Columbus Survey 2009 Results:
Guideposts on the Path to Recovery

TRENDS ACROSS THE COMMUNITY FOUNDATION FIELD
A Snapshot of 2009

With this report, “Guideposts on the Path to Recovery,” CF Insights’ aim is to share 2009 highlights following a February 2009 report that looked in depth at 2008 results.

This report is based on over 200 community foundations’ contributions to the Columbus Survey as of March 2010. Participants interested in detailed 2009 results for their foundation can visit www.cfinsights.org to find a wider range of comparative and longitudinal reports. CF Insights members can gauge 2009 performance compared to peer benchmarks in over 50 online reports. Metrics available are relevant to asset development, grantmaking and sustainability.

We encourage others to share data in the coming months. As 990s are completed, more comparative data will be available. CF Insights will build on this snapshot and engage its membership in analyses on topics such as grantmaking patterns and Donor Advised Fund trends.

A Note of Thanks

Community Foundation Insights (CF Insights) would like to offer special thanks to The Columbus Foundation which conducted the hallmark community foundation survey on behalf of the field from 1988-2007. We are grateful for the opportunity to now manage this important work of collecting and reporting field-wide data.

The Columbus Foundation

We would also like to thank the Council on Foundations’ Community Foundations Leadership Team (CFLT) for providing funding to transition the Columbus Survey to CF Insights, building on the infrastructure The Columbus Foundation established. This funding helped incorporate the Columbus Survey data within CF Insights’ online database, creating a longitudinal field-wide dataset of great breadth and depth that is easily accessed by community foundations. The CFLT’s support also helped to improve the quality and variety of reports available to the field.

CF Insights Membership

If you find this report valuable, we hope you’ll join CF Insights’ membership, and become part of a community that is improving access to performance data and sharing knowledge across the field. Annual membership contributions start at $200. Visit www.cfinsights.org to learn more.
Overview of Findings


For community foundations and individual philanthropists, 2009 was a year of uncertainty, a mix of recession and recovery. The volatility in the market and implications for community foundations are evident in looking across results for community foundations with different fiscal year ends. For those foundations who ended the fiscal year in March of 2009, asset performance mirrors the deepest market decline. For those who ended the fiscal year in December of 2009, asset, gift, and grant measures show more signs of recovery.

In the aggregate, asset values grew relative to 2008, alongside a partial rebound in the financial markets. Looking at the overall trend for the 100 largest community foundations, assets have “rewound” back to a level slightly below 2006 values.

Despite improvements in the financial markets from March to December of 2009, gifts to community foundations declined by an average of 20%, a deeper cut than the average 8% decline experienced in 2008. And importantly in 2009, the gifts received by the 100 largest community foundations dipped below the level of grants made by these foundations.

In past years, many community foundations have based strategic plans and operating capacity decisions on an expectation of growth fueled both by investment performance and steady increases in gifts. 2009 performance underscores the need to continually reassess these expectations, donor development targets, and operating sustainability issues.

In 2008, the community foundation field and the individual donors that fuel much of community foundation grantmaking were able to increase grants made to communities relative to 2007 levels. In 2009, some measures of grantmaking remain unchanged, and others have slipped, though not as significantly as giving levels.

The grants made by the 100 largest community foundations remained constant from 2008 to 2009, and the overall payout rates are similar (grants as a percentage of assets). But looking at grantmaking levels across a more representative set of community foundations shows a more difficult picture relative to 2008. In 2008, a sample of 199 community foundations of all sizes increased grants by an average of 11%. For this same group, grantmaking declined an average of 8% in 2009. While this decline is concerning, the trend still implies that these community foundations made more grants in 2009 than they did in 2007.

While many of these results speak to the challenges community foundations have faced in 2008 and 2009, the changes in operating expenses reflect different approaches and circumstances across the field. There are significant differences across foundations in the changes made to operating budgets between 2008 and 2009. In fact, ¼ of community foundations increased operating budgets in 2009 and more than 1/3 kept budgets roughly constant. In times of economic hardship, the data implies that community foundations and individual donors are stretching to maintain operating capacity and grantmaking efforts, in spite of dramatic changes in the resources available.
Observing Trends Across the 100 Largest Community Foundations

Looking specifically at the largest community foundations in the US, where data is most readily available, trends are observed from 2006, before the economic crisis hit, through 2009 to gauge trends on the path to recovery.

