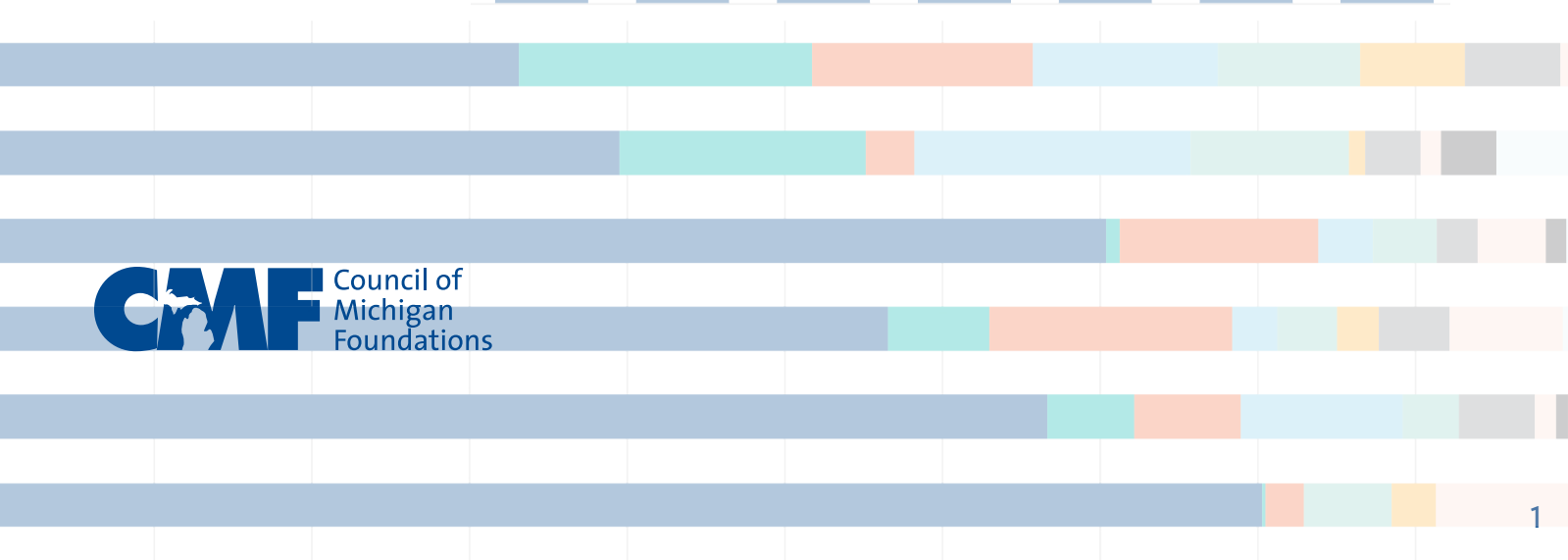
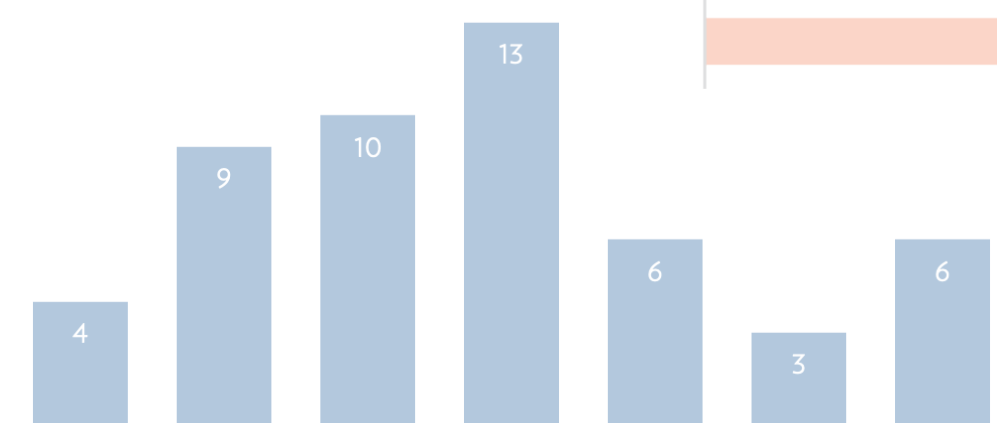
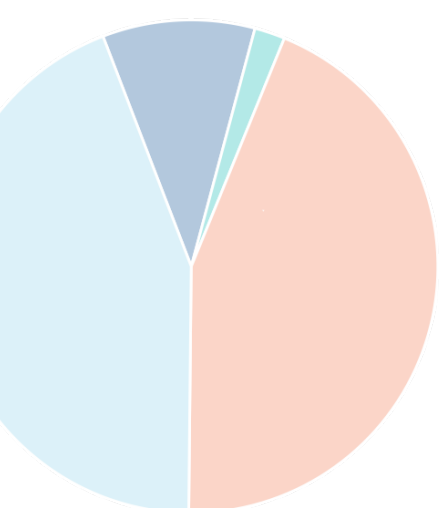


5%	10%	9%	1%	0%	0%
0%	7%	3%	7%	10%	
5%	4%	6%	10%	0%	1%
5%	0%	6%	2%	1%	
5%	3%	0%	9%	0%	0%
5%	6%	4%	6%	0%	12%

Community Foundation Databook

PUBLISHED IN 2019



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 databook represents perhaps 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.

New this year: This year's databook shows the results from a new set of questions asked in the 2019 survey focusing on office space. We've traditionally asked community foundations whether they own or lease their office space but now the data goes a step further to ask those who their space whether they have tenants and whether their space is made available for community convenings. You can see the results on Page 20!

Thank you for your time and commitment to providing this information each year. Your efforts benefit your community foundation peers as well as the field at large. This information is critically important to providing visibility to overall trends and norms in community foundation giving.

This publication is developed collaboratively within CMF, with multiple departments coming together to ensure we provide the best possible publication to meet your needs. This 2019 edition was made possible with outstanding support from Alexandra Zisser, our former Skillman Foundation Learning and Impact Fellow who is now completing a Master's degree program overseas.

We hope you find the data informative and helpful in your planning. Please know that we welcome your comments or questions at any time.

With gratitude,



Dave Lindberg
Chief Financial Officer
CMF



Andrea Judd Shurmur
Director of Learning Services
CMF

Table of Contents

SECTION I:

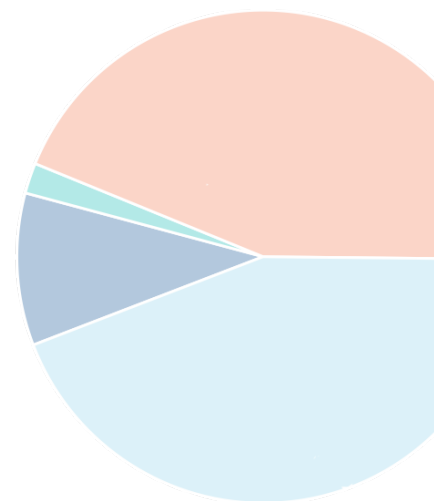
Assets, Gifts and Grants.....5

- Data Summary by Assets
- Asset Size, Gifts Received, Grants Made
- Gifts from Online Giving
- Gift Type
- Grants Made (Largest in the Year, Total for the Year)
- Funding Areas and Funds (Types, Total Number)
- Five-Year Analysis of Gift Types
- Five-Year Analysis of Assets, Gifts and Grants

SECTION II:

