



2012 STUDY ON THE STRATEGIC VALUE OF DONOR ADVISED FUNDS

The Philanthropy and Community Foundation fields have been asking themselves tough questions around Donor Advised Funds (DAFs). A Recent [NYT Op-Ed](#) and [Treasury Report](#) highlighted the interest shown by policy makers and a broader audience. In response, CF Insights and FSG, in collaboration with the Council on Foundations (COF) and the James Irvine Foundation, are conducting a study on the strategic value of Donor Advised Funds. The key questions we're trying to answer are:

To what extent do DAF donors with funds at Community Foundations...?

Become more active in local grantmaking



Contribute to the growth and sustenance of the CF

Become engaged with the CF and actively partner to address priorities



Create planned gifts or leave bequests

What policies and practices lead to these outcomes?

Results will be released in a White Paper to the field and presented during the **2012 COF Fall Conference in New Orleans**. High level trends and case studies will feed into DAF advocacy support for **Foundations on the Hill** in **March 2012**

PARTICIPANTS IN THE STUDY

33 participants have signed up, representing a diverse field and a significant portion of Community Foundation DAF activity:

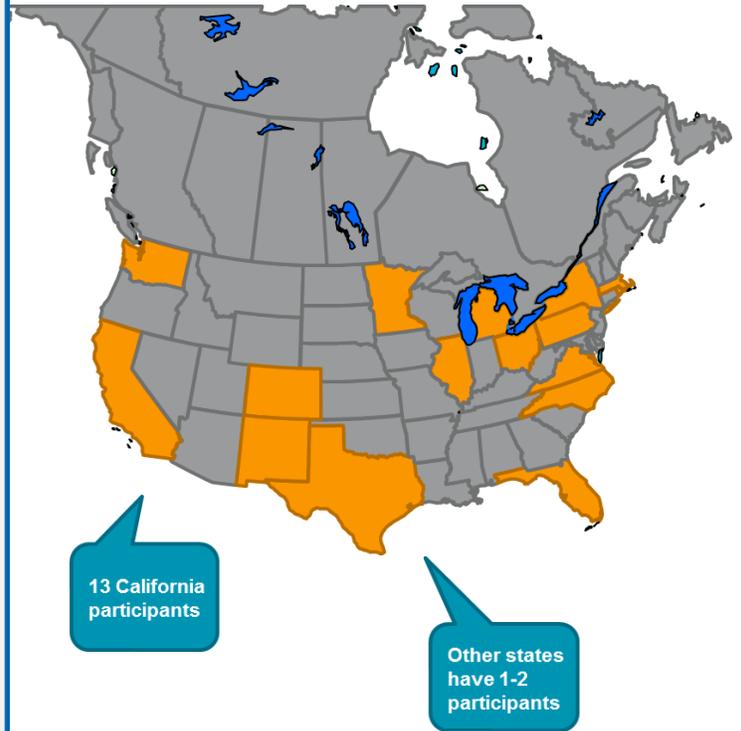
- **16 states** are represented by Community Foundations serving **both rural and urban** communities
- **Asset sizes** range from **\$13M to \$2B**, allowing us to understand the position and thinking of both small and large Community Foundations
- The study accounts for around **1/3** of Community Foundation **DAF Assets, DAF Contributions and DAF Grantmaking**

We hope this will build the foundation for a comprehensive, representative and interesting study!