From 2008 to 2009, the 100 largest community foundations experienced $1B in aggregate asset growth. Looking over a longer timeframe, this growth brought assets to levels just 2% lower than the assets of the top 100 in 2006. In other words, the total assets held by the top 100 community foundations have “rewound” to 2006 levels.

At the same time, giving to these foundations decreased 14% between 2008 and 2009, falling to a four year low in 2009.

And grantmaking held steady at $3.7B from 2008 to 2009 among the largest 100 foundations, representing a 15% increase in grants relative to 2006.

**Changes to Assets, Gifts and Grants Among the Top 100 CFs 2006-2009**

- **Total Assets:**
  - 2006: $41B
  - 2007: $45B
  - 2008: $39B
  - 2009: $40B

  -2% decrease from 2006 asset levels

- **Total Gifts:**
  - 2006: $4.7B
  - 2007: $4.8B
  - 2008: $4.2B
  - 2009: $3.6B

  -22% decrease from 2006 gift levels

- **Total Grants:**
  - 2006: $3.2B
  - 2007: $3.5B
  - 2008: $3.7B
  - 2009: $3.7B

15% increase from 2006 grant levels
Riding the 2009 Rollercoaster

Much of the economic uncertainty of 2008 and 2009 was attributed to the volatility experienced during this time frame. The severe downturns and instability of October 2008 and March 2009 are illustrated in the daily fluctuations in the Dow Jones over this time period.

As the economic trends in the Dow Jones illustrate, community foundations’ assets were at the mercy of extreme daily changes in the market as well as longer, deeper economic recession. The chart below shows the Dow Jones values at end of each month, highlighting the variability experienced quarter by quarter with the deepest part of the market decline hitting in March 2009.

It is important to note the impact of these quarterly changes in the market on community foundations with varying fiscal year ends. For example, those with calendar year ends (~60% of the field), experienced the lowest point when measuring asset values in 12/31/2008. On the other hand, those foundations with 3/31 FYEs only experienced economic cooling in 2008 and were hit harder at their 3/31/2009 year end. For this reason, analysis of 2008-2009 trends is done by fiscal year end.

Additionally, while the largest 100 community foundations represent overall trends in the majority of assets in the field, the sheer magnitude of assets that they represent may dilute the more dramatic changes experienced by the community foundation field. Foundation-level trend analysis by fiscal year end helps illuminate the broader set of experiences.
Foundations with FYEs between January and June experienced asset decline in 2009 relative to 2008. However, those foundations with later FYEs (July-December) that had difficult years in 2008 began to experience recovery in asset growth in 2009.

<table>
<thead>
<tr>
<th></th>
<th>Mar 31st N = 18</th>
<th>Jun 30th N = 75</th>
<th>Sept 30th N = 7</th>
<th>Dec 31st N = 139</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Assets</strong></td>
<td>Decreased 20%</td>
<td>Decreased 15%</td>
<td>Increased 5%</td>
<td>Increased 17%</td>
</tr>
<tr>
<td><strong>Gifts</strong></td>
<td>Decreased 17%</td>
<td>Decreased 29%</td>
<td>Decreased 34%</td>
<td>Decreased 13%</td>
</tr>
<tr>
<td><strong>Grants</strong></td>
<td>Decreased 12%</td>
<td>Decreased 3%</td>
<td>Decreased 31%</td>
<td>Decreased 10%</td>
</tr>
</tbody>
</table>

Just as the 2009 results seen by community foundations varied widely by fiscal year end, four year trends (2006-2009) vary for foundations with different fiscal year ends. See additional analysis in Appendix II.

**Unpacking Giving and Grantmaking Patterns**

Regardless of fiscal year end, giving to community foundations continued to decline in 2009 relative to 2008. Every year, giving varies widely across foundations given the unique circumstances of each foundation’s community context or the occurrence of atypical major gifts. However, when analyzing giving in terms of degrees of increase or decrease, the proportion of foundations experiencing some kind of decrease in 2009 has increased 10% compared to 2008.

