



# Community Foundation Databook

2016 EDITION



# Welcome

The Community Foundation Databook is one of the longest standing surveys produced at CMF, and one of the most comprehensive statewide looks at community foundations to exist in the field. It serves as an important benchmarking tool for key operational and financial indicators, as well as a collective story of community foundation giving to leverage when advocating with state and national government.

This year, we partnered with the Dorothy A. Johnson Center for Philanthropy and Jason Franklin, the W.K. Kellogg chair for Community Philanthropy, to take a broadened look at the data we are collecting. The results of this deep-dive will be presented in December. A supplemental packet and infographic to this report will be released at that time.

In advance to the supplemental analysis, we are pleased to provide you with the core 2016 Databook results in this report.

We thank you for your time and commitment to providing this information each year. Your efforts benefit your community foundation peers as well as field broadly, and are critically important to providing visibility to overall trends and norms in community foundation giving.

We hope you find the following data informative and helpful to your planning. We look forward to digging in with you at the **December 13** webinar!

With gratitude,



Dave Lindberg  
Chief Financial Officer  
CMF



Andrea Judd  
Learning Services  
Coordinator  
CMF

# Table of Contents

## SECTION I:

Assets, Grants, and Gifts.....6

## SECTION II:

Finance and Operations.....13

- Spending Policy
- Staffing
- Fees on Funds
- Annual Rates of Return
- Funding Operations Budget

## SECTION III:

Program and Mission Related Investments.....18

## SECTION IV:

Other Data.....20

- Geographic Affiliates
- Software Use

# Methodology and Data

With 60 community foundations in Michigan, the CMF Community Foundation Databook represents the most complete picture of community foundations in our state, with 53 participants, or 88 percent of CFs represented.

The community foundation databook data is gathered through online survey. Each community foundation receives a unique log-in and password to their respective survey. The survey can be saved and does not need to be completed at one time. It is typical that the survey is completed by more than one individual in a community foundation, as the data spans departments and functional areas. The survey is voluntary and all questions are optional. Each question notes the number of responses received.

The data represented in this databook was collected during the months of June-August 2016. In total, 53 community foundations responded to the survey. Where applicable, a year-over-year comparison is noted, however the quantity of respondents varies slightly from year-to-year, so this is not a direct comparison.

Prior to finalizing, each community foundation received back their raw dataset they submitted and was given a two week time window to review and make any updates to account for any erroneous data entry errors.

There are limitations to this data. They include, but may not be limited to: human error in data entry, different interpretations of the questions being asked, different definitions across organizations and incomplete data to work from on the community foundation side.

# SECTION I

Assets, Grants, & Gifts



# Community Foundation Data Summary

BY ASSETS, AS OF LAST FISCAL YEAR END

Community Foundation	Assets	Grants Made	Gifts Received
Community Foundation for Southeast Michigan	\$746,219,086	\$52,322,043	\$67,508,837
Kalamazoo Community Foundation	\$426,308,766	\$16,421,252	\$6,899,078
Grand Rapids Community Foundation	\$327,024,422	\$9,831,021	\$9,264,572
Fremont Area Community Foundation	\$215,576,286	\$7,423,826	\$2,023,662
Community Foundation for Muskegon County	\$190,199,203	\$10,152,836	\$22,486,037
Community Foundation of Greater Flint	\$164,443,132	\$5,279,374	\$3,199,580
Battle Creek Community Foundation	\$112,952,627	\$6,942,276	\$3,705,731
Midland Area Community Foundation	\$85,750,525	\$3,957,426	\$5,370,075
Capital Region Community Foundation	\$83,457,379	\$6,174,791	\$5,861,349
Grand Haven Area Community Foundation	\$82,499,327	\$3,795,379	\$4,580,463
Ann Arbor Area Community Foundation	\$75,600,487	\$2,781,085	\$3,938,447
Saginaw Community Foundation	\$57,266,717	\$1,713,257	\$5,426,772
Community Foundation of the Holland/Zeeland Area	\$56,161,825	\$4,124,357	\$7,011,856
Community Foundation of St. Clair County	\$55,342,246	\$1,891,944	\$5,899,532
Grand Traverse Regional Community Foundation	\$49,421,780	\$2,680,250	\$1,642,415
Berrien Community Foundation	\$38,171,001	\$5,304,599	\$8,095,564
Bay Area Community Foundation	\$35,685,589	\$1,996,051	\$1,084,119
Community Foundation for Northeast Michigan	\$35,058,307	\$933,654	\$2,208,426
Petoskey-Harbor Springs Area Community Foundation	\$34,144,261	\$3,024,035	\$1,773,654
Charlevoix County Community Foundation	\$29,580,152	\$1,615,092	\$1,786,083
Barry Community Foundation	\$29,035,667	\$708,492	\$2,813,652
Greenville Area Community Foundation	\$26,674,796	\$1,107,549	\$543,710
Sturgis Area Community Foundation	\$23,294,322	\$420,598	\$446,524
Community Foundation of the Upper Peninsula	\$23,110,631	\$1,480,940	\$937,487
Jackson Community Foundation	\$22,858,716	\$759,514	\$3,143,550
Lenawee Community Foundation	\$21,649,498	\$1,381,164	\$2,272,720
Allegan County Community Foundation	\$17,238,488	\$839,445	\$623,640

