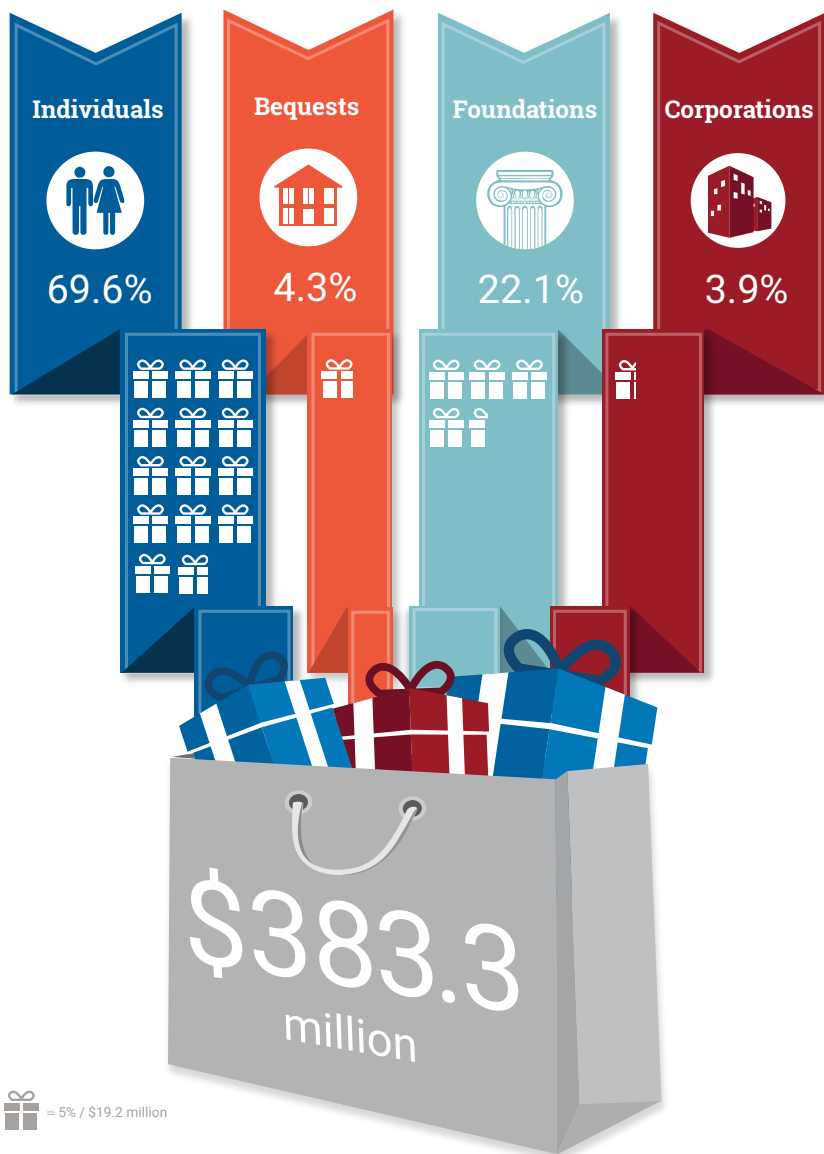


JOHNSON CENTER DATA BRIEF

November 2014

Estimate of Charitable Giving in Kalamazoo County, Mich.

In this brief, the Johnson Center for Philanthropy estimates the total amount of charitable giving in Kalamazoo County, Michigan, using multiple sources of data from the most recent year for which adequate data is available. The estimate given here is for the year 2012. Separate estimates are given for the amount donated from four sources: individuals, bequests/estates, foundations, and corporations. The annual *Giving USA* report is the source of national comparison data. Dollar amounts have not been adjusted for inflation.



In 2012, we estimate that donors of all types located in Kalamazoo County gave a total of \$383,386,829. This represents an increase of about \$50 million from our estimate of 2011 giving.

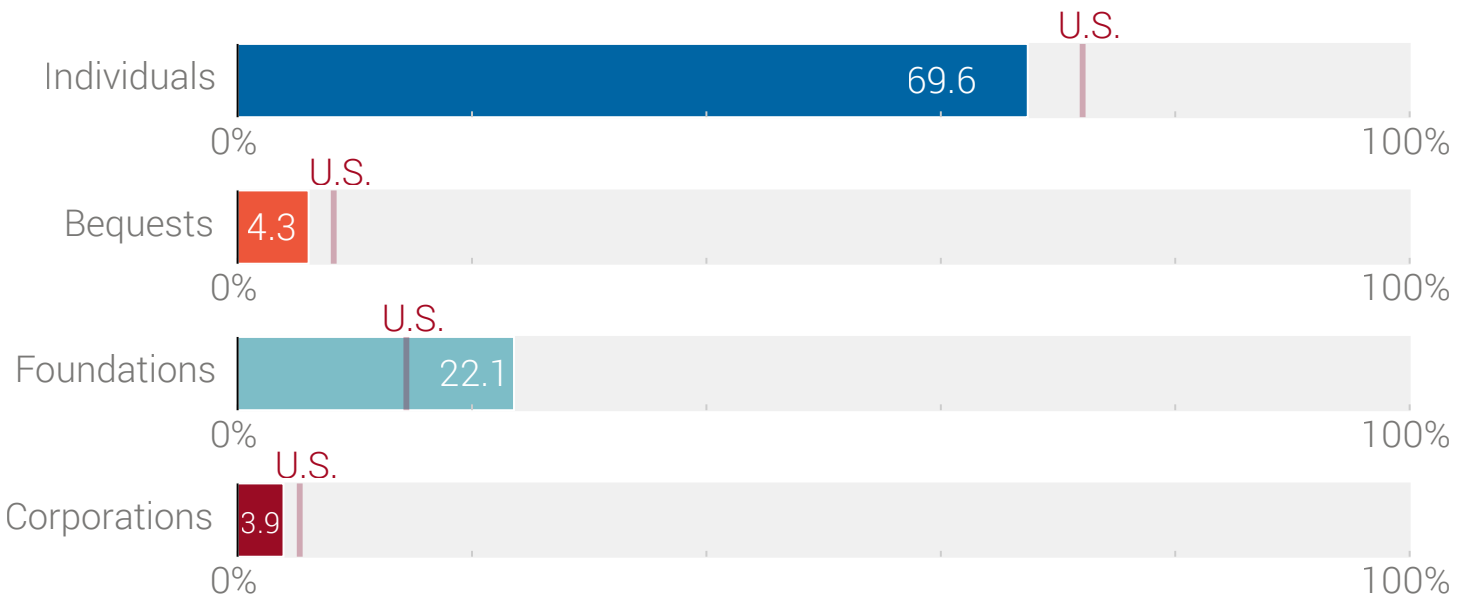
Of this \$383.39 million, the majority (69.6%) came from individuals, but foundations also contributed a significant portion (22.1%). In fact, foundations in Kalamazoo County contributed a much higher percent of total giving than foundations across the nation (14.5%).