Grantmaking decreased in 2009 relative to the increase observed in 2008. However, gifts continue to decline at a faster rate than grantmaking, raising questions for community foundations’ future growth and operating sustainability if grantmaking continues to outpace contributions.
Looking again at the variability of changes in grantmaking, the percent of foundations with declines in grantmaking increased 28% between 2008 and 2009. At the same time, 23% of foundations increased grantmaking in 2009 while another 29% had grantmaking levels roughly similar to 2008 (+ or – 10%).

Turning to the payout rate, or total grants for the year divided by end of year assets, differences can be observed across asset ranges.

Since this ratio aggregates measures from foundations with varying FYEs, the change in assets and grants can differ depending on the time period – some foundations saw an increase in assets while others did not. Benchmarking against peers of similar asset size and FYE is a more effective way to compare changes in payout ratio.
Understanding Operating Budget Decisions

Analysis of expenses indicates flat change (+0.41%) to community foundation budgets from 2008-2009. However, underneath what appears to be no change in community foundation operating expenses, there is significant variability among foundations in the changes to budgets between 2008 and 2009. While 37% of community foundations decreased core operating expenses an average of 14%, another 37% kept expenses steady (+/- 5%) and just over a quarter of community foundations increased core expenses by an average of 21%.

While increases in operating expenses in a time of continued economic uncertainty may seem counter-intuitive, the distribution of operating budget changes is aligned with findings from a mid-2009 CF Insights survey of community foundations (results can be found in “Taking Informed Action in Challenging Times” from June 2009). When asked about predicted budget changes for 2009, 43% of respondents expected to decrease 2009 budgets relative to 2008, 30% expected to hold things constant and 28% expected to increase core expenses.

Fiscal year end is a factor in the likelihood to increase or decrease expenses. Those foundations that were already in their 2009 fiscal year (FYE 3/31 and 6/30) when the economic crisis worsened in the fall of 2008 were more likely to be in the “increase” category. Similarly, 80% of those foundations that decreased 2009 expenses had 12/31 FYEs, entering their fiscal year with an acute awareness of the economic crisis.

Moving Forward

Taken together, the 2009 results imply a continued need to be vigilant in 2010 and beyond about budgets and efforts to achieve growth targets, while simultaneously focusing on strengthening the operating capacity and resilience of community foundations. The deep economic hardship in our communities and declines in giving underscore the important need for community foundations. The challenge is clear: community foundations must play an even stronger role in promoting philanthropy, connecting donors with opportunities to make a difference, supporting effective nonprofits, and leading the way toward collective impact.
Compare Metrics for Your Own Community Foundation

We hope this field-wide analysis serves as a starting point for understanding your community foundation’s growth and grantmaking in the context of relevant comparisons.

As CF Insights continues to administer the Columbus Survey, we will support the field and our members in using data to uncover insights. Some action steps to consider:

- **Share** this report with your board, highlighting how your foundation compares to the field
- **Connect** with your peers to understand best practices and fresh ideas in the field
- **Create** benchmark reports at [www.cfinsights.org](http://www.cfinsights.org) to view metrics for your foundation’s performance over time or compared to a peer aggregate

Once you’ve logged in to [www.cfinsights.org](http://www.cfinsights.org), you can instantly generate comparative data to further understand your community foundation’s performance relative to peers. Longitudinal trend and high level comparative reports are available for the field and CF Insights members have access to reports with customized benchmarking data. Examples of these reports are listed below and more detail is available in Appendix IV.

### CF Insights Non-Member Reports

**Longitudinal**
- Example reports
  - Average fund size
  - Average gift size
  - Grants per capita
  - Budget to asset ratio

**Peer Benchmarking**
- Example reports
  - Change in assets
  - Change in gifts
  - Change in grants

### CF Insights Member Reports

**Assets**
- Example reports
  - Average fund size vs. peers
  - Assets by product vs. peers
  - Asset growth/historical assets among peers

**Gifts & Grants**
- Example reports
  - Avg gift size vs. peers
  - Annual payout rate vs. peers
  - Gifts/Grants per capita vs. peers

**Operating Budget**
- Example reports
  - Budget to asset ratio vs. peers
  - Peer fee schedules by fund

**Staffing**
- Example reports
  - Assets per FTE among peers
  - Funds per FTE among peers
## Appendix I. Rankings

### Top 100 Community Foundations by Asset Size

*Note: Available for download in Excel format at [www.cfinsights.org](http://www.cfinsights.org)*

