

Washington Regional Association of Grantmakers



OUR REGION, OUR GIVING 2013

Giving in the Greater Washington Region

**Featuring a special look
at affordable housing**



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Letter from the President

Numbers never tell a full story.

Instead, they serve as benchmarks. We can compare the giving levels of funders in the Greater Washington region from year to year. We can compare the levels of grantmaking toward different issue areas. We can evaluate the philanthropic community based on the volume of its members' assets. These data are valuable – but what they lack is context.

In this year's edition of *Our Region, Our Giving*, we have added that context.

Instead of simply reporting on the hard numbers provided in public financial reports, we went straight to the source. We asked our region's leading funders not only about the amount of their giving, but also about the thinking behind their philanthropy. What challenges in the region are of the greatest concern to them? What are the issues facing the philanthropic community right now? What trends do funders expect to shape their giving in the coming years?

It is important for our region that leaders from every sector understand local philanthropy. Our hope is that this year's report will give funders a better understanding of their colleagues' thinking. We hope that it will give nonprofit leaders insight into the sector that supports their work. We hope that business and government leaders will have a better understanding of how philanthropy is addressing problems that affect every sector in our region.

As the Greater Washington region struggles to recover from the recession, while at the same time suffering the effects of federal budget cuts and the government shutdown, the brightness of our future will be determined by how intensely we work together.

By combining data with firsthand knowledge, we hope that this year's report will give you an informative ground level perspective on philanthropy and the role that it plays in the Greater Washington region.



Tamara Lucas Copeland
President

Washington Regional Association of Grantmakers
November 2013



Introduction

For this year's edition of *Our Region, Our Giving*, we're excited to take a new approach by focusing exclusively on the foundations and corporate giving programs that make up the membership of the Washington Regional Association of Grantmakers (WRAG). This community includes funders who are making the largest financial commitments to improving the Greater Washington region. It includes funders whose issue expertise and passion are driving critical changes. In total, it represents a highly diverse range of priorities, resources, experiences, and strategies, and it is reflective of the core of significant, ongoing giving in the region.

In years past, we took into account a wider range of grantmakers in the region to measure trends. One of the challenges of doing so is that the available data are two or more years old, due primarily to the amount of time that the IRS takes to release the information to the public.

By surveying our members directly, we are able to report more timely information about the Greater Washington region's philanthropic community. Our hope is that this report will serve not just as a compilation of data, but as an insightful perspective on the practices and ideas that help shape our region's social sector.

We are also pleased to add another new feature to the report: an in-depth exploration of one critical funding issue that is impacting our entire region. This year, we have focused on affordable housing – something that is truly *everyone's* issue. As we pointed out earlier this year in *The Daily WRAG**:

“According to research from the National Housing Conference, low- and moderate-income people without decent, affordable housing are more likely to have negative health consequences and poor education outcomes for their children. It is also harder for people to get to work and be reliable employees when their housing situation changes again and again – or for children to keep up with, much less meet, academic standards when they move from school to school.”

We hope that you will find this report to be useful and that it will urge you to consider new ideas about our region's social sector, particularly around affordable housing.

* The Daily WRAG, Why housing is everyone's issue, March 2013

Our Region's Philanthropic Challenge

The Greater Washington region's philanthropic sector faces a complex and unique set of circumstances.

Chief among them is our complicated geography, which brings together the District of Columbia, Maryland, and Virginia. Our governments are granted authority over policies and resources within the confines of our many borders – states, counties, and cities – while the challenges facing our residents flow freely through them. As such, cross-sector approaches to solving major regional problems are often stymied by local limitations.

On a larger scale, the federal government presents two obstacles. First, it is our local industry, and it isn't designed to generate the kind of personal wealth that builds foundations. Whereas the prosperity of local industries has created philanthropic giants in places like New York or Chicago, the federal government's resources are democratically distributed across the entire nation. Second, there is a misleading perception that, as the home of the deep-pocketed and relatively stable federal government, our region doesn't need national support. Reality couldn't be further from this idea, but the result is that national funders rarely consider making significant investments or piloting new ventures here.

Similarly, the District is home to many institutions of national stature, like the Kennedy Center, the American Red Cross, and the Smithsonian. The national philanthropic dollars that support them give the impression that national funds are, in fact, coming into our region. While this is true in a sense, as these major entities support our economy, national funds do not generally reach into the community in a transformative way.

Finally, the Greater Washington region has a reputation for being demographically young and transient. Our population fluctuates as workers spend a few years here and then move on. Opportunities for developing personal local commitments are fewer as many of our residents remain emotionally attached to their hometowns.

Philanthropy is relatively new in the Greater Washington region, and it has been formally organized into the WRAG network for barely more than two decades. Our funding community's youth, coupled with all of these issues, presents a philanthropic landscape that can be described with many words. Perhaps the most appropriate of these is "challenging."



