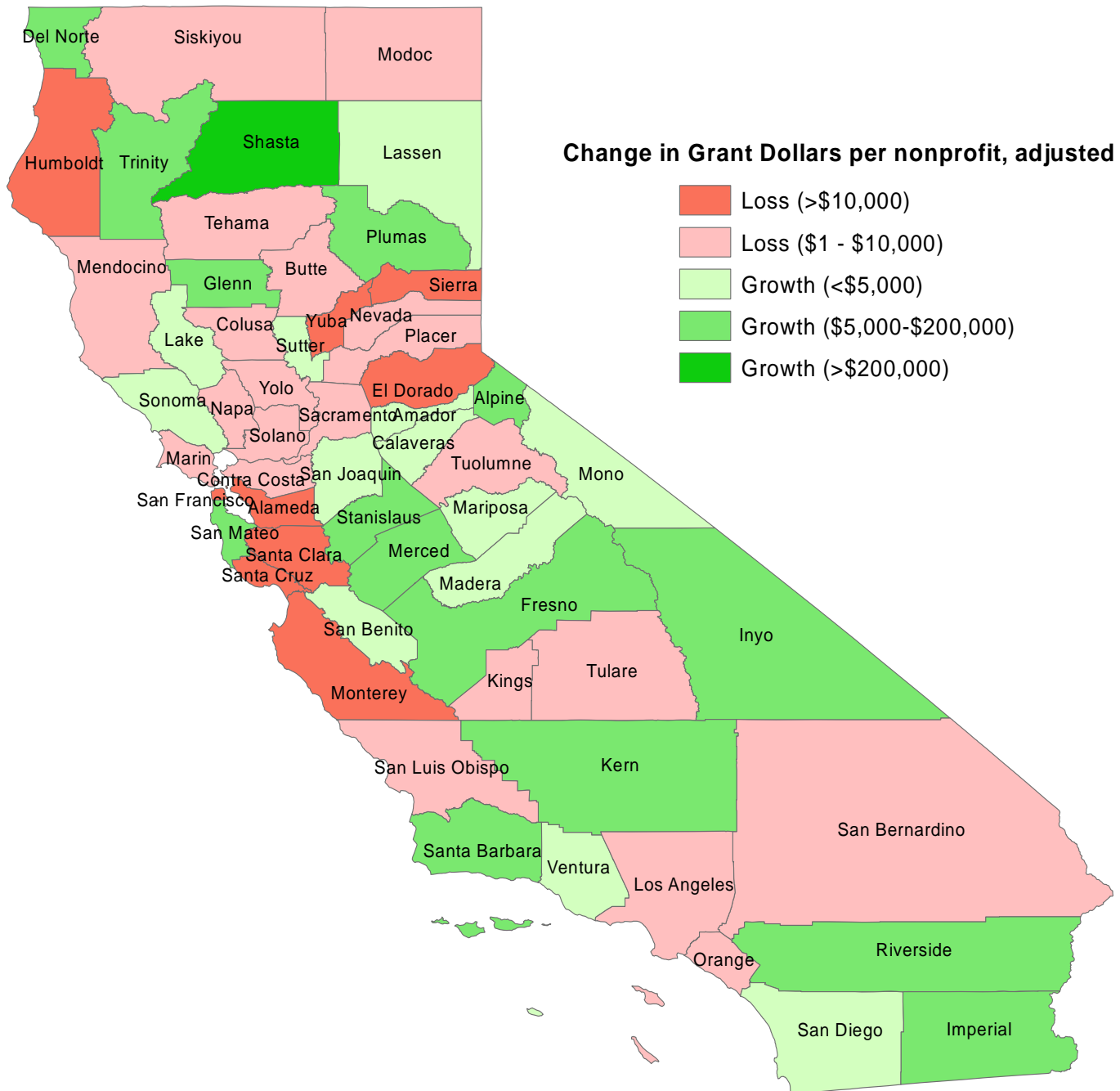
Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Map 10. Grant dollars received per nonprofit, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Map 11. Change in grant dollars received per nonprofit, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Differences in California and Non-California Foundations

California grant recipients benefit from the philanthropy of both California and non-California foundations. About 63 percent of the \$1.9 billion in grants in the 2004 sample were made by the 119 California foundations. This represents a decline from our 1999 sample, where almost 69 percent of the grant dollars to California recipients were provided by California foundations.²⁶

The question arises whether grants from California foundations differ from non-California foundations in their geographic focus *within* the state. To answer this question, we examine regional and county differences in grant dollars per capita from California and non-California foundations (Table 6). These data are presented spatially in Maps 12 and 13 for California foundations, and in Maps 14 and 15 for non-California foundations.²⁷

In the 2004 sample, grant dollars per capita averaged \$33 from California foundations and \$20 from non-California foundations. Both groups of funders favored the Bay Area and, to a much lesser extent, Los Angeles, providing grant dollars per capita in excess of the state average to both regions. The Bay Area enjoyed substantially higher average dollars than all other regions, receiving \$71 (215 percent of the state average) from California foundations and \$50 (257 percent of the state average) from non-California foundations. Los Angeles recipients averaged \$39 (118 percent of the state average) from California foundations, and almost \$23 (115 percent of the state average) from non-California foundations.

Otherwise, the geographic foci of these two funder groups diverge. The Central Coast region received per capita grant dollars in excess of the state average from California foundations - \$39 or 119 percent, but not from non-California foundations. This interest from California funders, however, represents a relative decline from 1999, when the Central Coast received \$44 per capita (146 percent of the \$30 state average) from California foundations. This decline is driven by reduced grant dollars to Monterey County, which offsets a substantial increase in grants to Santa Barbara County. Interestingly, both the reduced grantmaking to Monterey recipients and the increase to Santa Barbara recipients was observed from both California and non-California foundations.

The Central Valley - North enjoyed the largest regional increase in grant dollars from California foundations between 1999 and 2004. In 1999, California foundations provided grants of only \$3 per capita (11 percent of the state average) to this region; in 2004, their grants averaged \$23 per capita (almost 70 percent of the state average). This change reflects the previously discussed large grants to Shasta County in the 2004 sample. Thus, it is not clear whether this increased interest in the Central Valley - North will be

²⁶ This change is consistent with the observation that a growing percentage of California foundations grant dollars are being directed out of state, as noted in Figure 5.

²⁷ Patterns in grant dollars per nonprofit were similar to those in per capita terms and are thus not discussed in detail here. Appendix F summarizes the grant dollars received per nonprofit from California and non-California foundations.

sustained. Over the same period, the interest of non-California funders in the region appeared to decline. These funders provided Central Valley - North recipients only \$2 per capita (13 percent of the state average) in 1999, but that fell to \$1 per capita in 2004 (5 percent of the state average). There was, however, a small increase of interest in Shasta County from these funders as well.

Finally, there are indications of reduced interest by California foundations in the Central Valley - Central. In 1999, California foundations provided \$30 in per capita grant dollars to this region, or about the state average. In 2004, they provided \$22 per capita, or only 68 percent of the state average.

Among non-California funders, the most notable changes over the five years were an increase in per capita grantmaking to the Central Valley - Central and to Los Angeles, and a decrease to the North Coast & State region. Central Valley - Central recipients, largely in Sacramento County, enjoyed an increase from \$4 per capita in 1999 (32 percent of the \$14 1999 state average) to \$13 per capita in 2004 (68 percent of the state average). Los Angeles recipients saw increased grant dollars from non-California foundations from \$13 per capita in 1999 (98 percent of the state average) to \$23 per capita in 2004 (115 percent of the state average). In contrast, grant dollars to the North Coast & State region fell from \$13 per capita (93 percent of the state average) to \$8 per capita (43 percent of the state average). The major decrease was to Humboldt County. Trinity County in the North Coast & State region, however, enjoyed a large increase of grant dollars, though not enough to offset the declines to the larger Humboldt County.

Another perspective is gained by considering the percentage of total grant dollars received by region and county from California foundations. These data are summarized in Table 7. California foundations provided on average about 63 percent of the grant dollars in our 2004 sample, and for half the regions the percentage of their grants dollars received from California foundations were within 5 percent of this average.

The other five, however, reveal substantial differences in interest across the two groups of funders. Four regions were disproportionately favored by California foundations -- the Central Valley - North (95 percent), Sierra (93 percent), Central Coast (86 percent), and the Central Valley - South (85 percent). For the Central Coast and the Central Valley - South regions, this represents a continuation of 1999 patterns, when California foundations also provided over 85 percent of the grant dollars to recipients in these regions. For the Central Valley - North and Sierra regions, however, this represents a large change from 1999, when only about 62 percent grants to Sierra and only 65 percent to the Central Valley - North came from California foundations. The former reflects the impact of large grants to Plumas and Inyo counties; the latter reflects large grants to Shasta County.

Finally, one region received greater proportional support from non-California foundations -- the Inland Empire, which received only 51 percent of its grant dollars from California foundations. This reflects the previously mentioned interest of the Annenberg Foundation in Riverside County. The Annenberg Foundation is incorporated and headquartered in Pennsylvania, and, thus, is treated as a non-California foundation though it has an office in Los Angeles.

Table 6. Grant dollars received per capita from California and non-California foundations, 1999 and 2004

Region/County		Grant Dollars Received Per Capita from CA Foundations		Grant Dollars Received Per Capita from Non-California Foundations	
		1999	2004	1999	2004
Bay Area		\$66.48	\$70.73	\$39.01	\$50.32
	Alameda	64.73	71.68	45.75	40.36
	Contra Costa	9.47	10.07	1.82	1.22
	Marin	109.98	127.04	17.93	12.71
	Napa	13.35	8.10	1.38	12.76
	San Francisco	229.57	258.36	188.56	261.53
	San Mateo	32.30	56.40	5.21	25.25
	Santa Clara	65.85	54.79	21.73	34.24
	Solano	1.46	0.05	0.70	0.05
	Sonoma	6.40	14.79	5.23	6.16
Central Coast		\$43.93	\$38.95	\$5.33	\$6.17
	Monterey	167.72	102.97	9.74	5.27
	San Benito	2.52	5.37	0.00	0.00
	San Luis Obispo	7.85	6.83	1.71	0.76
	Santa Barbara	17.36	53.37	6.02	12.50
	Santa Cruz	48.26	40.09	8.14	6.40
	Ventura	6.82	10.29	3.23	5.48
Central Valley – Central		\$29.70	\$22.49	\$4.42	\$13.31
	El Dorado	14.35	1.57	0.79	1.74
	Placer	0.20	0.56	1.53	0.83
	Sacramento	40.49	30.46	3.66	17.47
	Sutter	0.00	0.85	0.32	0.14
	Yolo	28.15	37.46	20.88	24.97
	Yuba	8.98	0.65	1.63	0.00
Central Valley – North		\$3.38	\$23.04	\$1.77	\$1.14
	Butte	6.03	1.48	1.99	0.61
	Colusa	5.10	0.48	0.00	0.00
	Glenn	0.00	6.23	0.00	0.00
	Shasta	1.64	61.68	1.87	2.47
	Tehama	0.00	0.69	2.13	0.00
Central Valley – South		\$4.88	\$9.73	\$0.83	\$1.72
	Fresno	3.74	9.42	0.23	1.60
	Kern	0.68	4.44	1.23	2.45
	Kings	1.26	1.43	0.00	0.00
	Madera	0.20	2.42	0.17	0.00
	Merced	0.24	4.91	0.21	0.00
	San Joaquin	6.52	8.94	2.27	3.50
	Stanislaus	14.97	28.51	0.53	0.98
	Tulare	5.55	6.52	0.43	0.90

Table 6. (continued) Grant dollars received per capita from California and non-California foundations, 1999 and 2004

Region/County		Grant Dollars Received Per Capita from CA Foundations		Grant Dollars Received Per Capita from Non-California Foundations	
		1999	2004	1999	2004
Inland Empire		\$3.11	\$5.78	\$2.03	\$5.63
	Riverside	3.10	7.54	3.38	10.71
	San Bernardino	3.12	4.08	0.82	0.75
Los Angeles		\$31.69	\$38.58	\$13.29	\$22.52
	Los Angeles	31.69	38.58	13.29	22.52
North Coast & State		\$17.19	\$14.21	\$12.63	\$8.48
	Del Norte	0.00	11.33	0.00	0.00
	Humboldt	35.89	24.68	33.14	14.94
	Lake	0.00	0.00	0.00	0.52
	Lassen	0.00	1.84	0.00	0.00
	Mendocino	17.04	19.34	3.38	8.54
	Modoc	15.87	3.56	0.00	5.91
	Siskiyou	8.86	7.70	11.86	8.16
	Trinity	19.46	12.95	0.00	25.31
Sierra		\$4.77	\$9.82	\$2.89	\$0.73
	Alpine	0.00	15.70	0.00	0.00
	Amador	0.00	0.00	0.00	0.00
	Calaveras	0.91	2.22	0.26	0.00
	Inyo	4.58	33.73	0.00	0.00
	Mariposa	0.00	5.84	0.00	0.00
	Mono	2.31	4.43	0.00	0.00
	Nevada	10.08	11.32	5.96	2.20
	Plumas	1.49	43.11	11.14	0.00
	Sierra	39.39	0.00	0.00	0.00
	Tuolumne	2.79	2.36	0.90	0.20
South Coast & Border		\$12.54	\$15.36	\$5.48	\$9.46
	Imperial	5.73	10.91	0.00	0.73
	Orange	8.84	10.04	4.73	5.13
	San Diego	16.49	20.93	6.49	14.26
STATE		\$30.01	\$32.83	\$13.63	\$19.61

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 7. Percentage of grant dollars received from California foundations, 1999 and 2004

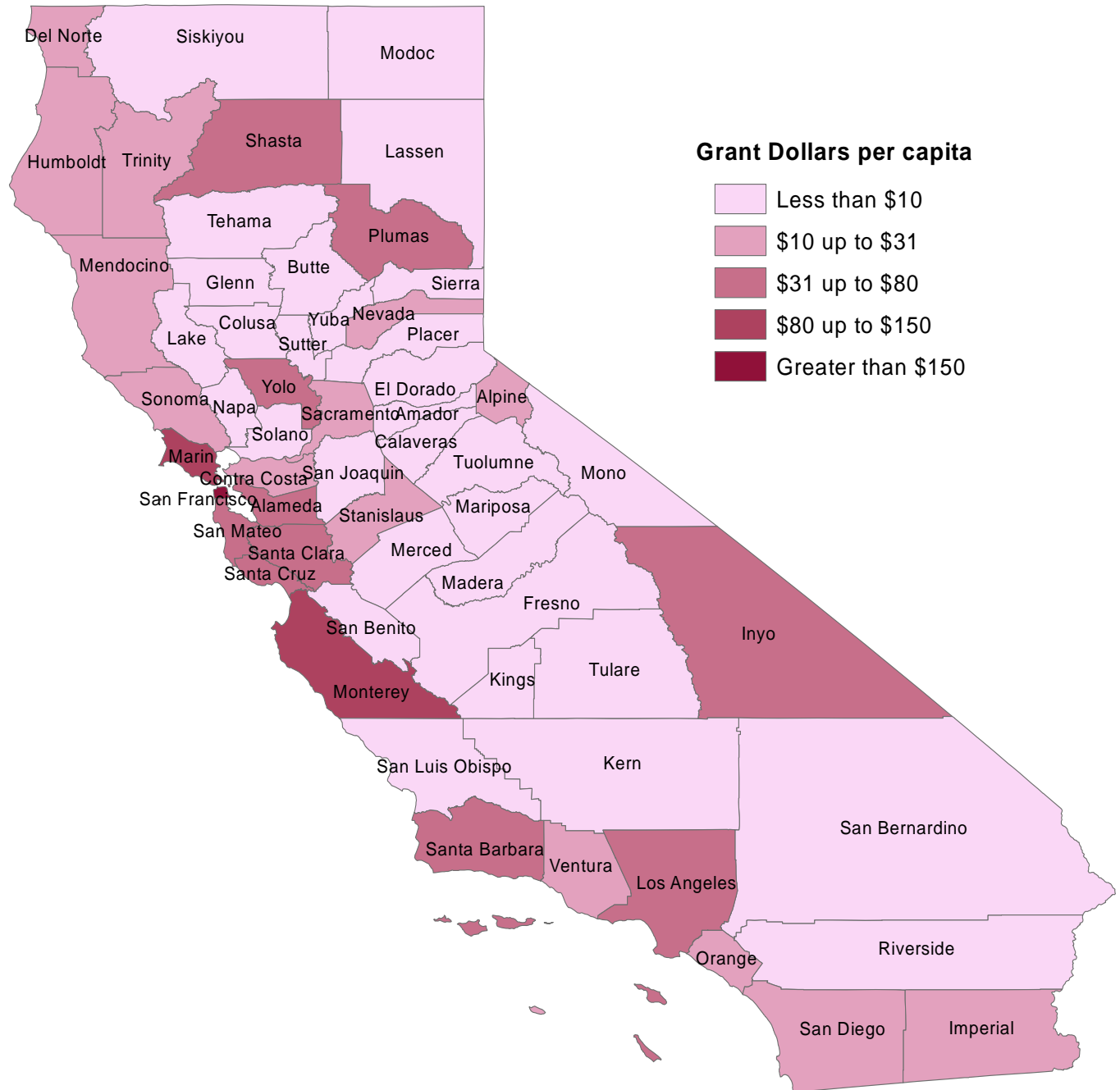
Region/County		Percent Grant Dollars	
		1999	2004
Bay Area		63.02%	58.43%
	Alameda	58.59%	63.98%
	Contra Costa	83.89%	89.21%
	Marin	85.98%	90.90%
	Napa	90.64%	38.85%
	San Francisco	54.90%	49.70%
	San Mateo	86.11%	69.08%
	Santa Clara	75.19%	61.54%
	Solano	67.49%	50.00%
	Sonoma	55.00%	70.60%
Central Coast		89.18%	86.33%
	Monterey	94.51%	95.13%
	San Benito	100.00%	100.00%
	San Luis Obispo	82.12%	89.98%
	Santa Barbara	74.25%	81.02%
	Santa Cruz	85.56%	86.23%
	Ventura	67.85%	65.27%
Central Valley – Central		87.06%	62.82%
	El Dorado	94.80%	47.44%
	Placer	11.76%	40.38%
	Sacramento	91.71%	63.55%
	Sutter	0.00%	86.20%
	Yolo	57.42%	60.00%
	Yuba	84.62%	100.00%
Central Valley – North		65.62%	95.29%
	Butte	75.16%	70.89%
	Colusa	100.00%	100.00%
	Glenn	0.00%	100.00%
	Shasta	46.71%	96.15%
	Tehama	0.00%	100.00%
Central Valley – South		85.48%	85.00%
	Fresno	94.30%	85.51%
	Kern	35.53%	64.44%
	Kings	100.00%	100.00%
	Madera	53.49%	100.00%
	Merced	53.76%	100.00%
	San Joaquin	74.20%	71.89%
	Stanislaus	96.58%	96.67%
	Tulare	92.83%	87.89%

