

Columbus Survey

2008 Results

Guideposts for Growth and Grantmaking

COMMUNITY
FOUNDATION
INSIGHTS

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 1993-2007. We are grateful for the opportunity to now manage this important work collecting and reporting field-wide data.



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



Finally, we'd like to thank you, the community foundation field, for your contributions to this important research. Your participation makes this knowledge base possible. We hope you take advantage of the information and resources you have helped create to improve performance in your organization.

And we especially hope that you'll become part of a wave that will speed access to performance data across the field. We want to share 2009 data and analysis with you soon. You can help by visiting www.cfinsights.org to learn more and to update the database with your 2009 results.

Introduction

While it is true that “no two community foundations are alike,” similarities, differences, and trends can be observed across the field. And each community foundation can generate insights by comparing itself to foundations that share characteristics such as geography, asset composition, or asset size. Especially in today’s uncertain economy, comparative data plays a valuable role in gauging progress or identifying operating model strengths and challenges.

CF Insights’ latest report, *Guideposts for Growth and Grantmaking*, developed from Columbus Survey data, highlights trends in common metrics across the community foundation field. 2008 and 2009 have been extraordinary years for community foundations. This report provides 2008 results and is a valuable marker for gauging results in 2009. 2009 data will be collected in Q1 of 2010 and released in Q2.

This field-wide data begins to answer the question of how community foundations have fared in the economic crisis. It is important to note that the data is a composite representing a wide range of community foundations and communities across the US. Our objectives with this report are first, to describe field-wide trends in the aggregate, and more importantly, to offer you a resource to understand the performance of your individual organization in the context of the field.

The report will explore the following questions about the overall trends in the field:

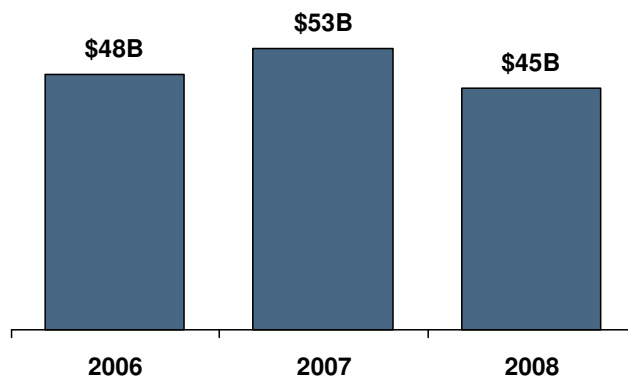
- **How have community foundations fared in the economic crisis?**
- **What is the longer term effect of the economic downturn on community foundation operating models and standard operating metrics?**
- **How did the timing of the market decline affect the field?**
- **How has giving to community foundations been affected?**
- **What level of grantmaking have community foundations supported? What are the implications of changes in grantmaking patterns for the field?**
- **What are some of the major differences in the profiles of community foundations across the field?**

Each of these questions can be further examined to understand the differences between the field as a whole, your peers, and your own foundation. Simply access additional comparative data at www.cfinsights.org.

Understanding Community Foundation Assets and Operating Metrics in a Time of Economic Crisis

Despite suffering a 14% decline in total assets from 2007 to 2008, the community foundation field still represents \$45B in assets, only slightly below the 2006 total of \$48B. Figure 1 illustrates the total assets held by community foundations from 2006-2008.

Figure 1. Aggregate Community Foundation Assets, 2006-2008
N = 374

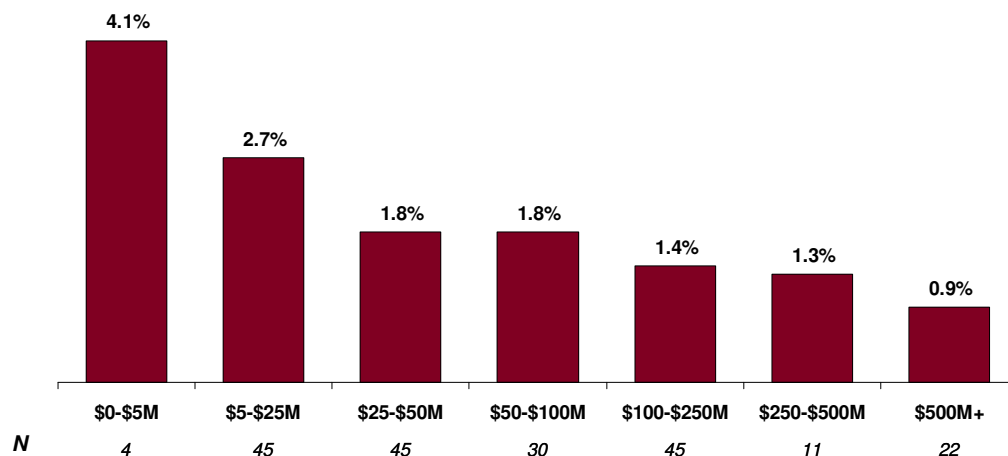


In terms of calculating aggregate field-wide metrics, we have looked at those foundations that have consistently entered asset data into the Columbus Survey for the three year time period (2006-2008), in total 374 community foundations.