Finance and Operations.....18

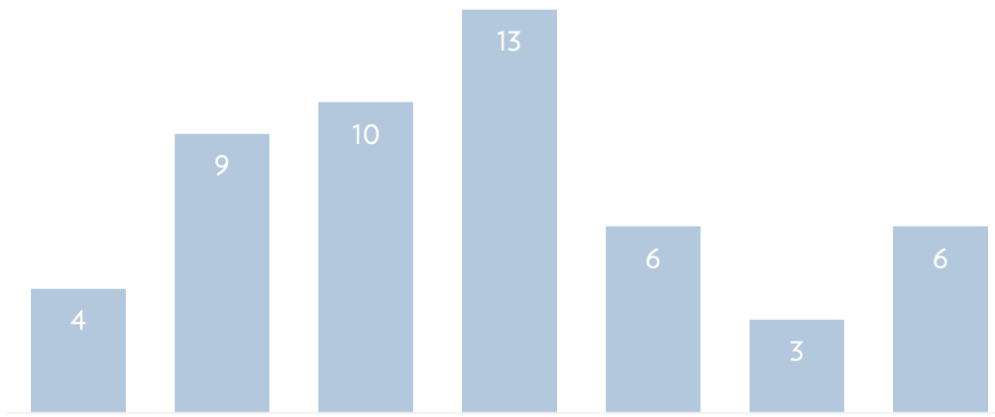
- Full-Time Employees and Wage Increases
- Real Estate
- Transactions
- Fees on Funds
- General Spending Policy
- Rolling Quarters
- Donor Advised Funds
- Underwater Funds
- Unused Spendable Income
- Annualized Rate of Return



SECTION III:

Other Data.....24

- Program Related Investments (PRIs) and Mission Related Investments (MRIs)
- Geographic Affiliates
- Technology (Vendors, Software Use)



Methodology and Data

With 57 community foundation members in Michigan, the CMF Community Foundation Databook represents the most complete picture of community foundations in our state, with 51 respondents.

The community foundation databook data is gathered through an 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. Often 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 2019. Where applicable, a year-over-year comparison is noted, however the quantity of respondents varies slightly from year-to-year, so this is not an exact comparison and shouldn't be taken as such.

Prior to finalizing the databook, each community foundation received back their raw dataset as it was submitted and was given opportunity to review the data and make any updates to account for any erroneous data entry errors.

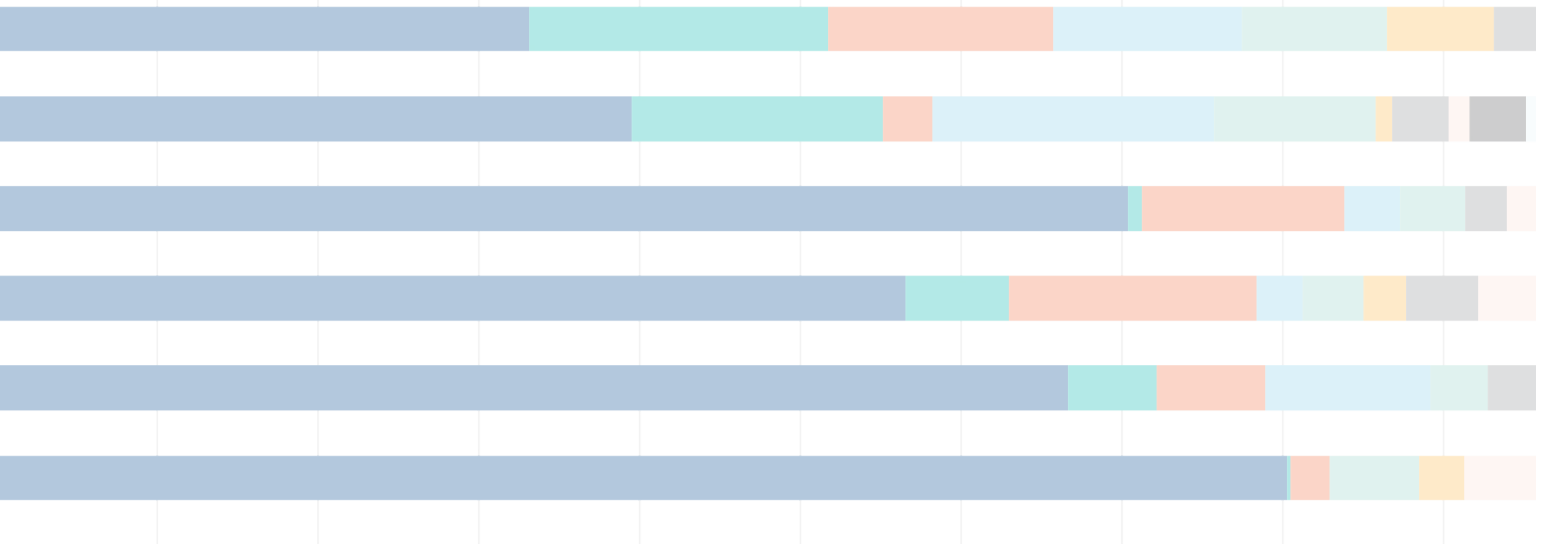
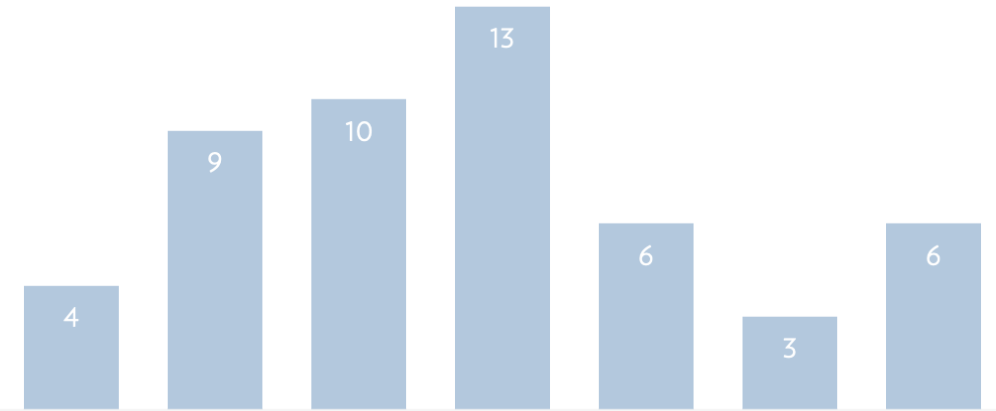
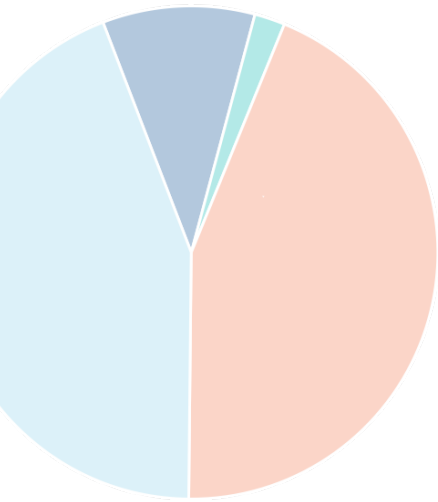
There are limitations to this data. They include, but may not be limited to: human error in data entry, different interpretations of the questions being asked, different definitions across organizations and incomplete data to work from on the community foundation side.

Fiscal Year End Date for Reporting

For the survey administered in 2019, foundations were asked to indicate the end date of the fiscal year for which they were reporting data. The majority of respondents indicated their fiscal year end date was December 31, however some respondents have an end date of March 31, June 30 or September 30.