Table 7. (continued) Percentage of grant dollars received from California foundations, 1999 and 2004

Region/County		Percent Grant Dollars	
		1999	2004
Inland Empire		60.50%	50.63%
	Riverside	47.82%	41.32%
	San Bernardino	79.25%	84.40%
Los Angeles		70.46%	63.14%
	Los Angeles	70.46%	63.14%
North Coast & State		57.65%	62.64%
	Del Norte	0.00%	100.00%
	Humboldt	51.99%	62.29%
	Lake	0.00%	0.00%
	Lassen	0.00%	100.00%
	Mendocino	83.45%	69.37%
	Modoc	100.00%	37.60%
	Siskiyou	42.77%	48.54%
	Trinity	100.00%	33.84%
Sierra		62.29%	93.08%
	Alpine	0.00%	100.00%
	Amador	0.00%	0.00%
	Calaveras	77.78%	100.00%
	Inyo	100.00%	100.00%
	Mariposa	0.00%	100.00%
	Mono	100.00%	100.00%
	Nevada	62.84%	83.71%
	Plumas	11.76%	100.00%
	Sierra	100.00%	0.00%
	Tuolumne	75.64%	92.05%
South Coast & Border		69.58%	61.90%
	Imperial	100.00%	93.74%
	Orange	65.14%	66.19%
	San Diego	71.76%	59.49%
STATE		68.76%	62.60%

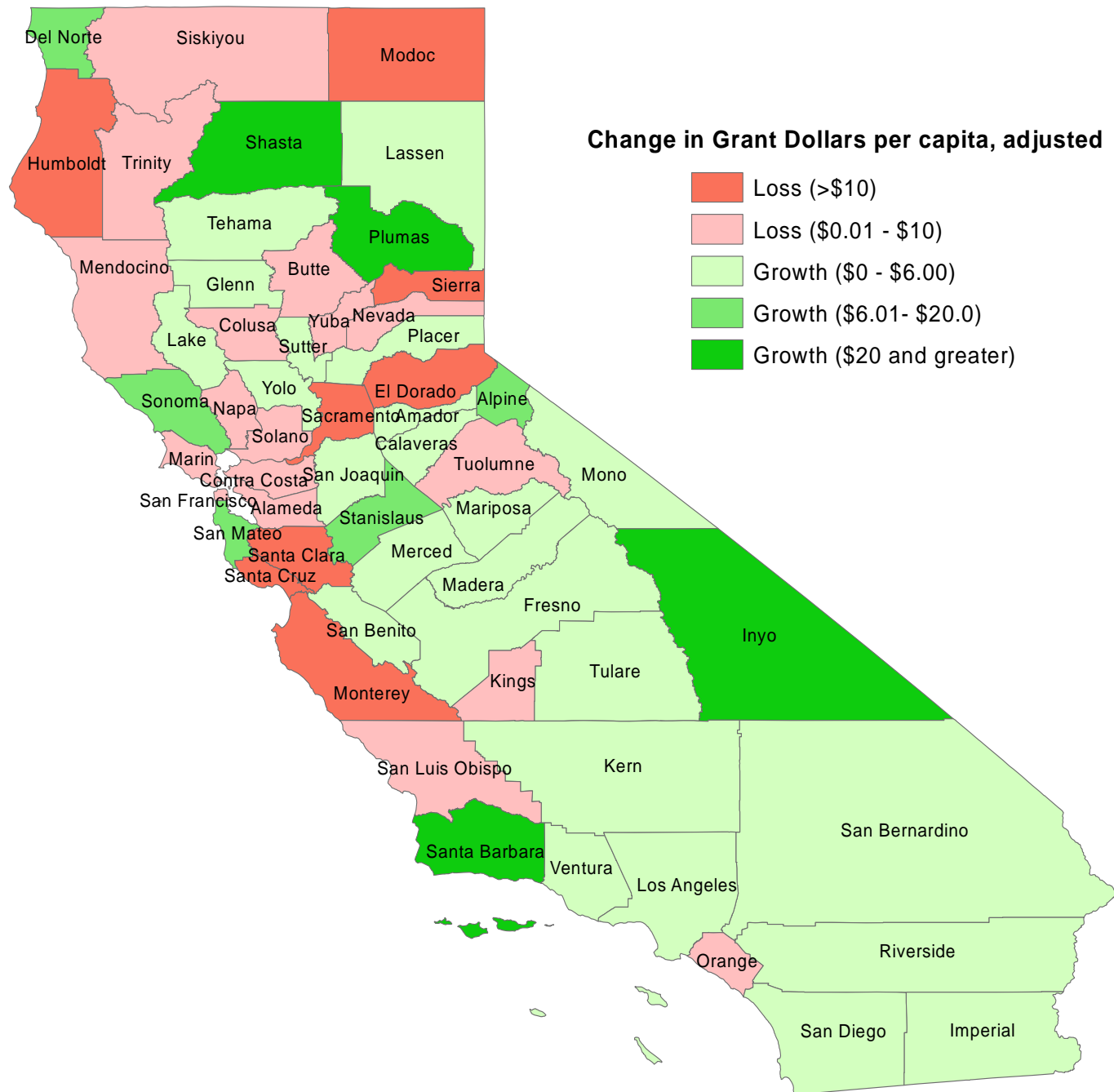
Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Map 12. Grant dollars received per capita from California foundations, 2004



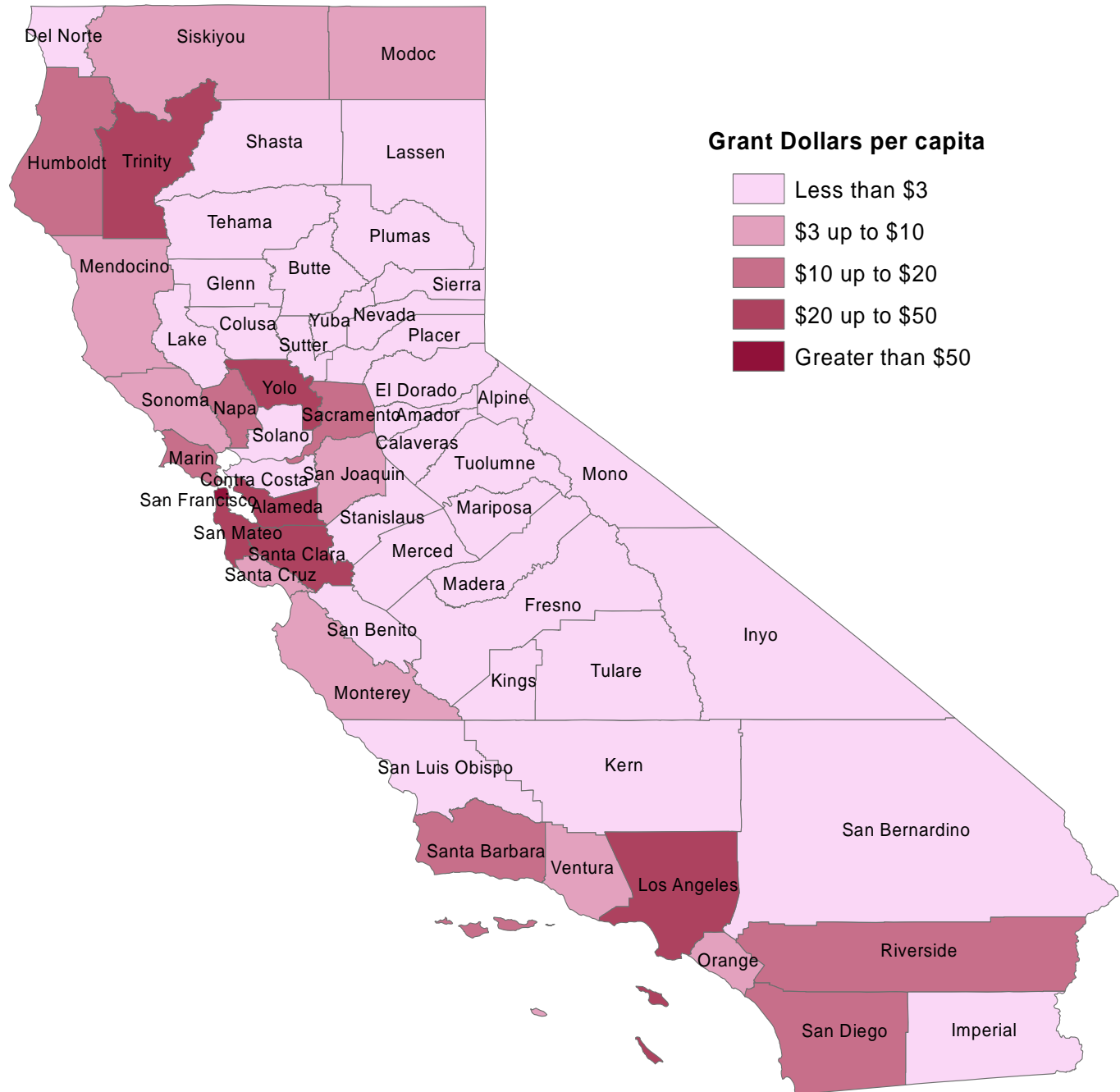
Source: The Foundation Center, *California Foundations*, 2006.

Map 13. Change in grant dollars received per capita from California foundations, 1999 to 2004 (in 1999 dollars)



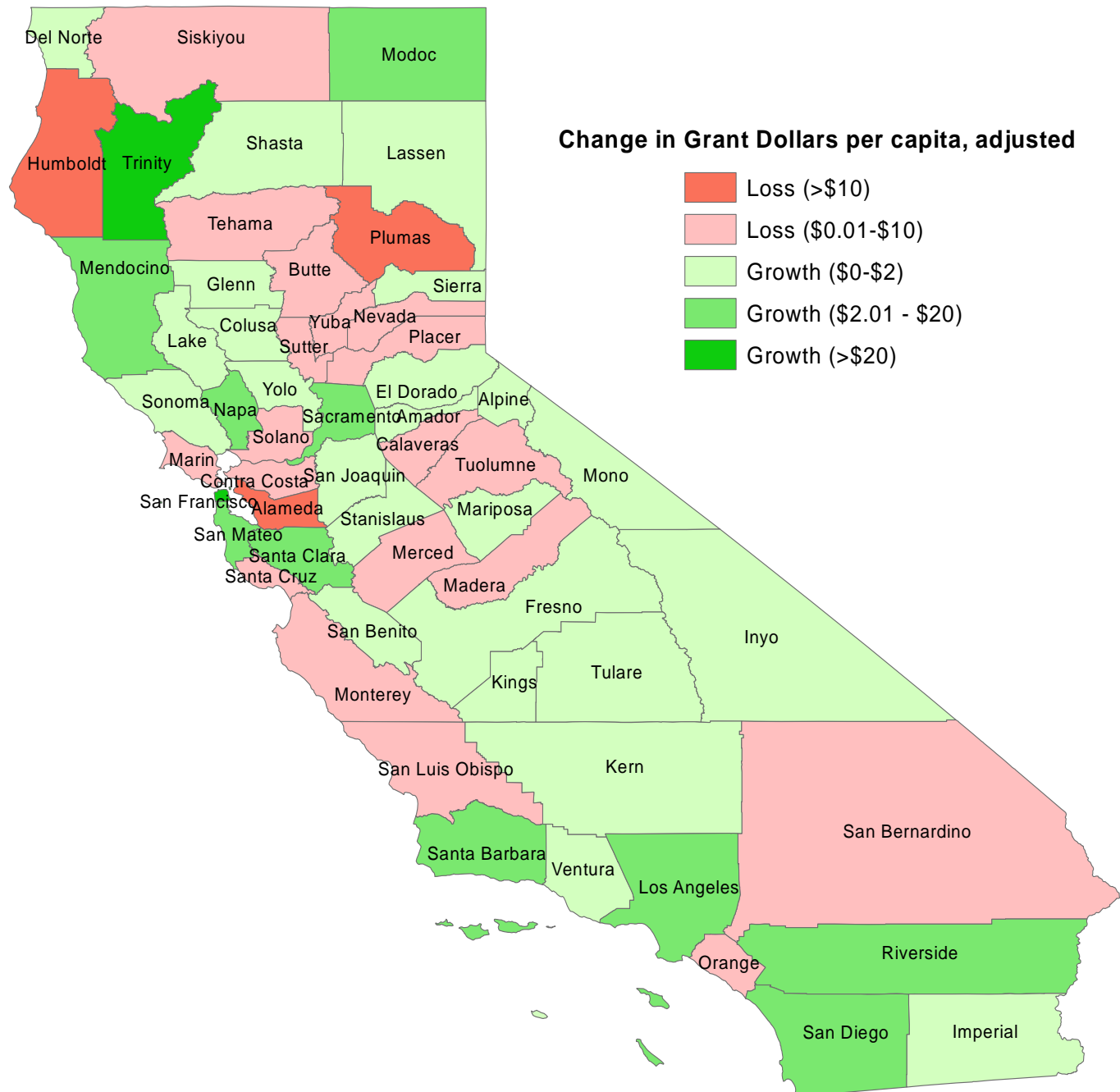
Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Map 14. Grant dollars received per capita from non-California foundations, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Map 15. Change in grant dollars received per capita from non-California foundations, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Subject Area Distribution of Grants

We consider now the subject area foci of foundation philanthropy in California by analyzing the distribution of grants in ten subject areas – arts and culture, education, environment and animals, health, human services, international affairs/human rights, public/societal benefit (which encompasses civil rights, community development, philanthropy and voluntarism, and public affairs), science and technology, social science, and religion. These subject areas, assigned by the Foundation Center, are a widely accepted means to categorize grants to nonprofit organizations.²⁸

Four subject areas claimed over 10 percent of the grant dollars to California recipients in the 2004 sample: health (29 percent), education (19 percent), arts and culture (15 percent), and human services (13 percent). These same subject areas dominated in the 1999 sample, but with a slight change in order and relative share – health (23 percent), education (22.5 percent), human services (14 percent), and arts and culture (11 percent). Funding for health and arts and culture thus increased over the period, while funding for education decreased. Moreover, concentration increased. In 2004, 76 percent of all grant dollars went to projects in these four subject areas, up from 71 percent in 1999 (see Figures 8 and 9)

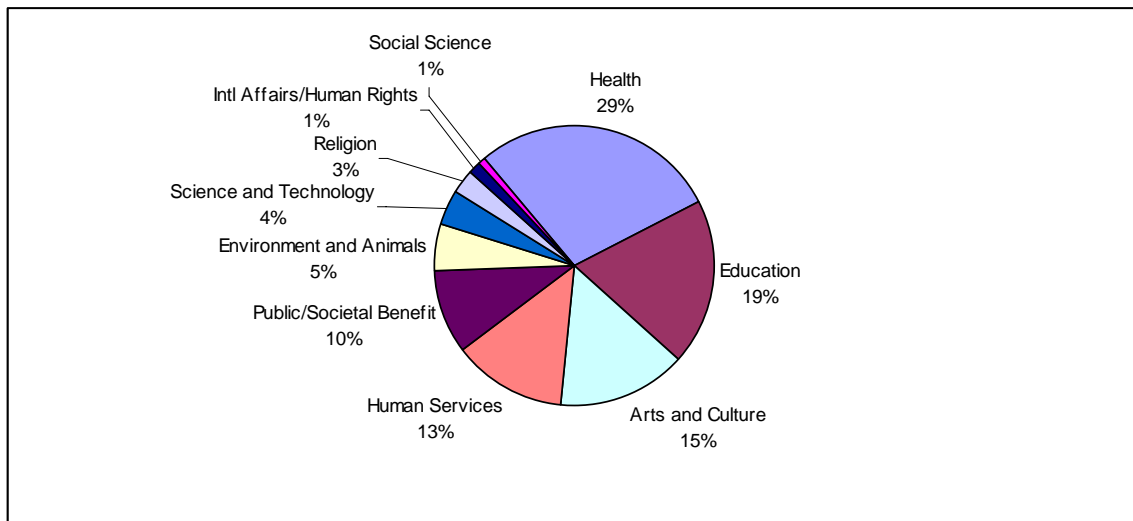
Three other subject foci evidenced notable changes in funding. Grants to the environment and animals and to science and technology decreased in relative emphasis over the period – the former from 9 percent of statewide grant dollars in 1999 to 5 percent in 2004, the latter from 7 percent in 1999 to 4 percent in 2004. Grant dollars for public/societal benefit increased in relative share between the two samples. In 1999 this subject area received 8 percent of statewide grant dollars; in 2004 this rose to almost 10 percent.

A more modest increase in relative share occurred in funding for religion, from 1.7 percent in 1999 to 2.6 percent of grant dollars in 2004.

The two subject areas that garnered the least funding in both 2004 and 1999 were grants in support of social science (less than 1 percent in 2004, down from 2 percent in 1999) and international affairs/human rights (1 percent in 2004, down from 1.5 percent in 1999). As is evident, relative interest in these areas declined slightly between the two samples.