As assets have decreased, the budget to asset ratio for community foundations has increased. 2008 market performance and economic circumstances suggest a need to recalibrate common benchmarks, such as the “1% rule” at larger foundations, as the asset base in the denominator has declined much faster than the rate at which budgets can be reduced.

For comparative purposes, using a subset of community foundations between \$100M and \$500M for whom data is available, this ratio has increased from 1% in 2007 to approximately 1.4% in 2008. Even for the largest foundations with assets greater than \$500M, the ratio increased from 0.8% in 2007 to 0.9% in 2008.

Figure 2. Budget to Asset Ratio by Asset Range, 2008



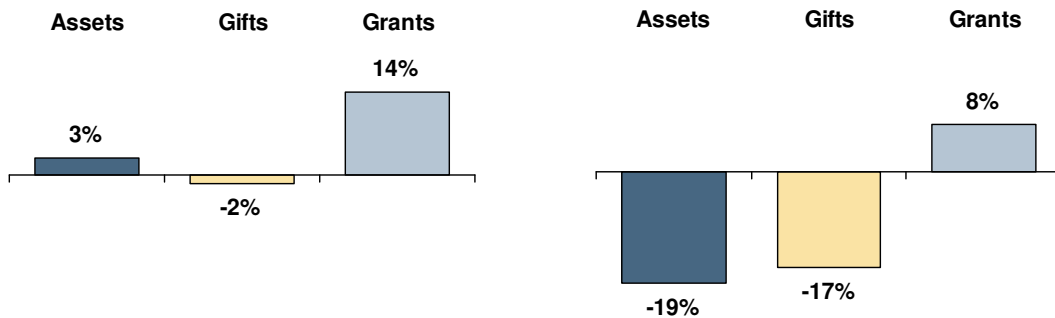
While larger foundations do achieve economies of scale, these tend to taper as foundations grow, and in 2008, only foundations above \$500M in assets achieved a ratio of less than 1%. From community foundations participating in the “Taking Informed Action in Challenging Times” study, we know that foundations of all sizes have been challenged to align economics with mission-driven priorities and increasing community needs. Typical operating metrics and operating models are being examined.

Understanding the Timing of Market Decline

The impact of the economic crisis on foundations during 2008 was severe. The Columbus Survey data confirmed the findings of CF Insights’ previous white papers “Making Informed Decisions in Uncertain Times” and “Taking Informed Action in Challenging Times”: assets and gifts declined between 2007 and 2008 while grantmaking remained strong.

Given that the community foundations’ 2008 data is reported by fiscal year end, an interesting comparison can be made about the impact of the dramatic market decline in fall of 2008. Those foundations that ended their fiscal year 2008 between January and June experienced some slowing of the economy but not the negative declines brought on by the market volatility of fall 2008. On the other hand, foundations that ended their fiscal year in the second half of 2008 experienced significant market decline. For this reason, we’ve analyzed changes in gifts, grants, and assets from 2007-2008 by fiscal year end (FYE). Figure 3 highlights these changes.

Figure 3. Changes to Assets, Gifts, and Grants from 2007-2008 by Fiscal Year End
Fiscal Years Jan-Jun *Fiscal Years Jul-Dec*



Community foundations with fiscal years ending in the first half of the year saw slowing market growth, on average 3%, from 2007 to 2008. Donor behavior also began to reflect the cooling economy, as gifts were down 2%. However, community foundations did not pull back on grantmaking in their communities; grants increased 14% from 2007 to 2008.

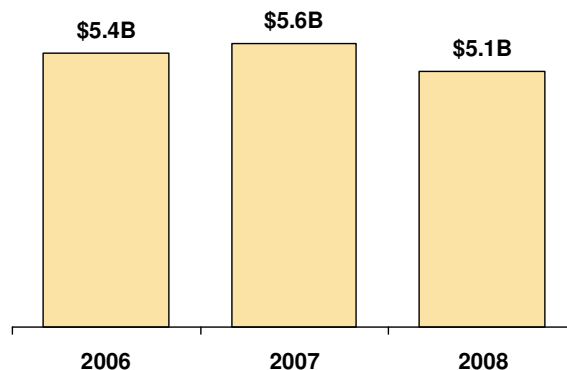
Community foundations that ended their fiscal year after the precipitous market decline in fall 2008 suffered a 19% decline in assets relative to 2007. We've heard during previous research, from community foundations whose donors expressed concern about market volatility, that donors were not contributing as much to new or existing funds during the fourth quarter 2008, with appreciated stock gifts particularly sparse. 2008 giving to community foundations declined 17% compared to 2007. Despite the decline in assets and giving, grantmaking increased 8%.

The impact of the economic crisis will be felt for years to come. Foundations in 2009 continued to suffer from market volatility and weak underlying economic conditions. There will be longer term implications for community foundation spending policies intended to smooth volatility. For example, down quarters will be factored into grantmaking and fee revenue calculations through 2013 (if a 20 quarter rolling average is used). Those foundations with shorter time horizons in their spending policy calculation have already felt the impact of the market decline in grants and fees while others will spread the impact over a longer timeframe.

