



Community Foundation Databook

2017 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 trimmed down questions to include only the essentials that you've identified as most helpful to your work. We also added a question on real estate ownership, to reflect the evolving practices and roles of community foundations in their local economies.

To our knowledge, this data book represents the most comprehensive look at Michigan community foundations available, and it is CMF's commitment to you to provide this information annually for your planning and benchmarking purposes.

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.

With gratitude,



Dave Lindberg
Chief Financial Officer
CMF



Andrea Judd
Learning Services
Coordinator
CMF

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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 2017. 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 and shouldn't be taken as such.

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

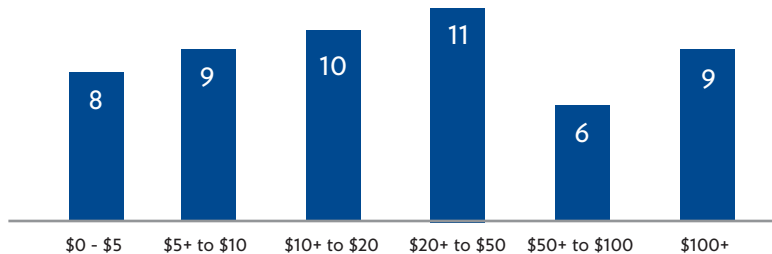
Community Foundation	Assets	Grants Made	Gifts Received
Community Foundation for Southeast Michigan	\$804,217,186	\$69,429,241	\$95,414,399
Kalamazoo Community Foundation	\$466,972,965	\$15,707,667	\$23,689,267
Grand Rapids Community Foundation	\$307,000,610	\$13,030,606	\$10,172,124
Fremont Area Community Foundation	\$225,658,603	\$8,681,467	\$1,969,290
Community Foundation of Greater Flint	\$213,055,670	\$9,914,551	\$41,222,159
Community Foundation for Muskegon County	\$195,849,308	\$10,156,030	\$10,640,136
Grand Haven Area Community Foundation	\$112,230,090	\$7,048,505	\$28,205,717
Battle Creek Community Foundation	\$105,967,252	\$9,987,561	\$4,106,832
Ann Arbor Area Community Foundation	\$101,430,277	\$3,783,855	\$7,738,188
Midland Area Community Foundation	\$91,674,759	\$4,493,026	\$6,542,930
Capital Region Community Foundation	\$90,636,425	\$7,184,244	\$5,662,943
Community Foundation of St. Clair County	\$62,523,715	\$2,086,694	\$6,556,930
Saginaw Community Foundation	\$60,905,881	\$2,899,963	\$2,625,831
Community Foundation of the Holland/Zeeland Area	\$56,161,825	\$4,857,452	\$7,377,819
Grand Traverse Regional Community Foundation	\$54,018,772	\$2,530,262	\$4,559,096
Berrien Community Foundation	\$43,795,383	\$5,651,291	\$8,102,616
Bay Area Community Foundation	\$38,201,619	\$1,711,995	\$2,203,237
Community Foundation for Northeast Michigan	\$38,114,543	\$1,638,962	\$2,910,432
Petoskey-Harbor Springs Area Community Foundation	\$37,792,602	\$2,252,208	\$2,246,297
Charlevoix County Community Foundation	\$35,329,926	\$2,075,391	\$6,884,164
Greenville Area Community Foundation	\$30,403,782	\$1,064,572	\$4,387,771
Barry Community Foundation	\$28,497,499	\$1,004,339	\$4,179,048
Jackson Community Foundation	\$25,225,635	\$983,591	\$2,639,968
Lenawee Community Foundation	\$23,684,596	\$1,476,135	\$1,940,086
Community Foundation of the Upper Peninsula	\$23,405,842	\$2,081,472	\$1,488,068
Sturgis Area Community Foundation	\$22,294,322	\$1,008,548	\$484,174
Allegan County Community Foundation	\$17,984,307	\$1,030,887	\$700,823

Community Foundation	Assets	Grants Made	Gifts Received
Mt. Pleasant Area Community Foundation	\$16,916,682	\$603,242	\$1,553,155
Hillsdale County Community Foundation	\$15,423,248	\$613,020	\$1,207,568
Manistee County Community Foundation	\$15,290,618	\$216,027	\$11,292,612
Community Foundation of Marquette County	\$14,601,492	\$661,845	\$2,243,911
Four County Community Foundation	\$14,267,393	\$321,258	\$801,565
Marshall Community Foundation	\$12,816,202	\$695,233	\$582,916
Tuscola County Community Foundation	\$11,262,359	\$471,287	\$1,224,056
Cadillac Area Community Foundation	\$10,447,561	\$107,700	\$49,000
Mackinac Island Community Foundation	\$10,031,915	\$196,847	\$260,165
M&M Area Community Foundation	\$9,482,159	\$687,049	\$1,792,615
Lapeer County Community Foundation	\$9,335,132	\$278,536	\$173,252
Dickinson Area Community Foundation	\$9,167,294	\$236,882	-
Michigan Gateway Community Foundation	\$8,661,773	\$419,705	\$7,677,518
Community Foundation of Greater Rochester	\$8,387,262	\$809,517	\$2,007,959
Community Foundation of Monroe County	\$7,688,310	\$155,676	\$539,355
Branch County Community Foundation	\$7,111,196	\$627,695	\$558,587
Roscommon County Community Foundation	\$6,934,226	\$248,420	\$253,622
Shiawassee Community Foundation	\$6,194,700	\$263,482	\$166,390
Leelanau Township Community Foundation	\$4,822,990	\$198,082	\$157,694
Albion Community Foundation	\$4,812,070	\$321,902	\$225,776
Sanilac County Community Foundation	\$4,495,950	\$147,250	-
Chippewa County Community Foundation	\$4,298,250	\$185,428	\$142,604
Otsego County Community Foundation	\$3,944,815	\$103,969	\$342,834
Huron County Community Foundation	\$3,943,800	\$145,056	\$279,950
Three Rivers Community Foundation	\$3,782,665	\$143,523	\$200,404
Canton Community Foundation	\$2,080,000	\$127,990	\$269,610
2017 Survey Totals	\$3,539,233,456	\$202,757,138	\$328,653,463
Change from 2016 Survey Totals	+8%	+23%	+67%