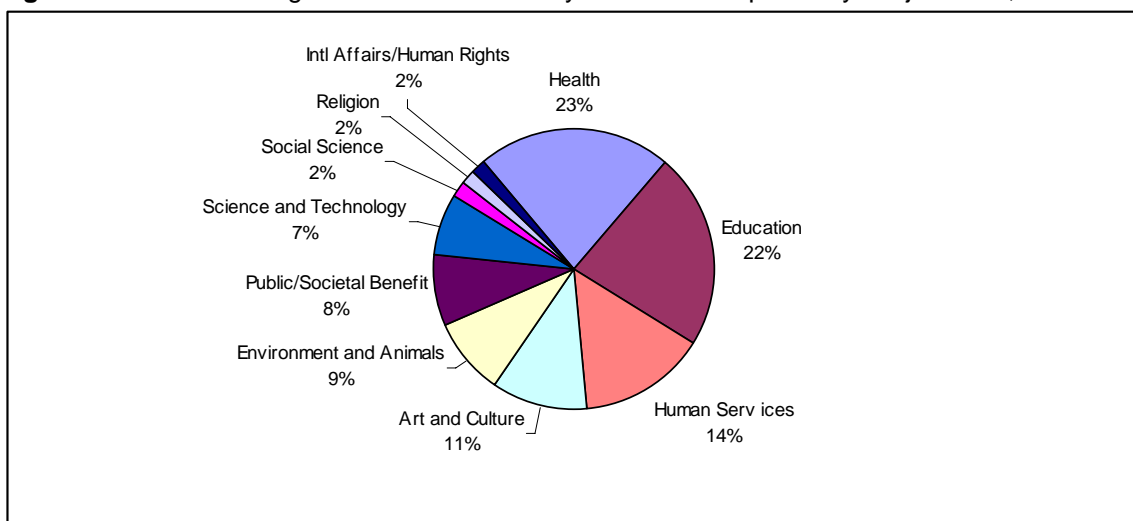
²⁸ For further explanation of this classification see The Foundation Center, *Foundation Giving Trends*, 2006, Appendix B.

Figure 8. Distribution of grant dollars received by California recipients by subject area, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Figure 9. Distribution of grant dollars received by California recipients by subject area, 1999



Source: The Foundation Center, *California Foundations*, 2001.

Subject Area Grants by Region

Tables 8 through 17 present the grant dollars received per capita in each subject area by county and region in both the 1999 and 2004 samples.²⁹ Given the heavy concentration of foundation philanthropy in arts and culture, education, health, and human services, the analysis that follows these tables focuses on patterns and trends in the spatial distribution of grants for these four subjects, including Maps 16 to 23 which present the distribution of grant dollars in 2004 and changes between 1999 and 2004 for these four top funding priorities.

²⁹ Care must be taken in drawing conclusions across samples. While the samples are similar in size and there is substantial overlap in the foundations included in the two samples, the inclusion of a single large foundation in one year and not another can drive an observed change.

Table 8. Arts and culture grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$10.09	\$12.75
	Alameda	11.67	6.40
	Contra Costa	0.83	2.23
	Marin	11.57	17.88
	Napa	4.55	1.68
	San Francisco	44.70	70.23
	San Mateo	1.63	4.91
	Santa Clara	6.34	7.31
	Solano	0.00	0.00
	Sonoma	0.38	2.80
Central Coast		\$4.41	\$3.31
	Monterey	12.46	1.29
	San Benito	0.00	0.00
	San Luis Obispo	0.29	2.66
	Santa Barbara	2.13	10.38
	Santa Cruz	12.87	4.58
	Ventura	0.21	0.77
Central Valley – Central		\$0.50	\$0.40
	El Dorado	0.79	0.00
	Placer	0.00	0.05
	Sacramento	0.65	0.59
	Sutter	0.00	0.00
	Yolo	0.25	0.30
	Yuba	0.00	0.00
Central Valley – North		\$0.06	\$17.12
	Butte	0.05	0.12
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	0.12	47.94
	Tehama	0.00	0.00
Central Valley – South		\$0.40	\$0.51
	Fresno	0.03	1.45
	Kern	0.07	0.13
	Kings	0.00	0.10
	Madera	0.00	0.00
	Merced	0.09	0.00
	San Joaquin	2.10	0.00
	Stanislaus	0.08	0.98
	Tulare	0.00	0.04

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.53	\$1.14
	Riverside	1.06	2.05
	San Bernardino	0.06	0.27
Los Angeles		\$7.37	\$16.25
	Los Angeles	7.37	16.25
North Coast & State		\$0.73	\$2.98
	Del Norte	0.00	0.00
	Humboldt	1.91	9.48
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	0.53	0.00
	Modoc	0.00	0.00
	Siskiyou	0.00	0.00
	Trinity	0.00	0.00
Sierra		\$0.40	\$0.93
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.26	0.00
	Inyo	1.39	3.55
	Mariposa	0.00	1.11
	Mono	0.00	1.85
	Nevada	0.66	1.72
	Plumas	0.99	0.00
	Sierra	0.00	0.00
	Tuolumne	0.00	0.18
South Coast & Border		\$1.91	\$2.00
	Imperial	0.00	0.00
	Orange	0.89	1.95
	San Diego	3.00	2.15
STATE		\$4.87	\$7.98

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 9. Education grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$29.88	\$24.37
	Alameda	36.39	20.66
	Contra Costa	2.43	3.69
	Marin	14.00	16.81
	Napa	0.98	2.42
	San Francisco	103.88	79.47
	San Mateo	9.51	19.39
	Santa Clara	32.45	30.35
	Solano	0.00	0.02
	Sonoma	0.44	5.55
Central Coast		\$5.97	\$8.07
	Monterey	9.41	5.58
	San Benito	2.52	0.00
	San Luis Obispo	1.04	1.60
	Santa Barbara	4.04	15.15
	Santa Cruz	12.73	14.11
	Ventura	4.75	6.44
Central Valley – Central		\$1.99	\$2.79
	El Dorado	0.07	1.25
	Placer	0.09	0.12
	Sacramento	1.43	3.08
	Sutter	0.00	0.11
	Yolo	12.58	8.68
	Yuba	0.00	0.00
Central Valley – North		\$0.77	\$0.46
	Butte	1.74	0.25
	Colusa	0.00	0.48
	Glenn	0.00	0.00
	Shasta	0.00	0.94
	Tehama	0.18	0.00
Central Valley – South		\$1.39	\$2.70
	Fresno	0.30	3.08
	Kern	0.87	2.38
	Kings	1.26	0.23
	Madera	0.09	0.00
	Merced	0.12	2.10
	San Joaquin	3.63	6.08
	Stanislaus	3.44	2.02
	Tulare	0.00	0.06

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$1.38	\$0.96
	Riverside	1.11	1.35
	San Bernardino	1.63	0.59
Los Angeles		\$9.39	\$12.46
	Los Angeles	9.39	12.46
North Coast & State		\$0.60	\$1.35
	Del Norte	0.00	0.00
	Humboldt	0.16	1.02
	Lake	0.00	0.52
	Lassen	0.00	0.00
	Mendocino	0.13	0.00
	Modoc	0.00	5.91
	Siskiyou	4.69	7.40
	Trinity	0.00	0.00
Sierra		\$0.47	\$0.14
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	0.00	0.00
	Mariposa	0.00	0.00
	Mono	0.00	0.74
	Nevada	1.49	0.21
	Plumas	0.00	0.70
	Sierra	0.00	0.00
	Tuolumne	0.00	0.00
South Coast & Border		\$2.06	\$4.66
	Imperial	0.10	2.46
	Orange	0.95	3.04
	San Diego	3.24	6.39
STATE		\$9.82	\$10.01

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 10. Environment and animals grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$13.71	\$6.77
	Alameda	6.36	7.70
	Contra Costa	0.85	0.66
	Marin	29.46	16.21
	Napa	8.45	0.57
	San Francisco	83.04	28.41
	San Mateo	8.33	5.20
	Santa Clara	1.65	2.60
	Solano	0.12	0.00
	Sonoma	0.56	1.27
Central Coast		\$3.19	\$4.94
	Monterey	6.85	11.91
	San Benito	0.00	0.00
	San Luis Obispo	0.62	0.17
	Santa Barbara	5.48	9.33
	Santa Cruz	4.77	3.00
	Ventura	0.56	1.54
Central Valley – Central		\$4.09	\$8.93
	El Dorado	11.77	0.85
	Placer	0.00	0.00
	Sacramento	4.36	13.01
	Sutter	0.00	0.00
	Yolo	4.17	8.59
	Yuba	0.00	0.00
Central Valley – North		\$0.27	\$0.30
	Butte	0.00	0.00
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	0.76	0.84
	Tehama	0.00	0.00
Central Valley – South		\$0.96	\$0.08
	Fresno	0.04	0.19
	Kern	0.00	0.00
	Kings	0.00	0.00
	Madera	0.00	0.00
	Merced	0.24	0.00
	San Joaquin	0.00	0.18
	Stanislaus	6.01	0.00
	Tulare	1.09	0.00

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.10	\$0.12
	Riverside	0.21	0.24
	San Bernardino	0.01	0.01
Los Angeles		\$0.97	\$1.25
	Los Angeles	0.97	1.25
North Coast & State		\$5.44	\$3.30
	Del Norte	0.00	1.03
	Humboldt	11.22	3.81
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	5.43	4.32
	Modoc	0.00	0.00
	Siskiyou	0.28	0.76
	Trinity	19.46	31.03
Sierra		\$3.46	\$1.11
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	1.53	14.72
	Mariposa	0.00	0.00
	Mono	2.31	0.00
	Nevada	7.54	0.76
	Plumas	11.14	0.00
	Sierra	0.00	0.00
	Tuolumne	0.49	0.00
South Coast & Border		\$1.01	\$0.91
	Imperial	0.00	0.00
	Orange	0.55	0.89
	San Diego	1.51	0.97
STATE		\$3.83	\$2.71

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 11. Health grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$17.76	\$35.11
	Alameda	18.27	29.21
	Contra Costa	4.53	2.10
	Marin	13.31	11.51
	Napa	0.20	8.37
	San Francisco	56.48	188.15
	San Mateo	5.41	28.90
	Santa Clara	21.77	14.63
	Solano	0.13	0.05
	Sonoma	2.29	4.52
Central Coast		\$2.14	\$5.94
	Monterey	1.62	6.91
	San Benito	0.00	4.76
	San Luis Obispo	0.16	1.40
	Santa Barbara	3.66	8.79
	Santa Cruz	3.29	12.89
	Ventura	1.96	3.26
Central Valley – Central		\$21.57	\$9.20
	El Dorado	2.51	1.08
	Placer	0.26	0.32
	Sacramento	30.81	11.32
	Sutter	0.00	0.70
	Yolo	18.28	22.83
	Yuba	3.93	0.65
Central Valley – North		\$3.16	\$4.34
	Butte	5.86	0.22
	Colusa	5.10	0.00
	Glenn	0.00	5.34
	Shasta	0.59	11.09
	Tehama	1.95	0.00
Central Valley – South		\$0.98	\$3.90
	Fresno	1.79	5.00
	Kern	0.00	3.45
	Kings	0.00	1.10
	Madera	0.00	2.18
	Merced	0.00	2.81
	San Joaquin	1.09	3.86
	Stanislaus	0.03	2.49
	Tulare	3.12	6.37

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$1.72	\$7.11
	Riverside	2.85	12.37
	San Bernardino	0.71	2.06
Los Angeles		\$11.87	\$16.48
	Los Angeles	11.87	16.48
North Coast & State		\$15.46	\$9.15
	Del Norte	0.00	10.30
	Humboldt	35.82	15.45
	Lake	0.00	0.00
	Lassen	0.00	1.84
	Mendocino	13.29	13.75
	Modoc	8.36	3.56
	Siskiyou	8.26	2.57
	Trinity	0.00	3.25
Sierra		\$0.55	\$6.37
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	2.22
	Inyo	0.00	11.17
	Mariposa	0.00	0.00
	Mono	0.00	0.00
	Nevada	0.22	6.72
	Plumas	0.50	42.41
	Sierra	39.39	0.00
	Tuolumne	0.00	2.18
South Coast & Border		\$6.19	\$8.09
	Imperial	3.43	8.43
	Orange	4.37	3.37
	San Diego	8.11	12.81
STATE		\$9.85	\$14.99

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 12. Human services grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$16.68	\$16.82
	Alameda	17.36	18.57
	Contra Costa	2.29	2.09
	Marin	48.02	51.28
	Napa	0.36	1.25
	San Francisco	64.76	53.58
	San Mateo	9.52	16.90
	Santa Clara	7.29	10.44
	Solano	1.59	0.02
	Sonoma	7.13	5.75
Central Coast		\$4.20	\$4.22
	Monterey	5.76	3.05
	San Benito	0.00	0.00
	San Luis Obispo	5.37	1.34
	Santa Barbara	3.50	9.30
	Santa Cruz	10.28	7.89
	Ventura	1.63	2.28
Central Valley – Central		\$3.74	\$2.33
	El Dorado	0.00	0.06
	Placer	0.20	0.76
	Sacramento	4.37	2.90
	Sutter	0.32	0.17
	Yolo	8.30	4.74
	Yuba	6.68	0.00
Central Valley – North		\$0.21	\$1.35
	Butte	0.12	1.21
	Colusa	0.00	0.00
	Glenn	0.00	0.89
	Shasta	0.45	1.95
	Tehama	0.00	0.69
Central Valley – South		\$1.40	\$3.36
	Fresno	1.28	0.60
	Kern	0.00	0.80
	Kings	0.00	0.00
	Madera	0.11	0.00
	Merced	0.00	0.00
	San Joaquin	0.86	0.97
	Stanislaus	5.53	20.62
	Tulare	1.72	0.90

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.50	\$1.48
	Riverside	0.76	1.70
	San Bernardino	0.26	1.26
Los Angeles		\$5.94	\$7.19
	Los Angeles	5.94	7.19
North Coast & State		\$1.35	\$2.80
	Del Norte	0.00	0.00
	Humboldt	0.33	1.92
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	1.04	8.37
	Modoc	7.52	0.00
	Siskiyou	7.49	2.40
	Trinity	0.00	3.98
Sierra		\$0.39	\$1.75
	Alpine	0.00	15.70
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	1.66	4.30
	Mariposa	0.00	4.73
	Mono	0.00	0.00
	Nevada	0.55	3.57
	Plumas	0.00	0.00
	Sierra	0.00	0.00
	Tuolumne	0.60	0.20
South Coast & Border		\$3.32	\$3.21
	Imperial	2.20	0.65
	Orange	1.72	2.51
	San Diego	4.94	4.04
STATE		\$6.30	\$6.74

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 13. International affairs/human rights grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$1.99	\$2.04
	Alameda	1.70	0.48
	Contra Costa	0.00	0.01
	Marin	2.27	0.76
	Napa	0.00	0.08
	San Francisco	8.09	12.30
	San Mateo	0.00	0.82
	Santa Clara	2.41	1.76
	Solano	0.00	0.00
	Sonoma	0.03	0.00
Central Coast		\$0.75	\$0.42
	Monterey	2.37	0.73
	San Benito	0.00	0.00
	San Luis Obispo	0.00	0.00
	Santa Barbara	1.19	0.75
	Santa Cruz	0.60	1.23
	Ventura	0.00	0.00
Central Valley – Central		\$0.10	\$0.58
	El Dorado	0.00	0.00
	Placer	0.00	0.00
	Sacramento	0.00	0.00
	Sutter	0.00	0.00
	Yolo	1.23	6.71
	Yuba	0.00	0.00
Central Valley - North		\$0.00	\$0.00
	Butte	0.00	0.00
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	0.00	0.00
	Tehama	0.00	0.00
Central Valley – South		\$0.01	\$0.12
	Fresno	0.00	0.17
	Kern	0.00	0.00
	Kings	0.00	0.00
	Madera	0.00	0.00
	Merced	0.00	0.00
	San Joaquin	0.06	0.46
	Stanislaus	0.00	0.00
	Tulare	0.00	0.00

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.00	\$0.01
	Riverside	0.00	0.01
	San Bernardino	0.01	0.00
Los Angeles		\$0.52	\$0.49
	Los Angeles	0.52	0.49
North Coast & State		\$5.31	\$1.31
	Del Norte	0.00	0.00
	Humboldt	16.63	4.17
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	0.00	0.00
	Modoc	0.00	0.00
	Siskiyou	0.00	0.00
	Trinity	0.00	0.00
Sierra		\$0.00	\$0.00
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	0.00	0.00
	Mariposa	0.00	0.00
	Mono	0.00	0.00
	Nevada	0.00	0.00
	Plumas	0.00	0.00
	Sierra	0.00	0.00
	Tuolumne	0.00	0.00
South Coast & Border		\$0.04	\$0.58
	Imperial	0.00	0.00
	Orange	0.01	0.16
	San Diego	0.06	1.04
STATE		\$0.67	\$0.72

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 14. Public/societal benefit grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$10.60	\$15.02
	Alameda	11.54	14.64
	Contra Costa	0.23	0.48
	Marin	6.39	22.93
	Napa	0.19	0.26
	San Francisco	50.92	79.08
	San Mateo	1.69	3.04
	Santa Clara	6.78	7.18
	Solano	0.22	0.00
	Sonoma	0.80	0.61
Central Coast		\$0.66	\$0.64
	Monterey	1.35	0.35
	San Benito	0.00	0.44
	San Luis Obispo	1.73	0.42
	Santa Barbara	0.60	1.45
	Santa Cruz	0.22	1.09
	Ventura	0.18	0.31
Central Valley – Central		\$1.75	\$10.38
	El Dorado	0.00	0.00
	Placer	1.12	0.07
	Sacramento	2.44	15.95
	Sutter	0.00	0.00
	Yolo	0.63	4.72
	Yuba	0.00	0.00
Central Valley – North		\$0.56	\$0.45
	Butte	0.00	0.00
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	1.58	1.27
	Tehama	0.00	0.00
Central Valley – South		\$0.38	\$0.67
	Fresno	0.52	0.33
	Kern	0.85	0.13
	Kings	0.00	0.00
	Madera	0.00	0.00
	Merced	0.00	0.00
	San Joaquin	0.14	0.59
	Stanislaus	0.40	3.38
	Tulare	0.04	0.02

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.08	\$0.21
	Riverside	0.05	0.17
	San Bernardino	0.10	0.24
Los Angeles		\$4.07	\$3.53
	Los Angeles	4.07	3.53
North Coast & State		\$0.81	\$1.79
	Del Norte	0.00	0.00
	Humboldt	2.54	3.77
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	0.00	1.44
	Modoc	0.00	0.00
	Siskiyou	0.00	2.73
	Trinity	0.00	0.00
Sierra		\$2.22	\$0.17
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.91	0.00
	Inyo	0.00	0.00
	Mariposa	0.00	0.00
	Mono	0.00	0.00
	Nevada	5.08	0.56
	Plumas	0.00	0.00
	Sierra	0.00	0.00
	Tuolumne	2.60	0.00
South Coast & Border		\$0.58	\$3.03
	Imperial	0.00	0.00
	Orange	0.49	1.21
	San Diego	0.69	5.02
STATE		\$3.62	\$5.17