SECTION I

Assets, Gifts & Grants



Section 1: Assets, Gifts & Grants

Community Foundation Data Summary By Assets as of Last Fiscal Year End

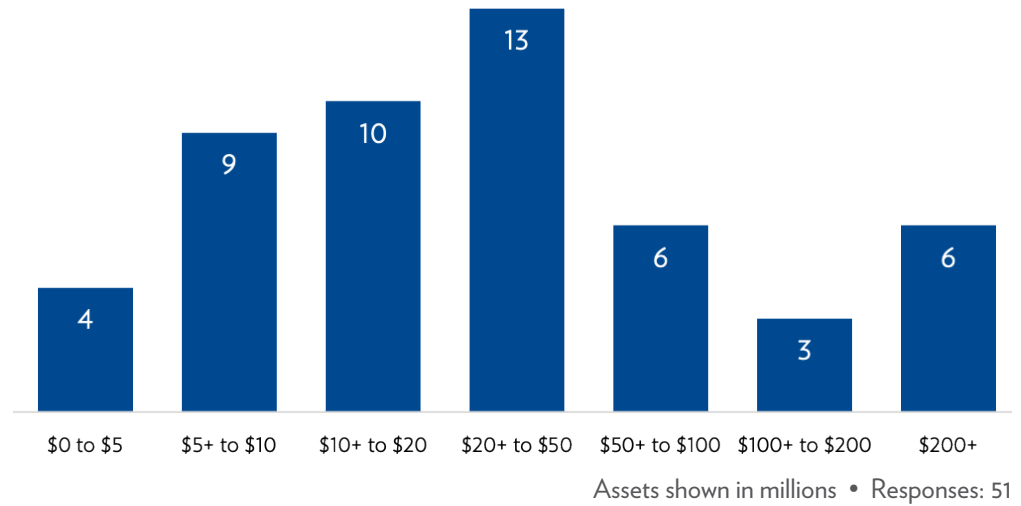
Community Foundation	Assets	Gifts Received	Grants Made
Community Foundation for Southeast Michigan	\$872,627,525.00	\$94,263,853.00	\$93,744,538.00
Kalamazoo Community Foundation	\$479,088,420.00	\$11,774,358.75	\$17,701,112.00
Grand Rapids Community Foundation	\$346,686,730.00	\$13,641,584.00	\$12,454,868.01
Fremont Area Community Foundation	\$229,330,235.00	\$5,917,999.00	\$7,306,372.63
Community Foundation of Greater Flint	\$224,110,422.00	\$4,768,097.00	\$10,521,151.00
Community Foundation for Muskegon County	\$202,008,586.00	\$9,003,202.30	\$11,556,047.00
Battle Creek Community Foundation	\$133,802,350.00	\$6,184,175.00	\$10,655,159.00
Ann Arbor Area Community Foundation	\$127,367,298.00	\$7,651,747.50	\$7,423,110.25
Grand Haven Area Community Foundation	\$118,081,690.00	\$5,163,985.00	\$8,775,063.00
Capital Region Community Foundation	\$95,187,057.00	\$3,402,659.00	\$3,843,355.83
Midland Area Community Foundation	\$94,332,894.00	\$7,276,741.00	\$4,530,037.00
Community Foundation of the Holland/Zeeland Area	\$81,441,030.00	\$18,713,062.00	\$5,878,525.57
Community Foundation of St. Clair County	\$71,784,587.00	\$2,773,503.00	\$2,862,388.00
Saginaw Community Foundation	\$63,137,708.00	\$5,238,229.00	\$2,629,998.00
Grand Traverse Regional Community Foundation	\$57,827,422.00	\$4,502,690.00	\$2,713,559.00
Community Foundation for Northeast Michigan	\$47,831,062.00	\$1,517,547.00	\$3,386,566.00
Petoskey-Harbor Springs Area Community Foundation	\$43,703,540.00	\$3,096,962.00	\$2,783,042.00
Bay Area Community Foundation	\$40,445,953.00	\$3,349,573.00	\$1,881,431.00
CharLevoix County Community Foundation	\$36,874,447.00	\$2,583,398.00	\$2,579,722.00
Barry Community Foundation	\$35,206,754.00	\$2,957,094.00	\$1,043,133.00
Greenville Area Community Foundation	\$30,764,154.00	\$582,468.00	\$1,503,551.76
Jackson Community Foundation	\$27,199,482.00	\$1,283,357.00	\$822,581.59
Community Foundation of the Upper Peninsula	\$26,781,835.75	\$1,215,799.67	\$1,479,587.92
Sturgis Area Community Foundation	\$24,912,136.00	\$499,066.71	\$812,910.43
Lenawee Community Foundation	\$24,907,961.00	\$1,562,298.00	\$2,214,301.00
Manistee County Community Foundation	\$24,120,852.00	\$1,298,762.00	\$424,316.00
Michigan Gateway Community Foundation	\$20,669,164.50	\$1,051,025.88	\$702,751.00

Community Foundation	Assets	Gifts Received	Grants Made
Mt. Pleasant Area Community Foundation	\$20,600,492.00	\$2,114,560.10	\$627,314.83
Allegan County Community Foundation	\$18,280,317.00	\$453,634.35	\$673,233.00
Hillsdale County Community Foundation	\$18,076,016.00	\$1,028,856.00	\$683,766.26
Community Foundation of Marquette County	\$16,246,883.26	\$961,333.05	\$685,744.43
Gratiot County Community Foundation	\$14,706,607.00	\$903,012.00	\$575,880.00
Four County Community Foundation	\$14,682,686.00	\$332,076.00	\$532,684.00
Marshall Community Foundation	\$14,497,672.00	\$524,229.00	\$867,882.00
Mackinac Island Community Foundation	\$12,025,450.36	\$569,250.00	\$555,048.00
Tuscola County Community Foundation	\$11,924,334.00	\$539,814.73	\$455,013
Community Foundation of Greater Rochester	\$11,500,942.00	\$4,339,552.08	\$2,083,690.71
Dickinson Area Community Foundation	\$10,282,039.00	\$1,504,128.00	\$328,556.00
Frankenmuth Community Foundation	\$9,776,401.97	\$1,983,183.06	\$2,393,695.34
M&M Area Community Foundation	\$9,733,897.00	\$1,246,090.00	\$965,880.00
Shiawassee Community Foundation	\$9,609,682.00	\$498,946.64	\$293,888.83
Lapeer County Community Foundation	\$9,518,618.91	\$456,488.18	\$318,715.70
Community Foundation of Monroe County	\$9,366,628.00	\$525,483.00	\$540,954.00
Branch County Community Foundation	\$7,431,508.00	\$277,038.00	\$848,652.77
Roscommon County Community Foundation	\$6,915,674.00	\$300,202.00	\$296,887.00
Sanilac County Community Foundation	\$5,936,619.72	\$520,682.26	\$153,557.30
Leelanau Township Community Survey	\$5,558,455.00	\$932,476.00	\$257,070.00
Albion Community Foundation	\$4,969,379.00	\$332,031.00	\$203,239.00
Huron County Community Foundation	\$4,618,455.00	\$425,120.00	\$279,088.11
Canton Community Foundation	\$4,200,000.00	\$644,000.00	\$217,033.00
Otsego Community Foundation	\$4,109,299.58	\$828,895.16	\$648,410.03
Keweenaw Community Foundation	N/A	N/A	N/A
2019 Survey Totals	\$3,834,799,352	\$237,335,561	\$237,260,048
Change from 2018 totals	-5%	-16%	+11%

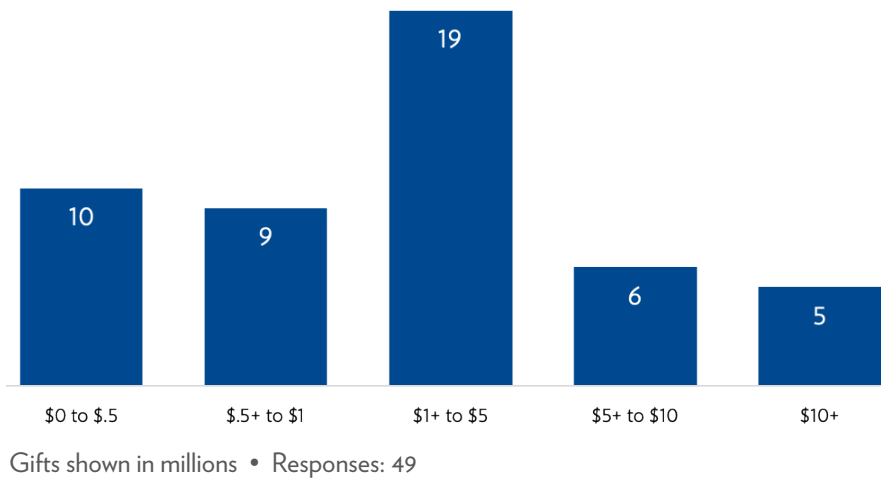
Responses: 51
Includes supporting organizations and affiliates.