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

Quantity Breakdowns

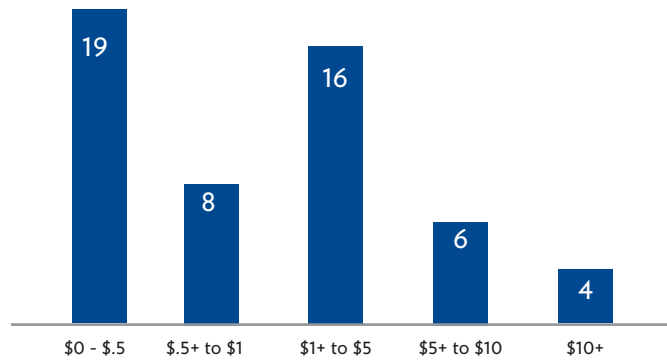
Number of Community Foundations by **Asset Size**



ASSET SIZE (\$ IN MILLIONS)

Responses: 53

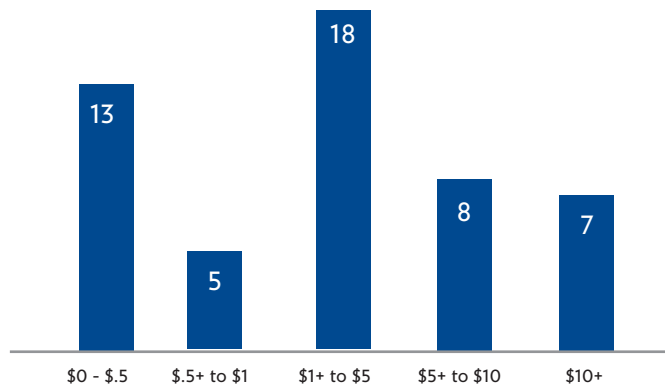
Number of Community Foundations by **Grants Made**



GRANTS MADE (\$ IN MILLIONS)

Responses: 53

Number of Community Foundations by **Gifts Received**



GIFTS RECEIVED (\$ IN MILLIONS)