Community Foundation	Assets	Grants Made	Gifts Received
Mt. Pleasant Area Community Foundation	\$15,535,122	\$545,821	\$1,452,727
Hillsdale County Community Foundation	\$15,051,455	\$641,175	\$991,060
Community Foundation of Marquette County	\$14,596,954	\$647,176	\$2,417,659
Four County Community Foundation	\$13,087,739	\$447,549	\$191,162
Marshall Community Foundation	\$11,839,189	\$701,846	\$390,967
Gratiot County Community Foundation	\$11,720,658	\$506,840	\$522,164
Cadillac Area Community Foundation	\$10,031,061	\$272,123	\$733,124
Tuscola County Community Foundation	\$9,850,574	\$375,119	\$214,419
Frankenmuth Community Foundation	\$9,028,705	\$697,012	\$869,984
Dickinson Area Community Foundation	\$8,977,917	\$193,664	\$430,774
Lapeer County Community Foundation	\$8,848,518	\$316,493	\$146,954
Michigan Gateway Community Foundation	\$8,646,563	\$456,309	\$484,845
M&M Area Community Foundation	\$8,141,095	\$416,426	\$754,575
Community Foundation of Monroe County	\$7,683,915	\$204,670	\$1,760,700
Keweenaw Community Foundation	\$7,214,690	\$178,199	\$311,529
Community Foundation of Greater Rochester	\$7,043,127	\$1,204,034	\$525,862
Branch County Community Foundation	\$6,905,765	\$292,601	\$1,701,743
Roscommon County Community Foundation	\$6,653,042	\$203,172	\$417,275
Shiawassee Community Foundation	\$5,803,161	\$245,252	\$120,111
Leelanau Township Community Foundation	\$4,560,613	\$121,152	\$107,834
Sanilac County Community Foundation	\$4,354,992	\$201,370	\$231,150
The Huron County Community Foundation	\$3,843,800	\$108,558	\$260,673
Otsego Country Community Foundation	\$3,729,340	\$113,479	\$233,166
Three Rivers Area Community Foundation	\$3,619,922	\$154,707	\$100,078
Chippewa County Community Foundation	\$3,237,685	\$168,707	\$629,341
Canton Community Foundation	\$2,041,000	\$117,037	\$238,000
<b>2016 Survey Totals</b>	<b>\$3,276,771,838</b>	<b>\$164,592,741</b>	<b>\$196,785,411</b>

Responses: 53. Responses inclusive of supporting organizations and affiliates.

# Quantity Breakdowns

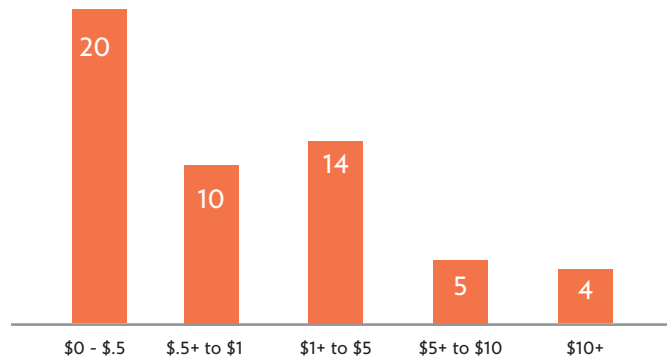
Number of Community Foundations by **Asset Size**



ASSET SIZE (\$ IN MILLIONS)

Responses: 53

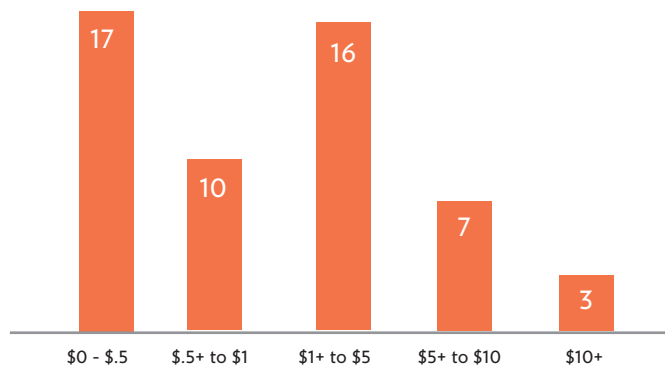
Number of Community Foundations by **Grants Made**



GRANTS MADE (\$ IN MILLIONS)

Responses: 53

Number of Community Foundations by **Gifts Received**



GIFTS RECEIVED (\$ IN MILLIONS)