#### 2009 Columbus Foundation Survey of Community Foundations

**List of Top 100 Community Foundations by Asset Size**

*CF Insights | April 2010*

<table>
<thead>
<tr>
<th>Foundation Name</th>
<th>2009 assets</th>
<th>FYE</th>
<th></th>
<th>Foundation Name</th>
<th>2009 assets</th>
<th>FYE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tulsa Community Foundation</td>
<td>$4,587M</td>
<td>12-31</td>
<td></td>
<td>51. San Antonio Area Foundation</td>
<td>$129M</td>
<td>12-31</td>
</tr>
<tr>
<td>2. Silicon Valley Community Foundation</td>
<td>$1,759M</td>
<td>12-31</td>
<td></td>
<td>52. Community Foundation of New Jersey</td>
<td>$129M</td>
<td>12-31</td>
</tr>
<tr>
<td>3. The New York Community Trust</td>
<td>$1,743M</td>
<td>12-31</td>
<td></td>
<td>53. The Grand Rapids Community Foundation</td>
<td>$190M</td>
<td>06-30</td>
</tr>
<tr>
<td>4. The Cleveland Foundation</td>
<td>$1,701M</td>
<td>12-31</td>
<td></td>
<td>54. The Gulf Coast Community Foundation of Venice</td>
<td>$182M</td>
<td>06-30</td>
</tr>
<tr>
<td>5. The Chicago Community Trust</td>
<td>$1,503M</td>
<td>09-30</td>
<td></td>
<td>55. Erie Community Foundation</td>
<td>$179M</td>
<td>12-31</td>
</tr>
<tr>
<td>6. California Community Foundation</td>
<td>$1,066M</td>
<td>06-30</td>
<td></td>
<td>56. Fremont Area Community Foundation</td>
<td>$176M</td>
<td>12-31</td>
</tr>
<tr>
<td>7. The Greater Kansas City Community Foundation</td>
<td>$1,061M</td>
<td>12-31</td>
<td></td>
<td>57. Dallas Foundation TX</td>
<td>$174M</td>
<td>12-31</td>
</tr>
<tr>
<td>8. The Oregon Community Foundation</td>
<td>$1,040M</td>
<td>12-31</td>
<td></td>
<td>58. Greater Des Moines Community Foundation</td>
<td>$165M</td>
<td>12-31</td>
</tr>
<tr>
<td>9. The Columbus Foundation</td>
<td>$968M</td>
<td>12-31</td>
<td></td>
<td>59. Rochester Area Community Foundation</td>
<td>$165M</td>
<td>03-31</td>
</tr>
<tr>
<td>10. Marin Community Foundation</td>
<td>$933M</td>
<td>06-30</td>
<td></td>
<td>60. Community Foundation for the Fox Valley Region, Inc</td>
<td>$164M</td>
<td>06-30</td>
</tr>
<tr>
<td>11. The San Francisco Foundation</td>
<td>$904M</td>
<td>06-30</td>
<td></td>
<td>61. Community Foundation for Greater Buffalo</td>
<td>$164M</td>
<td>12-31</td>
</tr>
<tr>
<td>13. Foundation For The Carolinas</td>
<td>$711M</td>
<td>12-31</td>
<td></td>
<td>63. Amarillo Area Foundation</td>
<td>$156M</td>
<td>12-31</td>
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<tr>
<td>14. Hartford Foundation for Public Giving</td>
<td>$696M</td>
<td>12-31</td>
<td></td>
<td>64. Dade Community Foundation</td>
<td>$154M</td>
<td>03-31</td>
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<tr>
<td>17. The Community Foundation for Greater Atlanta</td>
<td>$654M</td>
<td>12-31</td>
<td></td>
<td>67. The Vermont Community Foundation</td>
<td>$143M</td>
<td>12-31</td>
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<tr>
<td>18. Communities Foundation of Texas, Inc.</td>
<td>$604M</td>
<td>06-30</td>
<td></td>
<td>68. The Community Foundation of Greater Birmingham</td>
<td>$143M</td>
<td>12-31</td>
</tr>
<tr>
<td>23. Baton Rouge Area Foundation</td>
<td>$535M</td>
<td>12-31</td>
<td></td>
<td>73. Community Foundation of Western North Carolina</td>
<td>$130M</td>
<td>06-30</td>
</tr>
<tr>
<td>24. The Rhode Island Community Foundation</td>
<td>$525M</td>
<td>12-31</td>
<td></td>
<td>74. Community Foundation of Sonoma County</td>
<td>$129M</td>
<td>12-31</td>
</tr>
<tr>
<td>25. The Denver Foundation</td>
<td>$522M</td>
<td>12-31</td>
<td></td>
<td>75. Community Foundation For Monterey County</td>