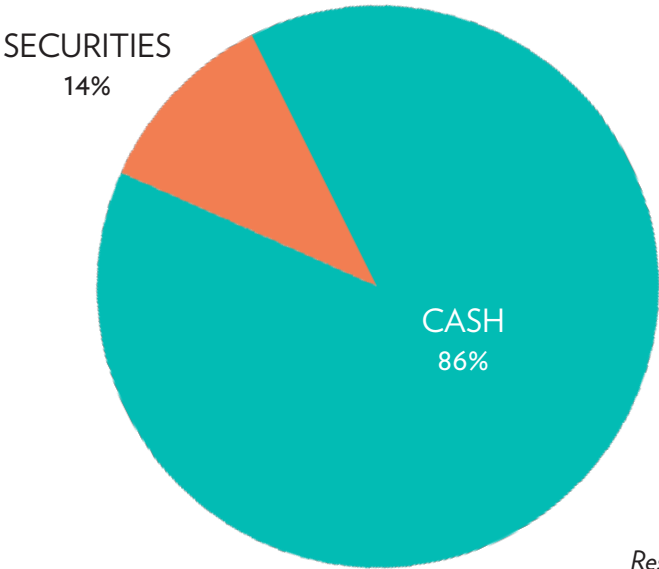
Responses: 53

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



Responses: 49

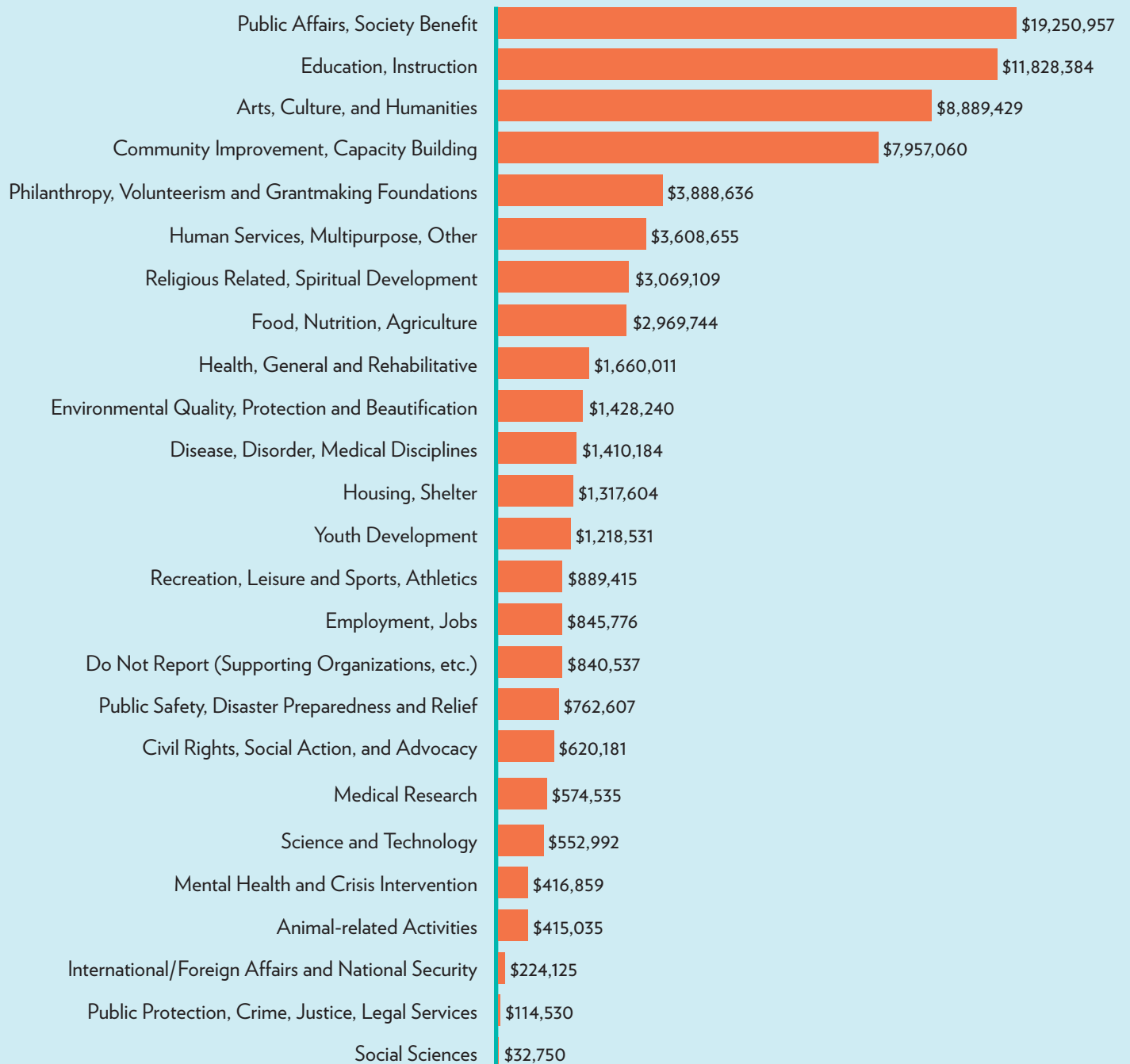
Gift Type Breakdown



Responses: 50

Largest Grant Totals

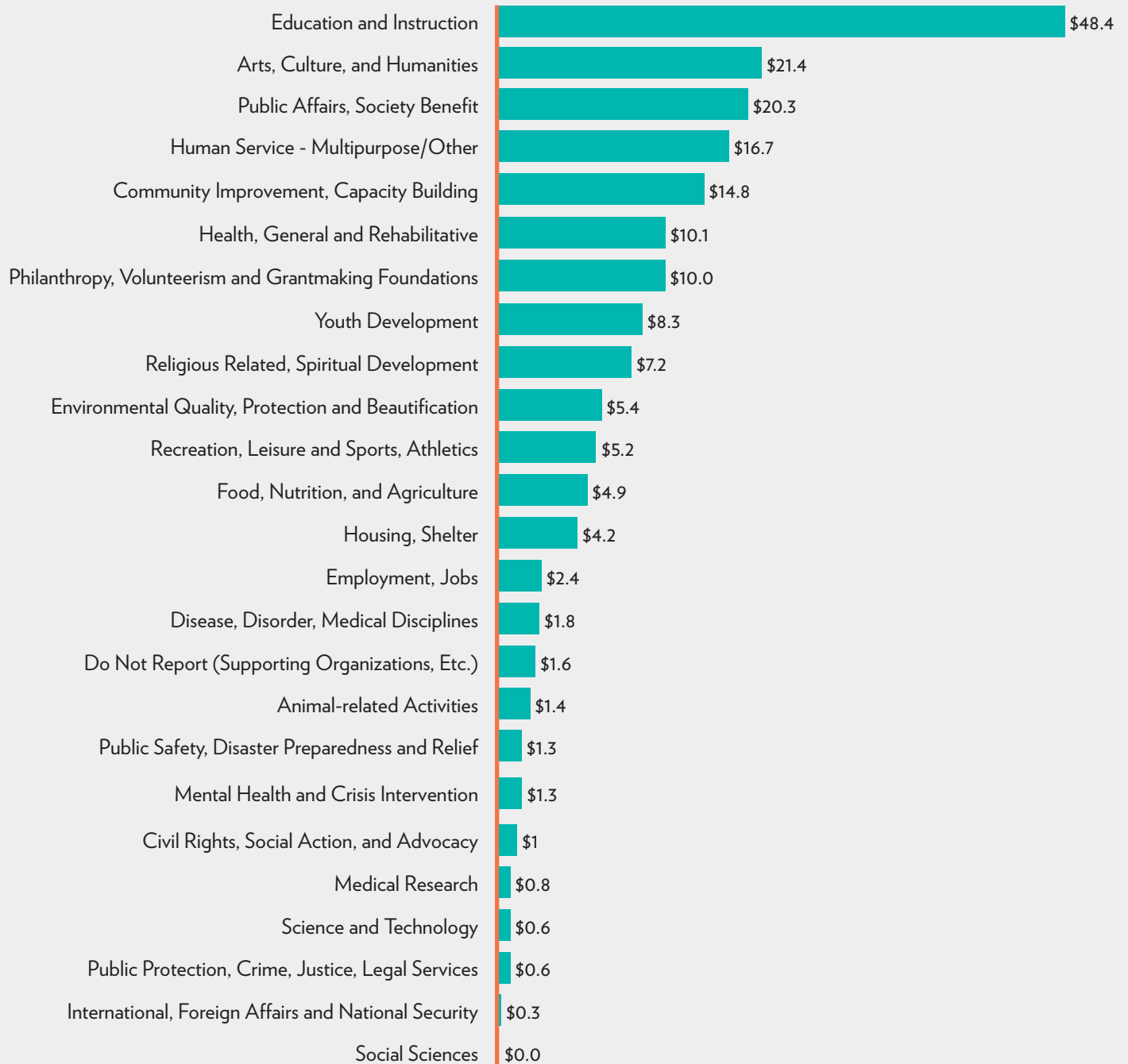
BY FIELD OF INTEREST



Total Annual Grants Made

BY FIELD OF INTEREST

Values shown in millions, rounded to one decimal.



Data note: The Public Affairs, Society Benefit category saw a significant jump this year. This was due to grants of \$18.7 million from the Community Foundation for Southeast Michigan's (CFSEM) supporting organization, Foundation for Detroit's Future (FDF), established in 2014 as the charitable entity that manages the "Grand Bargain" approved as part of the Plan of Adjustment that concluded the bankruptcy proceedings of the City of Detroit. According to the terms of the Plan, initial grants to the City was made in 2014, no grants were made in 2015, and then grants resumed in 2016. Therefore, CFSEM experienced an initial jump in 2014, a drop in 2015, and a resuming jump in 2016 that should be steady for the next 17 years or so (as long as grant conditions are met).

