Benchmarking Beyond Asset Size:
2010 Top 100 Lists

A Communications Resource to Promote Community Philanthropy
CF INSIGHTS’ TOP 100 LISTS

- HELP COMMUNITY FOUNDATIONS DEFINE THEMSELVES WITH METRICS BEYOND ASSET SIZE AND
- PROVIDE DATA POINTS FOR COMMUNICATING TO THE PUBLIC

**Most Active Grantmakers**
Lists the field’s 100 highest distribution rates (grants as a percentage of assets) alongside percentage of DAFs per foundation.

**Most Gifts per Capita**
Lists the field’s 100 highest average gifts received per person. This is alongside of the total population area served (as defined by the foundation).

**Most Activity Volume**
Lists the field’s 100 highest transactions (i.e. gifts and grants processed in FY 2010) alongside average transaction size.

**FACT:** If your foundation made one of these lists, then you are able to communicate what you already know – you have a generous community!

As noted in “Benchmarking Beyond Assets,” these rankings are not intended to represent what is ‘best’. Rather, these rankings represent a new way of gauging the unique characteristics of your own foundation and helping define appropriate peer benchmarks.
How do I talk about my community foundation’s ranking?
QUANTITATIVE, COMPARATIVE DATA CAN INFORM TALKING POINTS ABOUT YOUR FOUNDATION’S ROLE IN THE COMMUNITY

Here are some ideas from your peers to help frame your own insights when creating a press release, blog post, or talking points for a conversation with a local reporter.

<table>
<thead>
<tr>
<th>Theme to convey</th>
<th>Example</th>
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<tbody>
<tr>
<td><strong>Most Active Grantmakers</strong></td>
<td>• “The ranking shows that more dollars are being put to work in the community compared to other foundations.”</td>
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<tr>
<td><strong>Most Gifts per Capita</strong></td>
<td>• “Gifts to the community foundation on a per capita basis is $40 per person in our area. It speaks volumes regarding the generosity of our donor community.”</td>
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<td><strong>Most Activity</strong></td>
<td>• “We have processed more gifts and grants than larger foundations. Our donors believe in us when it comes to charitable giving.”</td>
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<tr>
<td><strong>Note Level of Community Investment</strong></td>
<td>• “Having relatively high gifts per capita suggests that our community is building a greater ability to make grants than other community foundations similar to us.”</td>
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<tr>
<td><strong>Celebrate Growing Grantmaking Resources</strong></td>
<td>• “We have processed more gifts and grants than many larger foundations. We truly are putting investments into multiple parts of the community.”</td>
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<td><strong>Note Level of Donor Activity and Trust</strong></td>
<td>• “We have processed more gifts and grants than larger foundations. Our donors believe in us when it comes to charitable giving.”</td>
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<tr>
<td><strong>Note Diversity of Activity</strong></td>
<td>• “We have processed more gifts and grants than many larger foundations. We truly are putting investments into multiple parts of the community.”</td>
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Community Foundation of Herkimer & Oneida Counties included in two top 100 lists
Jun 30, 2010
UTICA, N.Y. - The Community Foundation of Herkimer & Oneida Counties, Inc. has earned spots on two of three prestigious Community Foundation Top 100 Lists that were released on June 23.

There are more than 700 community foundations in the United States; of these, The Community Foundation of Herkimer & Oneida Counties is on the list of most active grantmakers at number 97 and the list of most gifts per capita at number 49.

In 2009, The Community Foundation awarded 313 grants in excess of $5.8 million to 139 not-for-profit organizations that serve the residents of Herkimer and Oneida counties. The Foundation also received 1,633 gifts totaling $8,634,244 and 14 new funds were created.

Foundation President & CEO Peggy O'Shea said, "We have long known that we live in one of the most generous communities in the nation, a fact these lists support. It goes to show that we have a great deal of heart and we truly care about our neighbors and the place we call 'home.' As a community, we give where we live."

The lists were released by CF Insights, which compiles and distributes data and information on finances, operations and best practices for community foundations nationwide. CF Insights was established by FSG, which consults foundations on how to accelerate their social impact, and the national association Council on Foundations.

The Community Foundation has been a force for improving lives and promoting philanthropy throughout Herkimer and Oneida counties since 1952. The Foundation has made more than 4,300 grants totaling over $35 million in support of causes ranging from education to health care, the arts to the environment. Grants are generated by the more than 270 funds that comprise The Foundation’s endowment, established and advanced by area individuals and families.
Community foundation earns ranking in CF Insights Top 100
by Hope Roush
June 2009

POINT PLEASANT — The Parkersburg Area Community Foundation (PACF) recently was awarded a spot on the Community Foundation Top 100 Lists.

In the CF Insights June 2010 publication, “Benchmarking Beyond Asset Size,” the company identifies the “Most Active Grantmakers” by distribution rates; “Most Gifts Per Capita;” and “Most Active Grantmakers” ranked on total gift and grant transactions. According to Judy Sjostedt, executive director of the PACF, the PACF along with their regional affiliates are now on the list of “Most Active Grantmakers.” The foundation is ranked at number 87 nationwide.

“With more than 700 community foundations in the U.S., these three lists provide peer benchmarks to help community foundations showcase their value in terms other than simply gross assets. PACF and the regional affiliates appear to be the only West Virginia community foundation to make it onto one of the ‘Top 100’ lists and the only local foundation listed,” Sjostedt said.

According to Sjostedt, one positive sign that a community foundation is making an impact is its “activity volume,” which is the number of people who make gifts and the number of grants made in its community annually.

“While we aim to be number one, we’re excited to be number 87 on a nationwide list of the Top 100 by most activity volume for 2009,” she said. “We knew folks here are very supportive and as a result we’re always busy, but being included on this list really confirms it. Many people are using Our Community’s Foundation as their charitable partner. This accomplishment is to their credit as their generosity meant we processed more gifts and grants than some much larger foundations.”

At number 87, the PACF and its regional affiliates are close to community foundations in Marin County, Calif. (77); Greensboro, N.C. (82); and Sarasota, Fla. (86). According to Sjostedt, the communities ranked closest to the PACF have a greater per capita income.

“Our listing is a wonderful tribute to our region’s citizens. It’s great to know so many good people are involved in using our services. As more people learn about how we can help them to make a real difference locally — now and for the future — we’ll keep rising on that list,” she said.
Going Beyond the Rankings
CF INSIGHTS CAN HELP YOU THINK THROUGH OTHER WAYS TO USE THIS DATA

• How does your rank compare with other community foundations in your state or region?

• Does my “ranking” align with my foundation’s strategic goals? (e.g. a higher grantmaking ranking could equate to engaging active donor advisors versus building endowments).

• How does this data help you think about benchmarking your foundation with other foundations? What characteristics do you share with other foundations?

REMEMBER CF INSIGHTS FOR YOUR DATA NEEDS

• Use CF Insights’ database to develop comparative reports and discover your own insights

• Visit cfinsights.org to learn more about the resources available to the field

PARTNER WITH US

• Contact Diana Esposito, Member Services, at diana.esposito@fsg.org to set up an overview and online demonstration of CF Insights’ resources