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 15. Science and technology grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$2.60	\$2.58
	Alameda	3.29	2.92
	Contra Costa	0.07	0.00
	Marin	0.37	1.55
	Napa	0.00	0.00
	San Francisco	2.55	2.04
	San Mateo	0.43	0.96
	Santa Clara	6.11	6.35
	Solano	0.10	0.00
	Sonoma	0.00	0.02
Central Coast		\$26.39	\$16.73
	Monterey	132.05	77.82
	San Benito	0.00	0.00
	San Luis Obispo	0.30	0.00
	Santa Barbara	2.67	8.47
	Santa Cruz	9.17	1.30
	Ventura	0.23	0.47
Central Valley – Central		\$0.06	\$0.06
	El Dorado	0.00	0.08
	Placer	0.00	0.00
	Sacramento	0.05	0.08
	Sutter	0.00	0.00
	Yolo	0.37	0.00
	Yuba	0.00	0.00
Central Valley – North		\$0.11	\$0.00
	Butte	0.25	0.00
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	0.00	0.00
	Tehama	0.00	0.00
Central Valley – South		\$0.16	\$0.01
	Fresno	0.01	0.06
	Kern	0.12	0.00
	Kings	0.00	0.00
	Madera	0.00	0.00
	Merced	0.00	0.00
	San Joaquin	0.80	0.00
	Stanislaus	0.00	0.00
	Tulare	0.00	0.00

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.42	\$0.28
	Riverside	0.05	0.23
	San Bernardino	0.75	0.32
Los Angeles		\$2.25	\$1.93
	Los Angeles	2.25	1.93
North Coast & State		\$0.00	\$0.00
	Del Norte	0.00	0.00
	Humboldt	0.00	0.00
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	0.00	0.00
	Modoc	0.00	0.00
	Siskiyou	0.00	0.00
	Trinity	0.00	0.00
Sierra		\$0.00	\$0.08
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	0.00	0.00
	Mariposa	0.00	0.00
	Mono	0.00	1.85
	Nevada	0.00	0.00
	Plumas	0.00	0.00
	Sierra	0.00	0.00
	Tuolumne	0.00	0.00
South Coast & Border		\$1.23	\$1.02
	Imperial	0.00	0.00
	Orange	1.15	0.43
	San Diego	1.37	1.67
STATE		\$3.07	\$2.26

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 16. Social science grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$1.65	\$0.90
	Alameda	3.49	0.55
	Contra Costa	0.02	0.00
	Marin	1.10	0.00
	Napa	0.00	0.00
	San Francisco	1.31	3.15
	San Mateo	0.64	0.32
	Santa Clara	2.56	1.59
	Solano	0.00	0.00
	Sonoma	0.00	0.00
Central Coast		\$1.34	\$0.56
	Monterey	5.48	0.60
	San Benito	0.00	0.00
	San Luis Obispo	0.00	0.00
	Santa Barbara	0.12	2.08
	Santa Cruz	1.88	0.04
	Ventura	0.18	0.15
Central Valley - Central		\$0.27	\$0.50
	El Dorado	0.00	0.00
	Placer	0.00	0.00
	Sacramento	0.00	0.00
	Sutter	0.00	0.00
	Yolo	3.21	5.88
	Yuba	0.00	0.00
Central Valley – North		\$0.00	\$0.05
	Butte	0.00	0.12
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	0.00	0.00
	Tehama	0.00	0.00
Central Valley – South		\$0.00	\$0.03
	Fresno	0.00	0.00
	Kern	0.00	0.00
	Kings	0.00	0.00
	Madera	0.00	0.00
	Merced	0.00	0.00
	San Joaquin	0.00	0.14
	Stanislaus	0.00	0.00
	Tulare	0.00	0.00

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.11	\$0.00
	Riverside	0.24	0.00
	San Bernardino	0.00	0.00
Los Angeles		\$1.44	\$0.79
	Los Angeles	1.44	0.79
North Coast & State		\$0.03	\$0.00
	Del Norte	0.00	0.00
	Humboldt	0.08	0.00
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	0.00	0.00
	Modoc	0.00	0.00
	Siskiyou	0.00	0.00
	Trinity	0.00	0.00
Sierra		\$0.00	\$0.00
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	0.00	0.00
	Mariposa	0.00	0.00
	Mono	0.00	0.00
	Nevada	0.00	0.00
	Plumas	0.00	0.00
	Sierra	0.00	0.00
	Tuolumne	0.00	0.00
South Coast & Border		\$0.10	\$0.07
	Imperial	0.00	0.00
	Orange	0.21	0.02
	San Diego	0.00	0.12
STATE		\$0.87	\$0.47

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

Table 17. Religion grant dollars received per capita, 1999 and 2004

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Bay Area		\$0.50	\$4.68
	Alameda	0.42	10.89
	Contra Costa	0.04	0.03
	Marin	1.41	0.82
	Napa	0.00	6.24
	San Francisco	2.37	3.39
	San Mateo	0.24	1.21
	Santa Clara	0.22	6.80
	Solano	0.00	0.00
	Sonoma	0.00	0.42
Central Coast		\$0.22	\$0.28
	Monterey	0.12	0.00
	San Benito	0.00	0.17
	San Luis Obispo	0.06	0.00
	Santa Barbara	0.00	0.18
	Santa Cruz	0.59	0.39
	Ventura	0.35	0.55
Central Valley - Central		\$0.04	\$0.63
	El Dorado	0.00	0.00
	Placer	0.06	0.08
	Sacramento	0.05	0.99
	Sutter	0.00	0.00
	Yolo	0.00	0.00
	Yuba	0.00	0.00
Central Valley – North		\$0.00	\$0.11
	Butte	0.00	0.17
	Colusa	0.00	0.00
	Glenn	0.00	0.00
	Shasta	0.00	0.11
	Tehama	0.00	0.00
Central Valley – South		\$0.02	\$0.07
	Fresno	0.00	0.14
	Kern	0.00	0.00
	Kings	0.00	0.00
	Madera	0.17	0.24
	Merced	0.00	0.00
	San Joaquin	0.09	0.14
	Stanislaus	0.00	0.00
	Tulare	0.00	0.02

Region/County		Grant Dollars Received Per Capita	
		1999	2004
Inland Empire		\$0.29	\$0.06
	Riverside	0.14	0.04
	San Bernardino	0.41	0.08
Los Angeles		\$1.16	\$0.71
	Los Angeles	1.16	0.71
North Coast & State		\$0.11	\$0.00
	Del Norte	0.00	0.00
	Humboldt	0.36	0.00
	Lake	0.00	0.00
	Lassen	0.00	0.00
	Mendocino	0.00	0.00
	Modoc	0.00	0.00
	Siskiyou	0.00	0.00
	Trinity	0.00	0.00
Sierra		\$0.16	\$0.00
	Alpine	0.00	0.00
	Amador	0.00	0.00
	Calaveras	0.00	0.00
	Inyo	0.00	0.00
	Mariposa	0.00	0.00
	Mono	0.00	0.00
	Nevada	0.49	0.00
	Plumas	0.00	0.00
	Sierra	0.00	0.00
	Tuolumne	0.00	0.00
South Coast & Border		\$1.56	\$1.23
	Imperial	0.00	0.09
	Orange	3.22	1.56
	San Diego	0.02	0.97
STATE		\$0.75	\$1.38

Source: The Foundation Center, *California Foundations*, 2001 and 2006.

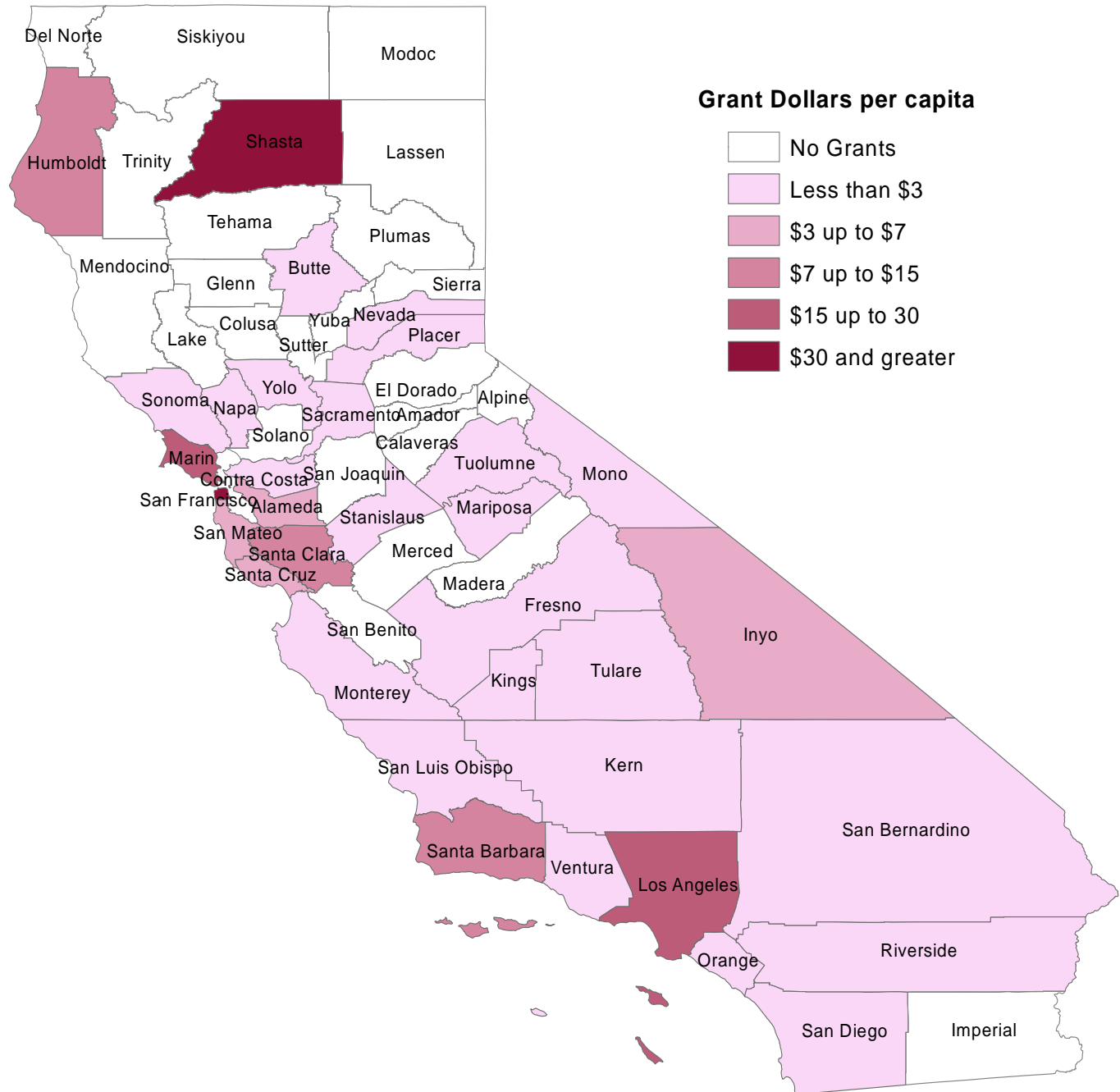
Arts and culture

Grants for arts and culture are highly concentrated geographically. Three regions dominate in 2004 grants dollars per capita to this subject area – the Central Valley - North (\$17.12), Los Angeles (\$16.25), and the Bay Area (\$12.75). The most surprising is the presence in this group of the Central Valley - North. This region went from receiving almost no arts and culture grant dollars in 1999 (1 percent of the statewide average) to being the largest in 2004 (214 percent of the statewide average). The change results exclusively from the previously discussed grants to Shasta County. Los Angeles is the second largest per capita recipient of arts and culture grants, and its 2004 position (204 percent of the state average, represents an improvement over its 1999 position (151 percent, \$7.37 per capita). The Bay Area had per capita arts and culture grant dollars of 160 percent of the state average, but this represents a relative decline from 207 percent in 1999 (\$10.09 per capita). Despite this decline, recipients in San Francisco County continue to enjoy the largest per capita arts and culture grant dollars from the foundations in our sample (\$70.23 in 2004) in the state.

Two other regions are noteworthy. The North Coast & State region doubled its relative share of arts and culture dollars, going from 15 percent of the state average in 1999 (\$0.73) to 37 percent in 2004 (\$2.98). This increase was driven completely by increased grant dollars to Humboldt County. The Central Coast region, in contrast reduced its relative share from 91 percent of the state average in 1999 (\$4.41) to 41 percent in 2004 (\$3.31). This reflects multiple changes within the region and includes increased grant dollars to Santa Barbara that were more than offset by decreased funding in the arts to Monterey and Santa Cruz recipients.

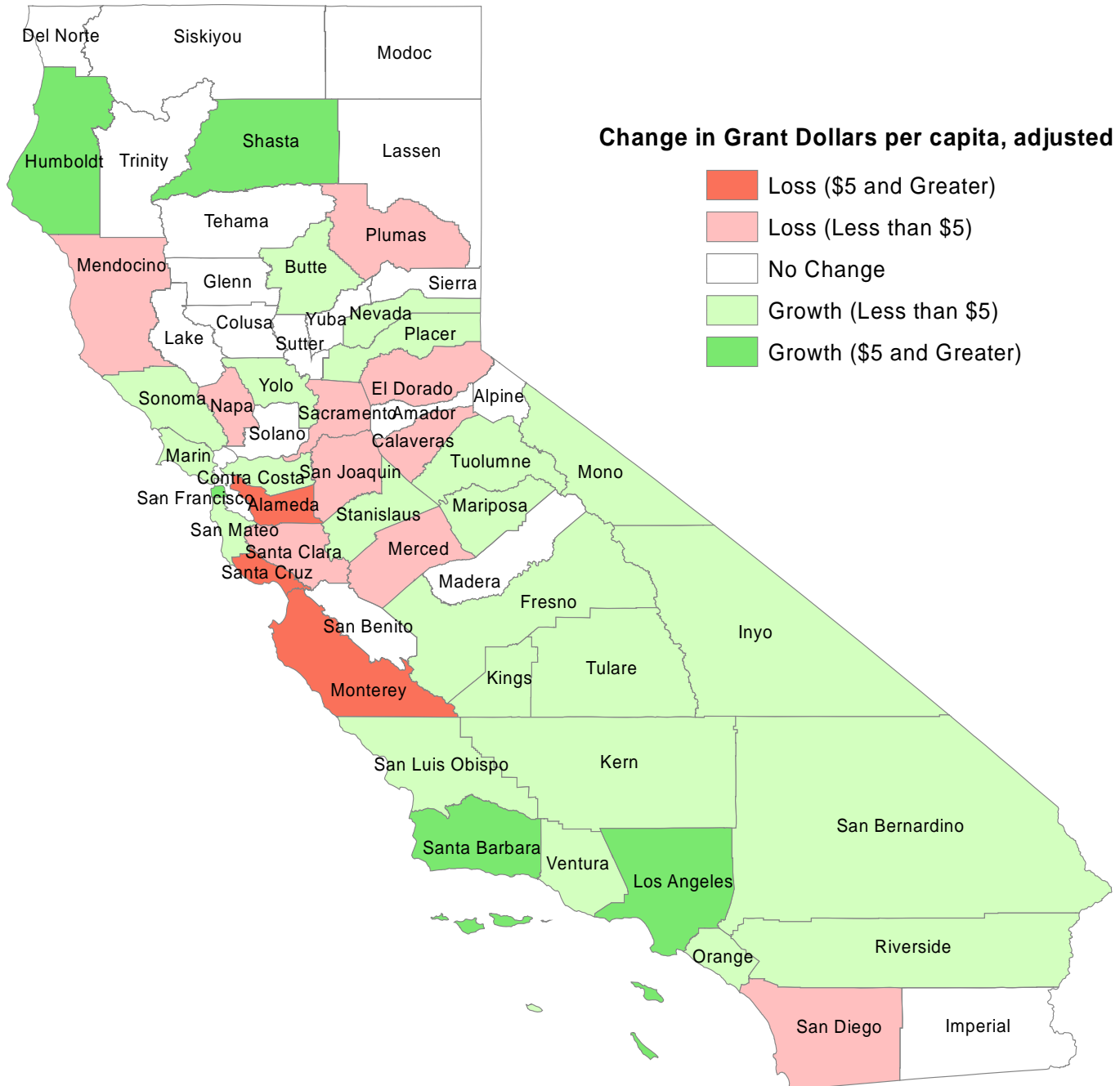
In summary, there are several indicators of increased support for arts and culture in California since 1999, bearing in mind the limitation of drawing broad conclusions from these particular grant samples. The relative share of statewide grant dollars to arts and culture increased from 11 percent in 1999 to 15 percent in 2004. Average statewide grant dollars per capita increased from \$4.87 in 1999 to \$7.98 in 2004 in nominal terms, and a significant 41 percent increase in 1999 dollars. The impact of this increase, however, was highly concentrated geographically. Only five counties received notable increases in per capita grant dollars across the two samples – Shasta, San Francisco, Santa Barbara, Los Angeles, and Humboldt. Moreover, 90 percent of 2004 arts and culture grant dollars flowed to only three regions of the state – Los Angeles, the Bay Area, and the Central Valley - North.