The page features several abstract, overlapping geometric shapes in various shades of blue. A large, light blue shape is prominent in the center-right, pointing upwards and to the right. Other shapes in darker and lighter blues are scattered around the page, some pointing in different directions, creating a dynamic, modern background.

SECTION II

Finance & Operations

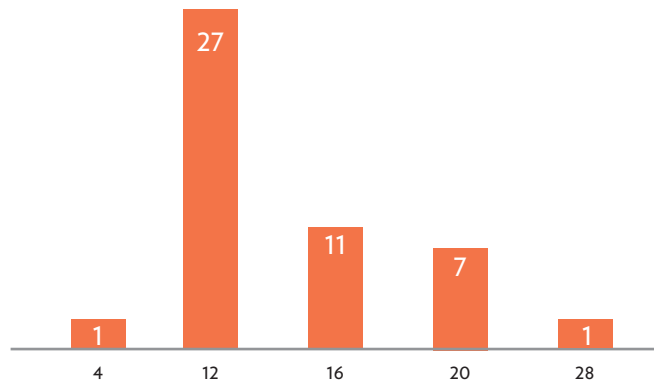
Spending Policy

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

GSP Percentage	Admin Fee Included	Admin Fee Excluded
4%	1	13
5%	12	10
Other	6	6
Total	19	29

Responses: 48

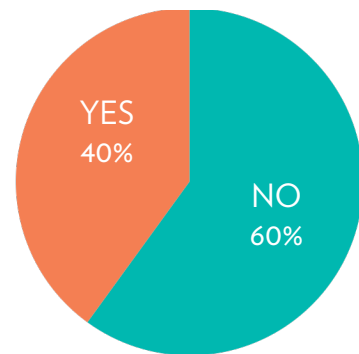
Number of Community Foundations by **Rolling Quarters** in Spending



NUMBER OF ROLLING QUARTERS

Responses: 47

40 Percent of Community Foundations Own Real Estate



Responses: 50

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	0.5	0.1	0.2	0.2	0.1	0.0	0.2	0.0
\$5+ to \$10	1.0	0.4	0.3	0.0	0.0	0.0	0.1	0.0
\$10+ to \$20	1.0	0.5	0.2	0.1	0.0	0.0	0.4	0.0
\$20+ to \$50	1.0	0.9	1.6	0.4	0.3	0.0	0.6	0.1
\$50+ to \$100	1.0	2.5	1.5	0.8	0.8	0.0	0.4	0.0
\$100+	1.2	4.4	7.4	4.2	1.4	0.4	0.7	0.8

Responses: 49

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	45	34	454	67
\$5+ to \$10	253	136	833	137
\$10+ to \$20	417	144	741	135
\$20+ to \$50	563	497	1826	285
\$50+ to \$100	882	645	1997	452
\$100+	2094	1659	4364	874

Assets shown in millions.