Understanding Giving to Community Foundations Across Communities

At a field-wide level, giving to community foundations saw a slight increase between 2006 and 2007, but tapered off between 2007 and 2008 with a 10% decline. This aggregate gifts data is measured among the 328 respondents with data from 2006-2008.

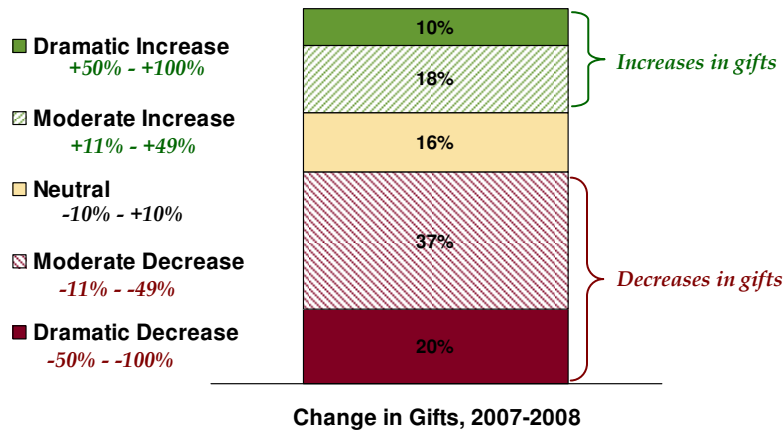
Figure 4. Aggregate Community Foundation Gifts, 2006-2008
N = 328



One of the most challenging aspects of the community foundation model is predicting donor behavior. At a field-wide level, giving has slowed between 2007 and 2008 but patterns differ from one community to another.

While giving to the field as a whole declined 10% from 2007 to 2008, patterns of donor behavior differed among community foundations as illustrated by Figure 5.

Figure 5. Changes in Gifts to Community Foundations, 2007-2008



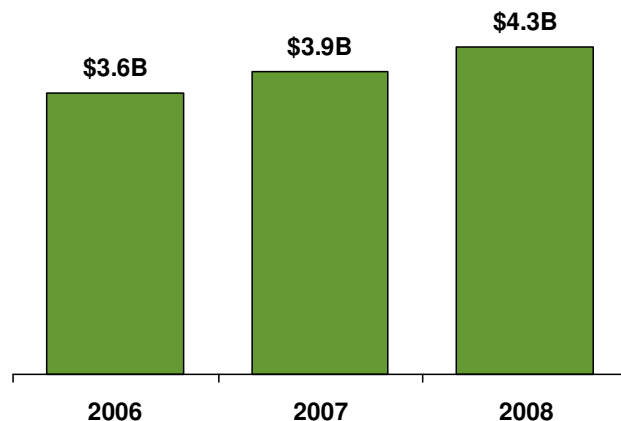
Nearly 60% of community foundations saw some kind of decline in giving, 37% of which were moderate declines (11% to 49% declines). On the other hand, 28% of community foundations saw an increase in gifts, 10% of which were experiencing increases in 2008 greater than 50% compared to 2007. Another 16% saw steady giving levels. These numbers were similar across the field, regardless of region or fiscal year end, underscoring the observation that donor behavior and growth patterns vary significantly across the field.

However, asset size and growth stage can have some influence on this metric. Larger foundations of \$250-\$500M were less likely to see decreases in giving and more likely to have a moderate or dramatic increase compared to the field. On the other hand, foundations with less than \$100M in assets were more likely to experience a decrease in giving to the foundation, especially those foundations growing towards \$100M and very small foundations just beginning (\$0-\$5M).

Understanding Grantmaking Across Communities

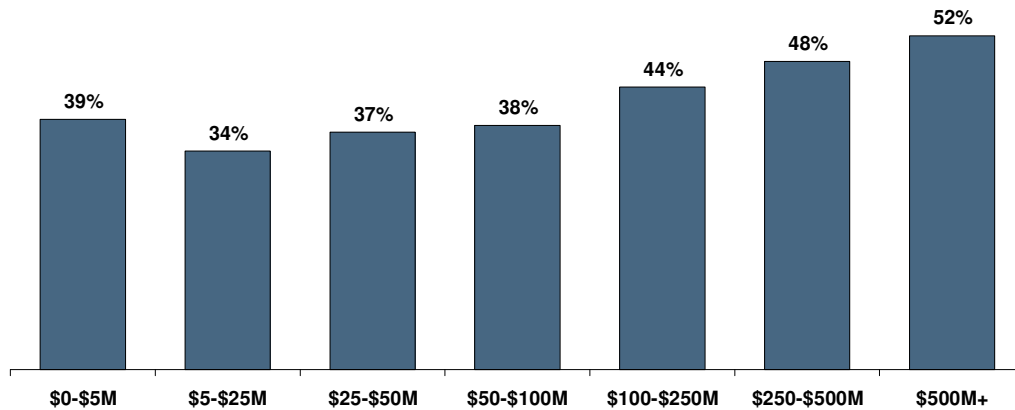
Community foundation grantmaking grew 8% annually from 2006 to 2008, bringing total grant dollars above \$4B. This aggregate grants data is measured among the 328 respondents with data from 2006-2008.