Section 1: Assets, Gifts & Grants

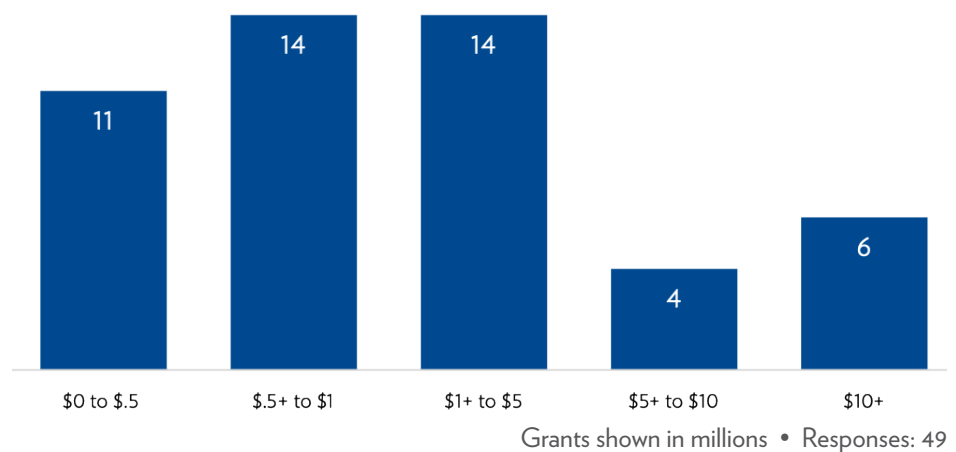
Number of Community Foundations by **Asset Size**



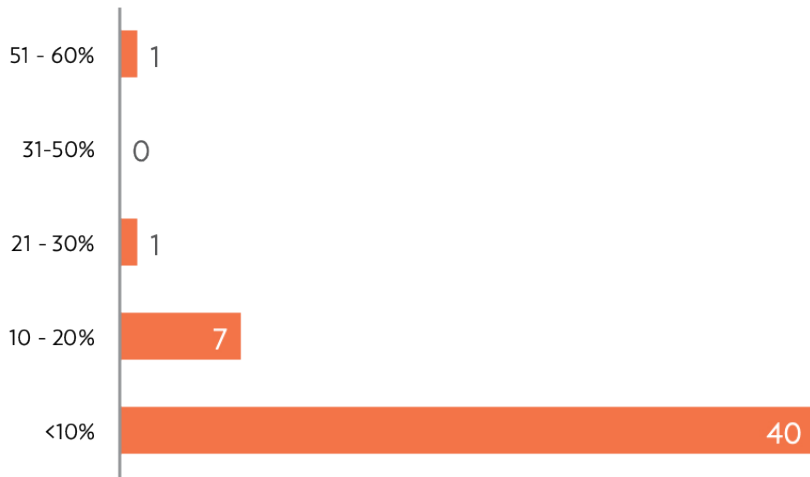
Number of Community Foundations by **Gifts Received**