Responses: 53

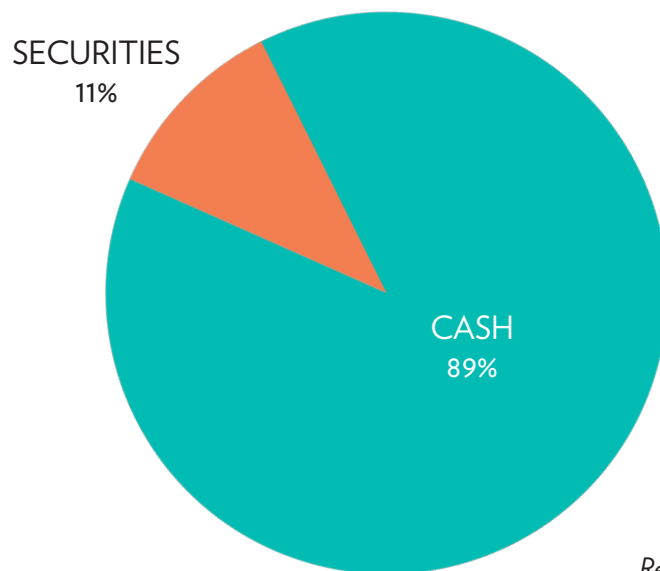


## Number of Community Foundations by Percentage of **Gifts from Online Giving**



Responses: 47

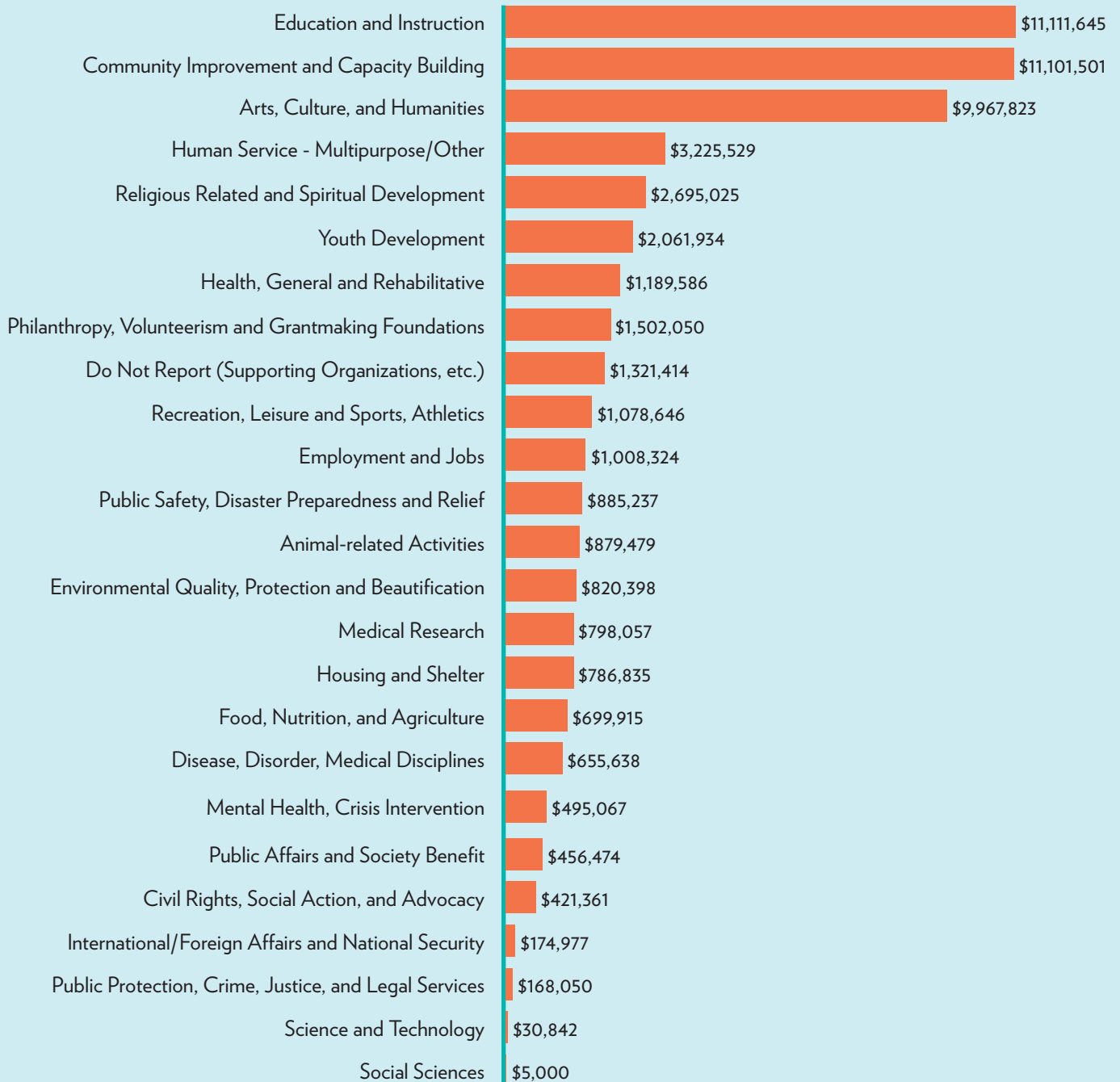
## Gift Type Breakdown



Responses: 46

# Single Largest Grant Made

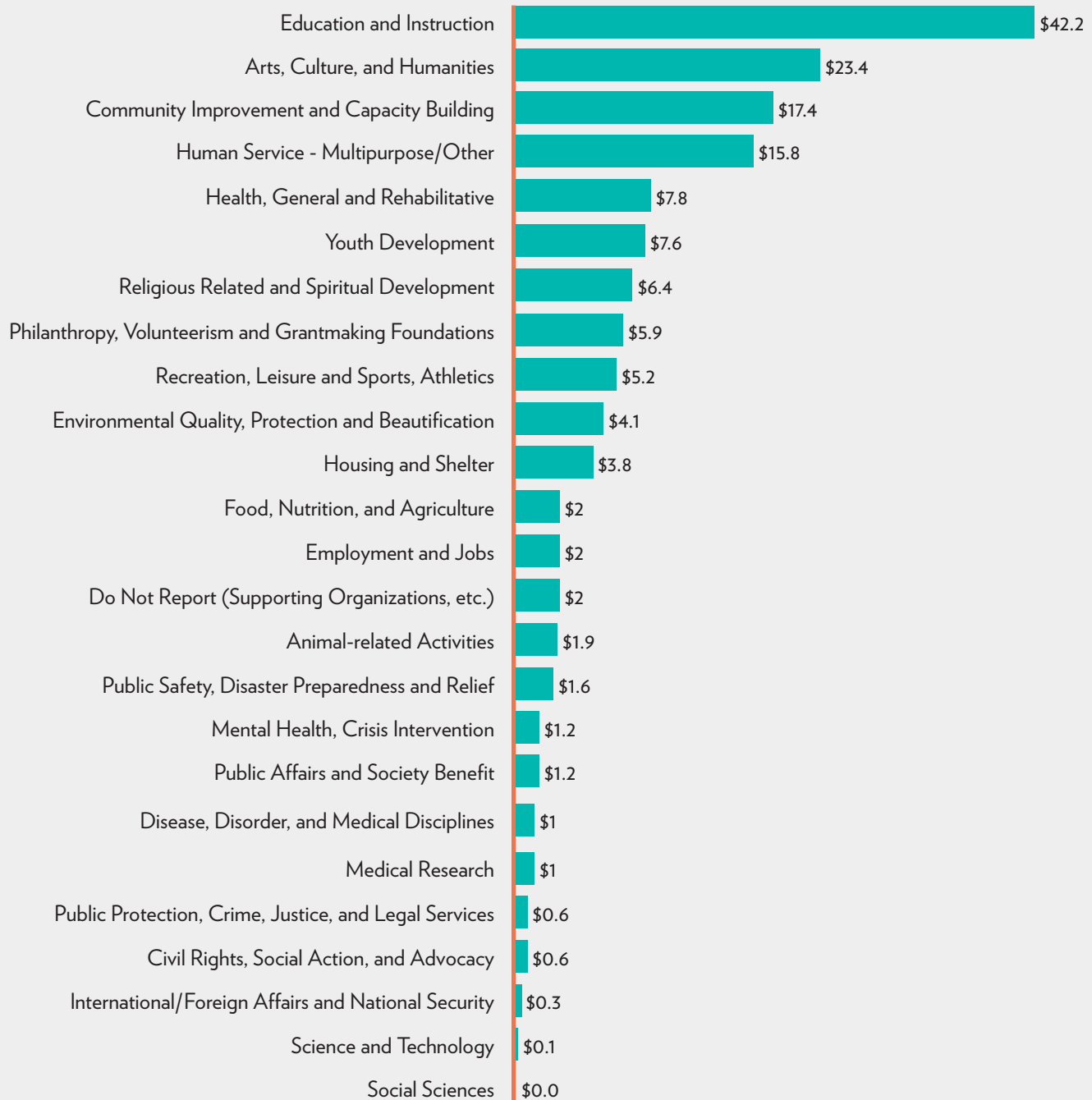
## BY FIELD OF INTEREST



# Total Annual Grants Made

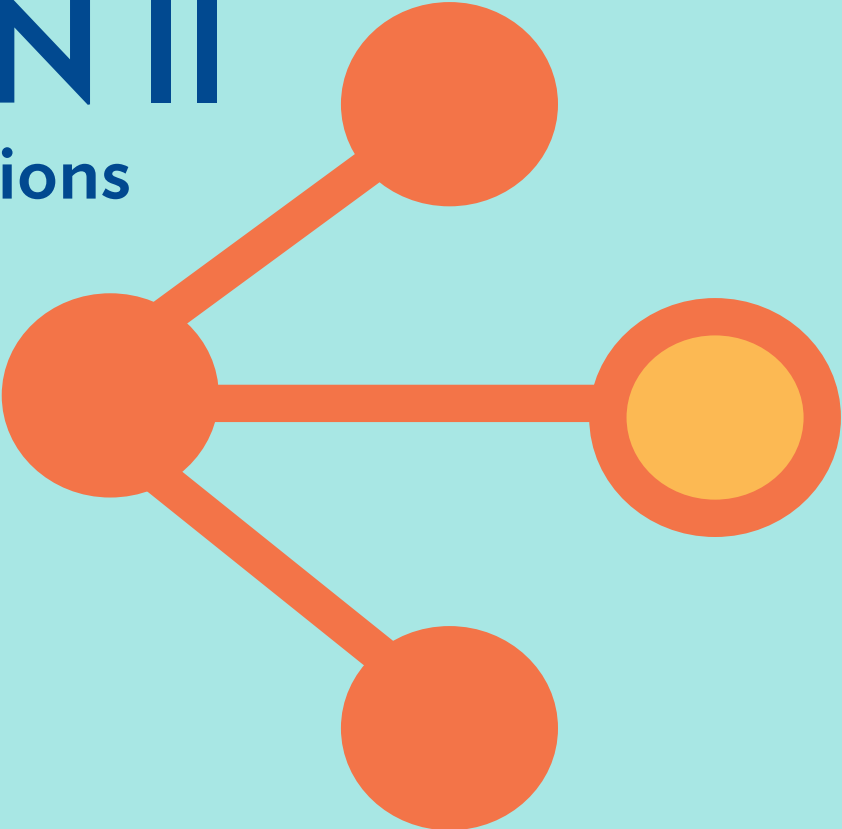
## BY FIELD OF INTEREST

Values shown in millions, rounded to one decimal.



# SECTION II

Finance & Operations



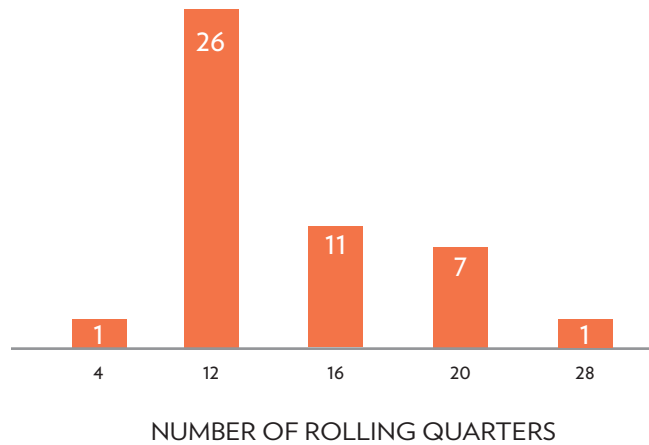
# Spending Policy

## Number of Community Foundations by **General Spending Policy**

GSP Percentage	Admin Fee Included	Admin Fee Excluded
4%	0	8
5%	12	15
Other	8	4
<b>Total</b>	<b>20</b>	<b>27</b>

Responses: 47

## Number of Community Foundations by **Rolling Quarters** in Spending Policy



Responses: 46

## Average Number of **Full Time Employees By Department\*** by Asset Category

Asset Category	CEO/ Executive Director	Finance and Admin	Program	Development	Communication	Technology	General Support	Other
\$0+ to \$5	0.4	0.2	0.0	0.1	0.1	0.0	0.1	0.0
\$5+ to \$10	0.9	0.4	0.1	0.0	0.1	0.0	0.2	0.0
\$10+ to \$20	1.0	0.5	0.8	0.3	0.3	0.0	0.0	0.0
\$20+ to \$50	1.0	1.5	1.3	0.2	0.3	0.0	0.6	0.0
\$50+ to \$100	1.0	1.9	1.8	1.0	0.8	0.1	1.0	0.0
\$100+	1.3	4.5	7.0	4.8	1.8	0.4	1.0	1.7

Responses: 53

Assets shown in millions.