Names and Locations of Participants

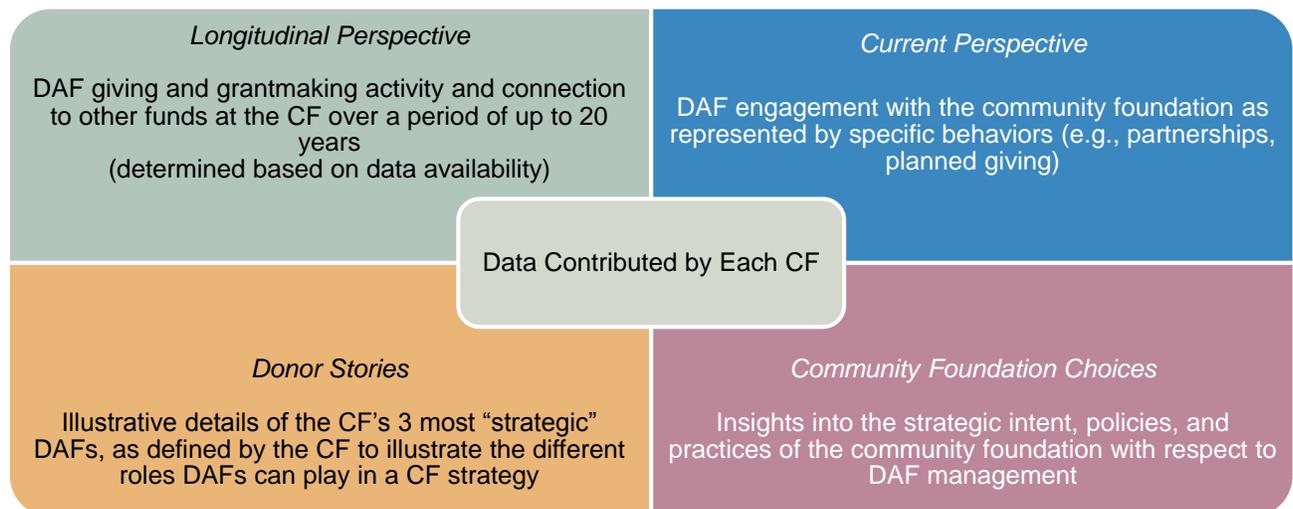
The Community Foundation for Greater Atlanta	GA
The Boston Foundation	MA
The Chicago Community Trust	IL
The Greater Cincinnati Foundation	OH
The Cleveland Foundation	OH
East Bay Community Foundation	CA
Community Foundation of Greater Flint	MI
The Gulf Coast Community Foundation	FL
Hampton Roads Community Foundation	VA
Kalamazoo Community Foundation	MI
Kern Community Foundation	CA
Minnesota Philanthropy Partners	MN
Napa Valley Community Foundation	CA
The Community Foundation for the National Capital Region	DC
The New York Community Trust	NY
Community Foundation of North Texas	TX
The Philadelphia Foundation	PA
The Pittsburgh Foundation	PA
Rancho Santa Fe Foundation	CA
The Rhode Island Community Foundation	RI
The Community Foundation Serving Riverside and San Bernardino Counties (CFRSBC)	CA
Rochester Area Community Foundation	NY
Rose Community Foundation	CO
Sacramento Region Community Foundation	CA
The San Francisco Foundation	CA
San Luis Obispo County Community Foundation	CA
Santa Barbara Foundation	CA
The Community Foundation of Santa Cruz County	CA
Santa Fe Community Foundation	NM
The Seattle Foundation	WA
Silicon Valley Community Foundation	CA
Community Foundation of Sonoma County	CA
Ventura County Community Foundation	CA

“The study represents a diverse selection of Community Foundations across the Country, with different assets sizes, DAF intensity and policies and practices”



METHODOLOGY

The study will mix quantitative and qualitative methods, with four types of data being collected from participating Community Foundations:



The project is guided by the Community Foundations Leadership Team (CFLT), the CF Insights Advisory Board, and COF. Throughout the project representatives from the field will come together to shape the study through **Steering and Methodology Committees**. During the fall, these committees have helped us define the research questions and develop data collection templates.

TIMELINE



In the months ahead we are going to release **three separate DAF research products**.

First off is the advocacy support materials for the **Foundations on the Hill** in March 2012, second are the individual **reports to study participants** based on CFs and DAFs analysis, and last is the field-wide white paper for the **COF Fall 2012 Conference** in New Orleans.

We are excited to be collaborating with the Community Foundation and Philanthropic fields to generate much awaited research and analysis and look forward sharing our findings with you.

We continue to seek engagement and feedback from both the Community Foundation field and other stakeholders so please reach out to us with questions, concerns or ideas.

Your [CF Insights](#) / [FSG](#) team,

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CF INSIGHTS responds to a hunger for shared knowledge and greater impact: Community foundations grow stronger when their decisions are based on timely, accurate, and complete information.

created by **COMMUNITY FOUNDATIONS**

IN PARTNERSHIP with the Community Foundations Leadership Team, FSG has been a driving force for CF Insights since its inception.

propelled by **FSG**



COUNCIL *on* **FOUNDATIONS**

Community Foundations Leadership Team