Map 16. Arts and culture grant dollars received per capita, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Map 17. Change in arts and culture grant dollars received per capita, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Education

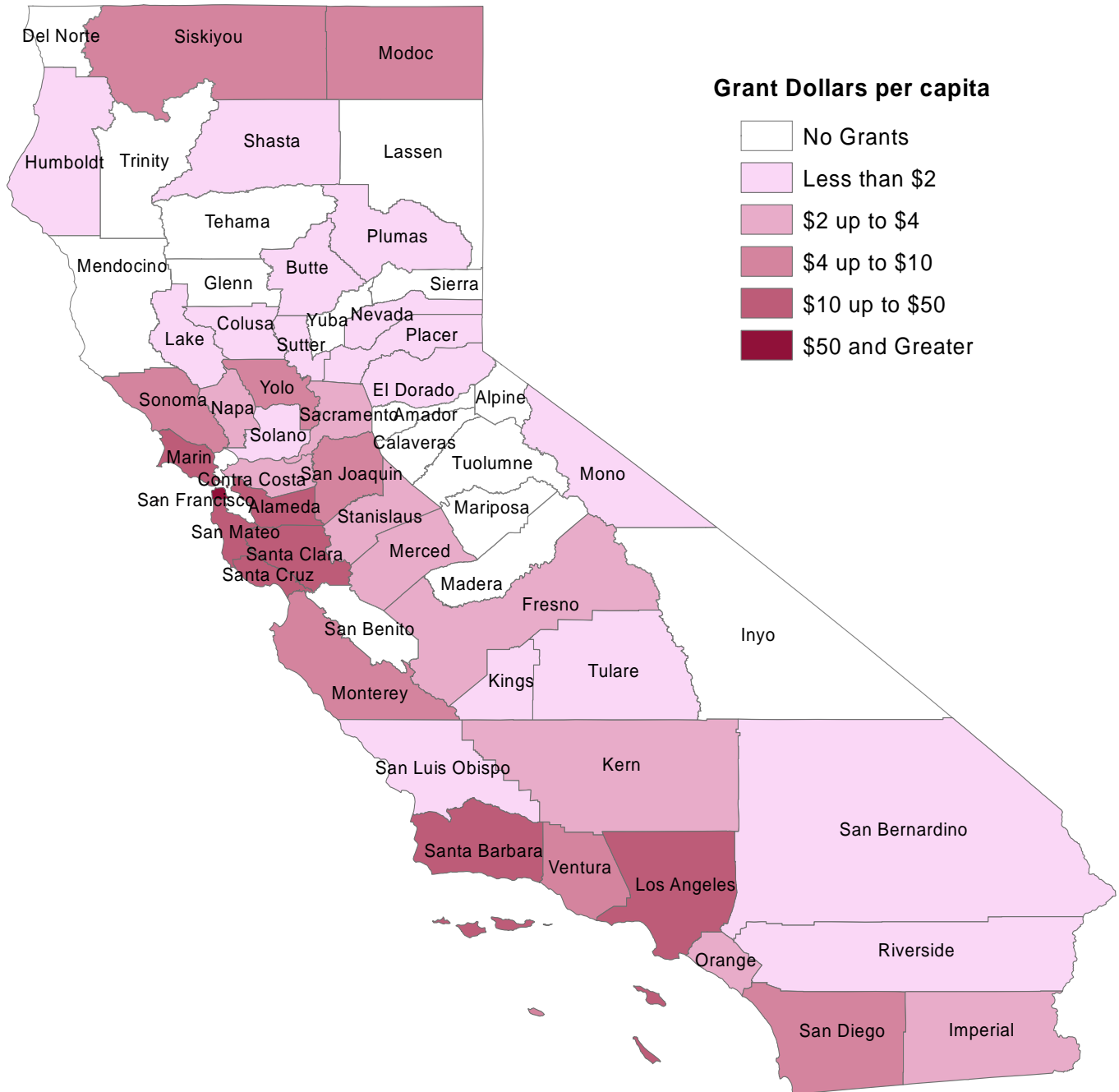
Education grants to California recipients averaged \$10 per capita in the 2004 grants sample. The distribution is highly skewed, with the Bay Area receiving 243 percent of the statewide per capita average (or \$24.37). The second highest per capita level is Los Angeles with 124 percent of the state average (or \$12.46). No other region exceeds the state average. Moreover, three regions average less than \$1 in per capita grants for education – Sierra, the Central Valley - North, and the Inland Empire.

There are, however, indications of changes in the geographic distribution of education grants. The Bay Area's relative share is lower than in 1999 when its share was 304 percent of the state average of \$9.82 (or \$29.88). San Francisco County, which is the largest recipient county in both samples, fell from 1058% of the state average (\$104) in 1999 to 795% of the state average in 2004 (\$79).

Five regions enjoyed large relative per capita increases in education grant dollars over this period. Los Angeles rose from 96 percent of the state average in 1999 (\$9.39) to 124 percent in 2004 (\$12.46). The Central Coast improved its relative share from 61 percent of the state average in 1999 (\$5.97) to 81 percent in 2004 (\$8.07), driven largely by increased grants to Santa Barbara County. The South Coast & Border region more than doubled its relative share from 21 percent in 1999 (\$2.06) to 46.5 percent in 2004 (\$4.66), with all three of its counties enjoying substantial per capita increases. The Central Valley - South almost doubled its relative share from 14 percent in 1999 (\$1.39) to 27 percent in 2004 (\$2.70) with large increases in grant dollars per capita to Fresno and Merced counties. Finally, the North Coast & State region doubled its share from 6 percent in 1999 (\$0.60) to 13 percent in 2004 (\$1.35), driven by a large increase to Modoc County (from \$0 in 1999 to \$5.91 in 2004).

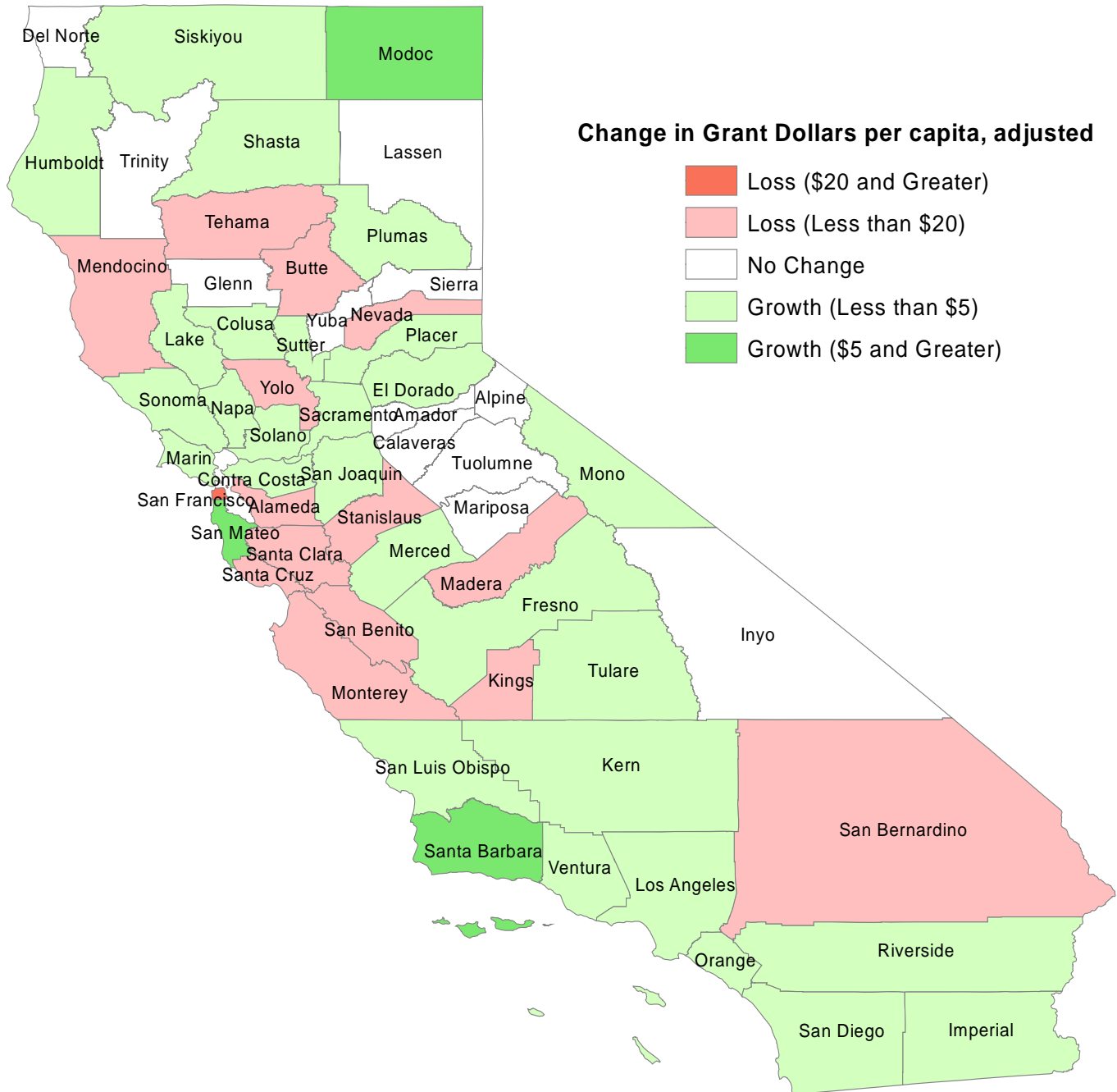
In summary, education reduced its relative share of grant dollars to California recipients between 1999 and 2004 falling from 22.5 percent in 1999 to 19 percent in 2004. This decline was sharpest in the Bay Area, which nevertheless remained the largest recipient of education grant dollars per capita by a large amount. On the other hand, several other regions enjoyed real gains, suggesting a reduction in the geographic concentration of education grant dollars over this period.

Map 18. Education grant dollars received per capita, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Map 19. Change in education grant dollars received per capita, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

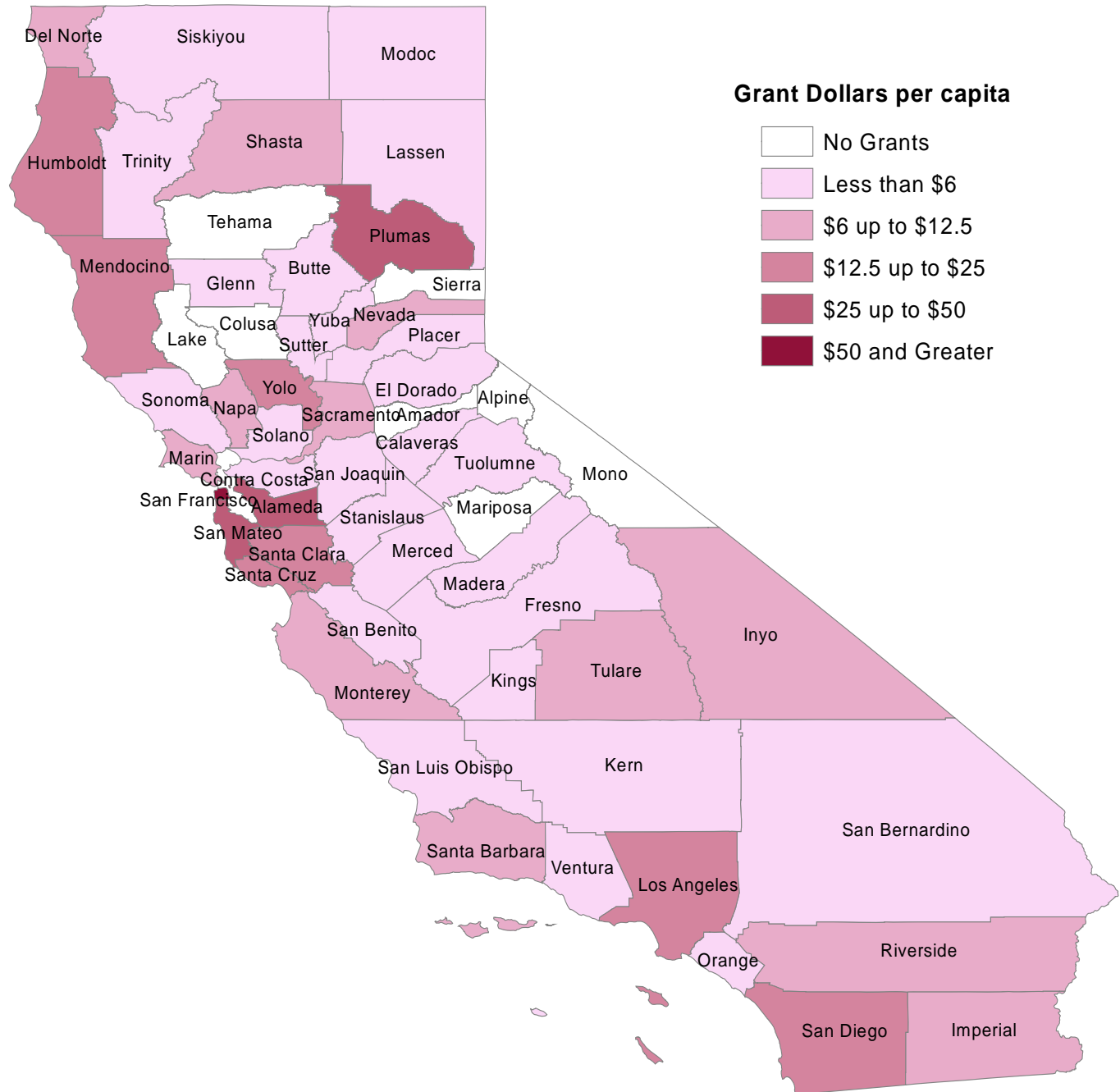
Health

Health increased its relative share of grant dollars from 23 percent in 1999 (\$9.85 per capita) to 29 percent in 2004 (\$14.99 per capita). But, these gains were not evenly distributed throughout the state. The Bay Area is the largest recipient of 2004 health grant dollars in per capita terms (234 percent of the state average, or \$35.11). This represents a relative increase over its 1999 share (180 percent of the state average, or \$17.76), and reflects a tripling of the per capita grants dollars to San Francisco County (the largest county level in 1999 and in 2004, \$56.48 and \$188.15 per capita). Los Angeles is the only other region with a per capita average (\$16.48) larger than the statewide average in 2004.

In 1999, however, four regions had per capita averages larger than the state average – the Central Valley - Central, the Bay Area, the North Coast & State, and Los Angeles. All but the Bay Area declined in relative levels in 2004. The largest decline was by the Central Valley - Central which went from 219 percent of the state average in 1999 (\$21.57) to 61 percent in 2004 (\$9.20), fueled by a reduction of \$20 per capita in health grant dollars to Sacramento County. The North Coast & State region declined from 157 percent of the state average in 1999 (\$15.46) to 61 percent in 2004 (\$9.15), fueled by reductions of over \$20 per person in health grants to Humboldt County. Finally, Los Angeles also fell in relative terms from 121 percent of the state average in 1999 (\$11.87) to 110 percent in 2004 (\$16.48).

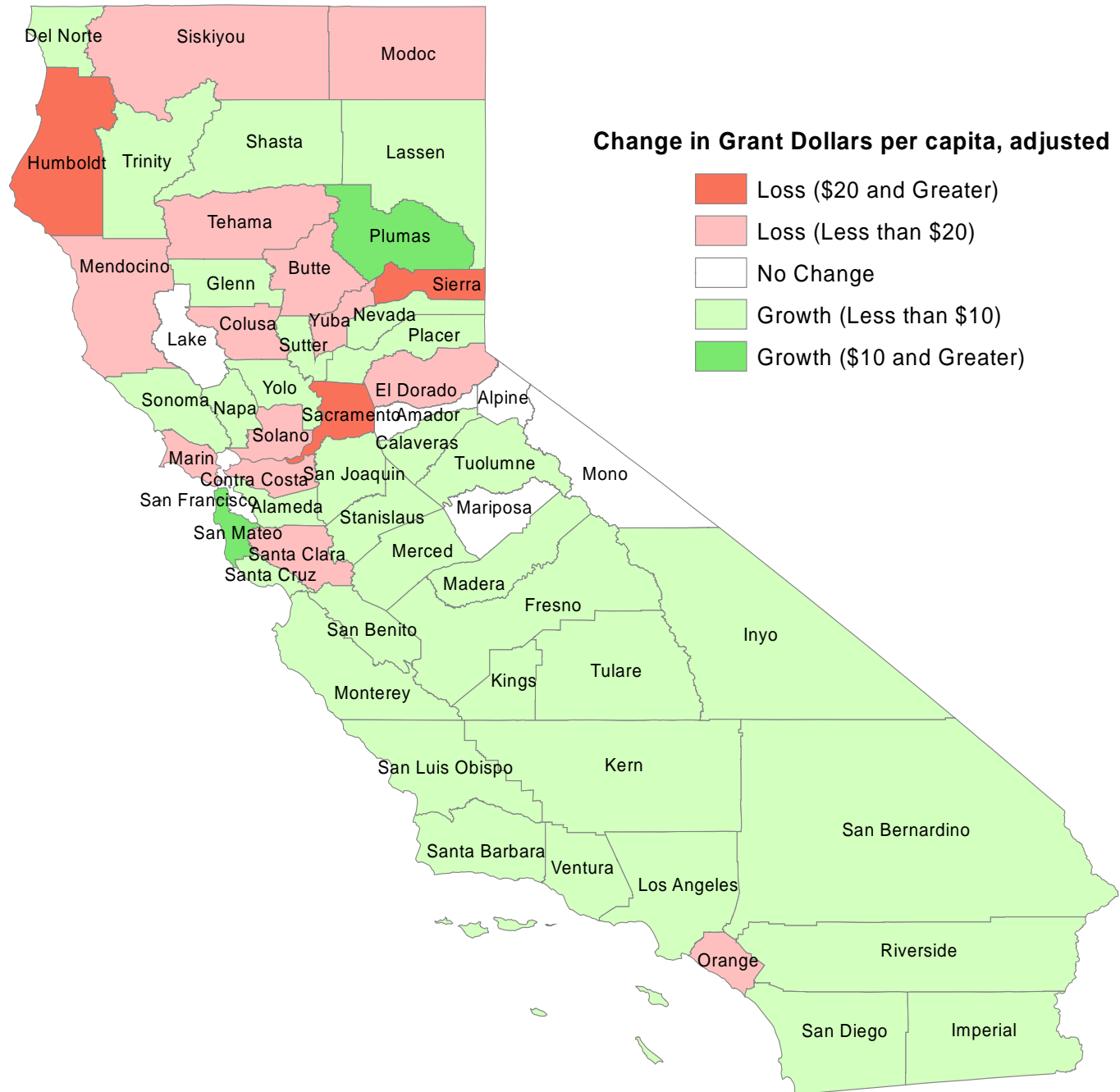
Two areas, in addition to the previously discussed Bay Area, enjoyed large relative gains – Sierra and the Inland Empire. Sierra went from per capita grant dollars of 5.5 percent of the state average in 1999 (\$0.55) to 42 percent in 2004 (\$6.37). The region had considerable internal variability with strong gains by Plumas and Inyo counties and strong losses by Sierra County. The Inland Empire increased from 17 percent of the state average in 1999 (\$1.72) to 47 percent in 2004 (\$7.11) based on large gains to Riverside County as a consequence of the sizeable grants to the Eisenhower Medical Center and its Foundation mentioned previously. Although on smaller bases, the Central Coast and the Central Valley - South also enjoyed relative gains in their share of statewide health grant dollars.