Number of Community Foundations by **Grants Made**

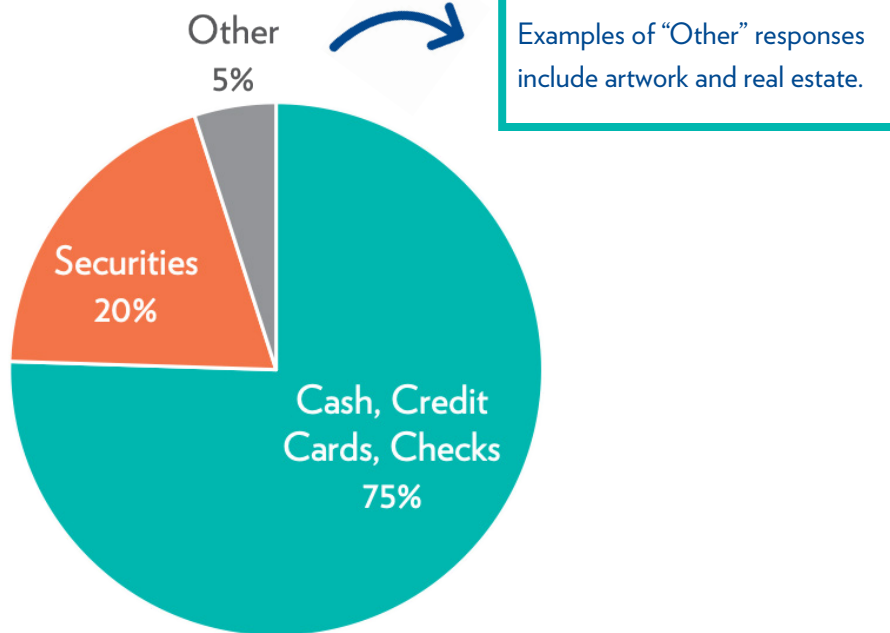


Number of Community Foundations by Percentage of **Gifts from Online Giving**



Responses: 49

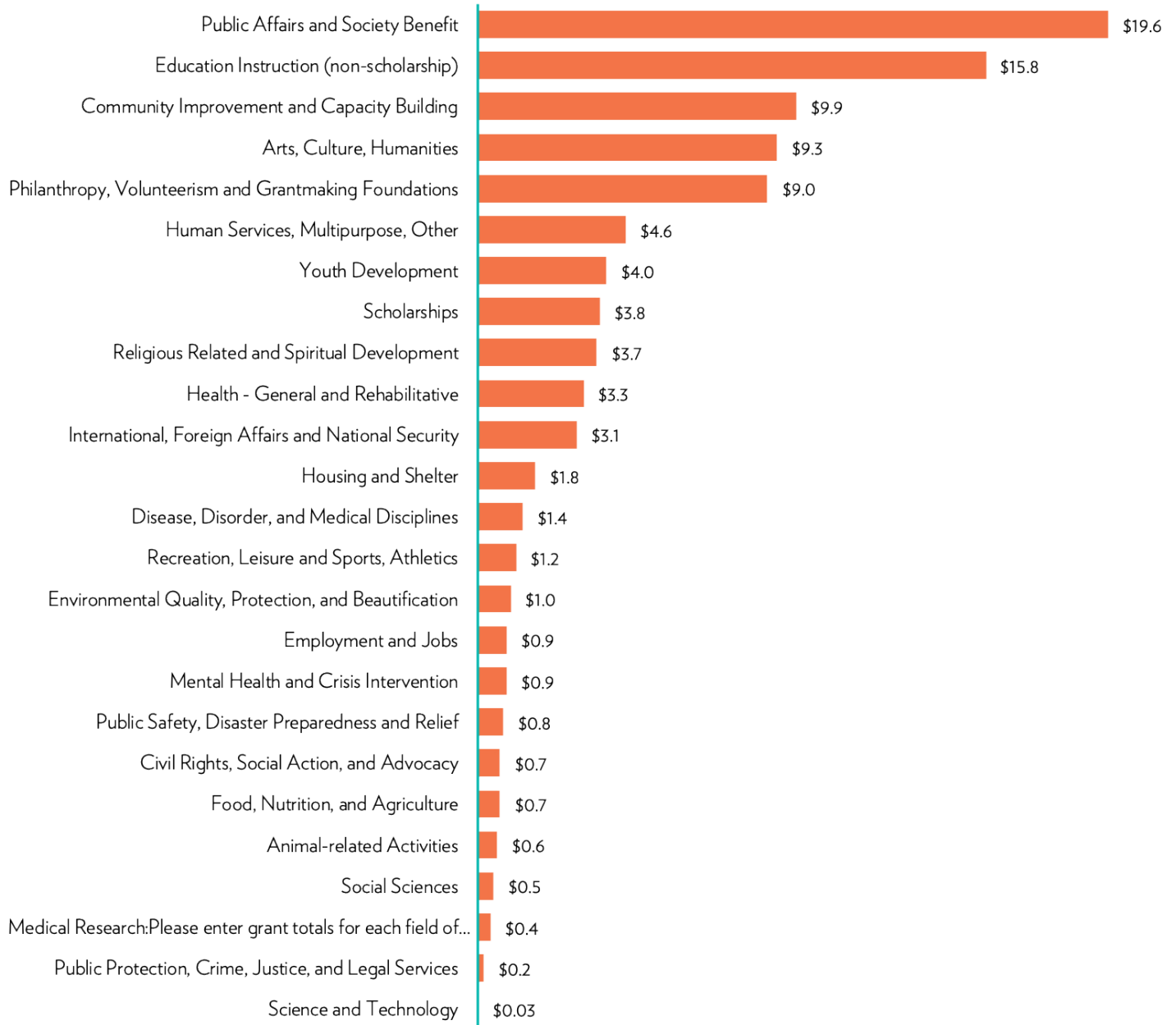
Gift Type Breakdown



Responses: 49

Section 1: Assets, Gifts & Grants

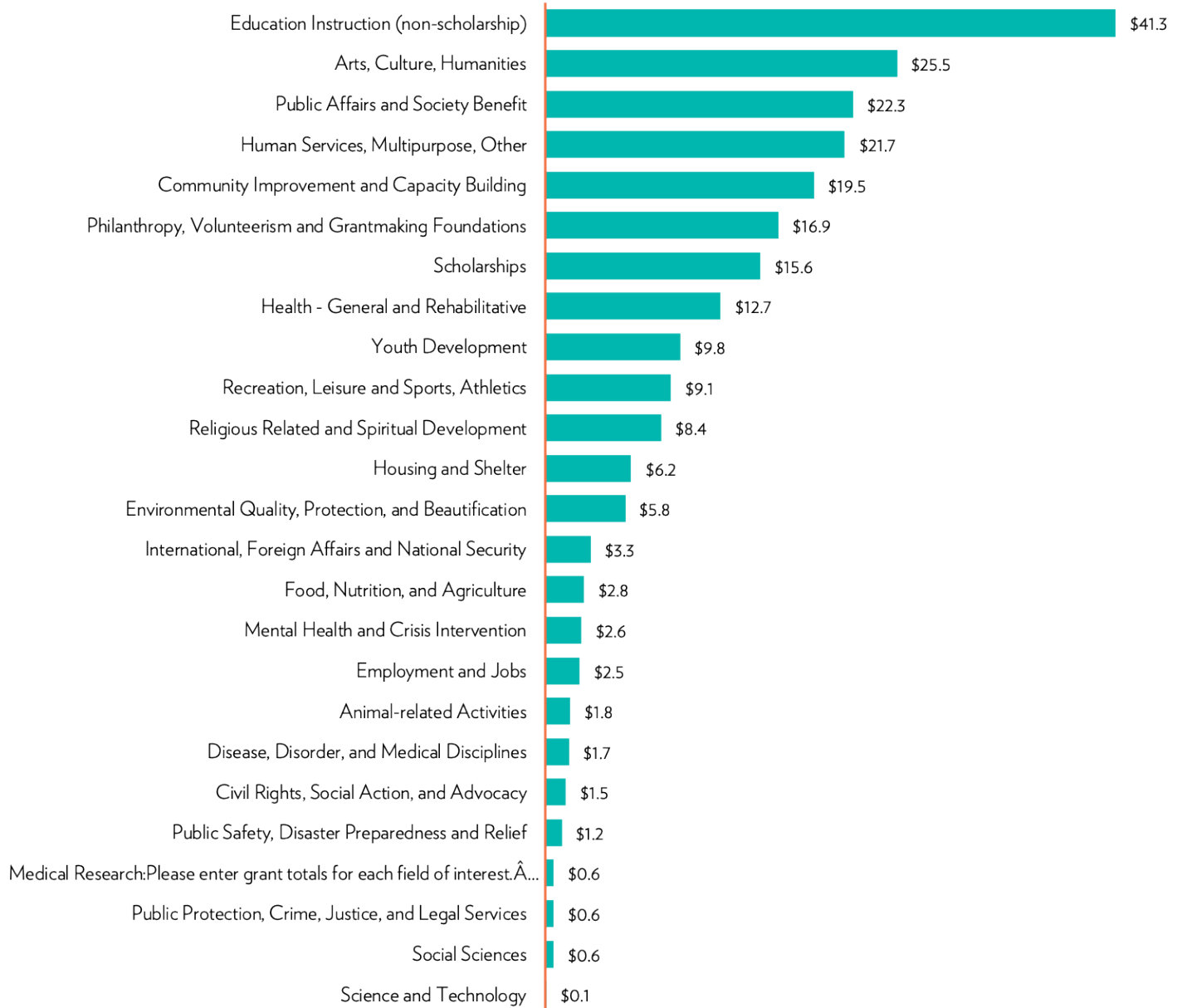
Largest Annual Grants Made by a Single Community Foundation By Field of Interest



Responses: 49

Values shown in millions, rounded to one decimal.

Total Annual Grants Made By Field of Interest

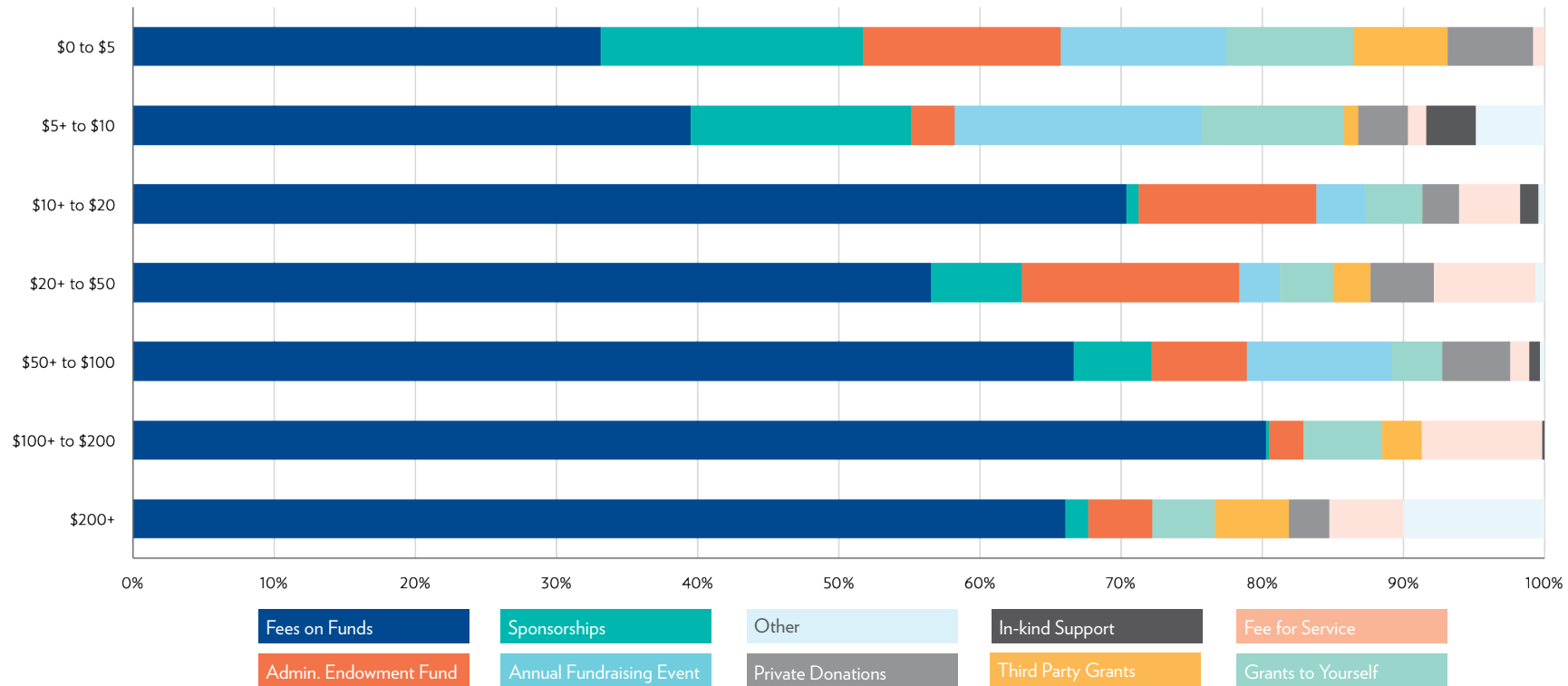


Responses: 49

Values shown in millions, rounded to one decimal.