The Big Picture:

Giving in the Greater Washington Region in 2012

2012 was a healthy year of growth for survey respondents, signaling that the tides of the economic crisis are finally receding. Giving increased by 9.2 percent over the previous year. This is a more significant uptick than the country as a whole saw last year. By comparison, the Foundation Center* estimated a 3.9 percent increase in total giving in the United States, from \$49 billion in 2011 to an estimated \$50.9 billion in 2012.

* Foundation Center, Key Facts on U.S. Foundations, 2013 Edition, October 2013



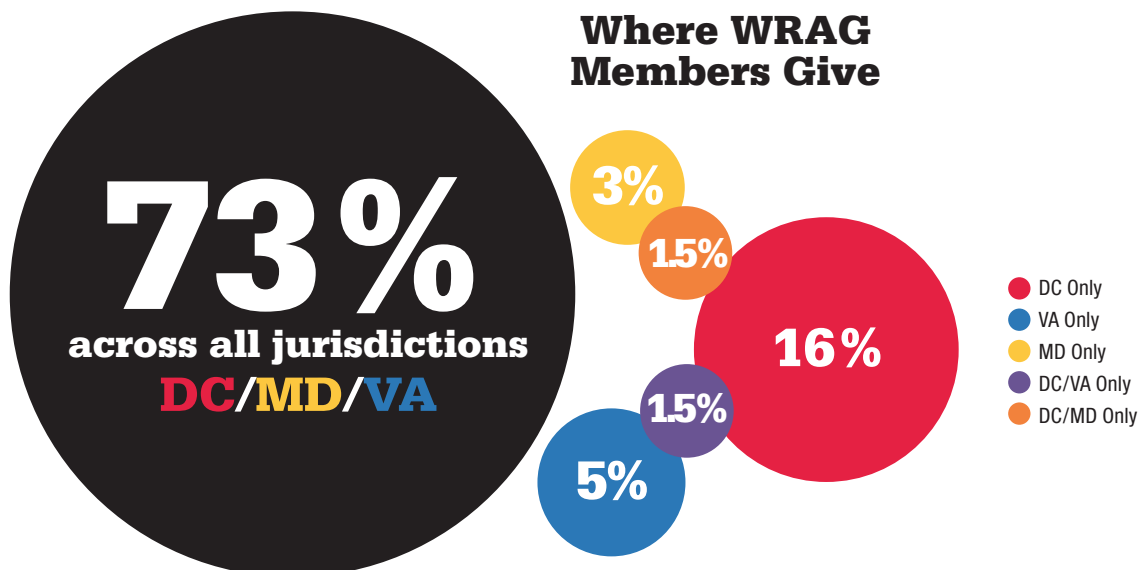
↑ 9.2%
Increase from 2011-2012

Geography

One of the unique factors in the Greater Washington region is that the challenges facing one jurisdiction generally affect the others. This is due to the fluidity of our region's residents across borders. By way of an economic example, George Mason University's Center for Regional Analysis reports that half of the region's commuters travel from their areas of residence to places of work in other parts of the region.*

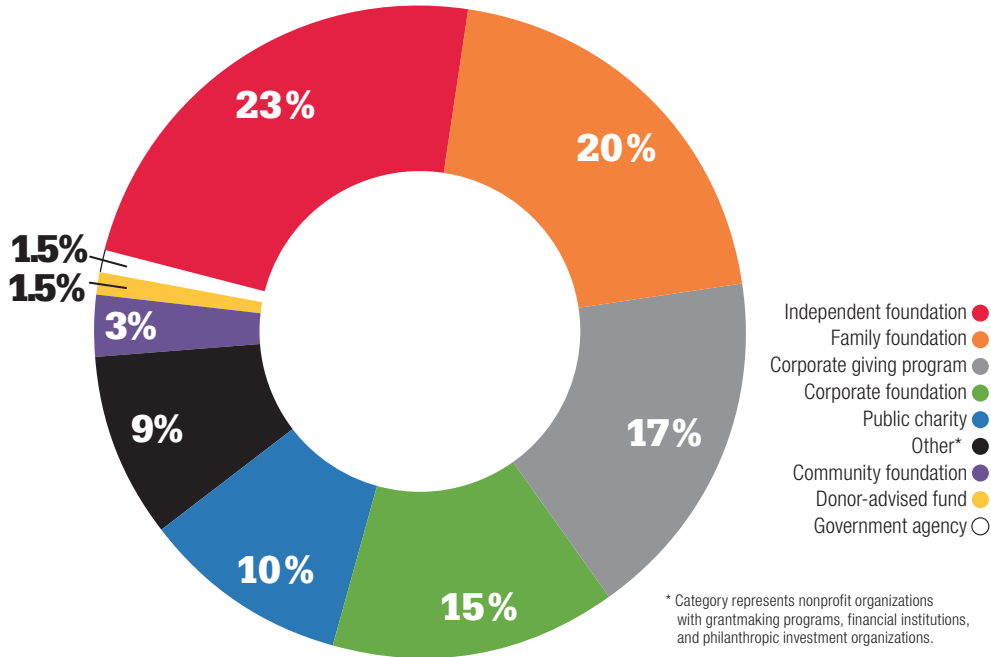
Recognizing that the needs of the region are not contained by geography, the vast majority of WRAG members (73%) fund across all three "states" – the District of Columbia, Northern Virginia, and suburban Maryland. It is important to note that, due to funding sources or scope of mission, most grantmakers that do not fund in multiple jurisdictions are legally prohibited from funding across borders. These funders do, however, participate in regional conversations by representing their respective jurisdictions.