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
Pass-Through	4	2	9	5	9	0	5	8
Scholarship	0	1	11	19	21	2	0	1
Agency	0	9	31	7	5	0	0	0
Designated Fund	1	5	32	9	5	0	0	0
Field of Interest	0	1	22	17	10	0	0	0
Donor Advised	0	3	25	14	9	0	0	0
Unrestricted	0	1	23	14	12	0	0	0
Other	1	0	2	2	0	1	1	2

Responses: 49

Planned Budget Wage Increase for Next Fiscal Year

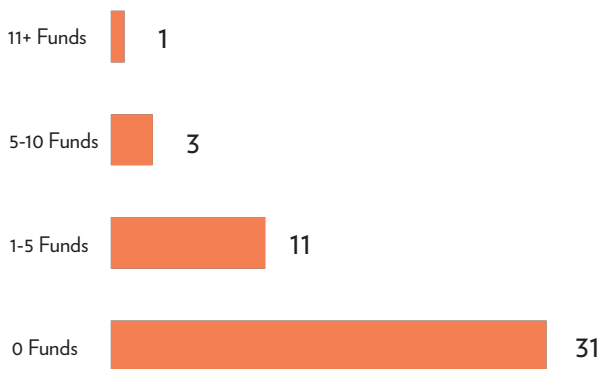


Annualized Rate of Return as of 12-31-16

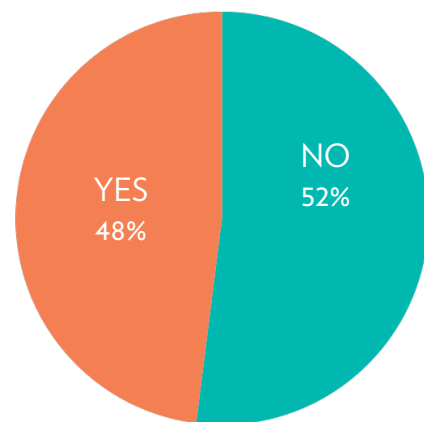
	Asset Size (M)	1 Year	3 Years	5 Years	10 Years
Foundation 1	\$0+ to \$5	7.8%	9.2%	-	-
Foundation 2	\$0+ to \$5	7.1%	3.0%	7.6%	-
Foundation 3	\$0+ to \$5	-	-	-	-
Foundation 4	\$0+ to \$5	4.7%	3.1%	6.7%	-
Foundation 5	\$0+ to \$5	9.1%	4.7%	8.7%	5.0%
Foundation 6	\$0+ to \$5	2.2%	1.8%	6.4%	-
Foundation 7	\$0+ to \$5	-	-	-	-
Foundation 8	\$0+ to \$5	5.9%	2.5%	-	-
Foundation 9	\$5+ to \$10	8.0%	3.7%	8.3%	5.2%
Foundation 10	\$5+ to \$10	-	-	-	-
Foundation 11	\$5+ to \$10	6.9%	3.0%	6.7%	4.0%
Foundation 12	\$5+ to \$10	-	-	-	-
Foundation 13	\$5+ to \$10	9.0%	4.6%	7.4%	-
Foundation 14	\$5+ to \$10	-	3.9%	4.8%	5.2%
Foundation 15	\$5+ to \$10	-	-	-	-
Foundation 16	\$5+ to \$10	7.4%	-	-	-
Foundation 17	\$5+ to \$10	8.4%	3.9%	7.6%	-
Foundation 18	\$10+ to \$20	8.9%	4.5%	7.0%	4.8%
Foundation 19	\$10+ to \$20	9.0%	7.0%	6.6%	-
Foundation 20	\$10+ to \$20	5.5%	0.9%	6.1%	3.7%
Foundation 21	\$10+ to \$20	8.3%	3.9%	8.3%	-
Foundation 22	\$10+ to \$20	-	-	-	-
Foundation 23	\$10+ to \$20	2.6%	4.3%	10.0%	6.7%
Foundation 24	\$10+ to \$20	16.3%	7.2%	9.2%	5.9%
Foundation 25	\$10+ to \$20	-	-	-	-
Foundation 26	\$10+ to \$20	6.7%	1.7%	6.5%	3.8%
Foundation 27	\$10+ to \$20	7.9%	5.0%	9.6%	6.5%

