


# What can CF Insights do for you?

## Benefits of Membership

### Multiple Ways to Define Peers

#### Create peer groups

Create your peer groups using any filtering criteria you like. Here are [instructions](#).

Click this green plus button to add each new group: 

Peer group:    

Foundation Characteristic *	Operator	Value (type in or select)
1. Total foundation gross assets	is greater than	\$50,000,000
2. AND Total foundation gross assets	is less than	\$250,000,000
3. AND Fiscal year end date	is on or after	2015
4. AND # FTE total	is greater than	10.00
5. AND Year foundation created	is greater than	1914
6. AND Urban Vs. Rural	is	Both
7. AND --None--		

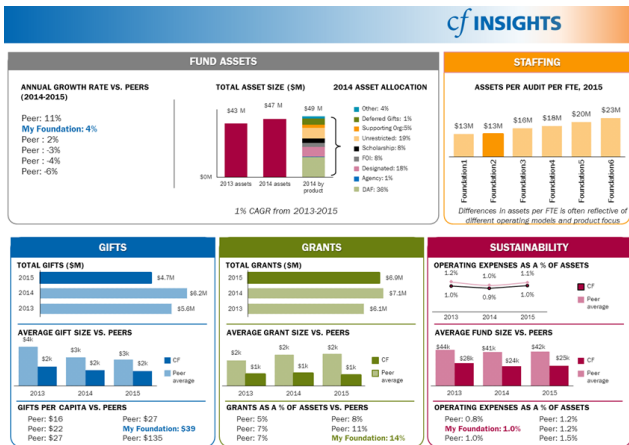
Include My Foundation  Only most recent for each foundation

#### Examples of Ways to Define Peers:

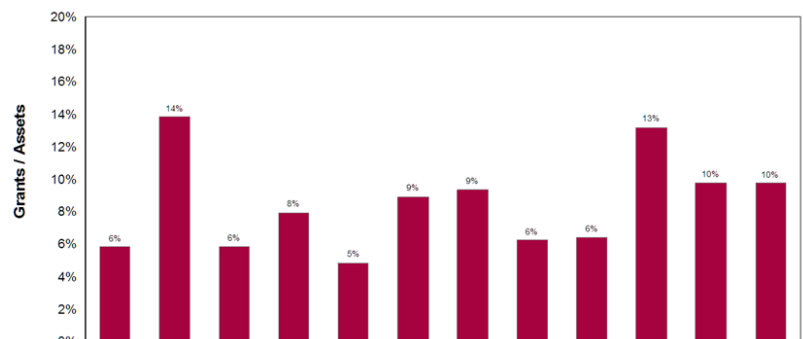
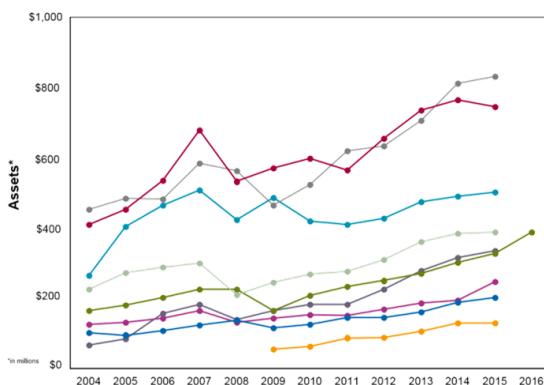
- Assets
- Age
- Service area/geography
- Asset composition (Discretionary, DAF, etc.)
- Staffing
- Levels of endowment
- Number of transactions
- Focus on community leadership
- ...and more!

*Extensive data collection means a robust peer comparison tool.*

*What is unique about your community foundation? How would you define your peers?*



Peer Benchmarking Dashboards, accompanied by custom analysis by CF Insights, serve as a powerful and concise way to present metrics to your Board of Directors.



*On-demand reports run on live data, ensuring that you have access to the very latest information collected by CF Insights*

# Data, Reports, and Tools

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

On-demand benchmarking reports compare your foundation to a defined peer group and to the field.

## Examples of Available Data By Category

### Foundation Basics:

- Fiscal Year End Date
- Staffing by Function
- Software Types Used

### Geographic:

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

### Assets and Funds:

- Total Assets, including by product
- Total Number of DAFs
- Total Number of Funds Held at SOs
- Operating Endowment and Reserves

### Expenses:

- Total Operating Expenses
- Special Initiative Operations Expenses

### Contributions and Grants:

- Contributions - \$ and # to DAFs, SOs, and the entire foundation

### 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:

FAOG provides CF Insights with the results of their annual and quarterly investment surveys.

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

## Examples of On-Demand Reports By Category

### Assets:

- Percent of Assets in Endowed/Non Endowed Funds
- Average Fund Size
- Year over Year Assets

### Gifts:

- Gifts to Assets Ratio
- Gifts Per Capita
- Average Gift Size

### Grants:

- Annual Payout Rate
- Average Grant Size
- Grants per Capita

### Grants:

- Assets and Funds per FTE
- FTEs by Functional Area

### Operating Efficiency:

- Expense to Asset Ratio
- Revenue Mix

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

## 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 peer data on product profitability.

## Economic Scenario Planning

Inform practical budgeting considerations and longer-term strategic decisions.

## Interactive Strategy Model

Model the impact of strategic changes on your sustainability.

## Technical Assistance to Help Address Important Questions

“How do other community foundations operated their women’s funds?”

“What are the replenishment rates of donor-advised funds at similarly-sized peers?”

“What is the range of revenue sources community foundations use to support their community leadership work?”