

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--		

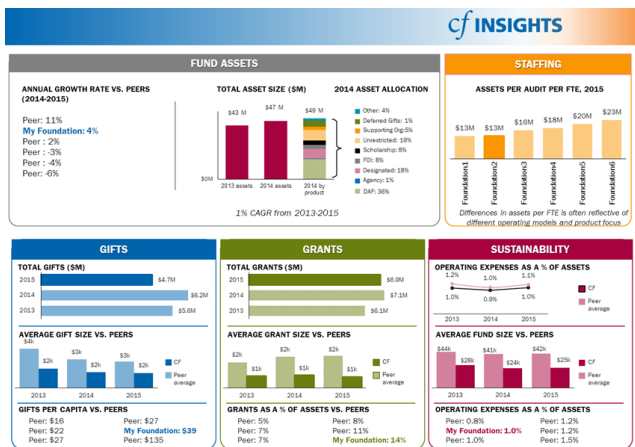
Include My Foundation Only most recent for each foundation

Examples of Ways to Define Peers:

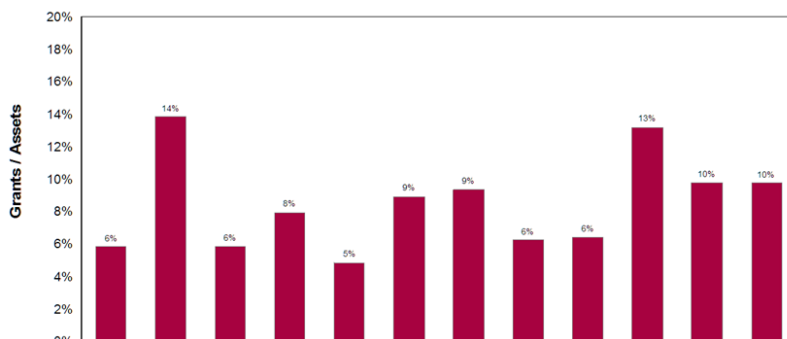
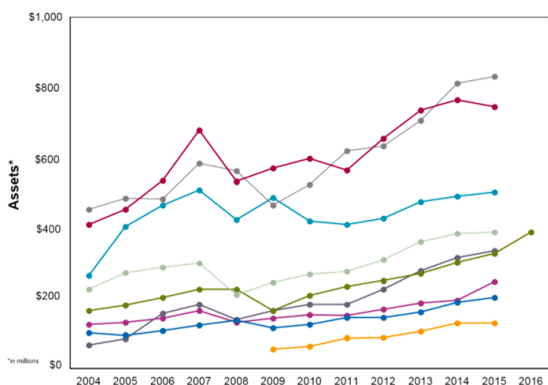
- Assets
- Age
- Service area/geography
- Asset composition (Discretionary, DAF, etc.)
- Staffing
- Levels of endowment
- Number of transactions
- Focus on community leadership
- ...and more!

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 running on live data, ensuring that you have access to the very latest

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 expert help with tools which provide in-depth analytics and business intelligence to shape decisions

Activity-Based Costing Analysis

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 operate their women’s funds?”

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

“Which revenues do community foundation depend on to help sustain their leadership work?”