Map 20. Health grant dollars received per capita, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Map 21. Change in health grant dollars received per capita, 1999 to 2004 (in 1999 dollars)



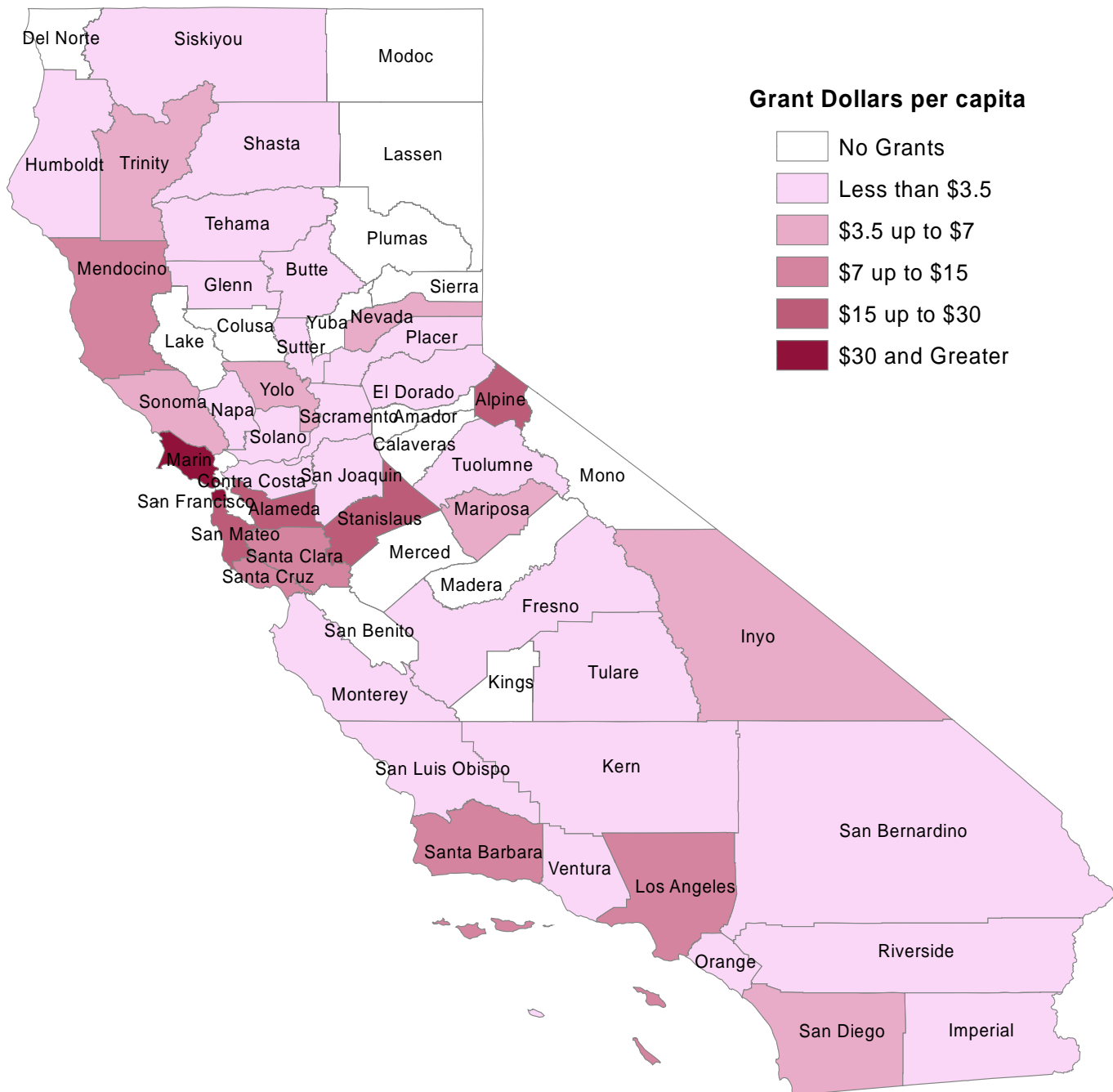
Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Human services

The share of statewide grant dollars going to human services remained relatively constant, 14 percent in 1999 (\$6.30 per capita) and 13 percent in 2004 (\$6.74 per capita). One region however saw a notable reduction. Human services grant dollars to the Central Valley - Central fell from 59 percent of the state average in 1999 (\$3.74) to 35 percent in 2004 (\$2.33). Reduced grant dollars to Yuba County was a major factor in the region's decrease.

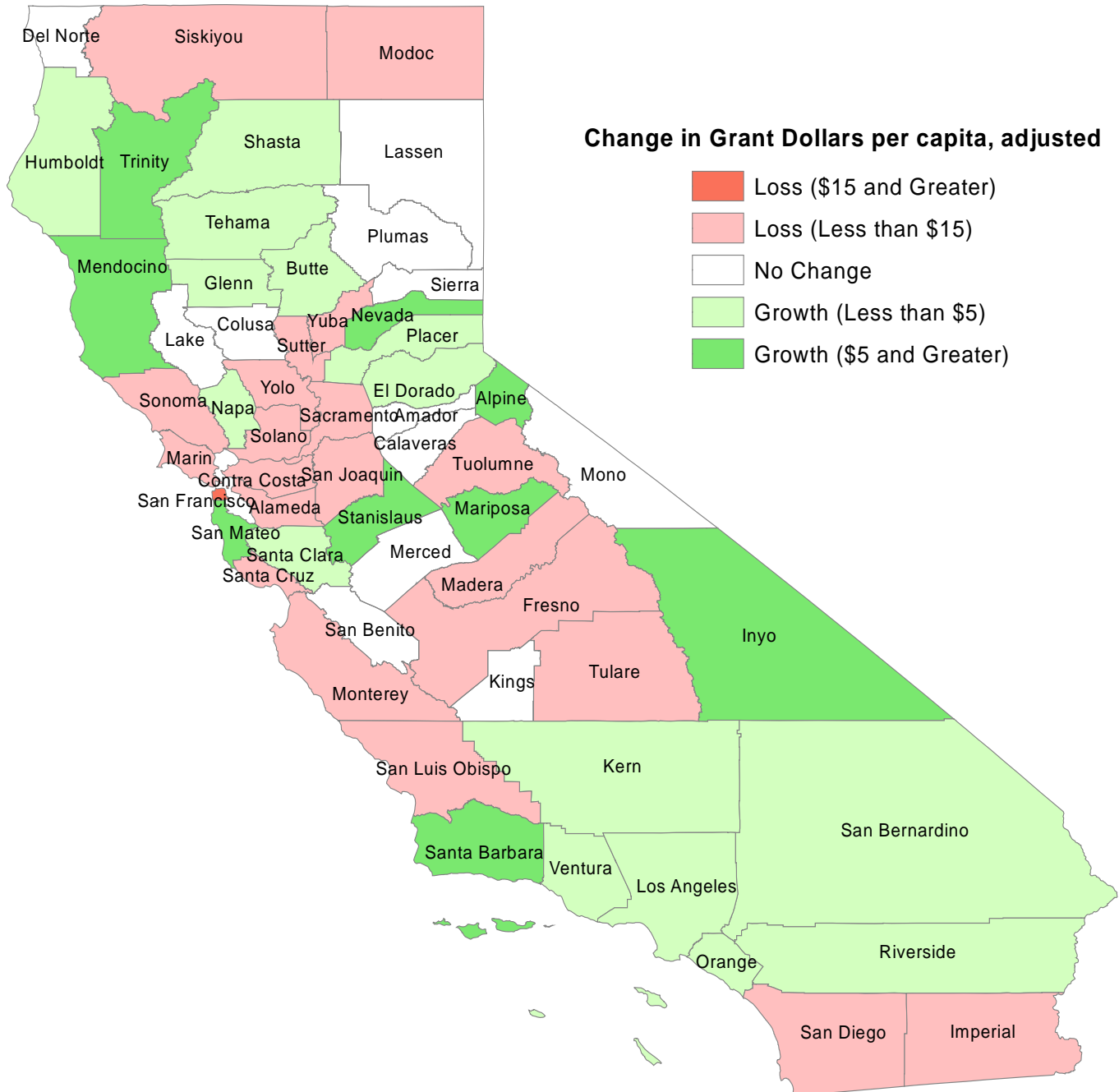
Several regions made large relative gains. Sierra improved its relative position from 6 percent of the state average in 1999 (\$0.39) to 26 percent in 2004 (\$1.75) largely based on new grants to Alpine County. Similarly the Central Valley - North increased from 3 percent of the state average in 1999 (\$0.21) to 20 percent in 2004 (\$1.35), with gains throughout the region. The Central Valley - South and the North Coast & State regions also at least doubled their relative share of human services grants. The Central Valley - South went from 22 percent of the state average in 1999 (\$1.40) to 50 percent in 2004 (\$3.36), driven by a large increase in grants to Stanislaus County. North Coast & State went from 21 percent of the state average in 1999 (\$1.35) to 42 percent in 2004 (\$2.80). Here, there was considerable within region variability, with increases in grant dollars to Mendocino County dominating losses to Modoc and Siskiyou counties. The other regions had little change.

Map 22. Human services grant dollars received per capita, 2004



Source: The Foundation Center, *California Foundations*, 2006.

Map 23. Change in human services grant dollars received per capita, 1999 to 2004 (in 1999 dollars)



Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Summary

Our analysis of the reach of foundation philanthropy in California reveals the following trends and patterns:

- Grant dollars received, like foundation capacity is concentrated in the Bay Area and in Los Angeles. Almost 77 percent of the grant dollars in the 2004 sample went to recipients in one of these regions, similar to the 78 percent in the 1999 sample.
- There is wide disparity across the state in grant dollars received per capita. Grant dollars received are very heavily concentrated in the Bay Area, where they average \$121 per resident, twice the level received by Los Angeles residents (\$61), and 230 percent of the state average.
- Three regions received substantially more grant dollars per capita relative to the state average in 2004 compared to 1999 – the Central Valley - North, the Inland Empire, and the Central Valley - South. Large grants to Shasta, Riverside, and Stanislaus counties were instrumental in this growth in these three regions.
- Two regions suffered notable declines in their relative share of grant dollars in this period – the North Coast & State and the Central Coast regions. Reduced grants to Humboldt County and Monterey County recipients were the major reasons.
 - ❖ Recall, the North Coast & State region also suffered a loss in foundation capacity during this period. The Central Coast, however, was increasing its relative share of foundation capacity while it suffered these losses in grant dollars.
 - ❖ Reduced grants to Humboldt and Monterey counties were observed from both California and non-California foundations.
- Grant dollars to California recipients are concentrated in four subject areas – health, education, arts and culture, and human services. In 2004, 76 percent of all grant dollars went to these priorities, up from 71 percent in 1999.
- The relative share of statewide grants to health and to arts and culture increased over the period, but the geographic impact of these increases differed.
 - ❖ 2004 arts and culture grant dollars were highly concentrated in three regions – Los Angeles, the Bay Area, and the Central Valley - North.
 - ❖ Changes in health grant dollars varied considerably across regions. The Central Valley - Central and the North Coast & State regions suffered real losses in health grant dollars per capita while the state average increased 31 percent.

- The relative share of statewide grants to education declined over the period, but the declines brought some reductions in geographic concentration.
 - ❖ Six regions enjoyed real increased education dollars per capita in a time of decreased real dollars statewide (Central Coast, Central Valley - Central, Central Valley - South, Los Angeles, North Coast & State, and South Coast & Border).

Conclusion

This 2004 update of the 1999 baseline analysis reveals some dramatic changes in foundation growth over the last five years, especially when compared to the previous five-year period. California foundations have essentially weathered the downturn in their fortunes in the intervening years since the baseline analysis was conducted. The number of foundations has continued to grow, foundation giving has rebounded, and foundation assets are almost back. Short term projections are cautiously optimistic and the long term prospects are bright. The stock market is progressing to new highs. And with a quarter of California foundations having been created since 1999, and 72 percent since 1990, there is reason to be optimistic that these relatively young foundations will grow in the future as new additions are made to their endowments.

Several of the distinctive features of California's foundation sector in terms of structure and composition identified in the 1999 baseline analysis continue to characterize the sector in 2004. These include the high degree of concentration of assets and giving among a relatively small number of foundations, the prominence of community foundations and their growing share of foundation assets and giving among all foundations in the state, and the modest role of corporate foundations in the state compared to the nation. Moreover, the grantmaking patterns and priorities of California foundations that we observed in 1999 continue, with only modest changes. The majority of grant dollars of California foundations are directed to recipients within the state, health remains the top funding priority with education second – the reverse of the national pattern, and the environment attracts a greater interest among the state's funding community than foundations nationwide.

These aggregate trends and patterns are important to understand the resources of California foundations and their capacity to use their philanthropy to help address the most pressing problems of the state's residents. Yet, philanthropy has its impact most often at the regional and community level. And foundation capacity and the reach of foundation philanthropy are not evenly distributed across the state.

Foundation capacity in the state is highly concentrated in 2004. The Bay Area and Los Angeles regions are headquarters for 68 percent of all California foundations. These foundations hold 89 percent of the assets and account for 85 percent of the giving of all California foundations. And while there were some variations in growth across the regions and counties of the state, the spatial patterns look quite similar to those that were found five years earlier.

The patterns for the reach of foundations philanthropy are quite similar. Almost 77 percent of the grant dollars in the 2004 sample went to recipients in the Bay Area and Los Angeles, \$121 per resident and \$61 per resident, respectively. These two regions are the only ones that exceed the state average of \$52 per resident. The patterns in grant dollars received per nonprofit are similar to those revealed in the per capita analysis, though the differences are somewhat muted. Only the Bay Area and Los Angeles regions received grant dollars per nonprofit at higher than the state-wide average of \$51,785. The Bay Area nonprofits received \$81,265 on average, and the Los Angeles nonprofits received \$66,691 on average. Some regions have made progress relative to the state average in

both per capita and per nonprofit terms from 1999 to 2004, such as the Central Valley - North, the Inland Empire, and the Central Valley – South, but these changes are driven by sizeable grants and whether they represent trends will require tracking over a longer period of time.

Given the analysis of the changes between 1999 and 2004, what can we anticipate in terms for California foundations and foundation philanthropy in the future?

This analysis demonstrates that the trajectory of foundation growth will not be smooth. The fortunes of California foundations will be tied to the ups and downs of the stock market and the creation of wealth among Californian entrepreneurs, as well as the tax and regulatory environment. All indications are that over the long term the prospects for growth are strong. There has been a steady growth in the state's foundation community over the past 25 years. Such a progression is not likely to abate, though there might be periodic dips or slowdowns as we experienced in the earlier part of this decade.

The distinctive structure and composition of California's foundations and foundation philanthropy is unlikely to be reshaped in any significant way in the coming years. The basic contours of the foundation sector have been established, though there are possible changes at the margins. For example, the prominence of health philanthropy in California reflects the creation of new foundations from health care conversions of the 1980s and 1990s. While these have created endowments focused on health that will grow in value, there is little likelihood that new foundations will be established in the coming years with this focus and scale. So over time, the gap between health and education philanthropy is likely to narrow, and perhaps reverse the state's ordering of these two areas.

Another area worth watching is community foundations, given their prominent role in the state's foundation landscape. The growth in the activities of community foundations has been driven by an increasing interest in donor control, the nurturing by some of the state's private foundations of community foundations in more rural areas of the state, and the greater flexibility and lighter regulation of donor advised funds than private foundations. The future role of these foundations will be shaped by forces in their environment such as the competition from financial institutions and increased regulation as well as strategic choices they make in balancing donor services with community leadership roles.

The concentration of foundation capacity and the reach of foundation philanthropy across the regions and counties of the state are quite similar to those observed five years earlier. But underneath those patterns we have detected notable changes particularly in a few regions and counties. Some of these changes such as the growth of new foundations in Orange County, San Diego County and Santa Clara County suggest that these areas will trend up over time in capacity and most likely foundation giving. The extent to which there is a shift in foundation capacity and foundation giving in other regions of the state is something that merits tracking.³⁰

³⁰ Other noticeable changes, particularly in the more rural areas of the state where there is less of an incidence of grants and where a few large grants can have a big impact on changes, may create the impression that a trend has been observed when it is more of an episodic change. To discern whether the

This analysis, in addition to identifying areas to monitor in the coming years, suggests some opportunities for the foundation community within the state. We have focused here on the growth and distribution of foundation capacity and the reach of foundation philanthropy across the regions and communities of the state, but there remains the challenge of assessing and increasing the impact of foundations. Of course, the magnitude of assets and the grant dollars they can generate are important, and it is reasonable to infer foundations with more resources will have a greater impact. However, the reality is that even with the robust growth of philanthropy and the fortunes of foundations, the growth in the nonprofit sector and the needs of the communities have been even faster, and the growth in capacity is not necessarily in the regions and communities with the most pressing needs. Moreover, questions have been raised about the effectiveness of foundations in terms of impact as new players have entered the field, bringing with them their entrepreneurial models, and policymakers and the media have increased their scrutiny of the foundations.

This analysis suggests at least two areas where foundations can develop strategies to respond to these challenges. The demography of California foundations suggests an opportunity for foundations to focus on the development of their sector by building networks that facilitate learning from each other, sharing information, and even working together for greater impact. And, the geography of foundations and their philanthropy indicates an opportunity to work in a vast array of communities to address critical problems both through building nonprofit capacity and developing programs in areas that seem to have received less attention. Efforts in these and other areas are likely to have a payoff in realizing the promise of philanthropy. But that will require strategic and concerted action by the philanthropic community.