	Asset Size (M)	1 Year	3 Years	5 Years	10 Years
Foundation 28	\$20+ to \$50	6.5%	2.2%	5.8%	7.5%
Foundation 29	\$20+ to \$50	8.7%	3.4%	8.9%	5.9%
Foundation 30	\$20+ to \$50	7.8%	3.1%	7.9%	4.8%
Foundation 31	\$20+ to \$50	7.3%	2.5%	7.7%	5.0%
Foundation 32	\$20+ to \$50	5.7%	4.5%	10.8%	6.1%
Foundation 33	\$20+ to \$50	-	-	-	-
Foundation 34	\$20+ to \$50	8.1%	3.4%	8.5%	5.6%
Foundation 35	\$20+ to \$50	5.1%	1.3%	6.4%	3.8%
Foundation 36	\$20+ to \$50	5.6%	3.6%	7.4%	6.0%
Foundation 37	\$20+ to \$50	7.7%	4.0%	9.5%	6.2%
Foundation 38	\$20+ to \$50	5.8%	2.5%	6.4%	4.7%
Foundation 39	\$50+ to \$100	8.1%	3.6%	8.1%	4.4%
Foundation 40	\$50+ to \$100	10.0%	5.9%	9.6%	6.4%
Foundation 41	\$50+ to \$100	7.4%	2.2%	5.9%	2.9%
Foundation 42	\$50+ to \$100	8.6%	2.9%	8.0%	5.4%
Foundation 43	\$50+ to \$100	6.0%	2.1%	8.0%	5.0%
Foundation 44	\$50+ to \$100	8.6%	2.9%	8.0%	5.4%
Foundation 45	\$100+	7.5%	3.5%	7.5%	4.1%
Foundation 46	\$100+	7.7%	5.0%	11.1%	6.0%
Foundation 47	\$100+	7.7%	4.3%	7.4%	4.2%
Foundation 48	\$100+	7.7%	2.6%	6.0%	4.0%
Foundation 49	\$100+	6.8%	1.7%	6.1%	3.8%
Foundation 50	\$100+	9.2%	3.0%	8.0%	4.4%
Foundation 51	\$100+	9.4%	5.3%	10.5%	-
Foundation 52	\$100+	8.5%	2.3%	7.5%	3.9%
Foundation 53	\$100+	12.3%	5.4%	10.3%	6.1%
AVERAGES		7.6%	3.7%	7.8%	4.9%

Number of **donor-advised funds** that receive contributions from private foundations