\*Includes supporting organizations & affiliate organizations.

## Average Number of **Transactions Per Year** by Asset Category

Asset Category	Number of grant requests received	Number of grants approved	Number of gifts received	Number of Funds
\$0+ to \$5	43	39	351	51
\$5+ to \$10	271	145	503	111
\$10+ to \$20	230	147	668	169
\$20+ to \$50	511	421	1737	270
\$50+ to \$100	1,080	663	2,083	474
\$100 +	2022	2030	2647	897

Assets shown in millions.

Responses: 42

## Number of Community Foundations by **Fees on Funds**

Fund type	0 - 0.49%	0.5 - .99%	1.0 - 1.49%	1.5 - 1.99%	2.0 - 2.49%	2.5-2.99%	3%+	Other
Donor Advised	1	3	20	17	7	0	0	0
Pass-Through	7	2	9	5	9	2	6	7
Agency	1	8	27	9	4	0	0	0
Scholarship	1	1	10	17	18	2	0	0
Other	0	0	9	2	4	0	1	0
Designated Fund	2	5	27	11	4	0	0	0
Field of Interest	1	2	18	18	10	0	0	0

Responses: 47

## Planned **Budget Wage Increase** for Next Fiscal Year

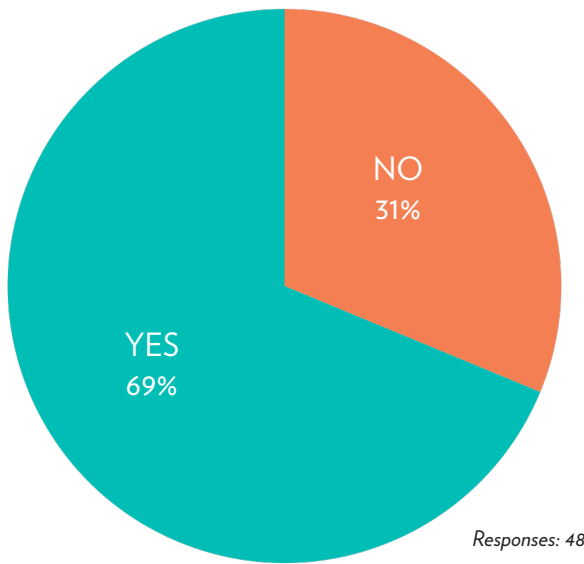


## Annualized Rate of Return as of 12-31-15

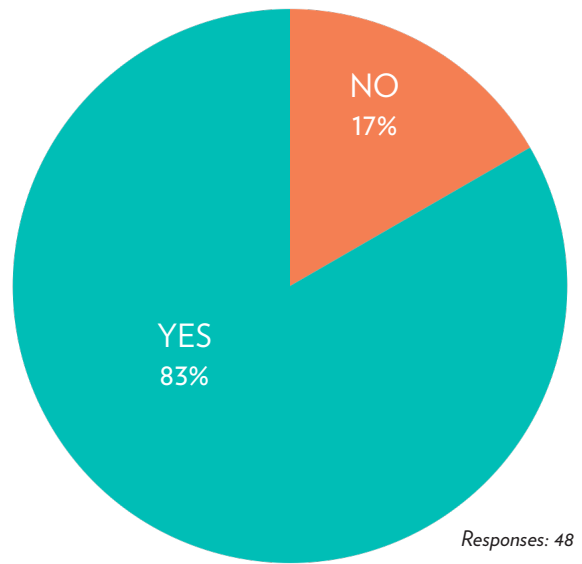
	Asset Size (Millions)	1 Year	3 Years	5 Years	10 Years
Foundation 1	\$0+ to \$5	-2.7%	6.4%	5.4%	6.3%
Foundation 2	\$0+ to \$5	-1.1%	8.2%	7.4%	5.7%
Foundation 3	\$0+ to \$5	0.0%	5.7%	5.6%	-
Foundation 4	\$0+ to \$5	-3.0%	6.6%	6.1%	-
Foundation 5	\$0+ to \$5	-0.9%	5.5%	-	-
Foundation 6	\$5+ to \$10	5.0%	12.3%	9.3%	-
Foundation 7	\$5+ to \$10	0.9%	5.4%	7.8%	-
Foundation 8	\$5+ to \$10	-1.4%	4.4%	4.8%	4.4%
Foundation 9	\$5+ to \$10	0.1%	6.9%	5.9%	3.5%
Foundation 10	\$5+ to \$10	-0.8%	6.9%	6.5%	-
Foundation 11	\$5+ to \$10	-1.2%	5.2%	4.8%	0.0%
Foundation 12	\$5+ to \$10	4.8%	12.1%	8.9%	5.8%
Foundation 13	\$5+ to \$10	-1.9%	11.5%	8.2%	-
Foundation 14	\$5+ to \$10	-1.4%	6.1%	5.7%	2.4%
Foundation 15	\$5+ to \$10	0.0%	7.7%	6.4%	6.2%
Foundation 16	\$5+ to \$10	-1.9%	5.6%	5.0%	-
Foundation 17	\$10+ to \$20	-1.5%	7.1%	6.7%	-