Section 1: Assets, Gifts & Grants

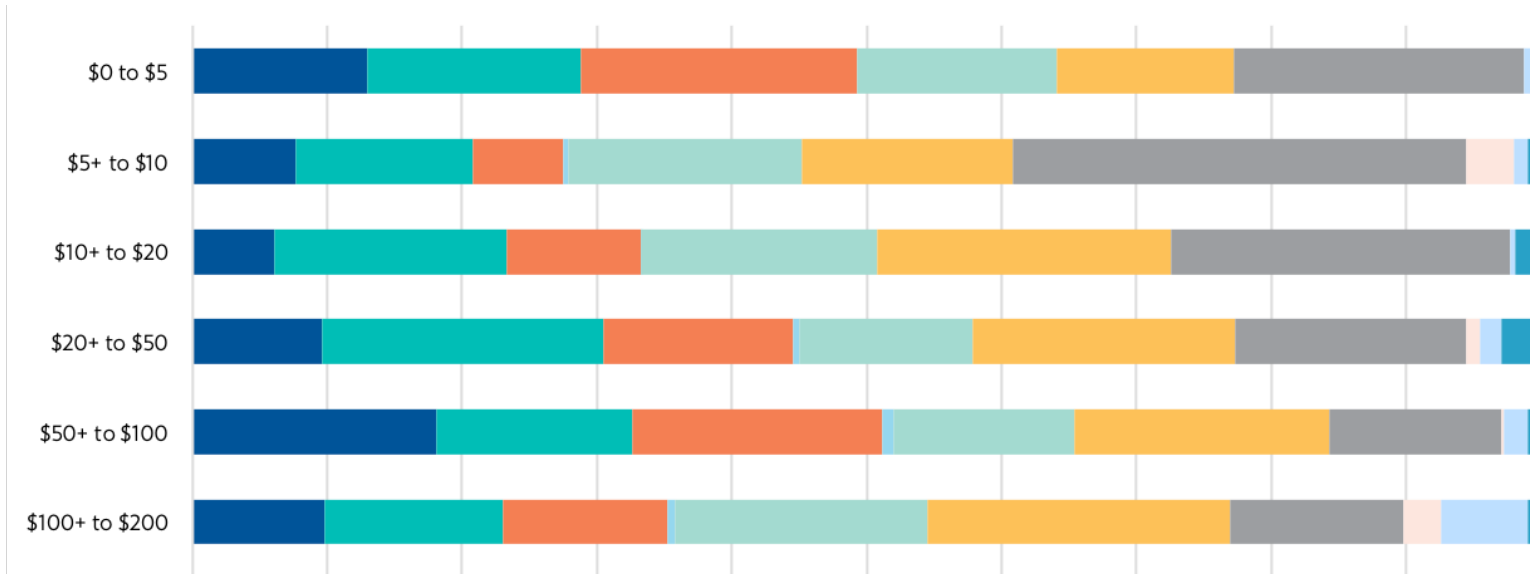
Average Percent of Operations Budget by Funding Area Based on Asset Size



Asset Category	Fees on Funds	Sponsorships	Admin Endowment Fund	Annual Fundraising Event	Grants to Yourself	Third Party Grants	Private Donations	Fee for Service	In-kind Support	Other
\$0 to \$5	48%	27%	20%	17%	13%	10%	9%	1%	0%	0%
\$5+ to \$10	78%	31%	6%	35%	20%	2%	7%	3%	7%	10%
\$10+ to \$20	81%	1%	15%	4%	5%	0%	3%	5%	2%	1%
\$20+ to \$50	79%	9%	22%	4%	5%	4%	6%	10%	0%	1%
\$50+ to \$100	84%	7%	9%	13%	5%	0%	6%	2%	1%	0%
\$100+ to \$200	87%	0%	3%	0%	6%	3%	0%	9%	0%	0%
\$200+	81%	2%	6%	0%	5%	6%	4%	6%	0%	12%

Assets shown in millions
Responses: 48

Average Fund Type Breakdown by Asset Size



Asset Category	Agency	Designated	Donor Advised	Supporting Org.	Unrestricted	Field of Interest	Scholarship	Affiliate	Other	Admin
\$0 to \$5	13%	16%	21%	0%	15%	13%	22%	0%	1%	1%
\$5+ to \$10	8%	13%	7%	0%	17%	16%	34%	4%	1%	1%
\$10+ to \$20	6%	18%	10%	0%	18%	22%	26%	0%	0%	1%
\$20+ to \$50	10%	22%	15%	0%	13%	20%	18%	1%	2%	3%
\$50+ to \$100	18%	15%	19%	1%	14%	19%	13%	0%	2%	2%
\$100+ to \$200	10%	13%	12%	1%	19%	23%	13%	3%	6%	1%
\$200+	11%	15%	17%	11%	24%	12%	5%	3%	3%	1%