Appendix A. Map of California counties and regions



Appendix B. 100 Largest California Foundations by Assets, Circa 2004*

	Name	Type	Assets	Total Giving	Fiscal Date
1.	J. Paul Getty Trust	OP	\$9,642,414,092	\$22,671,156	6/30/2004
2.	The William and Flora Hewlett Foundation	IN	6,525,004,389	268,427,895	12/31/2004
3.	The David and Lucile Packard Foundation	IN	5,328,293,452	302,778,355	12/31/2004
4.	Gordon and Betty Moore Foundation	IN	5,042,534,007	225,986,140	12/31/2004
5.	The California Endowment	IN	3,729,571,524	153,242,789	2/28/2005
6.	The James Irvine Foundation	IN	1,541,924,918	49,407,820	12/31/2004
7.	W. M. Keck Foundation	IN	1,307,546,774	48,658,855	12/31/2004
8.	Marin Community Foundation	CM	1,153,585,937	49,224,806	6/30/2004
9.	The California Wellness Foundation	IN	1,095,660,990	40,505,102	12/31/2004
10.	The Ahmanson Foundation	IN	890,412,590	34,131,350	10/31/2004
11.	The Norton Simon Foundation	IN	868,986,375	4,200,000	12/31/2004
12.	Weingart Foundation	IN	795,207,659	32,938,475	6/30/2005
13.	The Packard Humanities Institute	OP	779,174,772	10,926,803	12/31/2004
14.	California Community Foundation	CM	762,726,071	91,295,121	6/30/2005
15.	The San Francisco Foundation	CM	757,717,972	64,392,830	6/30/2004
16.	Community Foundation Silicon Valley	CM	664,906,845	75,920,573	6/30/2004
17.	Wayne & Gladys Valley Foundation	IN	648,163,609	31,602,667	9/30/2004
18.	Peninsula Community Foundation	CM	565,416,429	109,135,104	12/31/2004
19.	The Henry J. Kaiser Family Foundation	OP	547,983,207	839,393	12/31/2004
20.	Evelyn and Walter Haas, Jr. Fund	IN	543,763,647	23,912,036	12/31/2004
21.	Broad Foundation	IN	489,208,470	18,329,788	12/31/2003
22.	H. N. & Frances C. Berger Foundation	IN	486,833,474	17,931,865	12/31/2003
23.	Eli & Edythe L. Broad Foundation	IN	467,696,217	17,991,673	12/31/2003
24.	The San Diego Foundation	CM	467,611,000	42,393,000	6/30/2005
25.	Richard and Rhoda Goldman Fund	IN	425,551,491	35,979,000	12/31/2004
26.	Arnold and Mabel Beckman Foundation	IN	373,405,000	15,644,933	8/31/2004
27.	The Wells Fargo Foundation	CS	368,372,548	46,446,723	12/31/2003
28.	The McConnell Foundation	IN	367,694,308	11,293,566	12/31/2004
29.	The Ralph M. Parsons Foundation	IN	367,479,701	16,702,634	12/31/2004
30.	May and Stanley Smith Charitable Trust	IN	359,826,583	7,892,602	12/31/2004
31.	Tosa Foundation	IN	352,972,319	3,139,916	12/31/2003
32.	Koret Foundation	IN	316,301,710	21,910,336	12/31/2003
33.	Stuart Foundation	IN	313,285,429	15,146,309	12/31/2003
34.	UniHealth Foundation	IN	291,708,903	13,339,493	9/30/2004
35.	The Broad Art Foundation	OP	269,275,125	1,010,841	6/30/2004
36.	Thomas & Dorothy Leavey Foundation	IN	243,072,931	11,270,218	12/31/2004
37.	Public Policy Institute of California	OP	230,251,695	30,000	6/30/2004
38.	William K. Bowes, Jr. Foundation	IN	221,819,316	7,796,390	12/31/2004
39.	The Milken Family Foundation	IN	221,044,152	13,698,399	11/30/2003
40.	Miriam and Peter Haas Fund	IN	218,699,026	9,296,415	12/31/2003
41.	Dan Murphy Foundation	IN	217,957,371	11,511,837	12/31/2003
42.	The Walt and Lilly Disney Foundation	IN	211,663,216	8,993,104	12/31/2003
43.	Walter and Elise Haas Fund	IN	208,934,387	9,595,223	12/31/2003
44.	Wasserman Foundation	IN	207,104,977	5,265,200	12/31/2003
45.	The Priem Family Foundation	OP	200,173,531	9,475,507	6/30/2004
46.	Colburn Music Fund	IN	178,258,393	31,195,000	6/30/2005
47.	The Thomas and Stacey Siebel Foundation	IN	170,951,238	6,729,600	12/31/2004
48.	S. H. Cowell Foundation	IN	169,801,309	5,130,248	12/31/2004
49.	The Kenneth T. and Eileen L. Norris Foundation	IN	169,349,386	7,430,270	11/30/2004

	Name	Type	Assets	Total Giving	Fiscal Date
50.	The Fletcher Jones Foundation	IN	167,820,293	7,219,654	12/31/2004
51.	The East Bay Community Foundation	CM	164,000,000	21,900,000	6/30/2004
52.	The Skoll Foundation	IN	161,234,459	2,000,000	11/30/2003
53.	Carrie Estelle Doheny Foundation	IN	160,312,543	7,464,011	12/31/2004
54.	Charles and Helen Schwab Foundation	IN	160,304,016	5,609,571	6/30/2005
55.	The Noyce Foundation	IN	159,243,411	4,409,102	12/31/2003
56.	Waitt Family Foundation	IN	157,342,483	6,549,647	12/31/2003
57.	Fritz B. Burns Foundation	IN	155,789,259	6,680,000	9/30/2004
58.	Sierra Health Foundation	IN	153,872,011	2,747,921	12/31/2004
59.	Santa Barbara Foundation	CM	153,340,248	54,781,446	12/31/2003
60.	Colburn Foundation	IN	152,197,414	6,085,931	12/31/2004
61.	The Larry L. Hillblom Foundation, Inc.	IN	148,676,029	8,701,033	12/31/2003
62.	Maddie's Fund	IN	145,173,366	1,906,679	8/31/2004
63.	Frederick R. Weisman Art Foundation	OP	140,816,009	35,000	1/31/2004
64.	Amateur Athletic Foundation of Los Angeles	IN	139,775,448	3,536,512	12/31/2003
65.	MJH Education & Healthcare Assistance Foundation	IN	135,605,160	150,000	12/31/2004
66.	Y & H Soda Foundation	IN	128,189,196	3,663,001	11/30/2004
67.	The Eisner Foundation, Inc.	IN	125,912,705	5,765,011	12/31/2003
68.	S. Mark Taper Foundation	IN	124,558,168	5,222,600	12/31/2004
69.	Lakeside Foundation	IN	123,694,353	5,643,966	12/31/2004
70.	The Christensen Fund	IN	121,939,514	4,776,799	12/31/2003
71.	The Carnegie Foundation for the Advancement of Teaching	OP	121,379,689	294,456	6/30/2004
72.	B. C. McCabe Foundation	IN	120,848,361	6,814,430	12/31/2004
73.	Monterey Bay Aquarium Research Institute	OP	120,186,126	76,642	12/31/2002
74.	Henry L. Guenther Foundation	IN	119,537,219	5,798,000	12/31/2004
75.	WellPoint Foundation	CS	116,955,856	1,758,677	12/31/2003
76.	The William G. Irwin Charity Foundation	IN	114,410,673	2,668,000	12/31/2004
77.	Archstone Foundation	IN	114,061,604	4,434,041	6/30/2004
78.	Grousbeck Family Foundation	IN	113,713,021	7,283,836	11/30/2004
79.	Omidyar Network	IN	113,112,150	7,864,533	12/31/2003
80.	Amgen Foundation, Inc.	CS	111,463,413	10,897,549	12/31/2003
81.	The Sharon D. Lund Foundation	IN	109,283,389	4,488,805	12/31/2004
82.	Flora Family Foundation	IN	108,983,918	4,816,400	12/31/2004
83.	The Zellerbach Family Foundation	IN	107,836,118	4,228,310	12/31/2004
84.	The Price Family Charitable Fund	IN	106,994,019	259,462	12/31/2002
85.	Walter S. Johnson Foundation	IN	104,475,953	3,892,554	12/31/2004
86.	The Hogan Family Foundation, Inc.	OP	102,957,565	750,000	9/30/2003
87.	Cisco Systems Foundation	CS	102,456,013	8,469,865	7/31/2004
88.	The Kavli Foundation	IN	99,473,662	4,050,000	11/30/2003
89.	Community Foundation Sonoma County	CM	99,400,199	5,116,404	12/31/2004
90.	L. K. Whittier Foundation	IN	98,810,033	5,594,000	4/30/2005
91.	Chais Family Foundation	IN	96,936,637	4,532,448	5/31/2004
92.	S. D. Bechtel, Jr. Foundation	IN	93,511,218	3,937,350	12/31/2003
93.	The David B. Gold Foundation	IN	93,225,739	2,311,845	11/30/2003
94.	The Thomas J. Long Foundation	IN	91,266,679	3,634,888	12/31/2004
95.	Pfaffinger Foundation	IN	90,584,689	3,529,963	12/31/2004
96.	Joseph Drown Foundation	IN	90,017,572	4,500,402	3/31/2004
97.	The James G. Boswell Foundation	IN	89,646,490	4,515,618	12/31/2004
98.	Community Foundation for Monterey County	CM	87,723,206	3,736,177	12/31/2004
99.	D & DF Foundation	IN	87,479,089	9,599,812	6/30/2004
100.	The Lincy Foundation	IN	87,170,966	30,620,767	9/30/2004

*Note: IN = Independent; CS = Corporate; CM = Community; OP = Operating.

Source: The Foundation Center, *Guide to U.S. Foundations* circa 2004, which includes all independent, corporate, community, and operating foundations making grants of at least one dollar during the relevant fiscal reporting period. Sources of data for these foundations include IRS information returns (Form 990-PF), foundation reports, and information reported to the Foundation Center on annual surveys of foundations with assets of at least \$100,000 or giving of \$50,000 or more. Assets are stated at market value. Total giving amount includes grants, scholarships, and employee matching gifts; it does not include all qualifying distributions, e.g., loans, PRIs, set-asides, and program or other administrative expenses.

Appendix C. 100 Largest California Foundations by Total Giving, Circa 2004*

	Name	Type	Total Giving	Assets	Fiscal Date
1.	The David and Lucile Packard Foundation	IN	\$302,778,355	\$5,328,293,452	12/31/2004
2.	The William and Flora Hewlett Foundation	IN	268,427,895	6,525,004,389	12/31/2004
3.	Gordon and Betty Moore Foundation	IN	225,986,140	5,042,534,007	12/31/2004
4.	The California Endowment	IN	153,242,789	3,729,571,524	2/28/2005
5.	Peninsula Community Foundation	CM	109,135,104	565,416,429	12/31/2004
6.	California Community Foundation	CM	91,295,121	762,726,071	6/30/2005
7.	Community Foundation Silicon Valley	CM	75,920,573	664,906,845	6/30/2004
8.	The San Francisco Foundation	CM	64,392,830	757,717,972	6/30/2004
9.	Genentech Access To Care Foundation	OP	56,804,289	2,375,736	12/31/2004
10.	Santa Barbara Foundation	CM	54,781,446	153,340,248	12/31/2003
11.	The James Irvine Foundation	IN	49,407,820	1,541,924,918	12/31/2004
12.	Marin Community Foundation	CM	49,224,806	1,153,585,937	6/30/2004
13.	W. M. Keck Foundation	IN	48,658,855	1,307,546,774	12/31/2004
14.	The Wells Fargo Foundation	CS	46,446,723	368,372,548	12/31/2003
15.	The San Diego Foundation	CM	42,393,000	467,611,000	6/30/2005
16.	The California Wellness Foundation	IN	40,505,102	1,095,660,990	12/31/2004
17.	Richard and Rhoda Goldman Fund	IN	35,979,000	425,551,491	12/31/2004
18.	The Ahmanson Foundation	IN	34,131,350	890,412,590	10/31/2004
19.	Weingart Foundation	IN	32,938,475	795,207,659	6/30/2005
20.	Wayne & Gladys Valley Foundation	IN	31,602,667	648,163,609	9/30/2004
21.	Colburn Music Fund	IN	31,195,000	178,258,393	6/30/2005
22.	Bernard Osher Foundation	IN	30,930,483	50,960,944	12/31/2004
23.	The Lincy Foundation	IN	30,620,767	87,170,966	9/30/2004
24.	Evelyn and Walter Haas, Jr. Fund	IN	23,912,036	543,763,647	12/31/2004
25.	J. Paul Getty Trust	OP	22,671,156	9,642,414,092	6/30/2004
26.	Koret Foundation	IN	21,910,336	316,301,710	12/31/2003
27.	The East Bay Community Foundation	CM	21,900,000	164,000,000	6/30/2004
28.	The Marisla Foundation	IN	19,358,600	14,324,696	12/31/2004
29.	Broad Foundation	IN	18,329,788	489,208,470	12/31/2003
30.	Eli & Edythe L. Broad Foundation	IN	17,991,673	467,696,217	12/31/2003
31.	H. N. & Frances C. Berger Foundation	IN	17,931,865	486,833,474	12/31/2003
32.	Energy Foundation	IN	17,579,462	21,868,550	12/31/2004
33.	Mary Stuart Rogers Foundation	IN	17,246,233	34,360,479	12/31/2003
34.	The Ralph M. Parsons Foundation	IN	16,702,634	367,479,701	12/31/2004
35.	Arnold and Mabel Beckman Foundation	IN	15,644,933	373,405,000	8/31/2004
36.	Stuart Foundation	IN	15,146,309	313,285,429	12/31/2003
37.	The Capital Group Companies Charitable Foundation	IN	14,984,545	73,564,117	6/30/2004
38.	The Ann and Gordon Getty Foundation	IN	14,016,676	55,215	12/31/2003
39.	The Milken Family Foundation	IN	13,698,399	221,044,152	11/30/2003
40.	UniHealth Foundation	IN	13,339,493	291,708,903	9/30/2004
41.	Blue Shield of California Foundation	CS	12,746,018	50,654,612	12/31/2004
42.	Dan Murphy Foundation	IN	11,511,837	217,957,371	12/31/2003
43.	The McConnell Foundation	IN	11,293,566	367,694,308	12/31/2004
44.	Thomas & Dorothy Leavey Foundation	IN	11,270,218	243,072,931	12/31/2004
45.	The Packard Humanities Institute	OP	10,926,803	779,174,772	12/31/2004
46.	Amgen Foundation, Inc.	CS	10,897,549	111,463,413	12/31/2003
47.	The Jane and Marc Nathanson Family Foundation	IN	10,218,728	126,518	12/31/2004
48.	Open Doors International, Inc.	OP	10,162,970	8,506,215	12/31/2003
49.	D & DF Foundation	IN	9,599,812	87,479,089	6/30/2004

	Name	Type	Total Giving	Assets	Fiscal Date
50.	Walter and Elise Haas Fund	IN	9,595,223	208,934,387	12/31/2003
51.	The Priem Family Foundation	OP	9,475,507	200,173,531	6/30/2004
52.	The Winnick Family Foundation	IN	9,466,281	15,855,986	12/31/2003
53.	Miriam and Peter Haas Fund	IN	9,296,415	218,699,026	12/31/2003
54.	The Walt and Lilly Disney Foundation	IN	8,993,104	211,663,216	12/31/2003
55.	Levi Strauss Foundation	CS	8,867,814	74,186,552	12/31/2004
56.	The Gonda Family Foundation	IN	8,713,636	6,012	11/30/2004
57.	The Larry L. Hillblom Foundation, Inc.	IN	8,701,033	148,676,029	12/31/2003
58.	Chartwell Charitable Foundation	IN	8,699,500	1,650	12/31/2004
59.	Cisco Systems Foundation	CS	8,469,865	102,456,013	7/31/2004
60.	May and Stanley Smith Charitable Trust	IN	7,892,602	359,826,583	12/31/2004
61.	Omidyar Network	IN	7,864,533	113,112,150	12/31/2003
62.	William K. Bowes, Jr. Foundation	IN	7,796,390	221,819,316	12/31/2004
63.	Simpson PSB Fund	CS	7,711,902	71,759,066	12/31/2003
64.	Sacramento Region Community Foundation	CM	7,667,618	51,111,118	12/31/2003
65.	Carrie Estelle Doheny Foundation	IN	7,464,011	160,312,543	12/31/2004
66.	The Kenneth T. and Eileen L. Norris Foundation	IN	7,430,270	169,349,386	11/30/2004
67.	The Applied Materials Foundation	CS	7,407,063	3,755,883	10/31/2004
68.	Compton Foundation, Inc.	IN	7,301,198	78,796,023	12/31/2003
69.	Grousbeck Family Foundation	IN	7,283,836	113,713,021	11/30/2004
70.	The Fletcher Jones Foundation	IN	7,219,654	167,820,293	12/31/2004
71.	Orange County Community Foundation	CM	7,175,154	58,217,839	6/30/2004
72.	The Seaver Institute	IN	7,022,050	40,309,210	6/30/2004
73.	El Adobe Corporation	IN	7,017,551	6,450,661	8/31/2004
74.	B. C. McCabe Foundation	IN	6,814,430	120,848,361	12/31/2004
75.	The Donald Bren Foundation	IN	6,795,000	9,213,887	11/30/2004
76.	World Children's Fund	IN	6,792,567	978,277	3/31/2004
77.	The Thomas and Stacey Siebel Foundation	IN	6,729,600	170,951,238	12/31/2004
78.	Wallis Foundation	IN	6,707,500	45,043,921	6/30/2004
79.	Fritz B. Burns Foundation	IN	6,680,000	155,789,259	9/30/2004
80.	Waitt Family Foundation	IN	6,549,647	157,342,483	12/31/2003
81.	The Grove Foundation	IN	6,338,626	56,926,245	9/30/2004
82.	Colburn Foundation	IN	6,085,931	152,197,414	12/31/2004
83.	Clinton Walker Foundation	IN	6,003,500	106,549	12/31/2004
84.	Bill Hannon Foundation	IN	5,961,333	56,554,807	9/30/2004
85.	Mattel Children's Foundation	CS	5,924,165	765,194	12/31/2003
86.	The Bolthouse Foundation	IN	5,871,407	935,531	12/31/2004
87.	Henry L. Guenther Foundation	IN	5,798,000	119,537,219	12/31/2004
88.	The Eisner Foundation, Inc.	IN	5,765,011	125,912,705	12/31/2003
89.	Union Bank of California Foundation	CS	5,750,022	2,023,845	12/31/2003
90.	Lakeside Foundation	IN	5,643,966	123,694,353	12/31/2004
91.	Charles and Helen Schwab Foundation	IN	5,609,571	160,304,016	6/30/2005
92.	L. K. Whittier Foundation	IN	5,594,000	98,810,033	4/30/2005
93.	The Gap Foundation	CS	5,456,964	7,798,771	1/31/2004
94.	The Roberts Foundation	IN	5,411,216	48,330,374	12/31/2003
95.	Wasserman Foundation	IN	5,265,200	207,104,977	12/31/2003
96.	S. Mark Taper Foundation	IN	5,222,600	124,558,168	12/31/2004
97.	S. H. Cowell Foundation	IN	5,130,248	169,801,309	12/31/2004
98.	Community Foundation Sonoma County	CM	5,116,404	99,400,199	12/31/2004
99.	Selim K. Zilkha Foundation	IN	5,100,000	224,325	9/30/2004
100.	The Crean Foundation	IN	4,958,440	84,767,990	12/31/2004

*Note: IN = Independent; CS = Corporate; CM = Community; OP = Operating.