Figure 6. Changes in Community Foundation Grantmaking, 2006-2008
N = 328



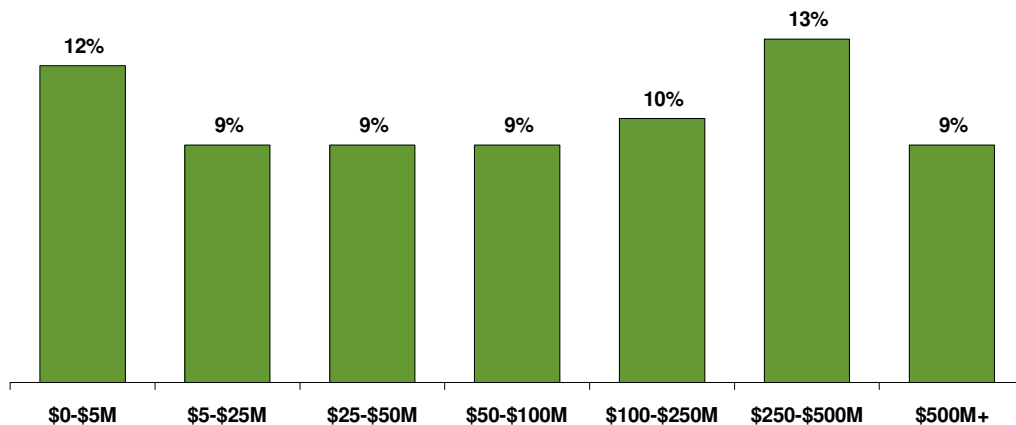
Despite the economic climate, grantmaking has continued to increase at community foundations. One factor underlying this increase, and movement away from a traditional endowment model, is the increase in donor advised funds (DAF). An analysis of DAF grants as a percent of total grantmaking shows not only that 50% of the \$4B in community foundation grants in 2008 were driven by DAFs, but also that this ratio increases with increased asset size (Figure 7).

Figure 7. 2008 Percent of Total Grants That Are Donor Advised by Asset Range



Higher donor advised fund asset composition and transactions are also influencing community foundations' payout rates. Figure 8 illustrates the payout rate by asset range.

Figure 8. 2008 Payout Rate by Asset Range



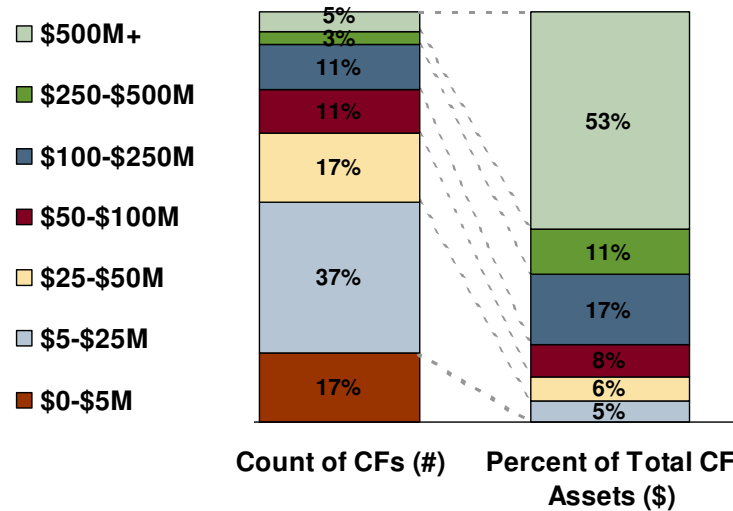
Community foundations have traditionally been oriented toward building endowment, though the preponderance of DAF grantmaking demonstrates the degree to which the field today is also driven by active individual donors and families. Increasing grants distributions demonstrates the flexibility of community foundations and donors in responding to heightened community need, but also stretches the operating model further from its traditional focus on building endowment.

Understanding Community Foundation Profiles Across the US

The community foundation field is comprised of a diverse set of philanthropic organizations, ranging in asset size from just a few thousand dollars to over one billion in total assets. The largest foundations (over \$100M in assets) represent over 80% of the field's total assets. In contrast, foundations with less than \$50M in total assets comprise just over 10% of total assets yet account for nearly three-quarters of the total count of community foundations. These proportions are based upon the ~500 foundations included in the Columbus Survey; the 200+ community foundations not included in this data set most likely hold less than \$50M in assets, thus even more dramatically influencing this unbalanced picture of assets compared to count. Figure 9 highlights the total asset distribution of the community foundation field.