Assets shown in millions
Responses: 49

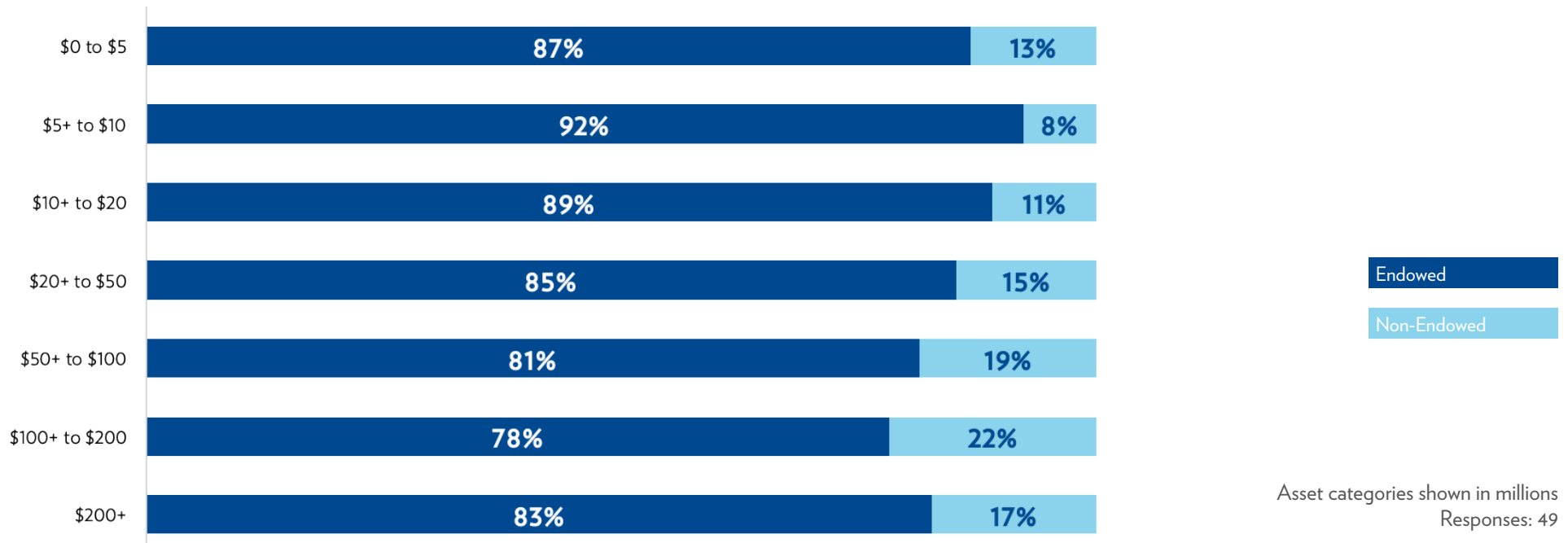
Section 1: Assets, Gifts & Grants

Average Assets by Fund Type

Asset Category	Agency	Designated	Donor Advised	Supporting Org.	Unrestricted	Field of Interest	Scholarship	Affiliate	Admin	Other
\$0 to \$5	\$562,746	\$685,766	\$888,805	N/A	\$642,175	\$568,994	\$935,588	N/A	\$590,523	\$53,135
\$5+ to \$10	\$700,924	\$1,404,178	\$532,940	\$76,970	\$1,581,805	\$1,254,311	\$2,683,445	\$576,688	\$1,036,682	\$316,836
\$10+ to \$20	\$966,866	\$2,432,822	\$1,400,547	\$955	\$2,466,508	\$3,072,449	\$3,549,178	N/A	\$1,644,531	\$114,295
\$20+ to \$50	\$3,254,365	\$6,525,420	\$4,400,746	\$932,559	\$4,015,350	\$6,078,851	\$5,354,663	\$1,320,191	\$16,951,207	\$736,964
\$50+ to \$100	\$13,393,286	\$10,800,516	\$13,736,445	\$1,885,906	\$9,934,236	\$14,015,358	\$9,400,313	\$453,216	\$12,932,798	\$1,996,372
\$100+ to \$200	\$12,139,919	\$16,322,821	\$15,137,237	\$1,080,783	\$23,114,073	\$27,738,023	\$15,933,002	\$5,235,196	\$5,559,503	\$7,915,197
\$200+	\$39,811,089	\$55,194,019	\$63,641,998	\$42,513,307	\$88,197,945	\$43,599,355	\$20,344,605	\$14,193,456	\$25,887,921	\$10,008,287

Asset categories shown in millions • Responses: 49

Endowed vs. Non-Endowed Breakdown by Asset Size



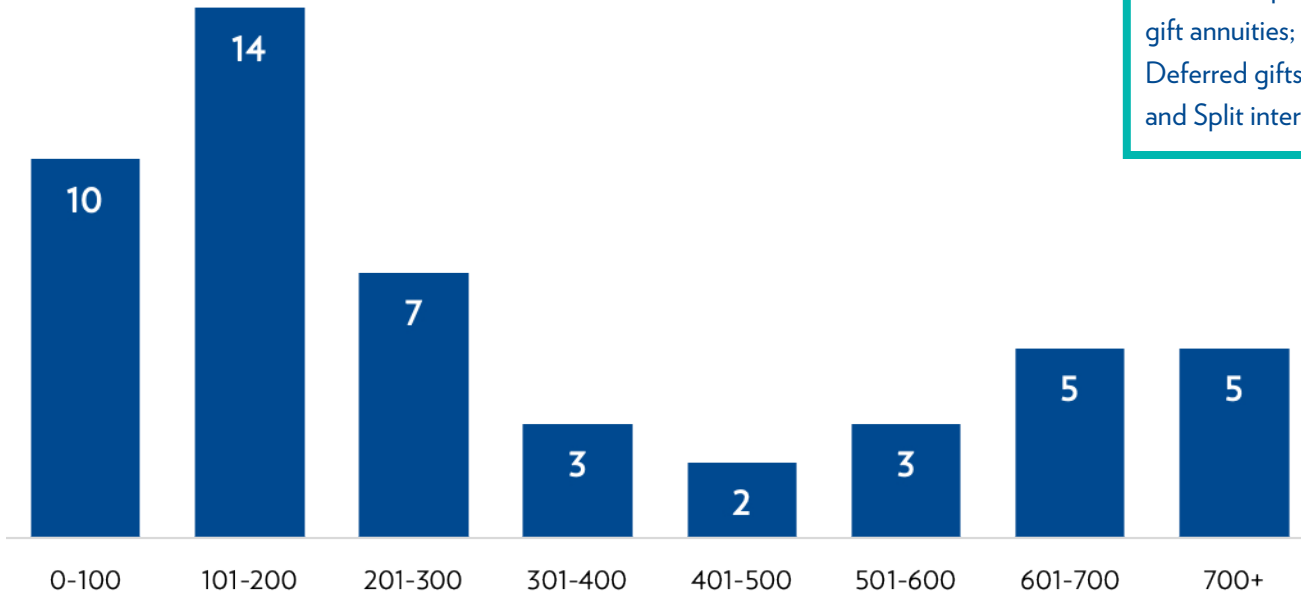
Average Number of Funds by Asset Category and Fund Type

Asset Category	Agency	Designated	Donor Advised	Supporting Org.	Unrestricted	Field of Interest	Scholarship	Affiliate	Admin	Other*
\$0 to \$5	8	14	16	-	3	11	22	-	2	4
\$5+ to \$10	10	19	7	10	4	14	43	5	1	3
\$10+ to \$20	17	32	14	1	10	21	52	-	1	2
\$20+ to \$50	36	62	31	1	25	29	81	6	4	21
\$50+ to \$100	81	87	76	1	31	44	126	2	3	16
\$100+ to \$200	136	93	123	16	62	86	155	82	19	102
\$200+	158	153	197	27	71	74	95	123	2	42

Asset categories shown in millions
Responses: 49



Number of Community Foundations by Total Funds

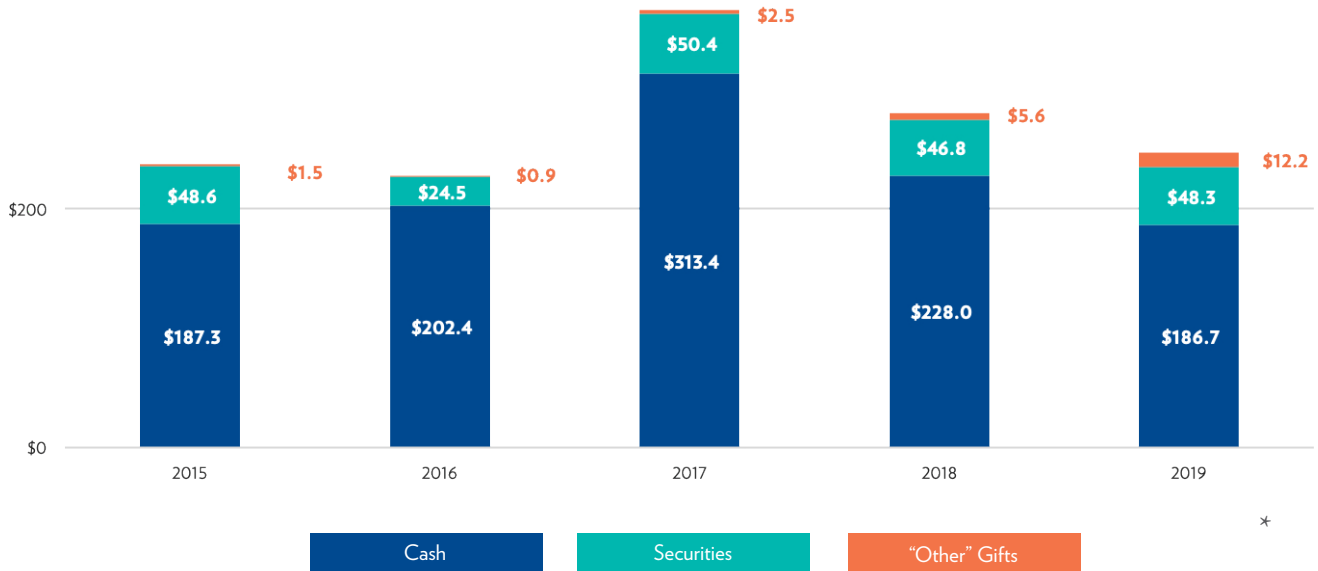


“Other” responses included: Capital campaign funds; Charitable gift annuities; Community service funds; Conservation easement; Deferred gifts; Fiscal sponsorships; Projects / Special projects; and Split interest funds, among others.