While 3% of Michigan households are in Kalamazoo County, individuals in the county contributed 4% of Michigan's total estimated individual giving in 2012.



Estimate of Charitable Giving for Kalamazoo County, Mich.

The figure and table below compare the estimated giving from each type of donor in Kalamazoo County with the estimated giving from those types in the United States as a whole, as reported in *Giving USA*.



Donor Type	Estimated Giving			
	2011 Kalamazoo (in millions)	2012 Kalamazoo (in millions)	2011 National (in billions)	2012 National (in billions)
Individuals	\$219.21	\$266.97	\$220.26	\$228.93
Bequests	\$15.98	\$16.59	\$25.18	\$23.41
Foundations	\$83.40	\$84.45	\$43.83	\$45.74
Corporations	\$13.65	\$14.98	\$16.18	\$18.15
Total	\$333.24	\$383.39	\$305.35	\$316.23

- The percentage of total estimated charitable giving coming from foundations in Kalamazoo County (22.1%) is greater than the percentage from foundations across the U.S. (14.5%), and the percentage coming from individuals is slightly lower in Kalamazoo County (69.6%) than in the U.S. (72.4%) overall. This does not necessarily mean individuals in Kalamazoo County give less than individuals in other communities. Rather, these differences in percentage from the national estimates are likely caused by the relatively higher level of foundation giving in Kalamazoo County compared to other parts of the country.
- In fact, individual giving increased dramatically (21.8%) in Kalamazoo County from 2011-2012, much more than individual giving increased across the nation (3.9%).
- In prior years, a large portion of total foundation giving in Kalamazoo County came from the Arcus Foundation (38% in 2011). However, in 2012 the Arcus Foundation was no longer located in Kalamazoo County, yet foundation giving remained relatively stable, even increasing 1.7% overall from 2011.
- The percentage of estimated giving coming from corporations is slightly lower in Kalamazoo County than across the nation (5.7%).

Estimate of Charitable Giving for Kalamazoo County, Mich., for 2011

Notes on Estimation Methods

Estimating the amount of charitable giving in a given community is very difficult because of the diverse ways that people give and the lack of precise data on giving that is specified by region. However, calculating such estimates can help communities and their leaders understand the scale of their philanthropic contributions, track them over time, and use them for planning or other purposes.

The most respected estimate of total giving across the U.S. is provided each year in the publication *Giving USA*. We adapted that method as closely as possible to estimate charitable giving in Kalamazoo County. Note that, like other giving estimates, the one here is likely an underestimation of actual total charitable giving, because of individuals who do not report their full giving, the amounts given “in kind,” and other factors.

These figures estimate giving by donors located in Kalamazoo County, but some of that giving is distributed outside of Kalamazoo County.

Figures for individual giving include estimates of both itemized and non-itemized deductions. Giving for itemized deductions used the total itemized charitable deductions that Kalamazoo County tax filers claimed on their tax forms. The estimate for non-itemizers was calculated using the average giving (nationally) per household, based on the number of households in Kalamazoo County that did not itemize their taxes. This was an updated method in this year’s data brief, as more detailed county level data has become available. The same method was used to calculate an estimate of total individual giving for the state of Michigan, which then allowed for an assessment of the percent of statewide giving coming from Kalamazoo County. The American Community Survey five-year estimates were used to determine the percent of Michigan households in Kalamazoo County.

Bequest giving is based on the number of deaths of people over age 55 in Kalamazoo County multiplied by the size of the average bequest (from research conducted by Russell N. James).

Data for the foundation grantmaking total comes from the Foundation Center and includes only those foundations classified as independent, community, or operating. Several large public charities such as medical research and hospital foundations, arts organization trusts, and federated giving institutions are not included, following the *Giving USA* method of tracking those contributions when the initial philanthropic gift is made.

Corporate giving includes corporate foundations listed in Foundation Center data, as well as an estimate of other giving by corporations using data from the Bureau of Economic Analysis on the GDP of the Kalamazoo/Portage MSA.

Estimates prepared by the Dorothy A. Johnson Center for Philanthropy at Grand Valley State University. For all inquiries, please contact the Johnson Center at 616-331-7585.