<td>$127M</td>
<td>03-31</td>
</tr>
<tr>
<td>27. The Minneapolis Foundation</td>
<td>$481M</td>
<td>03-31</td>
<td></td>
<td>77. Madison Community Foundation</td>
<td>$126M</td>
<td>12-31</td>
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<tr>
<td>29. Oklahoma City Community Foundation, Inc.</td>
<td>$466M</td>
<td>06-30</td>
<td></td>
<td>79. Community Foundation of North Texas TX</td>
<td>$124M</td>
<td>12-31</td>
</tr>
<tr>
<td>31. The San Diego Foundation</td>
<td>$429M</td>
<td>06-30</td>
<td></td>
<td>81. Fairfield County Community Foundation</td>
<td>$117M</td>
<td>06-30</td>
</tr>
<tr>
<td>32. New Hampshire Charitable Foundation</td>
<td>$426M</td>
<td>12-31</td>
<td></td>
<td>82. Coastal Community Foundation of South Carolina</td>
<td>$117M</td>
<td>06-30</td>
</tr>
<tr>
<td>33. Omaha Community Foundation*</td>
<td>$405M</td>
<td>12-31</td>
<td></td>
<td>83. Triangle Community Foundation</td>
<td>$117M</td>
<td>06-30</td>
</tr>
<tr>
<td>34. Arizona Community Foundation</td>
<td>$389M</td>
<td>03-31</td>
<td></td>
<td>84. Community Foundation of Greater Flint*</td>
<td>$114M</td>
<td>12-31</td>
</tr>
<tr>
<td>35. The Community Foundation of Middle Tennessee</td>
<td>$369M</td>
<td>12-31</td>
<td></td>
<td>85. Community Foundation of Tampa Bay, Inc.</td>
<td>$114M</td>
<td>06-30</td>
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<tr>
<td>36. East Bay Community Foundation</td>
<td>$331M</td>
<td>06-30</td>
<td></td>
<td>86. Community Foundation for Muskegon County</td>
<td>$113M</td>
<td>12-31</td>
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<tr>
<td>37. The Community Foundation for the Capital Region DC</td>
<td>$312M</td>
<td>03-31</td>
<td></td>
<td>87. Community Foundation for Palm Beach and Martin Counties</td>
<td>$113M</td>
<td>06-30</td>
</tr>
<tr>
<td>39. The Dayton Foundation</td>
<td>$279M</td>
<td>06-30</td>
<td></td>
<td>89. Arkansas Community Foundation</td>
<td>$107M</td>
<td>06-30</td>
</tr>
<tr>
<td>40. The Philadelphia Foundation</td>
<td>$270M</td>
<td>12-31</td>
<td></td>
<td>90. Community Foundation of Greater Greensboro</td>
<td>$106M</td>
<td>12-31</td>
</tr>
<tr>
<td>41. The Kalamazoo Community Foundation</td>
<td>$266M</td>
<td>12-31</td>
<td></td>
<td>91. Community Foundation of St. Joseph County, Inc.</td>
<td>$104M</td>
<td>06-30</td>
</tr>
<tr>
<td>42. The Greater Houston Community Foundation</td>
<td>$261M</td>
<td>12-31</td>
<td></td>
<td>92. Harrison County Community Foundation, Inc.</td>
<td>$102M</td>
<td>12-31</td>
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<tr>
<td>43. The Community Foundation of Louisville, Inc.</td>
<td>$250M</td>
<td>06-30</td>
<td></td>
<td>93. Orange County Community Foundation</td>
<td>$101M</td>
<td>06-30</td>
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<tr>
<td>44. Community Foundation of Greater Memphis, Inc.</td>
<td>$248M</td>
<td>03-31</td>
<td></td>
<td>94. Community Foundation of Greater Fort Wayne</td>
<td>$100M</td>
<td>12-31</td>
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<td>45. Santa Barbara Foundation</td>
<td>$247M</td>
<td>12-31</td>
<td></td>
<td>95. Akron Community Foundation</td>
<td>$100M</td>
<td>03-31</td>
</tr>
<tr>
<td>46. Rose Community Foundation</td>
<td>$245M</td>
<td>12-31</td>
<td></td>
<td>96. Ventura County Community Foundation</td>
<td>$96M</td>
<td>09-30</td>
</tr>
<tr>
<td>47. The Winston-Salem Foundation</td>
<td>$243M</td>
<td>12-31</td>
<td></td>
<td>97. The Greater Cedar Rapids Foundation</td>
<td>$95M</td>
<td>12-31</td>
</tr>
</tbody>
</table>