* Center for Regional Analysis, Update from the American Community Survey Worker Flows in the Washington Metropolitan Area, 1990-2010, May 2013



Types of Grantmakers

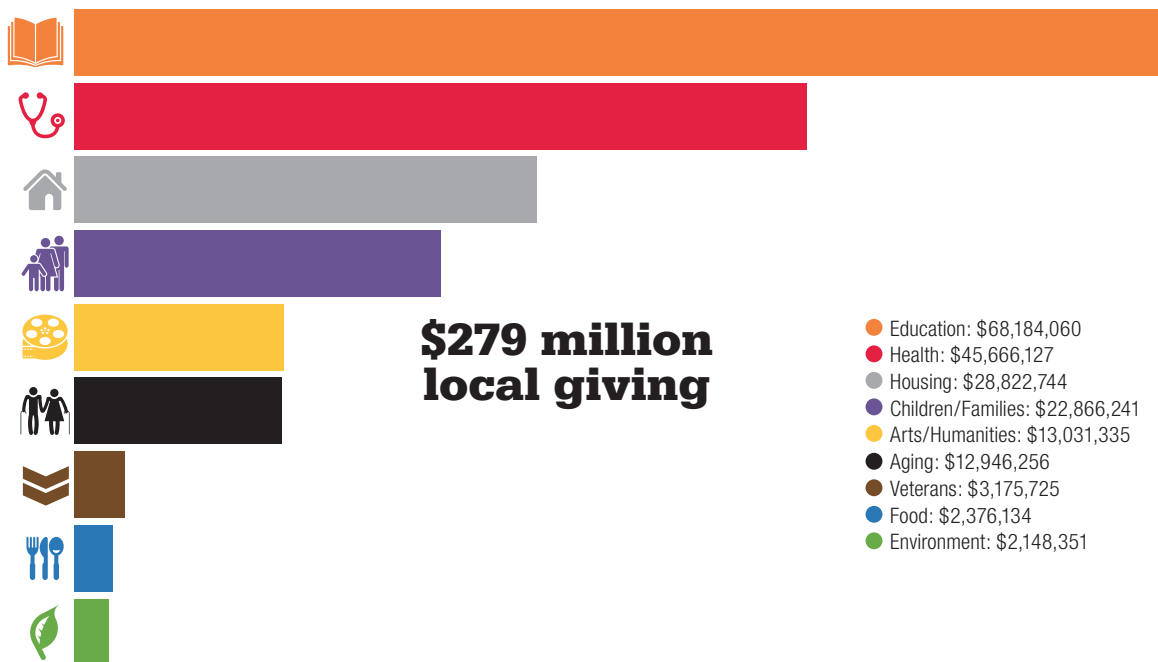
The Greater Washington region's funding community is comprised of a variety of types of grantmaking institutions. Survey respondents fall into the following categories:



Issue areas

WRAG members fund across a wide spectrum of issue areas. Their giving doesn't always fit neatly into buckets. Still, a number of broad issue areas attract a significant amount of local giving. The top two, education and health, are also the two issues that attract the most institutional philanthropic support across the country* – though the positions are reversed. Of the \$279 million in local giving, about 70 percent (\$199 million) is divided among the following issue areas:

* Foundation Center, Key Facts on U.S. Foundations, 2013 Edition, October 2013



6

The biggest concerns in the Greater Washington region

We asked funders which issues in the Greater Washington region were of the greatest concern to their organizations. The majority of the responses were aligned with the giving levels by issue area – **education and health were among the most frequently mentioned**. Some responses were more detailed, however, offering specific visions both within issue areas and for the wider philanthropic and nonprofit sectors. These responses, some of which are highlighted below, generally fit into three buckets: issue areas, philanthropic practices, and the nonprofit sector.

1. Issue areas

“Moving homeless families to stability, providing permanent, loving homes for children in foster care, [and] increasing the academic achievement of children from low-income communities.”

“Access to quality healthcare for the low-income uninsured, healthy eating and active living, health literacy, childhood obesity, health equity, [and] access to healthy food.”

“Showing the impact of the Washington, D.C., creative economy in such a way that demonstrates the arts’ ability to be an economic driver and job creator.”

“Preparing students to obtain a job with a livable wage.”