Foundation 18	\$10+ to \$20	-	-	-	-
Foundation 19	\$10+ to \$20	-	-	-	-
Foundation 20	\$10+ to \$20	-4.1%	4.0%	4.6%	4.6%
Foundation 21	\$10+ to \$20	-1.8%	5.2%		
Foundation 22	\$10+ to \$20	-4.4%	3.3%	4.5%	4.6%
Foundation 23	\$20+ to \$50	1.2%	3.9%	4.1%	0.0%
Foundation 24	\$20+ to \$50	-2.0%	7.3%	6.8%	6.4%
Foundation 25	\$20+ to \$50	-2.1%	5.9%	9.8%	7.8%
Foundation 26	\$20+ to \$50	-0.9%	9.7%	9.1%	7.2%
Foundation 27	\$20+ to \$50	-0.9%	6.2%	5.5%	6.7%
Foundation 28	\$20+ to \$50	-2.2%	5.2%	4.9%	
Foundation 29	\$20+ to \$50	-2.9%	7.3%	6.3%	6.0%
Foundation 30	\$20+ to \$50	-4.2%	3.8%	4.7%	9.2%
Foundation 31	\$20+ to \$50	-0.3%	6.6%	6.7%	6.0%
Foundation 32	\$20+ to \$50	-1.0%	8.3%	7.5%	6.7%
Foundation 33	\$20+ to \$50	-1.3%	4.2%	4.2%	5.3%
Foundation 34	\$20+ to \$50	-2.8%	5.8%	5.6%	5.7%
Foundation 35	\$50+ to \$100	-2.1%	5.5%	5.5%	4.6%
Foundation 36	\$50+ to \$100	-1.7%	6.2%	5.7%	-
Foundation 37	\$50+ to \$100	2.1%	8.6%	7.4%	6.1%
Foundation 38	\$50+ to \$100	-3.0%	4.1%	3.8%	3.4%
Foundation 39	\$50+ to \$100	-0.4%	9.8%	8.3%	7.6%
Foundation 40	\$50+ to \$100	-2.3%	6.2%	5.7%	6.3%
Foundation 41	\$50+ to \$100	-2.7%	6.3%	6.2%	5.7%
Foundation 42	\$100 +	-0.4%	8.4%	8.1%	7.1%
Foundation 43	\$100 +	-3.1%	3.3%	4.9%	4.7%
Foundation 44	\$100 +	-3.4%	4.3%	4.8%	4.5%
Foundation 45	\$100 +	-2.9%	5.4%	5.3%	5.1%
Foundation 46	\$100 +	-4.3%	5.2%	4.8%	4.3%
Foundation 47	\$100 +	-2.0%	8.0%	7.3%	6.3%
Foundation 48	\$100 +	-0.4%	5.7%	5.1%	4.7%
<b>AVERAGES</b>		<b>-1.4%</b>	<b>6.5%</b>	<b>6.2%</b>	<b>5.3%</b>

# Spending Policy

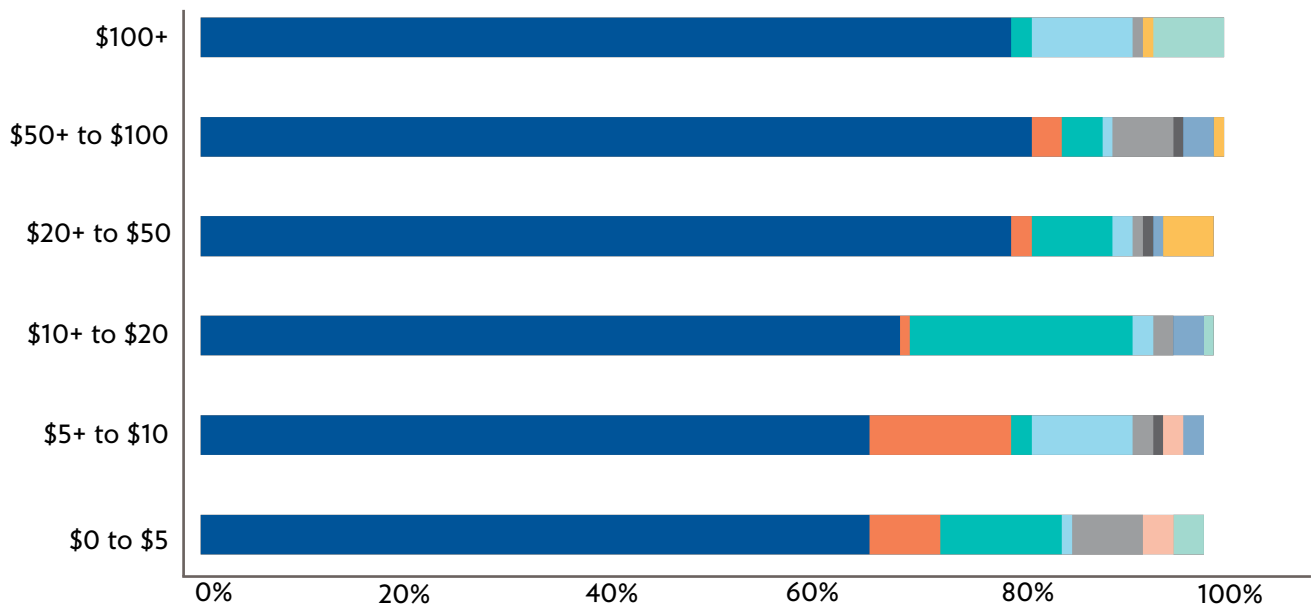
**69 Percent** Allow Disbursements from Underwater Funds



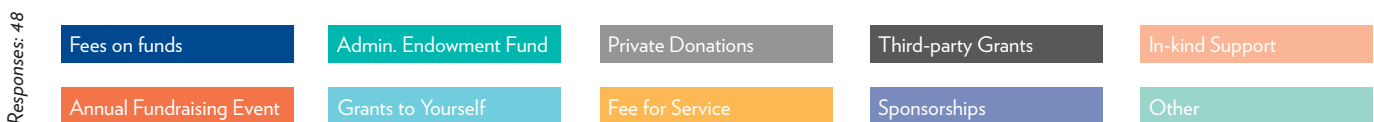
**83 Percent** Allow Unused Spendable Income to Rollover to the Next Fiscal Year



Average Percent of Operations Budget by Funding Area, Based on Asset Size



Assets shown in millions.