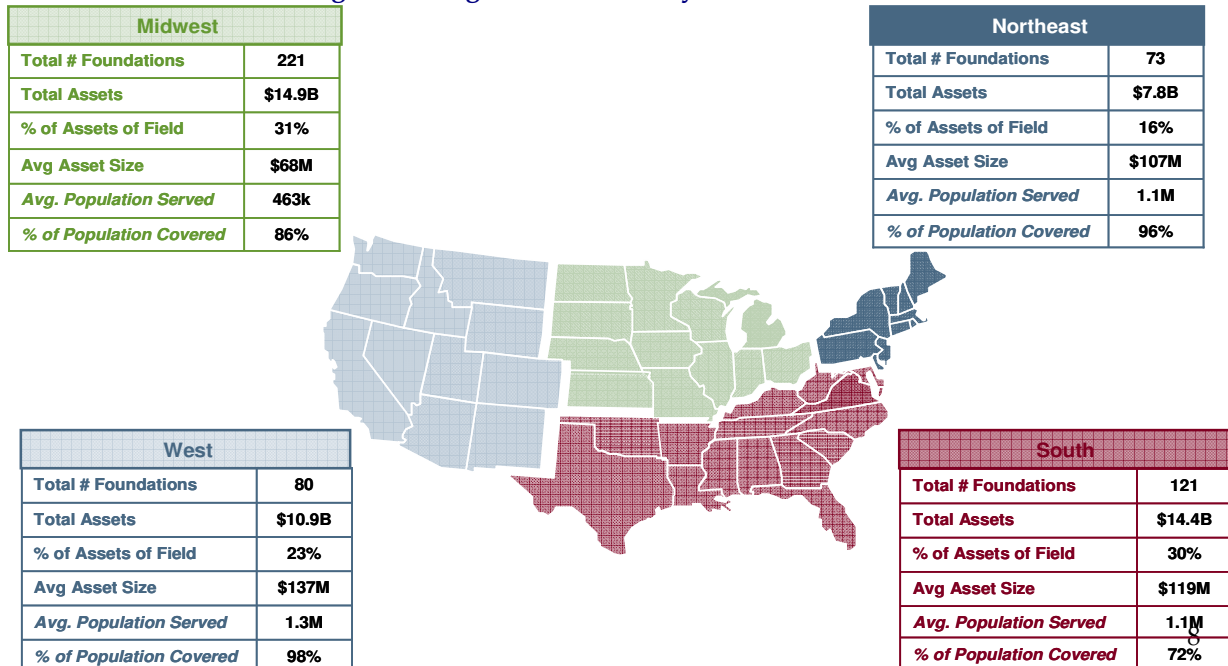
Figure 9. Community Foundation Field Asset Distribution

N = 495



Nationwide, community foundations illustrate differences across regions in number, total assets, average asset size, and population served. Figure 10 illustrates differences in community foundations across the four US regions.

Figure 10. Regional Community Foundation Metrics



The Midwest is home to the largest concentration (45%) in number of US community foundations. Many of these are smaller foundations; the average asset size of \$68M is lower than in other regions. Despite this lower average asset size, the Midwest has the highest concentration of total assets compared to other regions (31%). Correspondingly, community foundations in the Midwest have an average population served of less than half (463K) that of the other regions, which range from 1.1-1.3 million.

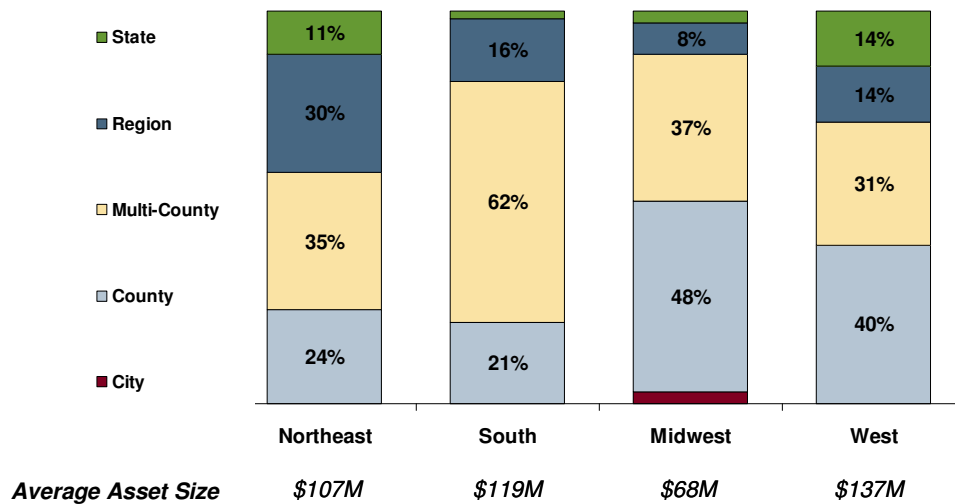
The Southern states represent the second highest number of community foundations, but with average asset size nearly double (\$119M) that of the Midwest. Southern community foundations account for another 30% of the country's total assets.

The West has the highest average community foundation asset size (\$137M), and represents a smaller number of community foundations, accounting for 23% of total assets in the US.

The Northeast has the smallest number of community foundations, with an average asset size of \$107M, representing 16% of total assets in the US.

Another factor in understanding asset concentration and number of community foundations regionally is the type of area served by these organizations (city, county, multi-county, region, state). Figure 11 highlights the type of area served by region.