Source: The Foundation Center, *Guide to U.S. Foundations* circa 2004, which includes all independent, corporate, community, and operating foundations making grants of at least one dollar during the relevant fiscal reporting period. Sources of data for these foundations include IRS information returns (Form 990-PF), foundation reports, and information reported to the Foundation Center on annual surveys of foundations with assets of at least \$100,000 or giving of \$50,000 or more. Assets are stated at market value. Total giving amount includes grants, scholarships, and employee matching gifts; it does not include all qualifying distributions, e.g., loans, PRIs, set-asides, and program or other administrative expenses.

Appendix D. Grant dollars received, 1999 and 2004

Region/County		Grant Dollars		Nominal		Adjusted	
		1999	2004	Change	Percent Change	Change	Percent Change
Bay Area		\$721,040,616	\$852,552,071	\$131,511,455	18.24%	\$14,711,821	2.04%
	Alameda	160,060,137	167,756,374	7,696,237	4.81%	-15,286,386	-9.55%
	Contra Costa	10,517,740	11,439,705	921,965	8.77%	-645,275	-6.14%
	Marin	31,553,788	35,100,082	3,546,294	11.24%	-1,262,417	-4.00%
	Napa	1,829,577	2,759,533	929,956	50.83%	551,900	30.17%
	San Francisco	333,329,414	411,649,443	78,320,029	23.50%	21,924,055	6.58%
	San Mateo	27,276,235	58,597,164	31,320,929	114.83%	23,293,118	85.40%
	Santa Clara	150,421,401	155,219,762	4,798,361	3.19%	-16,466,746	-10.95%
	Solano	851,025	40,000	-811,025	-95.30%	-816,505	-95.94%
	Sonoma	5,201,299	9,990,008	4,788,709	92.07%	3,420,078	65.75%
Central Coast		\$103,194,408	\$100,448,302	-\$2,746,106	-2.66%	-\$16,507,523	-16.00%
	Monterey	69,370,032	45,898,057	-23,471,975	-33.84%	-29,760,009	-42.90%
	San Benito	125,000	307,364	182,364	145.89%	140,255	112.20%
	San Luis Obispo	2,300,477	1,976,198	-324,279	-14.10%	-595,018	-25.86%
	Santa Barbara	9,556,260	27,454,801	17,898,541	187.30%	14,137,233	147.94%
	Santa Cruz	14,293,588	12,068,092	-2,225,496	-15.57%	-3,878,825	-27.14%
	Ventura	7,549,051	12,743,790	5,194,739	68.81%	3,448,840	45.69%
Central Valley – Central		\$64,237,752	\$77,813,258	\$13,575,506	21.13%	\$2,915,090	4.54%
	El Dorado	2,307,107	569,976	-1,737,131	-75.29%	-1,815,218	-78.68%
	Placer	402,287	422,012	19,725	4.90%	-38,091	-9.47%
	Sacramento	53,075,453	65,055,533	11,980,080	22.57%	3,067,472	5.78%
	Sutter	25,000	86,976	61,976	247.90%	50,060	200.24%
	Yolo	7,791,462	11,635,966	3,844,504	49.34%	2,250,377	28.88%
	Yuba	636,443	42,795	-593,648	-93.28%	-599,511	-94.20%
Central Valley - North		\$2,401,200	\$12,132,545	\$9,731,345	405.27%	\$8,069,186	336.05%
	Butte	1,609,800	447,782	-1,162,018	-72.18%	-1,223,364	-75.99%
	Colusa	95,600	10,000	-85,600	-89.54%	-86,970	-90.97%
	Glenn	0	175,000	175,000	n/a	151,025	n/a
	Shasta	578,000	11,458,033	10,880,033	1882.36%	9,310,282	1610.78%
	Tehama	117,800	41,730	-76,070	-64.58%	-81,787	-69.43%
Central Valley - South		\$18,626,943	\$42,327,060	\$23,700,117	127.24%	\$17,901,310	96.10%
	Fresno	3,151,170	9,653,326	6,502,156	206.34%	5,179,650	164.37%
	Kern	1,238,378	5,147,921	3,909,543	315.70%	3,204,278	258.75%
	Kings	160,925	205,817	44,892	27.90%	16,695	10.37%
	Madera	43,000	335,737	292,737	680.78%	246,741	573.82%
	Merced	93,000	1,170,320	1,077,320	1158.41%	916,986	986.01%
	San Joaquin	4,940,771	8,048,893	3,108,122	62.91%	2,005,424	40.59%
	Stanislaus	6,814,952	14,748,028	7,933,076	116.41%	5,912,596	86.76%
	Tulare	2,184,747	3,017,018	832,271	38.09%	418,940	19.18%

Appendix D. (continued) Grant dollars received, 1999 and 2004

Region/County	Grant Dollars		Nominal		Adjusted	
	1999	2004	Change	Percent Change	Change	Percent Change
Inland Empire	\$16,339,827	\$43,073,982	\$26,734,155	163.61%	\$20,833,019	127.50%
Riverside	9,747,248	33,761,128	24,013,880	246.37%	19,388,605	198.91%
San Bernardino	6,592,579	9,312,854	2,720,275	41.26%	1,444,414	21.91%
Los Angeles	\$440,353,544	\$618,955,911	\$178,602,367	40.56%	\$93,805,407	21.30%
Los Angeles	440,353,544	618,955,911	178,602,367	40.56%	93,805,407	21.30%
North Coast & State	\$11,784,745	\$9,513,643	-\$2,271,102	-19.27%	-\$3,574,471	-30.33%
Del Norte	0	330,000	330,000	n/a	284,790	n/a
Humboldt	8,705,653	5,223,115	-3,482,538	-40.00%	-4,198,105	-48.22%
Lake	0	33,000	33,000	n/a	28,479	n/a
Lassen	0	65,000	65,000	n/a	56,095	n/a
Mendocino	1,766,798	2,514,212	747,414	42.30%	402,967	22.81%
Modoc	152,000	93,090	-58,910	-38.76%	-71,663	-47.15%
Siskiyou	906,354	726,226	-180,128	-19.87%	-279,621	-30.85%
Trinity	253,940	529,000	275,060	108.32%	202,587	79.78%
Sierra	\$2,179,615	\$3,318,449	\$1,138,834	52.25%	\$684,206	31.39%
Alpine	0	20,000	20,000	n/a	17,260	n/a
Amador	0	0	0	0.00%	0	0.00%
Calaveras	45,000	99,182	54,182	120.40%	40,594	90.21%
Inyo	82,600	627,777	545,177	660.02%	459,172	555.90%
Mariposa	0	105,000	105,000	n/a	90,615	n/a
Mono	25,000	60,000	35,000	140.00%	26,780	107.12%
Nevada	1,451,750	1,338,515	-113,235	-7.80%	-296,612	-20.43%
Plumas	255,000	921,670	666,670	261.44%	540,401	211.92%
Sierra	125,250	0	-125,250	-100.00%	-125,250	-100.00%
Tuolumne	195,015	146,305	-48,710	-24.98%	-68,754	-35.26%
South Coast & Border	\$105,263,441	\$154,458,997	\$49,195,556	46.74%	\$28,034,673	26.63%
Imperial	834,372	1,854,022	1,019,650	122.21%	765,649	91.76%
Orange	38,173,476	46,058,304	7,884,828	20.66%	1,574,840	4.13%
San Diego	66,255,593	106,546,671	40,291,078	60.81%	25,694,184	38.78%
STATE	\$1,485,422,091	\$1,914,594,218	\$429,172,127	28.89%	\$166,872,719	11.23%

Source: The Foundation Center, *California Foundations*, 2001 and 2006. Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Appendix E. Average grant size received, 1999 and 2004

Region/County		Average Grant Size		Nominal		Adjusted	
		1999	2004	Change	Percent Change	Change	Percent Change
Bay Area		\$121,000	\$103,265	-\$17,735	-14.66%	-\$31,883	-26.35%
	Alameda	124,174	106,377	-17,797	-14.33%	-32,371	-26.07%
	Contra Costa	65,328	58,070	-7,258	-11.11%	-15,214	-23.29%
	Marin	75,488	66,477	-9,010	-11.94%	-18,118	-24.00%
	Napa	166,325	57,490	-108,835	-65.44%	-116,711	-70.17%
	San Francisco	115,140	119,388	4,248	3.69%	-12,108	-10.52%
	San Mateo	78,606	66,815	-11,790	-15.00%	-20,944	-26.64%
	Santa Clara	201,637	111,030	-90,607	-44.94%	-105,818	-52.48%
	Solano	47,279	10,000	-37,279	-78.85%	-38,649	-81.75%
	Sonoma	70,288	55,810	-14,478	-20.60%	-22,124	-31.48%
Central Coast		\$150,649	\$102,813	-\$47,836	-31.75%	-\$61,921	-41.10%
	Monterey	374,973	339,986	-34,988	-9.33%	-81,566	-21.75%
	San Benito	41,667	76,841	35,174	84.42%	24,647	59.15%
	San Luis Obispo	88,480	54,894	-33,585	-37.96%	-41,106	-46.46%
	Santa Barbara	43,636	57,317	13,681	31.35%	5,829	13.36%
	Santa Cruz	100,659	76,380	-24,279	-24.12%	-34,743	-34.52%
	Ventura	68,628	77,235	8,607	12.54%	-1,974	-2.88%
Central Valley - Central		\$176,964	\$164,510	-\$12,454	-7.04%	-\$34,991	-19.77%
	El Dorado	164,793	25,908	-138,885	-84.28%	-142,435	-86.43%
	Placer	50,286	28,134	-22,152	-44.05%	-26,006	-51.72%
	Sacramento	198,784	189,666	-9,118	-4.59%	-35,102	-17.66%
	Sutter	25,000	21,744	-3,256	-13.02%	-6,235	-24.94%
	Yolo	116,290	132,227	15,936	13.70%	-2,179	-1.87%
	Yuba	106,074	42,795	-63,279	-59.66%	-69,142	-65.18%
Central Valley - North		\$104,400	\$205,636	\$101,236	96.97%	\$73,064	69.98%
	Butte	160,980	26,340	-134,640	-83.64%	-138,248	-85.88%
	Colusa	95,600	10,000	-85,600	-89.54%	-86,970	-90.97%
	Glenn	0	87,500	87,500	n/a	75,513	n/a
	Shasta	57,800	309,677	251,877	435.77%	209,451	362.37%
	Tehama	58,900	20,865	-38,035	-64.58%	-40,894	-69.43%
Central Valley - South		\$114,276	\$135,230	\$20,954	18.34%	\$2,428	2.12%
	Fresno	82,926	92,820	9,895	11.93%	-2,821	-3.40%
	Kern	72,846	125,559	52,713	72.36%	35,512	48.75%
	Kings	160,925	51,454	-109,471	-68.03%	-116,520	-72.41%
	Madera	14,333	167,869	153,535	1071.18%	130,537	910.72%
	Merced	31,000	97,527	66,527	214.60%	53,166	171.50%
	San Joaquin	114,902	143,730	28,829	25.09%	9,138	7.95%
	Stanislaus	170,374	226,893	56,519	33.17%	25,435	14.93%
	Tulare	121,375	104,035	-17,340	-14.29%	-31,593	-26.03%

Appendix E. (continued) Average grant size received, 1999 and 2004

Region/County		Average Grant Size		Nominal		Adjusted	
		1999	2004	Change	Percent Change	Change	Percent Change
Inland Empire		\$93,370	\$118,989	\$25,619	27.44%	\$9,317	9.98%
	Riverside	94,633	152,765	58,132	61.43%	37,203	39.31%
	San Bernardino	91,564	66,049	-25,515	-27.87%	-34,564	-37.75%
Los Angeles		\$107,351	\$128,281	\$20,930	19.50%	\$3,356	3.13%
	Los Angeles	107,351	128,281	20,930	19.50%	3,356	3.13%
North Coast & State		\$133,918	\$80,624	-\$53,294	-39.80%	-\$64,339	-48.04%
	Del Norte	0	165,000	165,000	n/a	142,395	n/a
	Humboldt	164,258	98,549	-65,708	-40.00%	-79,210	-48.22%
	Lake	0	33,000	33,000	n/a	28,479	n/a
	Lassen	0	32,500	32,500	n/a	28,048	n/a
	Mendocino	103,929	86,697	-17,232	-16.58%	-29,110	-28.01%
	Modoc	76,000	46,545	-29,455	-38.76%	-35,832	-47.15%
	Siskiyou	69,720	40,346	-29,374	-42.13%	-34,901	-50.06%
	Trinity	84,647	48,091	-36,556	-43.19%	-43,144	-50.97%
Sierra		\$66,049	\$60,335	-\$5,714	-8.65%	-\$13,979	-21.16%
	Alpine	0	20,000	20,000	n/a	17,260	n/a
	Amador	0	0	0	0.00%	0	0.00%
	Calaveras	22,500	49,591	27,091	120.40%	20,297	90.21%
	Inyo	27,533	62,778	35,244	128.01%	26,644	96.77%
	Mariposa	0	35,000	35,000	n/a	30,205	n/a
	Mono	25,000	15,000	-10,000	-40.00%	-12,055	-48.22%
	Nevada	80,653	60,842	-19,811	-24.56%	-28,146	-34.90%
	Plumas	63,750	115,209	51,459	80.72%	35,675	55.96%
	Sierra	125,250	0	-125,250	-100.00%	-125,250	-100.00%
	Tuolumne	48,754	29,261	-19,493	-39.98%	-23,502	-48.20%
South Coast & Border		\$120,027	\$87,611	-\$32,416	-27.01%	-\$44,418	-37.01%
	Imperial	166,874	103,001	-63,873	-38.28%	-77,984	-46.73%
	Orange	115,328	82,988	-32,340	-28.04%	-43,709	-37.90%
	San Diego	122,469	89,535	-32,934	-26.89%	-45,200	-36.91%
STATE		\$119,139	\$111,307	-\$7,832	-6.57%	-\$23,081	-19.37%

Source: The Foundation Center, *California Foundations*, 2001 and 2006.
Adjusted dollars are calculated in 1999 dollars based on the California CPI (see California Department of Finance, 2006).

Appendix F. Grant dollars received per nonprofit from California and non-California foundations, 1999 and 2004

Region/County		Grant Dollars Received Per Nonprofit from California Foundations		Grant Dollars Received Per Nonprofit From Non-California Foundations	
		1999	2004	1999	2004
Bay Area		\$54,008	\$47,484	\$31,688	\$33,781
	Alameda	51,553	47,489	36,440	26,740
	Contra Costa	10,154	9,346	1,949	1,130
	Marin	41,108	40,697	6,701	4,073
	Napa	9,213	4,485	951	7,061
	San Francisco	95,417	90,478	78,373	91,587
	San Mateo	35,215	47,454	5,679	21,241
	Santa Clara	73,874	48,465	24,377	30,287
	Solano	2,587	69	1,246	69
	Sonoma	5,220	9,505	4,271	3,959
Central Coast		\$40,575	\$30,643	\$4,925	\$4,852
	Monterey	162,283	94,923	9,425	4,855
	San Benito	4,310	7,497	0	0
	San Luis Obispo	6,339	4,571	1,381	509
	Santa Barbara	11,631	29,660	4,035	6,946
	Santa Cruz	31,440	22,093	5,305	3,529
	Ventura	9,521	11,568	4,511	6,156
Central Valley - Central		\$32,627	\$21,336	\$4,851	\$12,629
	El Dorado	16,082	1,359	882	1,506
	Placer	218	521	1,636	769
	Sacramento	44,945	29,677	4,063	17,025
	Sutter	0	1,190	490	190
	Yolo	23,301	26,247	17,280	17,497
	Yuba	15,388	995	2,796	0
Central Valley - North		\$3,989	\$23,986	\$2,090	\$1,185
	Butte	6,760	1,436	2,234	590
	Colusa	10,622	1,000	0	0
	Glenn	0	10,938	0	0
	Shasta	1,765	56,498	2,013	2,262
	Tehama	0	1,043	3,366	0
Central Valley – South		\$8,271	\$15,067	\$1,405	\$2,658
	Fresno	5,607	12,878	339	2,182
	Kern	1,226	7,356	2,224	4,059
	Kings	3,353	2,899	0	0
	Madera	411	4,663	357	0
	Merced	455	9,143	391	0
	San Joaquin	10,911	13,909	3,793	5,439
	Stanislaus	24,287	42,057	860	1,448
	Tulare	9,433	9,821	729	1,353

Appendix F. (continued) Grant dollars received per nonprofit from California and non-California foundations, 1999 and 2004

Region/County		Grant Dollars Received Per Nonprofit From California Foundations		Grant Dollars Received Per Nonprofit From Non-California Foundations	
		1999	2004	1999	2004
Inland Empire		\$5,931	\$9,549	\$3,871	\$9,310
	Riverside	6,110	12,739	6,665	18,093
	San Bernardino	5,779	6,611	1,513	1,222
Los Angeles		\$41,439	\$42,108	\$17,377	\$24,582
	Los Angeles	41,439	42,108	17,377	24,582
North Coast & State		\$12,264	\$8,574	\$9,008	\$5,115
	Del Norte	0	12,692	0	0
	Humboldt	23,331	13,555	21,544	8,208
	Lake	0	0	0	589
	Lassen	0	2,031	0	0
	Mendocino	8,236	7,752	1,634	3,422
	Modoc	13,818	3,182	0	5,281
	Siskiyou	6,684	4,352	8,943	4,614
	Trinity	11,543	7,458	0	14,583
Sierra		\$3,771	\$6,369	\$2,283	\$473
	Alpine	0	6,667	0	0
	Amador	0	0	0	0
	Calaveras	946	1,681	270	0
	Inyo	2,360	14,947	0	0
	Mariposa	0	4,375	0	0
	Mono	1,471	3,158	0	0
	Nevada	6,860	6,917	4,056	1,346
	Plumas	882	19,201	6,618	0
	Sierra	13,917	0	0	0
	Tuolumne	3,430	1,772	1,105	153
South Coast & Border		\$17,109	\$16,642	\$7,479	\$10,244
	Imperial	12,642	21,195	0	1,415
	Orange	12,372	10,924	6,620	5,579
	San Diego	21,562	22,069	8,486	15,030
STATE		\$35,142	\$32,418	\$15,965	\$19,367

Source: The Foundation Center, *California Foundations*, 2001 and 2006.