

What can CF Insights do for you?

All data collected by CF Insights is available to members as criteria with which to build peer groups and as the basis for over 80 on-demand reports.

Members and non-members can run on-demand benchmarking reports comparing your foundation to a defined peer group and to the field.

Foundation Basics:

- Fiscal Year End Date
- Year Foundation Created
- Staffing by Function
- Strategic Operating Priorities
- Affiliations with Other Foundations
- Software Type Used
- Engagement in the Following Areas:
 - Community Leadership
 - Fiscal Sponsorship/Fundraising
 - Fundraising for Operations
 - Nonprofit Resource Center
 - Services to Private Foundations
 - Special Initiatives

Geographic:

- Urban vs. Rural
- Population of Area Served
- Geographic Area Served
- State
- Region

Assets and Funds:

- Total Assets
- Total Assets by Product Type
- Total Number of Foundation Funds
- Total Number of DAFs
- Total Number of Funds Held at SOs
- Total Number of SOs
- Operating Endowment and Reserves

Expenses:

- Total Operating Expenses
- Special Initiative Operations Expenses
- Operating Expenses as Percent of Assets

Contributions:

- Total Foundation Contributions - \$ and #
- Total Contributions to DAFs - \$ and #
- Total Contributions to SOs - \$ and #

Grants:

- Total Foundation Grants - \$ and #
- Total Grants from DAFs - \$ and #
- Total Grants from SOs - \$ and #

Activity-Based Costing Results:

- Contributions/Subsidies by Product - \$
- Total Cost by Product - \$
- Total Cost by Activity Type - \$

Administrative Fee Schedules:

CF Insights collects the following fee information by specific product and fund type.

- Total Fees
- Minimum Fees
- Minimum Fund Balance

Investment Data from the COF Investment Survey:

The Council on Foundations provides CF Insights with the results of their annual and quarterly investment surveys.

- Annualized Returns
- Overall Allocation
- Equity Allocation
- Fixed Income Allocation
- Alternate Allocation

The Field

- Total growth rates in the following metrics:
 - Assets
 - Gifts
 - Grants
- Longitudinal growth rates in the following metrics:
 - Assets
 - Gifts
 - Grants
- Average Fund Size Over Time
- Assets Per Capita Over Time
- Percent Total Core Assets Endowed and Non Endowed Over Time
- Gift and Grant Ratios Over Time
- Average Gift Size Over Time
- Gifts Per Capita Over Time
- Annual Payout Rate
- Average Grant Size Over Time
- Grants Per Capita Over Time
- Assets Per Audit Per FTE Over Time
- Expense to Asset Ratio Over Time
- Operating Endowment Over Time
- Percent of Total Expenses Over Time
- Revenue as a Percent of Assets Over Time
- Operating Reserves Over Time
- Operating Endowment and Reserves Over Time

Members - everything available to the field, plus the following in comparison to peers:

- Percent of Assets Endowed and Non Endowed
- Assets by Product Among
- Assets Per Audit Among
- Average Fund Size
- Per Capita Assets
- Core vs. Supporting Organization Assets
- Change in Total Assets
- Year Over Year Assets
- Gift Ratio
- Average Gift Size
- Average Discretionary Gift Size
- Average DAF Gift Size
- Gifts Per Capita
- Change in Total Gifts
- Year Over Year Gifts
- Total Transactions
- Annual Payout Rate
- Grant Ratio
- Average DAF Grant Size
- Average Discretionary Grant Size
- Average Grant Size
- Grants Per Capita
- Year Over Year Grants Among Peers
- Change in Total Grants
- Community Leadership Activities
- Assets Per Audit Per FTE
- Funds Per FTE
- FTEs by Functional Area
- ...and more!

Access tools that provide in-depth analytics and business intelligence to shape decisions

Dashboards for Board Presentations

CF Insights staff creates dashboards to help answer the questions your board is asking about your foundation's performance relative to peers. Make informed decisions and stay on track, or use comparative data to test or inspire changes in policy.

Economic Scenario Planning

Inform practical budgeting considerations and longer-term strategic decisions.

CF Activity-Based Costing Analysis

Using data, gain an understanding of your products and services in order make informed decisions and improve sustainability. CF Insights members can also access comparative data on product profitability.

Interactive Strategy Model

Model the impact of strategic changes on your sustainability.