2. Philanthropic practices

“Our bigger concern is aligning with other foundations to accelerate the impact in our region. There is too much inefficiency and redundancy.”

“Lack of coordination among philanthropic and impact investors to [foster] collective impact.”

3. The nonprofit sector

“Investing in high-performing nonprofit organizations that are serving the core, healthy developmental, learning, and educational needs of children from low-income families in the National Capital Region.”

“Funding organizational excellence. Moving beyond charity care models and investing in organizations that demonstrate sound operational practices.”

Sequestration

One particular point of local economic tension has been the federal budget cuts brought on by sequestration. While these deep cuts were designed as an unthinkable failsafe to force a bipartisan budget agreement, the cuts have instead been realized over the course of 2013 and are poised to remain in effect in the near future. During the initial months of sequestration, the local economy proved to be resilient.

As such, 76 percent of survey respondents said that they had not observed their grantees being affected by the budget cuts in 2013. However, local economists note that effects of sequestration are now beginning to take hold. For example, the *Washington Post* attributes the cuts to a significant decline in the median household income in Northern Virginia.* Expect sequestration to be a more prominent factor in the Greater Washington region’s nonprofit community in the upcoming year.

* Washington Post, Virginia’s median household income takes hit, census data indicate, 9/19/13

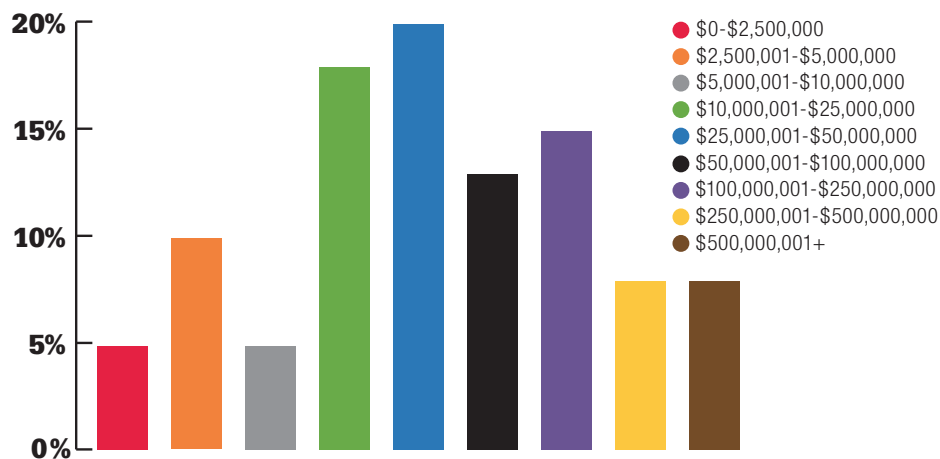
A Snapshot of the Funding Community

The Greater Washington region is home to a diverse community of funders with a wide range of resources. As we noted in the introduction, our region's industry is the federal government. Since the government doesn't afford the same wealth-building opportunities that some industries in other cities do, our local foundations do not reach the highest tiers of American philanthropy. While we are home to a number of foundations with very large asset bases and generous grantmaking budgets, no local private foundations rank among the nation's top 100 by asset size.* Only The Freedom Forum, an operating foundation,** appears on that list.

* Foundation Center, Top 100 U.S. Foundations by Asset Size (as of 10.19.13)

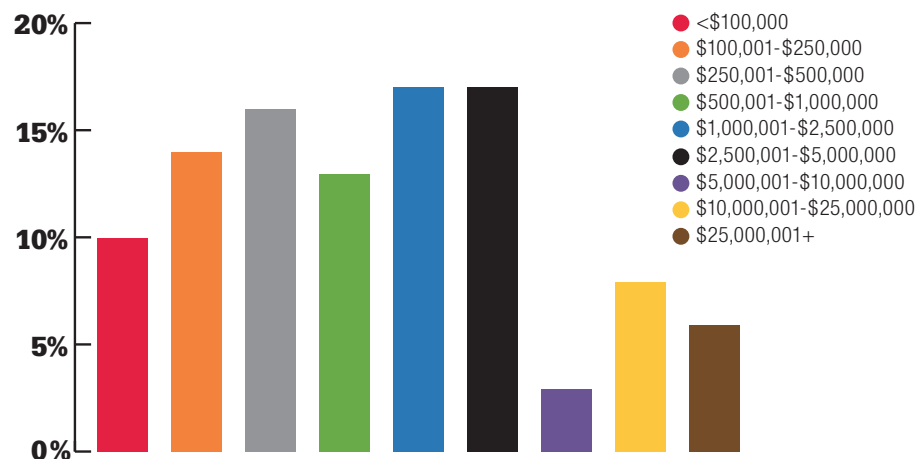
** An operating foundation uses most of its assets to support its own programming rather than making grants to the wider community. The Freedom Forum supports the Newseum.