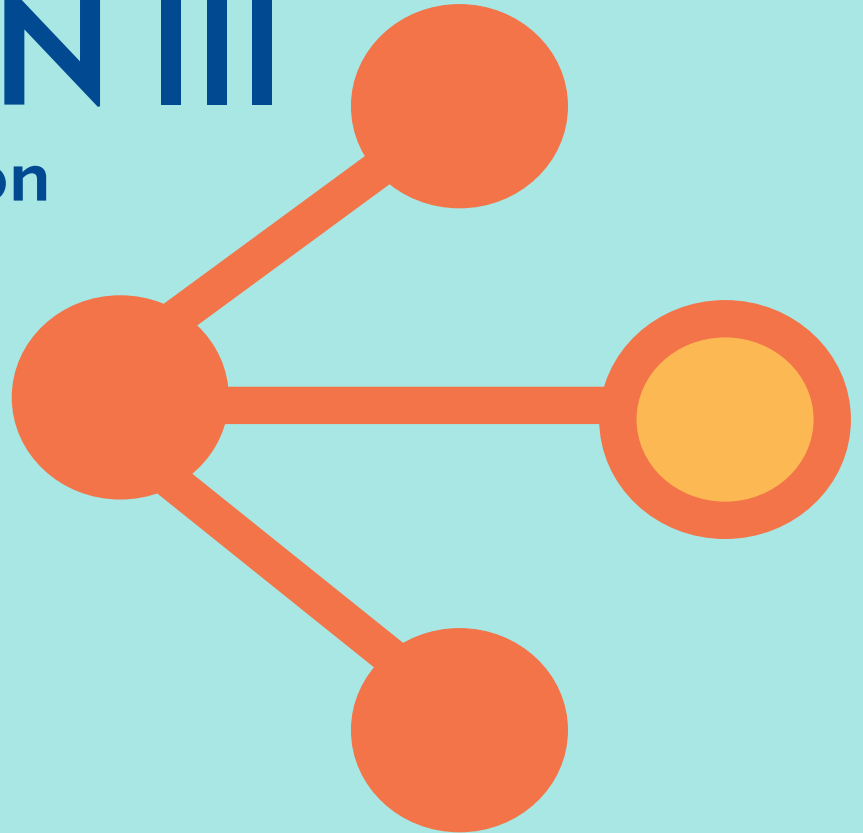


Responses: 48



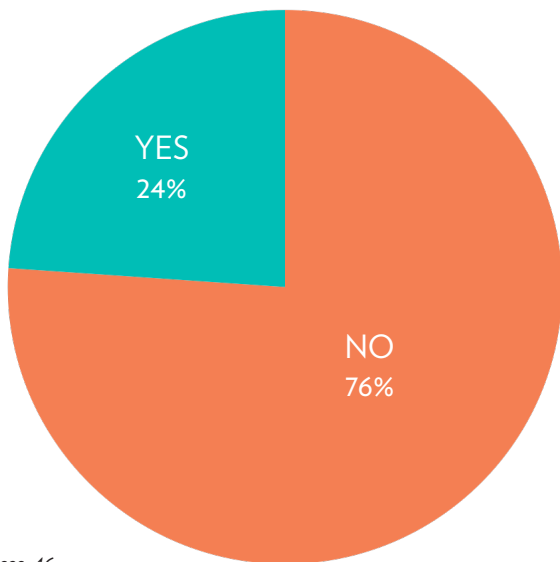
# SECTION III

Program & Mission  
Related Investing



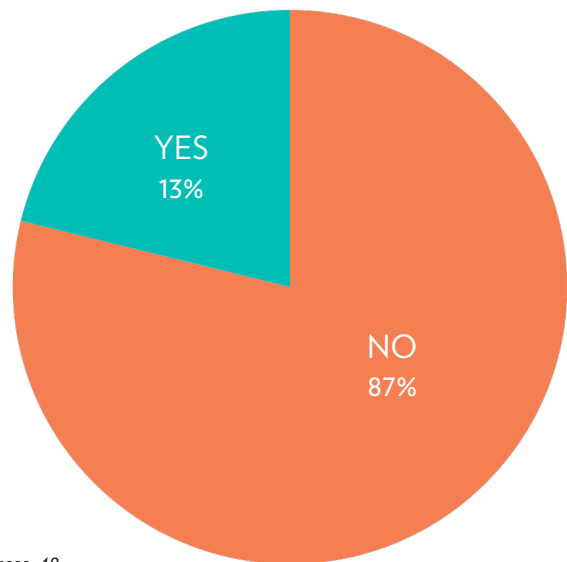
# Impact Investing

**24 Percent** of respondents do **Program Related Investing (PRI)**



Responses: 46

**13 Percent** of respondents do **Mission Related Investing (MRI)**



Responses: 48



## Demonstrating Impact Investing

The Community Foundation for Muskegon County and the Ann Arbor Area Community Foundation were both featured in CMF's Impact Investing video series. To view their videos and learn more about their impact investments, visit:

[www.michiganfoundations.org/impactinvesting](http://www.michiganfoundations.org/impactinvesting)