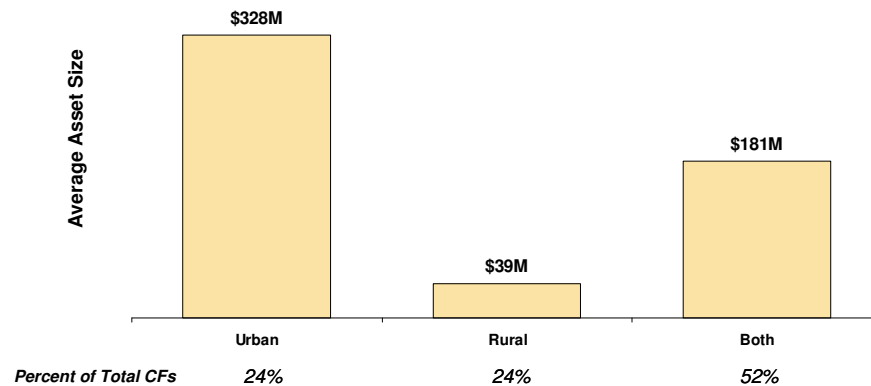
Figure 11. Community Foundation Service Area Focus by Region



The Midwest has more county or multi-county focused foundations, corresponding with its higher number of smaller foundations. Southern community foundations tend to be more multi-county and regionally focused compared to other regions. The West has the highest percent of statewide foundations, serving larger areas and having higher average assets. The Northeast has community foundations with more varied service areas, ranging from state-wide to county-focused; this accounts for its average asset size (\$107M) being larger than that of the Midwest (\$68M) but not as high as that of the West (\$137M).

Within these various service areas, community foundations also serve areas they characterize as more urban, rural, or a mixture of the two. Figure 12 highlights average asset size for foundations that serve these different types of communities.

Figure 12. Average Assets by Demographic of Area Served



More than three-quarters of community foundations serve areas that are urban or both urban and rural. Higher average asset values are associated with increased “urban” populations served by community foundations.

While these variables only begin to describe the differences between the community foundations serving different areas of the US, they also illustrate the fact that it is possible to find commonalities across many characteristics.

Implications and Next Steps

In keeping with the community foundation field’s collegial spirit, comparative data should be shared and discussed among peer foundations. We hope this trend report serves as a starting point for understanding your community foundation’s growth and grantmaking in the context of relevant comparisons.

As further support, you can use benchmark data to facilitate learning and decision making within your own organization. This could include:

- **Comparing your foundation to others to better understand your operating model.** What other foundations are similar to yours? What characterizes your “aspirational” peer set? How is your community foundation unique when compared to the field? Understanding these nuances and communicating with your peers about them can lead to new insights and best practices.
- **Educating your board about other community foundations and issues of sustainability.** Many board members are intrigued about the operating models of other foundations in the field. Who can you learn from? How can benchmark data help guide your board’s decision making process?
- **Understanding field-wide trends and the levers of sustainability to better prepare for the future.** 2008 represented a difficult year for many community foundations, but hopefully also provided a window of opportunity to examine the traditional community foundation operating model and identify scenarios for which it is not optimal. What is the new accepted norm for the budget to asset ratio? How do you match your foundation’s values with your operating model to withstand economic crisis? For

example, is the main priority of your foundation maintaining assets? Maintaining grantmaking in terms of dollar level? Maintaining operating capacity? Preserving operating cash? Once your organization determines what is at the core of its values, it can begin to match its economic model to these values.

As CF Insights continues to administer the Columbus Survey, we will support the field and our members in uncovering the answers to these questions. Some ways to do this include:

- **Share** this report with your board, highlighting how your foundation compares to the field
- **Connect** with you peers about this report to understand best practices and fresh ideas in the field
- **Create** benchmark reports at www.cfinsights.org to illustrate your foundation’s performance over time or compared to a peer aggregate

Once you’ve logged in to www.cfinsights.org, you can instantly begin generating benchmark reports to further understand your community foundation’s performance relative to peers. Longitudinal trend and peer aggregate reports are available for the field and CF Insights members have access to peer-identified reports. Examples of these reports are listed below and more detail is available in Appendix III.

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, 07-08
- Change in gifts, 07-08
- Change in grants, 07-08

CF Insights Member Reports

Assets

Example reports

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

Operating Budget

Example reports

- Budget to asset ratio vs. peers
- Peer fee schedules by fund

Gifts & Grants

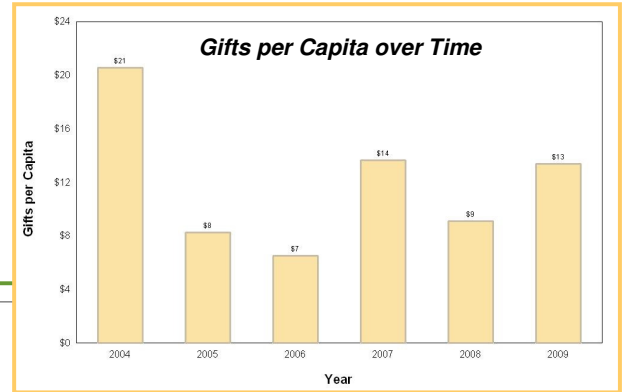
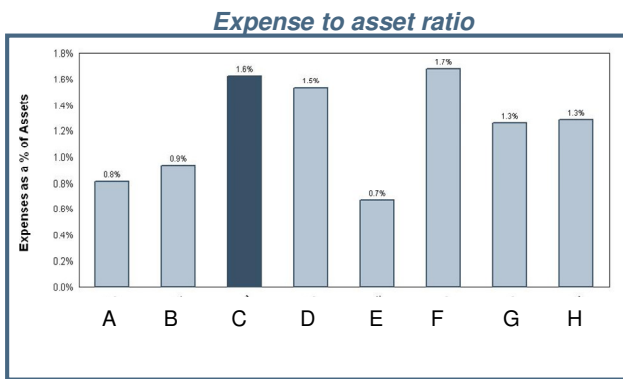
Example reports