Respondents by Asset Base*



* Some survey respondents declined to provide asset information.

Respondents by Giving Level



Median Staff Size

(Based on full-time employees administering local grants)

As might be expected, the median number of full-time staff members administering local grants increases with larger grantmaking budgets – but only above a certain level. Funders with local annual grants budgets under \$2.5 million – almost 70 percent of survey respondents – all report having a median full-time staff complement of one or two. While some funders supplement their staff with part-time employees or consultants, no discernible trend for these staff members emerges in correlation to grantmaking budgets.

Number of Full-time Staff Members by Giving Level



Types of Cash Support

More than 60 percent of respondents offer general operating and capacity building grants. At the opposite end, however, barely any respondents offered cash loans in 2012, though future trends, outlined later in this report, include an expected slight rise in loans next year. At the same time, it is worth noting that this survey was conducted months before the government shutdown became a threat to the nonprofit community. During the shutdown, some funders discussed the need for emergency bridge loans, but determined that the required due diligence for making these loans could not be completed quickly enough at the time. The 2013 shutdown has passed, but the possibility of another shutdown looms ahead. As such, loans may become a common type of support in 2014.

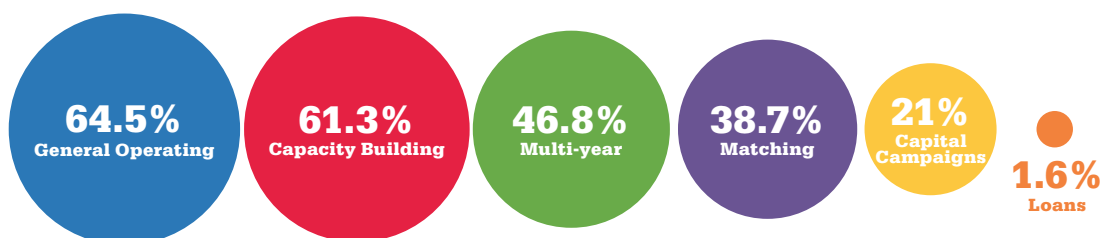
More than 40%
of survey respondents engage in or fund advocacy efforts.

Nearly 20%
are engaging in mission-related investing.*

* Mission-related investing is the use of assets to make strategic investments (rather than grants) that support a foundation's social mission.

In addition to these more common types of support, some funders noted that they fund sponsorships, special events, and scholarships.

Types of Support by percentage of respondents



Working together to maximize impact

A sizeable number of grantmakers in the Greater Washington region work collaboratively. More than 27 percent of survey respondents align their giving strategies with like-minded funders. Forty-two percent pool their grantmaking dollars with colleagues through funding collaboratives.

42%

of funders participate in
funding collaboratives

27%

align giving

Examples of collaborative projects currently underway in the WRAG community include:



HIV/AIDS

In 1988, local funders came together to create the Washington AIDS Partnership. This funding collaborative, in which more than 30 grantmaking organizations currently participate, has become the largest private funder of HIV/AIDS prevention, care, and advocacy in the Greater Washington region.



FOOD EQUITY

In 2011, a group of local foundations came together at WRAG to examine how food can be used to build healthy people and healthy places. They envision the creation of an equitable food system that ensures food security and decreased nutrition-related chronic disease for all, affordability of nutrient rich, good food, investments which promote equity in every element of the food system, and increased investment in the local and sustainable food economy.



ECONOMIC SECURITY

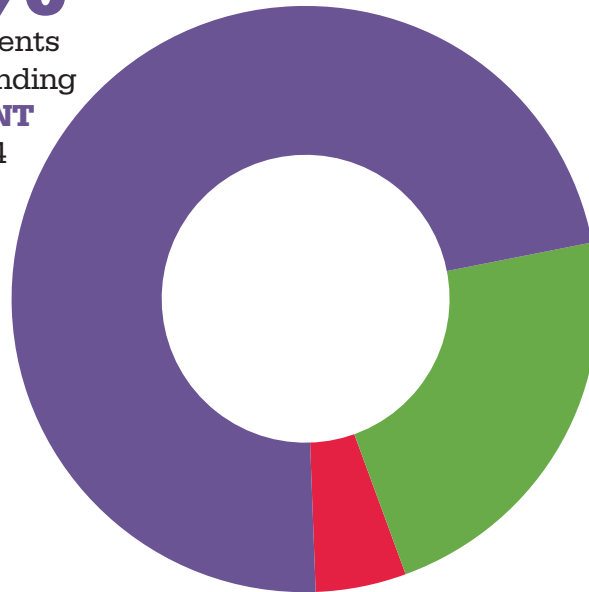
Cleveland's Evergreen Cooperatives have significantly increased opportunities for low-income individuals through cooperative ownership of businesses. Recently, a collective of funders supported a study that found that an exceptionally favorable climate for this model exists in our region. These funders are currently developing an action plan to launch local employee-owned businesses in our region as part of the Community Wealth Building Initiative.