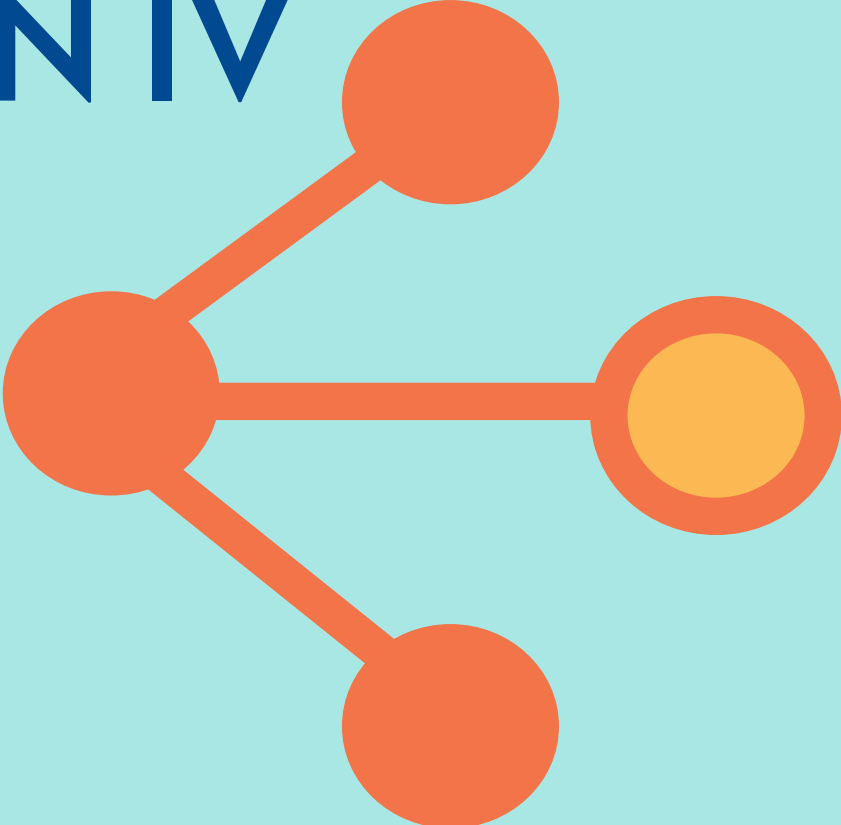


- **100 percent** of MRI investments reported were individual investments (i.e. investing in a specific project in your community to support community economic development)
- **Three foundations** reported designating a percent of their permanent endowment investment pool for MRIs. Two designate 2%, one designates 6%.
- **50 percent** of foundations who do MRIs perform due diligence in-house. **25 percent** use one or more service providers, and **25 percent** use a combination of in-house and service providers.
- **Oversight** on the investments selection process for MRIs varied across each organization, with the following entities identified:

Investment or Impact Investing Committee  
 Management, Executive Committee and Board  
 Investment Committee with External Advisory Committee Support

# SECTION IV

Other



# Geographic Affiliates

21%

Of respondents reported on their geographic affiliates

8

Respondents have more than one geographic affiliate

\$2,697,597

Combined total reported grantmaking of geographic affiliates

Foundation	Affiliate	Total Grantmaking
Barry Community Foundation	Delton Kellogg Education Foundation	\$23,500
Barry Community Foundation	Thornapple Area Enrichment Foundation	\$36,945
Battle Creek Community Foundation	Athens Community Foundation	\$76,424
Battle Creek Community Foundation	Homer Community Foundation	\$234,422
Bay Area Community Foundation	Arenac	\$47,311
Community Foundation for Northeast Michigan	North Central Michigan Community Foundation	\$128,633
Community Foundation for Northeast Michigan	Straits Area Community Foundation	\$112,306
Community Foundation for Northeast Michigan	Iosco County Community Foundation	\$472,977
Community Foundation for Southeast Michigan	Chelsea Community Foundation	\$115,000
Community Foundation for Southeast Michigan	Community Foundation for Livingston County	\$64,798
Community Foundation of St. Clair County	Algonac/Clay Community Fund	\$14,500
Community Foundation of St. Clair County	Citizens For St. Clair Fund	\$12,500
Community Foundation of St. Clair County	Marysville Community Fund	\$10,000
Fremont Area Community Foundation	Lake County Community Foundation	\$174,892
Fremont Area Community Foundation	Mecosta County Community Foundation	\$176,728
Fremont Area Community Foundation	Osceola County Community Foundation	\$231,362
Grand Haven Area Community Foundation	Coopersville Area Community Foundation	\$454,309
Grand Haven Area Community Foundation	Allendale Community Foundation	\$227,792
Greenville Area Community Foundation	Lakeview Community Fund	\$42,141
Greenville Area Community Foundation	Montcalm Panhandle Community Fund	\$9,078
Sturgis Area Community Foundation	White Pigeon Area Community Foundation	\$19,211
Sturgis Area Community Foundation	Constantine Area	\$12,728

# Technology Vendors

## Number of Community Foundations Utilizing **Software by Area of Work**

Software	Donor/Gifts	Grants	Accounting	Scholarships
Blackbaud (Raisers Edge, Financial Edge)	10	5	9	3
Community Pearl	9	6	9	6
FIMS (MicroEdge)	16	16	16	15
Stellar iPhi	5	5	5	5
QuickBooks	1	0	2	0
Fusion	0	2	0	1
Grant Edge	0	2	0	2
Microsoft Excel/Word	1	1	1	1
eGrant	0	1	0	3
Access	0	0	0	1
AwardSpring	0	0	0	2
Stars	0	0	0	1

## Number of **Planned Software Transitions** (by transitioning to)

Software	Donor/Gifts	Grants	Accounting	Scholarships
Akoya-Brommelkamp	1	1	1	1
Quickbooks	0	0	1	0