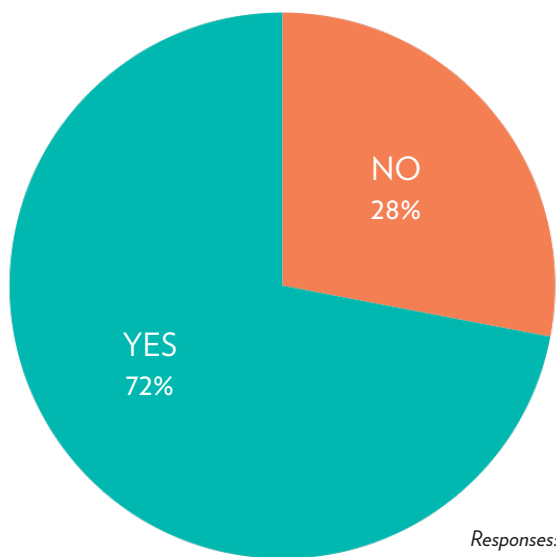


48 percent of respondents have a **policy on inactive donor advised funds.**

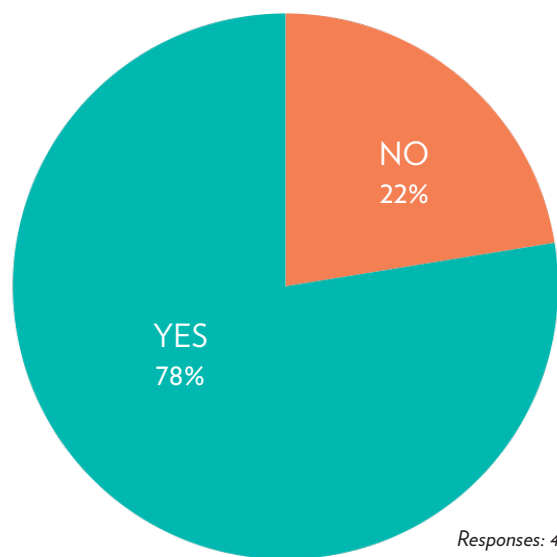


Spending Policy

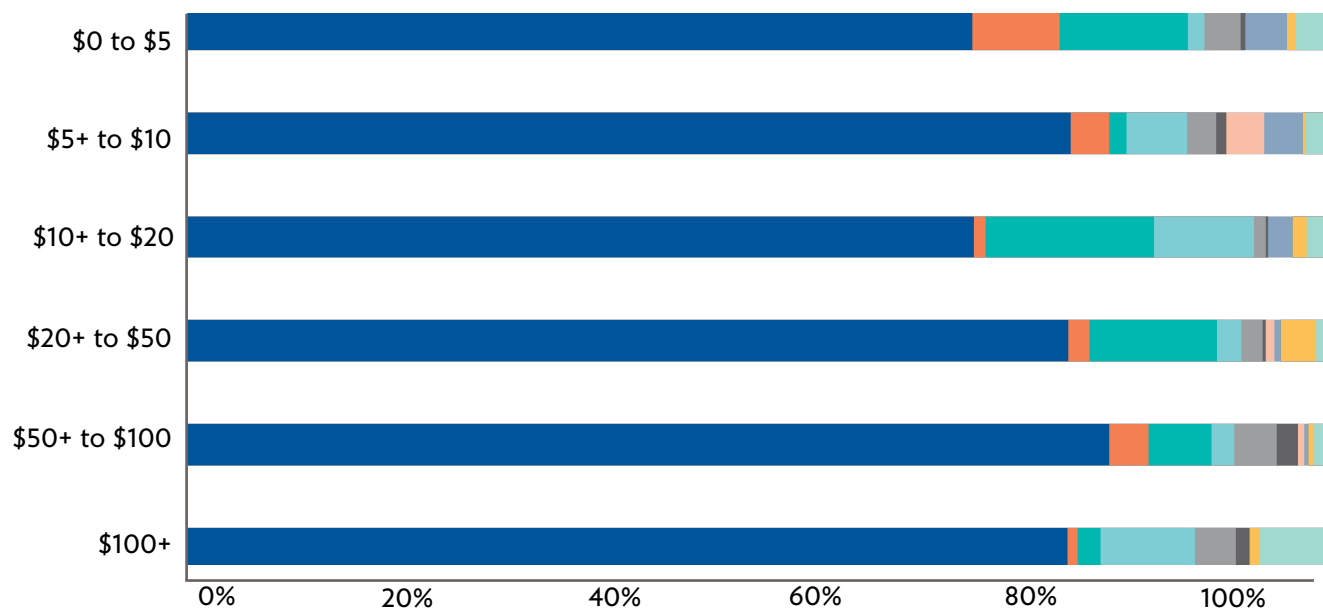
72 Percent Allow Disbursements from Underwater Funds



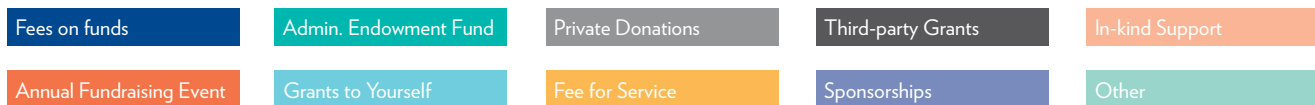
78 Percent Allow Unused Spendable Income to Rollover to the Next Fiscal Year



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



Assets shown in millions.



Responses: 48

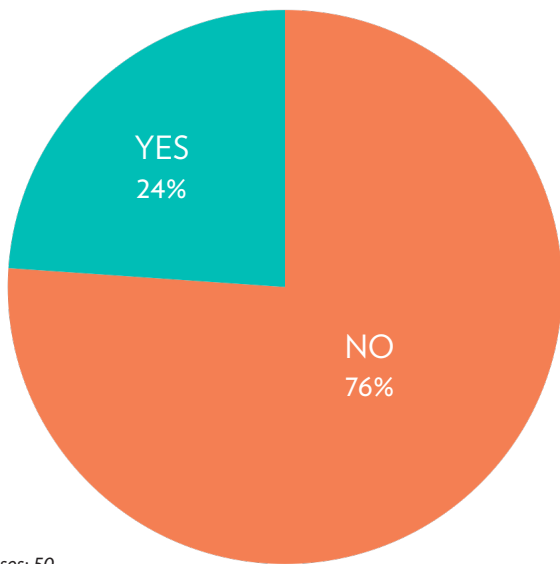
The background of the page is filled with several overlapping, semi-transparent blue shapes of various sizes and orientations. These shapes are primarily triangles and polygons with rounded corners, creating a dynamic, layered effect. The colors range from a light, pale blue to a deeper, more saturated blue. The shapes are scattered across the upper and middle portions of the page, leaving the lower right corner clear for text.

SECTION III

**Program & Mission
Related Investing**

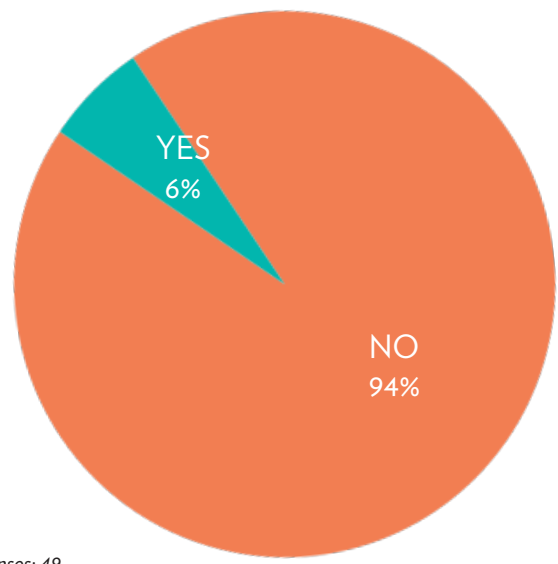
Impact Investing

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



Responses: 50

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



Responses: 49



- This represents a **7 percent decline in reported Mission Related Investing** from last year's data book. (Note: Varying community foundations participating does not make this a true equal comparison).
- **100 percent** of MRI investments reported were individual investments (i.e. investing in a specific project in your community to support community economic development)
- **75 percent** of foundations who do MRIs perform due diligence in-house.
- **Oversight** on the investments selection process for MRIs varied across each organization, with the following entities identified:

Investment or Impact Investing Committee,
Executive Committee or delegated by Board

SECTION IV

Other



Reported Geographic Affiliates

FOUNDATION	AFFILIATE	ASSET SIZE
Ann Arbor Area Community Foundation	Ypsilanti Area Community Fund	\$2,201,732
Ann Arbor Area Community Foundation	Community Foundation of Plymouth	\$782,318
Barry Community Foundation	Thornapple Area Enrichment Foundation	\$1,726,823
Barry Community Foundation	Delton Kellogg Education Foundation	\$402,088
Battle Creek Community Foundation	Athens Community Foundation	N/A
Battle Creek Community Foundation	Homer Community Foundation	\$2,762,238
Bay Area Community Foundation	Aranac Community Funds	\$719,217
Cadillac Area Community Foundation	Missaukee Area	\$414,092
Community Foundation for Muskegon County	Community Foundation for Mason County	\$13,145,606
Community Foundation for Muskegon County	Community Foundation for Oceana County	\$9,616,817
Community Foundation for Northeast Michigan	North Central Michigan Community Foundation	\$3,823,661
Community Foundation for Northeast Michigan	Straits Area Community Foundation	\$2,009,890
Community Foundation for Northeast Michigan	Iosco County Community Foundation	\$4,704,058
Community Foundation for Southeast Michigan	Community Foundation for Livingston County	\$1,064,272
Community Foundation for Southeast Michigan	Chelsea Community Foundation	\$1,938,607
Community Foundation of Marquette County	Negaunee	\$771,162
Community Foundation of Marquette County	Ishpeming	\$1,146,842
Community Foundation of Marquette County	Gwinn	\$939,847
Community Foundation of Monroe County	Greater Milan Area Community Foundation	\$1,695,000
Community Foundation of St. Clair County	Algonac-Clay Community Fund	\$239,803
Community Foundation of St. Clair County	Citizens for St. Clair Fund	\$581,278
Community Foundation of St. Clair County	Marysville Community Fund	\$69,684
Fremont Area Community Foundation	Mecosta County Community Foundation	\$5,007,750
Fremont Area Community Foundation	Osceola County Community Foundation	\$8,288,180
Fremont Area Community Foundation	Lake County Community Foundation	\$4,362,700
Grand Haven Area Community Foundation	Allendale Community Foundation	\$1,892,521
Grand Haven Area Community Foundation	Coopersville Area Community Foundation	\$5,019,990
Grand Rapids Community Foundation	Wyoming Community Foundation	\$507,093
Grand Rapids Community Foundation	Sparta Community Foundation	\$916,002
Grand Rapids Community Foundation	Ionia County Community Foundation	\$6,729,753
Grand Rapids Community Foundation	Hudsonville-Jenison Community Foundation	\$334,374
Grand Rapids Community Foundation	Cascade Community Foundation	\$450,996
Grand Rapids Community Foundation	East Grand Rapids Community Foundation	\$173,181
Grand Rapids Community Foundation	Lowell Area Community Fund	\$14,987,210
Greenville Area Community Foundation	Lakeview Area Community Fund	\$846,943
Greenville Area Community Foundation	Montcalm Panhandle Community Fund	\$234,660
Midland Area Community Foundation	Clare County Community Foundation	\$2,695,571
Midland Area Community Foundation	Gladwin County Community Foundation	\$2,726,187
Sturgis Area Community Foundation	White Pigeon Area Community Foundation	\$19,211
Sturgis Area Community Foundation	Constantine Area Community Foundation	\$12,728

32%

Of respondents reported having geographic affiliates

14

Respondents have more than one geographic affiliate

1

CF reported plans to add more geographic affiliates

Technology Vendors

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

Software	Donor/Gifts	Grants	Accounting	Scholarships
Access	1	0	0	0
Blackbaud/Raiser's Edge	12	6	12	4
Community Pearl	8	5	7	4
FIMS (MicroEdge)	17	16	17	15
Stellar iPhi	6	6	6	6
QuickBooks	0	0	2	0
Fusion	0	2	0	2
Grant Edge	0	2	0	1
Microsoft Excel/Word	1	1	0	1
eGrant	0	1	0	2
AwardSpring	0	0	0	4
Donor Perfect	1	0	1	0
Community Force	0	1	0	2
Foundant	0	1	0	0
Akoya-Brommelkamp	1	1	1	1
Computer Ease	0	0	0	1

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

Software	Donor/Gifts	Grants	Accounting	Scholarships
Akoya-Brommelkamp	2	1	2	1
Blackbaud/Raiser's Edge	2	0	1	0
Stellar iPhi	1	1	1	1
GiftsOnline	0	1	0	0
eGrant	0	1	0	1