- Avg gift size vs. peers
- Annual payout rate vs. peers
- Gifts/Grants per capita vs. peers

Staffing

Example reports

- Assets per FTE among peers
- Funds per FTE among peers



Payout ratio

Appendix I. Rankings

Top 100 Community Foundations by Asset Size

Note: Available for download in Excel format at www.cfinsights.org

Columbus Foundation Survey of Community Foundations

List of Top 100 Community Foundations by Asset Size

CF Insights | February 2010

| Foundation Name | 2008 Assets | FYE | Foundation Name | 2008 Assets | FYE |
|--|-------------|-------|---|-------------|-------|
| 1. Tulsa Community Foundation | \$3.80B | 12-31 | 51. The Winston-Salem Foundation | \$211M | 12-31 |
| 2. The Cleveland Foundation | \$1.60B | 12-31 | 52. The Norfolk Foundation | \$206M | 12-31 |
| 3. The Chicago Community Trust | \$1.59B | 09-30 | 53. Community Foundation for the Fox Valley Region, Inc | \$193M | 06-30 |
| 4. The New York Community Trust | \$1.53B | 12-31 | 54. Maine Community Foundation, Inc. | \$184M | 12-31 |
| 5. Silicon Valley Community Foundation | \$1.46B | 12-31 | 55. Erie Community Foundation | \$183M | 12-31 |
| 6. California Community Foundation | \$1.26B | 06-30 | 56. San Antonio Area Foundation | \$182M | 12-31 |
| 7. Marin Community Foundation | \$1.24B | 06-30 | 57. Greater New Orleans Foundation | \$179M | 12-31 |
| 8. The San Francisco Foundation | \$1.02B | 06-30 | 58. Community Foundation of New Jersey | \$169M | 12-31 |
| 9. The Greater Kansas City Community Foundation | \$969M | 12-31 | 59. Community Foundation of Western North Carolina | \$164M | 06-30 |
| 10. Boston Foundation, Inc. | \$915M | 06-30 | 60. The Fremont Area Foundation | \$148M | 12-31 |
| 11. The Oregon Community Foundation | \$887M | 12-31 | 61. Dallas Foundation TX | \$146M | 12-31 |
| 12. The Columbus Foundation | \$817M | 12-31 | 62. Community Foundation for Palm Beach and Martin Counties | \$145M | 06-30 |
| 13. The Saint Paul Foundation and the Minnesota Community Foundation | \$762M | 12-31 | 63. Baltimore Community Foundation, Inc. | \$143M | 12-31 |
| 14. Communities Foundation of Texas, Inc. | \$754M | 06-30 | 64. Fairfield County Community Foundation | \$142M | 06-30 |
| 15. The Minneapolis Foundation | \$689M | 03-31 | 65. Community Foundation of the Ozarks | \$141M | 06-30 |
| 16. The Community Foundation for Greater Atlanta | \$621M | 12-31 | 66. St. Louis Community Foundation | \$140M | 03-31 |
| 17. Foundation For The Carolinas | \$609M | 12-31 | 67. Community Foundation of Tampa Bay, Inc. | \$140M | 06-30 |
| 18. The Pittsburgh Foundation | \$575M | 12-31 | 68. Community Foundation of Sarasota County | \$139M | 06-30 |
| 19. Hartford Foundation for Public Giving | \$564M | 12-31 | 69. Greater Des Moines Community Foundation | \$139M | 12-31 |
| 20. Oklahoma City Community Foundation, Inc. | \$564M | 06-30 | 70. Akron Community Foundation | \$139M | 03-31 |
| 21. The San Diego Foundation | \$541M | 06-30 | 71. Amarillo Area Foundation | \$138M | 12-31 |
| 22. Community Foundation for Southeast Michigan | \$533M | 12-31 | 72. The Community Foundation Serving Coastal South Carolina | \$138M | 06-30 |
| 23. Arizona Community Foundation | \$512M | 03-31 | 73. Triangle Community Foundation | \$137M | 06-30 |
| 24. Baton Rouge Area Foundation | \$509M | 12-31 | 74. Stark Community Foundation | \$135M | 12-31 |
| 25. Community Foundation Serving Richmond/Central VA | \$508M | 12-31 | 75. Community Foundation for Greater Buffalo | \$135M | 12-31 |
| 26. The Seattle Foundation | \$507M | 12-31 | 76. Dade Community Foundation | \$135M | 03-31 |
| 27. Central Indiana Community Foundation | \$471M | 12-31 | 77. The Community Foundation of Greater Birmingham | \$132M | 12-31 |
| 28. The Rhode Island Community Foundation | \$456M | 12-31 | 78. Arkansas Community Foundation | \$129M | 06-30 |
| 29. The Greater Milwaukee Foundation | \$429M | 12-31 | 79. Community Foundation of St. Joseph County, Inc. | \$127M | 06-30 |
| 30. The Denver Foundation | \$427M | 12-31 | 80. East Tennessee Foundation TN | \$125M | 12-31 |
| 31. Omaha Community Foundation | \$405M | 12-31 | 81. Jacksonville Community Foundation | \$124M | 12-31 |
| 32. East Bay Community Foundation | \$386M | 06-30 | 82. Orange County Community Foundation | \$123M | 06-30 |
| 33. The Community Foundation for the Capital Region DC | \$383M | 03-31 | 83. The Vermont Community Foundation | \$117M | 12-31 |
| 34. The Greater Cincinnati Foundation | \$379M | 12-31 | 84. North Carolina Community Foundation | \$117M | 03-31 |
| 35. New Hampshire Charitable Foundation | \$370M | 12-31 | 85. Central New York Community Foundation | \$117M | 03-31 |
| 36. The Dayton Foundation | \$328M | 06-30 | 86. Community Foundation of Greater Flint | \$114M | 12-31 |
| 37. Community Foundation of Greater Memphis, Inc. | \$319M | 03-31 | 87. Community Foundation of Sonoma County | \$113M | 12-31 |
| 38. The Community Foundation of Middle Tennessee | \$316M | 12-31 | 88. Toledo Community Foundation | \$109M | 12-31 |
| 39. Hawaii Community Foundation | \$310M | 12-31 | 89. Madison Community Foundation | \$108M | 12-31 |
| 40. The Community Foundation of Louisville, Inc. | \$294M | 06-30 | 90. Battle Creek Community Foundation | \$106M | 03-31 |
| 41. The Philadelphia Foundation | \$246M | 12-31 | 91. Greater Kanawha Valley Foundation | \$105M | 12-31 |
| 42. The Gulf Coast Community Foundation of Venice | \$242M | 06-30 | 92. Community Foundation For Monterey County | \$103M | 03-31 |
| 43. The Grand Rapids Community Foundation | \$235M | 06-30 | 93. Community Foundation of North Texas TX | \$101M | 12-31 |
| 44. Santa Barbara Foundation | \$234M | 12-31 | 94. Community Foundation for Southern Arizona | \$97M | 06-30 |
| 45. Delaware Community Foundation | \$234M | 06-30 | 95. Community Foundation of Western Massachusetts | \$97M | 03-31 |
| 46. The Greater Houston Community Foundation | \$233M | 12-31 | 96. Ventura County Community Foundation | \$96M | 09-30 |
| 47. Rochester Area Community Foundation | \$226M | 03-31 | 97. Greater Worcester Community Foundation | \$92M | 12-31 |
| 48. The Community Foundation of Greater New Haven | \$225M | 12-31 | 98. Central Carolina Community Foundation | \$90M | 06-30 |
| 49. The Kalamazoo Community Foundation | \$220M | 12-31 | 99. Community Foundation of Greater Greensboro | \$87M | 12-31 |
| 50. Rose Community Foundation | \$219M | 12-31 | 100. Community Foundation for Muskegon County | \$82M | 12-31 |