*Flint & Omaha based on 2008 data*
Appendix II. Assets, Gifts, and Grants by FYE, 2006-2009

March 31st

-21% decrease from 2006 asset levels

5% increase from 2006 gift levels

4% increase from 2006 grant levels

June 30th

-10% decrease from 2006 asset levels

-14% decrease from 2006 gift levels

10% increase from 2006 grant levels

September 30th

-9% decrease from 2006 asset levels

-6% decrease from 2006 gift levels

41% increase from 2006 grant levels

December 31st

3% increase from 2006 asset levels

-27% decrease from 2006 gift levels

20% increase from 2006 grant levels
Appendix III. Methodology

This year’s Columbus Survey builds upon the work of The Columbus Foundation from 1993-2007. The Survey was transitioned to CF Insights for data collection via CF Insights’ online benchmarking database (www.cfinsights.org).

Field-wide survey participants entered their FYE 2009 data in the online form between February and March 2010. This process generated 223 complete responses, which means all data points were filled in – including assets, gifts, grants, fund-level data, total expenses and geographic information. Additionally, a dozen or so community foundations provided us with partial responses. This methodology led to different sample sizes for various data points.

Longitudinal analyses only use data from foundations with complete data across the time period defined. Therefore, the sample size for these analyses is smaller than the complete 2009 data set.

In some analyses, fiscal year end is noted or analyses are broken into groups by FYE. This is due to the timing of the economic crisis in 2008-2009. The time at which the data was recorded is of significance, especially for asset values, due to the sharp market declines in fall of 2008 and 2009.

Still want to participate?

CF Insights will be publishing future analyses on the 2009 data – make sure your foundation is included! Visit www.cfinsights.org to enter your 2009 data. Click on the “Log-in” button in the upper right-hand corner of the homepage.

CF Insights members have data automatically submitted to the survey once their annual data entry is complete. You are able to submit “unaudited” data if your 990 or audit is not complete; CF Insights will ensure that your final 990 data will be automatically included once you submit your 990.

Non-members can email info@cfinsights.org to obtain log-in and password information.
Appendix IV. Peer Benchmarking Reports

As a part of our field-building mission, CF Insights has made benchmarking reports available to all Columbus Survey participants. Participants can log-in at www.cfinsights.org to generate dynamic online reports that show longitudinal and benchmark data to analyze your foundation’s historical performance and your performance compared to a selected peer aggregate and the entire field.

All community foundations can access the following reports:

**Longitudinal for your foundation**
- Total Asset Annual Growth Rate
- Assets per Capita
- Average Fund Size
- Total Gift Annual Growth Rate
- Gifts per Capita
- Average Gift Size
- Total Grants Annual Growth Rate

**Benchmark reports**
- Grants per Capita
- Average Grant Size
- Annual Payout Rate
- Total Asset Growth Rate
- Total Grant Growth Rate
- Total Gift Growth Rate

Additionally, CF Insights members can generate customized comparative reports based on Columbus Survey data as well as many other detailed metrics. CF Insights members can define who their peers are according to a variety of characteristics such as product focus, geography, asset size or grantmaking levels. In addition to the non-member reports listed above, CF Insights members also have access to peer-group reports such as:

**Assets**
- Assets by Product Among Peers
- Average Fund Size Among Peers
- Change in Assets Among Peers
- Per Capita Assets Among Peers
- Historical Assets Among Peers

**Contributions**
- Average Gift Size Among Peers
- Change in Gifts Among Peers
- Per Capita Gifts Among Peers
- Historical Gifts Among Peers
- Gift Ratio Among Peers