The Road Ahead

Funders in the Greater Washington region have seen significant asset growth in the last year and have matched it with increases in giving, thanks to an improving, but not yet stable, economy. Continuing instability is affecting funders' plans for the immediate future. Slightly less than a quarter of respondents plan to increase their grantmaking budgets, and only about 18 percent plan to increase staff salaries. No respondents have plans to decrease salaries and less than two percent plan to reduce staff size.

The composition of our funding community will experience major changes in the next few years. When asked whether they had plans to end grantmaking activities in the next five years, only three funders said yes. One of those foundations is the Freddie Mac Foundation, which has been directed by the conservator to complete its funding activities. The foundation announced in May of this year that it will complete its grantmaking between now and 2016. In addition, Fannie Mae announced in September – after survey results were collected - that it will officially end its grantmaking in 2013. Combined, these four funders represented \$25.4 million in local giving during 2012.

72.6%
of survey respondents
plan to continue funding
at their **CURRENT**
LEVEL in 2014



22.6%
of survey respondents
plan to **INCREASE**
grant budgets in 2014

4.8%
of survey respondents
plan to **DECREASE**
grant budgets in 2014

Future trends

Philanthropy is driven by innovation and new concepts. Some trends blow in quickly and then fade away just as fast. Others collect a critical mass of support and have the potential to fundamentally improve the way the sector works. We put our ear to the ground to listen for trends bubbling up, and then we asked survey respondents which ones they believe will impact their own work in the coming year.

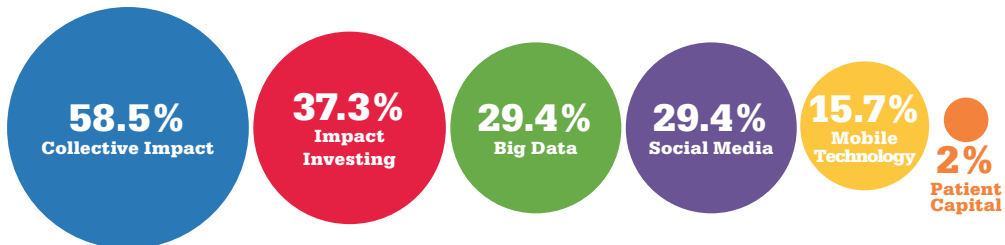
By a wide margin (59 percent), respondents identified collective impact as a meaningful trend. This response falls in line with what we're witnessing firsthand. Earlier in 2013, WRAG filled a room with funders and nonprofit leaders to hear from the Strive Network's Jeff Edmondson about the power of the collective impact model. In short, collective impact represents a shared community vision for an issue area, data-driven decision making, collaborative and cross-sector action, and long-term investment toward sustainability. As the survey shows, this trend is one that is likely to influence the grantmaking community in a major way moving forward.

Around a third of respondents also noted that impact investing, big data, and social media will all play a significant role in their future grantmaking efforts.

14.5%
of respondents who do not currently participate in mission-related investing plan to do so in 2014

6.5%
will make loans or program-related investments in 2014

What trends do funders expect to affect them?



A Special Look at Affordable Housing

The high cost of housing in the Greater Washington region is well documented. The Metropolitan Washington Council of Governments, the Center for Regional Analysis at George Mason University, and the National Low Income Housing Coalition have recently published reports indicating a significant gap between the wages earned by many of the region's residents and the cost of rental and for sale housing. In addition, the Community Foundation for the National Capital Region has commissioned a comprehensive report on the region's shelter and housing system. The report will be released in early 2014 and will include in-depth analysis of the region's affordable housing supply.

At this time, we know:



Almost **50 percent of renters** and **33 percent of homeowners** in our region are housing cost burdened, meaning that they **spend more than a third of their income** on their **housing costs**.*

*National Low Income Housing Coalition, *Out of Reach*, 2013



Fair Market Rent for our area is **\$1,412 for a 2-bedroom apartment**. A household would need to earn **\$56,480 annually for that rent to be affordable** to them.**

** Center for Regional Analysis, *Update from the American Community Survey: Housing Affordability in the Washington DC Metropolitan Area*, April 2013



There are **11,547 homeless people** in the region.***

*** Metropolitan Washington Council of Governments, *Homelessness in Metropolitan Washington: Results and Analysis from the 2013 Point-in-Time Count of Homeless Persons in the Metropolitan Washington Region*, 2013

In reaction to the existing and growing need for affordable housing in the region, WRAG decided to shine a spotlight on this critical issue and how our members are currently addressing it.

WRAG Members and Affordable Housing

As noted earlier in the giving report, housing was the third largest recipient of WRAG member grant dollars (\$28,882,744) in 2012, behind education and health. Support came from 36 percent of survey respondents. Because housing funding can include support for buildings and/or the people who live in them, our survey investigated further to determine the kinds of support provided. When asked whether their organization provided support for housing-related issues, including homelessness, supportive housing, advocacy, and tenant organizing, the total number of respondents jumped to 49 percent.