Appendix II. 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 2008 data collection via CF Insights' online benchmarking database (www.cfinsights.org).

Field-wide survey participants entered their FYE 2008 data in the online form between August and December 2009. This process generated 209 complete responses, which means all data points were filled in – including assets, gifts, grants, fund-level data, total expenses and geographic information. The CF Insights team then researched an additional 287 community foundations' assets, gifts and grant numbers for 2008 from publicly available data.

This methodology led to different sample sizes for various data points. For asset, gift and grant numbers, data is used from all available information – around 496 total responses. For more granular analyses such as operating budget to asset ratio or geographic description of area served, the sample size may be smaller (200-300 respondents). Additionally, for longitudinal analyses (2006-2008 or 2007-2008) data was only used from foundations that had complete data across the time period defined. Therefore, the sample size for these analyses is smaller than the complete 2008 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. 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.

Appendix III. 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 data about their foundation as well as benchmark data comparing their community foundation to a selected peer aggregate and the field as a whole.

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

Benchmark reports

- Total Asset Growth Rate, 2007-2008
- Total Grant Growth Rate, 2007-2008
- Total Gift Growth Rate, 2007-2008

Additionally, **CF Insights members can generate customized peer-group benchmark 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 IV. How to Contribute FYE 2009 Data

If you found this trend and benchmarking report helpful and would like to receive similar information based on 2009 data, please share your 2009 unaudited data with CF Insights. We are proactively collecting this data in the first quarter of 2010 to bring more timely, relevant benchmarks and trends to the community foundation field.

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.

Non-members can email info@cfinsights.org to obtain log-in and password information.

Appendix V. About CF Insights & List of Members

CF Insights is created by and for community foundations, and operated by FSG – the nonprofit consultants dedicated to social impact.

CF Insights is a vital contributor to the development of a sustainable, high impact community foundation field. We provide peer benchmarking tools and knowledge that helps leaders make effective, informed decisions. Visit www.cfinsights.org to learn more about our members and the insights they make possible for community foundations everywhere.

Our work is made possible through the financial support of our members and funders.

CF Insights Members & Funders

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