**Operating Budget & Fees**
- Budget to Asset Ratio Among Peers
- Peer Fee Schedules by Fund

**Grantmaking**
- Average Grant Size Among Peers
- Change in Grants Among Peers
- Per Capita Grants Among Peers
- Historical Grants Among Peers
- Grant Ratio Among Peers
- Payout Rate Among Peers
- Community Leadership Activities

**Staffing**
- Assets per FTE Among Peers
- FTEs by Functional Area Among Peers
- Funds per FTE Among Peers

Contact info@cfinsights.org for a demonstration of the online benchmarking reports and examples including your foundation’s data.
Appendix V. About CF Insights

The idea behind CF Insights is simple: What if each community foundation could know what all community foundations collectively know?

CF Insights is a unique resource helping community foundations use information to improve decision making, performance, and sustainability

about us

Created by community foundations.

We share one goal: improving our performance and sustainability—individually and collectively.

For community foundations, growing impact in the communities we serve begins with strong decision making. CF Insights was initiated in response to a shared hunger among U.S. community foundations for more accurate, timely, and complete information to inform our actions and drive improved performance.

Propelled by FSG.

As nonprofit consultants dedicated to social impact, FSG combines deep knowledge of the community foundation field with world-class research, strategy, and evaluation capabilities.

In partnership with the Council on Foundations’ Community Foundations Leadership Team, FSG has been a driving force for CF Insights since its inception.

CF Insights Members & Funders

Adirondack Community Trust
Akron Community Foundation
Alaska Community Foundation
Arizona Community Foundation
Community Foundation for Greater Atlanta
The Baltimore Community Foundation
Barrington Area Community Foundation
Berks County Community Foundation
Berkshire Taconic Community Foundation
Blackford County Community Foundation
The Community Foundation of Greater Birmingham
Community Foundation of Bloomington and Monroe County
Blue Grass Community Foundation
The Boston Foundation
California Community Foundation
The Community Foundation for the National Capital Region
Foundation for the Carolinas
Central New York Community Foundation
The Chicago Community Trust
The Greater Cincinnati Foundation
The Cleveland Foundation
The Columbus Foundation
The Dallas Foundation
The Erie Community Foundation
Evanston Community Foundation
Community Foundation of Fayette County
The Findlay-Hancock County Community Foundation
Fremont Community Foundation
Grand Rapids Community Foundation
Gulf Coast Community Foundation
Hampton Roads Community Foundation
Hartford Foundation for Public Giving
Hawaii Community Foundation
The Community Foundation of the Holland/Zeeland Area
Horizons Foundation
Greater Houston Community Foundation
Community Foundation of Jackson County
Johnson County Community Foundation
Kalamazoo Community Foundation
Greater Kansas City Community Foundation
Kern Community Foundation
The Community Foundation of Louisville
Maine Community Foundation
Greater Milwaukee Foundation
The Minneapolis Foundation
Nevada Community Foundation
New Hampshire Charitable Foundation
The Community Foundation for Greater New Haven
The New York Community Trust
Communities Foundation of Oklahoma
Oklahoma City Foundation
Parkersburg Area Community Foundation
The Philadelphia Foundation
The Pittsburgh Foundation
The Rhode Island Foundation
The Community Foundation Serving Richmond & Central Virginia
Rochester Area Community Foundation
San Angelo Area Foundation
San Antonio Area Foundation
The San Diego Foundation
The San Francisco Foundation
Community Foundation of Santa Cruz County
The Seattle Foundation
The Community Foundation of Shreveport-Bossier
Silicon Valley Community Foundation
Community Foundation of Greater South Wood County
Community Foundation for Southeastern Michigan
Southwest Initiative Foundation
The Saint Paul Foundation and Minnesota Community Foundation
The Greater Tacoma Community Foundation
Communities Foundation of Texas, Inc.
Toledo Community Foundation, Inc.
Truman Heartland Community Foundation
Unity Foundation of LaPorte County
Vermont Community Foundation
Community Foundation of Wabash County
Community Foundation of Western Massachusetts
Community Foundation of Western Nevada
The Community Foundation of Westmoreland County
The Winston-Salem Foundation
Greater Worcester Community Foundation