Thirty-one respondents support housing. It's important to note that four of them provide a full 90 percent of the total giving for housing – and two of those four are the Freddie Mac Foundation and Fannie Mae.

Although corporate foundations and corporate giving programs only represent 32 percent of the survey respondents who indicated support for affordable housing and related activities, corporate funders account for the vast majority – 84 percent – of the total giving toward housing in 2012. This is largely because of the

Freddie Mac Foundation and Fannie Mae. Additionally, banks, which are a significant portion of the corporate funding community, are encouraged through the Community Reinvestment Act to support low- to moderate-income neighborhoods and individuals. Financial institutions are given letter grades for the level of support they provide and significant support for affordable housing is one way an institution can improve its grade.

The breadth of support for housing and housing-related issues among responding family foundation members was particularly strong. Representing less than a quarter of all survey respondents, family foundations still account for 36 percent of funders that provide support for affordable housing and related activities.

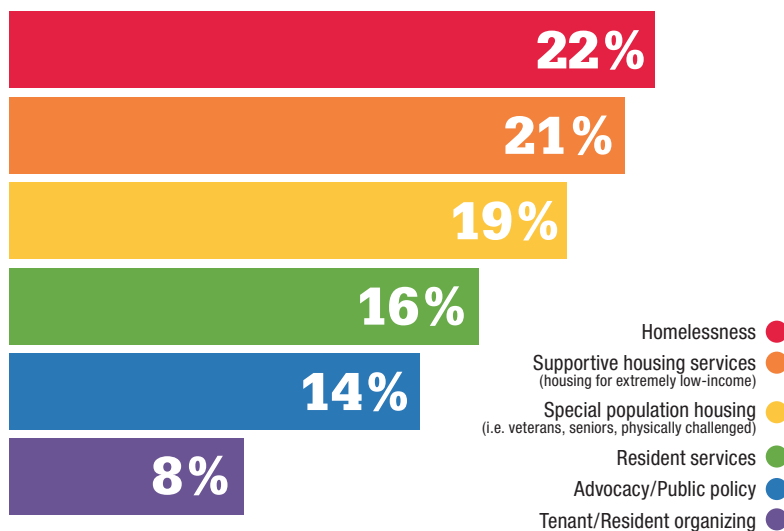
What WRAG Members Fund

Our survey indicates that funders are more likely to give smaller operating grants to affordable housing organizations rather than larger grants to develop affordable housing units. Reflecting the diversity of funding options, 14 percent of respondents indicated support for housing trade associations, housing advocacy efforts, community development financial institutions (CDFIs*), or intermediaries.** Only three percent of the respondents indicated that they provide loans to support actual housing development expenses.

Twenty-nine percent of the survey respondents, many of whom did not self-identify as affordable housing funders, indicated that they supported housing-related issues. These survey respondents were most likely to provide support for homelessness, supportive housing, and special population housing. This question was specifically asked of non-housing funders so that we could see how many members had missions that clearly overlapped with those members who identify as housing funders. Enhancing the understanding of and cooperation between these related but distinct groups of funders will move us closer to creating a full continuum of housing options in the region.

*CDFIs are financial institutions that focus on providing credit to underserved markets.
 **Intermediaries, in this instance, are organizations that link neighborhoods and affordable housing developers to resources, including funding and technical expertise necessary for the neighborhood's revitalization.

Housing-Related Issues Supported by Non-Housing Funders



Affordable Housing as a Cross-Cutting Issue

Health

The connection between stable affordable housing and improved health is documented in a recent academic literature review by the Center for Housing Policy.* Research indicates that stress around mortgage payments and home foreclosure is linked to hypertension, heart disease, anxiety, and depression. Whether you're a health funder concerned about the negative health consequences of high house payments or issues like the impact of lead-based paint on children's health, collaboration with your housing funding colleagues will extend and deepen the impact of your work.

*Center for Housing Policy, The Impacts of Affordable Housing on Health: A Research Summary, May 2011

Smart Growth

The Greater Washington region tops the nation in the percentage of commuters (27 percent) who have commutes of an hour or more.* To address both the shortage of affordable housing near jobs and the amount of congestion in the region, smart growth funders and affordable housing funders can work together to support the preservation of existing affordable housing and the production of new affordable units near job and transit centers.

*U.S. Census Bureau, American Community Survey, 2011

Education

An Urban Institute paper summarizes research indicating that better quality housing leads to better educational outcomes. Conversely, homeless students and other students who are forced to move frequently score lower on standardized tests than their peers.* By aligning funding, education and housing funders can help preserve affordable housing, which allows families to stay in their homes and children to stay in their schools, improving both educational and housing outcomes.

