

The Chronicle of Philanthropy

2009 Survey on Grant Making

We appreciate your efforts to fill out as much of this survey as possible before our Thursday, February 5 deadline. We can easily update our records with figures that you can't supply now but can provide to us after the deadline.

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Fiscal year ending in:	2007 <i>(Below is information you provided last year. Please make any necessary corrections.)</i>	2008 <i>(If final figures are not available, please provide estimates.)</i>	2009* <i>(Please provide budgets or estimates.)</i>
1. Date your fiscal year ends:	12/31/2007	12/31/2008	12/31/2009
2. Total assets (fair market value) at end of fiscal year (equivalent to line I on the Form 990-PF):	\$ 831,695,847	\$ 490,000,000	
3. Total assets (fair market value) as of 12/31/08:		\$	
4. Total operating and administrative costs (equivalent to Part I, Line 24d on the Form 990-PF):	\$ 4,779,955	\$ 5,400,000	\$ 6,000,000
4a. Compensation of officers, directors, trustees, etc. (equivalent to Part I, Line 13d on the Form 990-PF):	\$ 1,492,753	\$	\$
5. Total value of grants paid (equivalent to Part I, line 25d on the Form 990-PF):	\$ 39,810,371	\$ 36,600,000	\$ 41,200,000
6. Total value of program-related investments (put 0 if nothing was paid, equivalent to Part XII, line 1b on the Form 990-PF):	\$ 0	\$ 5,000,000	\$ 0
7. Total value of grants approved (including program-related investments):	\$ 43,371,742	\$ 40,250,000	\$ 41,200,000
8. Number of grants approved (including program-related investments):	515	521	
9. Number of grants paid (including program-related investments):	590	576	

*10. If you cannot provide figures for fiscal 2009, do you expect the value of grants paid to:

☐ Increase by 3% or more ☐ Decrease by 3% or more ☐ Remain the same ☐ Unknown

11. Has your foundation granted more than 5 percent of its distributable assets in either of the past two years?

☒ Yes ☐ No

12. Has your foundation increased the percentage of net assets the foundation seeks to distribute this year and/or in coming years because of the economy?

☐ Yes ☒ No

12a. If so, by how much? _____

12b. For how long? _____

13. Does your organization financially compensate any of its board members?

☒ Yes ☐ No ☐ Previously, but the practice was discontinued ☐ Considering it for the future

Fiscal year ending in:	2007	2008
14. Cash value of the single largest grant paid during the fiscal year to an organization not affiliated with the foundation:	\$3,000,000	\$5,000,000
15. Name of organization awarded that grant:	Charter School Growth Fund	Charter School Growth Fund
16. Median size of all grants approved:	\$30,000	\$25,000
17. Percentage of all grants approved that were for your grantees' general operating support instead of their specific projects:		43

18. Do you consider unsolicited grant proposals? ☒ Yes ☐ No

19. Is your foundation considered a "pass-through" foundation (does your foundation spend all of its assets in a given fiscal year)?

☐ Yes ☒ No

20. Has your foundation either started grant making in a new program area, or ceased support in one of its existing grant-making areas, in the past 12 months?

☐ Yes ☒ No

21. Does your foundation offer help other than direct grants (such as sponsoring conferences or offering financial advice) to the organizations it supports?

☒ Yes ☐ No

22. Has your foundation cut staff positions or other expenses because of the economic downturn?

☐ Yes ☒ No

23. Has your foundation cancelled, stalled, or spread out payments to grantees because of the economic downturn? ☐ Yes ☒ No

24. In response to the economic crisis, has your organization changed your grant-making programs or offered non-grant assistance to hard-hit charities or communities? ☐ Yes ☒ No

Grant-making areas:

Here are the foundation's top five grant-making areas as reported by *The Chronicle* last year:

Arts and culture, community and economic development, education, government and public policy,

25. From the following choices, please select your organization's top five grant-making areas for the fiscal year ending in 2008. Because of space considerations, we cannot list more than five.

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|--|--|---|
| <input type="checkbox"/> Abortion clinics and services | <input type="checkbox"/> Environment and conservation | <input type="checkbox"/> Nuclear-war prevention |
| <input type="checkbox"/> Aging | <input type="checkbox"/> Equipment purchases | <input type="checkbox"/> Other |
| <input type="checkbox"/> Agriculture and food | <input type="checkbox"/> Families | <input type="checkbox"/> Other: HIV/AIDS |
| <input type="checkbox"/> American Indians | <input type="checkbox"/> Foreign affairs | <input type="checkbox"/> Peace |
| <input type="checkbox"/> Animal welfare | <input checked="" type="checkbox"/> Government and public policy | <input type="checkbox"/> Population |
| <input type="checkbox"/> Antiterrorism | <input type="checkbox"/> Health | <input type="checkbox"/> Poverty |
| <input checked="" type="checkbox"/> Arts and culture | <input type="checkbox"/> Health (global) | <input type="checkbox"/> Public broadcasting |
| <input type="checkbox"/> Capital projects | <input type="checkbox"/> Health (U.S.) | <input type="checkbox"/> Public parks |
| <input type="checkbox"/> Character development | <input type="checkbox"/> Historic preservation | <input type="checkbox"/> Public policy |
| <input type="checkbox"/> Children and youths | <input type="checkbox"/> Housing | <input type="checkbox"/> Real-estate acquisition |
| <input type="checkbox"/> Civic affairs | <input checked="" type="checkbox"/> Human rights | <input type="checkbox"/> Recreation |
| <input type="checkbox"/> Civil rights | <input type="checkbox"/> Human services | <input type="checkbox"/> Religion |
| <input checked="" type="checkbox"/> Community and economic development | <input type="checkbox"/> International | <input type="checkbox"/> Science and technology |
| <input type="checkbox"/> Conflict resolution | <input type="checkbox"/> International relief and development | <input type="checkbox"/> Social entrepreneurs |
| <input type="checkbox"/> Criminal justice | <input type="checkbox"/> Internet access | <input type="checkbox"/> Social-science research |
| <input type="checkbox"/> Crisis intervention | <input type="checkbox"/> Jewish causes | <input type="checkbox"/> Substance abuse |
| <input type="checkbox"/> Disabilities | <input type="checkbox"/> Leadership | <input type="checkbox"/> Teenage-pregnancy prevention |
| <input type="checkbox"/> Diversity | <input type="checkbox"/> Local and regional causes | <input type="checkbox"/> United Way |
| <input type="checkbox"/> Economics | <input type="checkbox"/> Media and journalism | <input type="checkbox"/> Urban affairs |
| <input checked="" type="checkbox"/> Education | <input type="checkbox"/> Medical research and education | <input type="checkbox"/> Violence prevention |
| <input type="checkbox"/> Employment and training | <input type="checkbox"/> Mental health | <input type="checkbox"/> Women's issues |
| <input type="checkbox"/> Energy | <input type="checkbox"/> Minorities | |
| <input type="checkbox"/> Entrepreneurship education and training | <input type="checkbox"/> Nonprofit development | |

Other (please explain):

We welcome your views about trends in grant making at your foundation and others. Please feel free to send us your comments by e-mail, as an attachment to this survey, or in any way that is easiest for you. You may also use the space below for comments.

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Please submit a completed copy of this questionnaire along with a copy of your foundation's most recently
filed Form 990-PF by THURSDAY, FEBRUARY 5

Fax: (202) 466-2078

If you have questions please send an e-mail message to survey@philanthropy.com
or call Noelle Barton at (202) 466-1214 or Candie Jones at (202) 466-1043.

THANK YOU!