*Urban Institute, Housing as a Platform for Improving Education Outcomes Among Low Income Children, May 2012

An Uncertain Future

Looking forward, it is unclear if our region's philanthropic institutions can maintain their current support for affordable housing and housing-related activities. While eight percent of survey respondents indicated that they are planning to add, or are at least considering adding, affordable housing to their funding portfolio, it is hard to imagine that these new funders will fill the gap created as Fannie Mae and the Freddie Mac Foundation wind down their philanthropic activities.

The impact of the end of Fannie Mae's and the Freddie Mac Foundation's grantmaking on the region's affordable housing organizations is hard to overstate. Clearly, these two funders provided a significant source of support for nonprofits working on housing and housing-related issues. In 2012, 100 percent of Fannie Mae's philanthropic contributions – \$3,865,000 – went toward housing. This amount, which was dramatically reduced from previous years, represented 13 percent of the total affordable housing giving from survey respondents. In 2012, the Freddie Mac Foundation provided \$12,737,600 – or 44 percent of our survey's housing giving – to Washington area programs that support “family stability through housing.” Unless other funders increase the amount of their giving to affordable housing organizations, many area nonprofit housing organizations are going to have to cut back on staff and/or eliminate programs when support from Fannie Mae and the Freddie Mac Foundation ends.

A Certain Future

What Stephen Fuller, director of the Center for Regional Analysis at George Mason University, sees in our region's future are problems created by a shortage of affordable housing. Based on his research and analysis of current factors, as well as economic projections, he forecasts that **our region will:***



Generate 1.8 million employment vacancies in the next 20 years



Need to add at least 35,000 units of housing per year through 2030 to accommodate these new workers



Need to create a housing supply across the price spectrum to accommodate the range of incomes our region's future workers will earn

*Washington Business Journal, Stephen Fuller: DC Region Needs 35,000 More Housing Units, 9/18/12

Unless the affordable housing shortage is addressed, rising home prices will be a significant factor in inflation and will make it harder for our region's low-income residents to get by. It will also make it more difficult to attract workers to our region.

Affordable housing should be a regional priority now more than ever because of the existing shortage, the growing future need, and the end of funding from Fannie Mae and the Freddie Mac Foundation. To make a dent on this issue, it will be even more important for funders to collaborate to leverage resources, raise the visibility of affordable housing and affordable housing philanthropy, and work as partners not only within philanthropy, but with the nonprofit, business, and government sectors. The economic and social health of our region depends on it.

Acknowledgements

The Washington Regional Association of Grantmakers would like to thank the following members for participating in this year's giving survey:

AARP Foundation	The Hitachi Foundation
Agua Fund, Inc.	The Horizon Foundation
Association of American Medical Colleges	IBM
BB&T	International Monetary Fund
Bernstein Family Foundation	Jack and Jill of America Foundation
The Herb Block Foundation	Kaiser Permanente
The Boeing Company	The MARPAT Foundation
Booz Allen Hamilton	The J. Willard and Alice S. Marriott Foundation
Christopher W. Brown & Mimi Conger Fund	Eugene and Agnes E. Meyer Foundation
Butler Family Fund	Mitsubishi Electric America Foundation
Carter & Melissa Cafritz Charitable Trust	Claude Moore Charitable Foundation
The Morris & Gwendolyn Cafritz Foundation	The Curtis and Edith Munson Foundation
Calvert Foundation	National Geographic Education Foundation
Capital One Community Affairs	New Venture Fund
CareFirst BlueCross BlueShield	Northern Virginia Health Foundation
Citi Community Development	Northrop Grumman
Clark Charitable Foundation	Omega Foundation
Naomi & Nehemiah Cohen Foundation	Open Society Foundations - Washington, D.C.
The Community Foundation for Northern Virginia	The Palmer Foundation
The Community Foundation for the National Capital Region	PNC Bank
Consumer Health Foundation	Prince Charitable Trusts
Jack Kent Cooke Foundation	Public Welfare Foundation
DC Children & Youth Investment Trust Corporation	Alexander and Margaret Stewart Trust
DC Commission on the Arts and Humanities	Barry S. & Evelyn M. Strauch Foundation
de Beaumont Foundation	Hattie M. Strong Foundation
Deloitte LLP	United Way of the National Capital Area
Fannie Mae	Venture Philanthropy Partners
Freddie Mac Foundation	Washington Area Women's Foundation
Gannett Foundation, Inc.	Washington Gas
Healthcare Initiative Foundation	Wells Fargo
Corina Higginson Trust	World Bank Group
Hill-Snowdon Foundation	



Thanks

This annual giving report would not be possible without the support of our generous sponsor and funders.

Thanks to our sponsor, **Capital One**, for their ongoing commitment to this publication.

The affordable housing section of this report was made possible through support from **Fannie Mae**, with additional support from **Citi Community Development**.

About

The Washington Regional Association of Grantmakers (WRAG) is a network of funders dedicated to promoting increased, effective, and responsible philanthropy in the Greater Washington region.

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