Section 1: Assets, Gifts & Grants

Five-Year Analysis

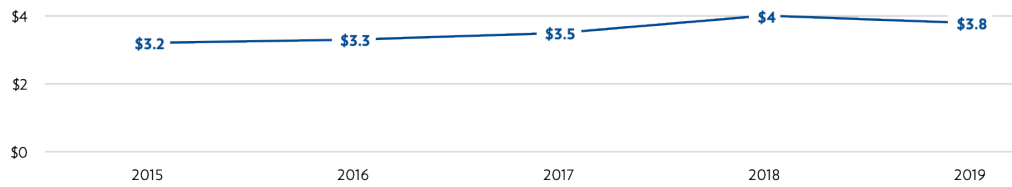
Gift Type Breakdown Over the Past Five Years (2015 - 2019)



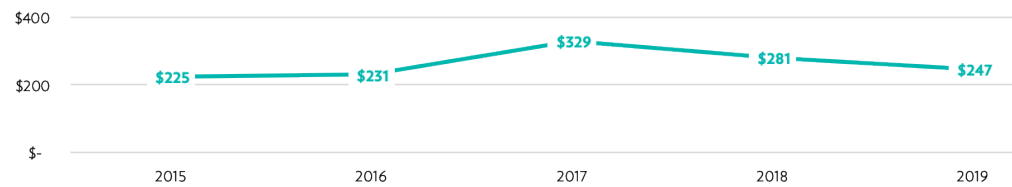
Year shown refers to year of publication • Values shown in millions

Assets, Gifts and Grants Over the Last Five Years (2015 - 2019)

Assets In Billions of Dollars



Gifts In Millions of Dollars



Grants In Millions of Dollars



Year shown refers to year of publication • Values shown in millions

Grant Totals by Field of Interest Over the Past Five Years (2015 - 2019)

Highlighting

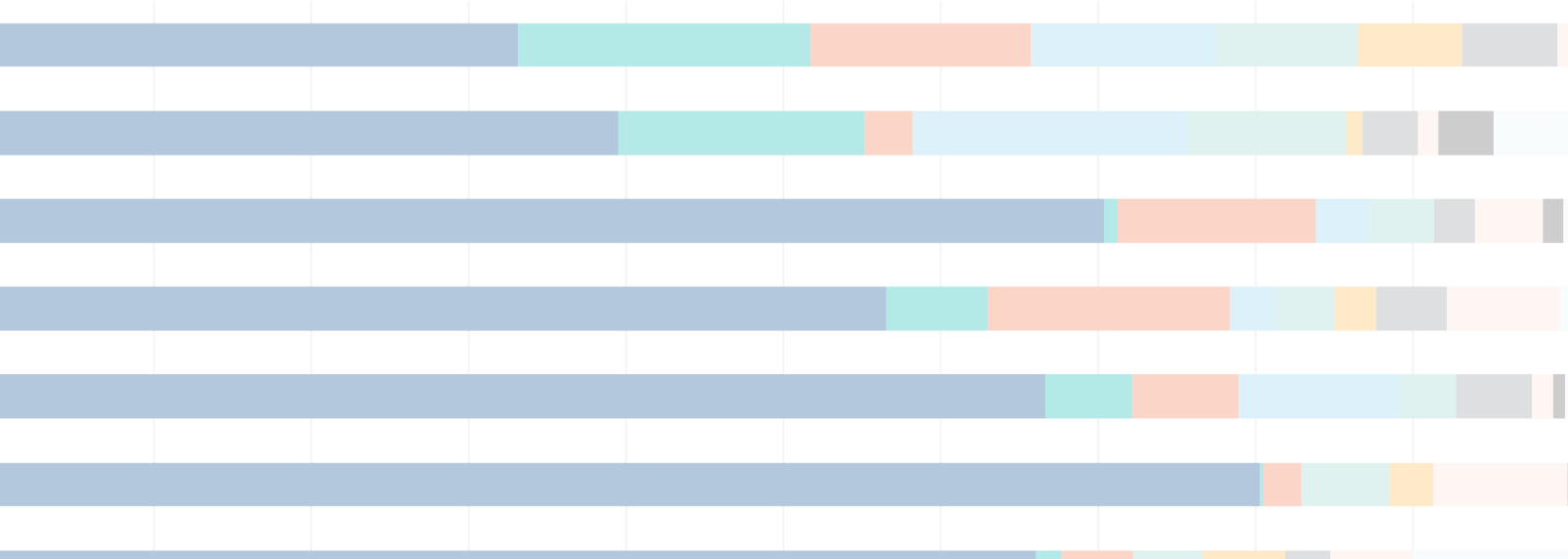
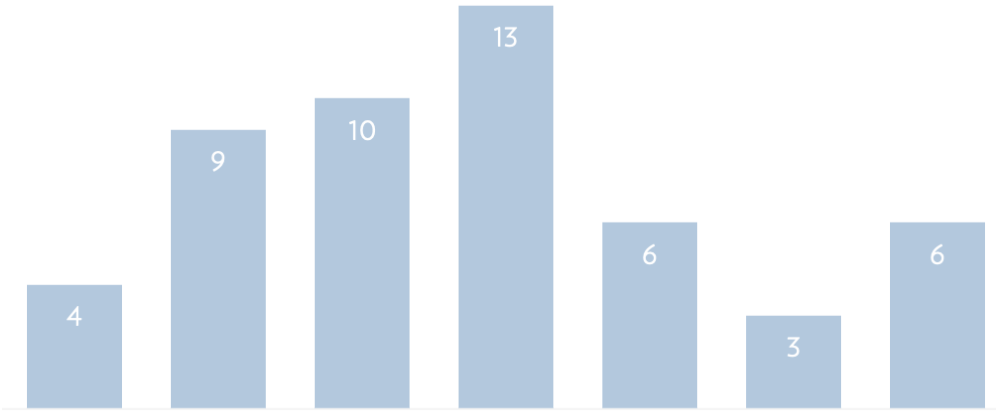
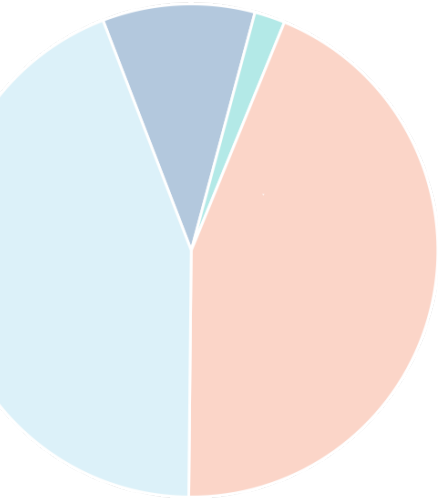
Interest	2015	2016	2017	2018	2019	Change from Previous Yr.
Do Not Report (Supporting Organizations, etc.)	\$1.5	\$2.0	\$1.6	\$3.8	N/A	N/A
Education and Instruction (non-scholarship)	\$43.6	\$42.2	\$48.4	\$38.5*	\$41.3	7%
Arts, Culture, and Humanities	\$23.3	\$23.4	\$21.4	\$23.1	\$25.5	10%
Public Affairs and Society Benefit	\$28.9	\$1.2	\$21.4	\$21.4	\$22.3	4%
Human Services, Multipurpose, Other	\$17.4	\$15.8	\$16.7	\$19.5	\$21.7	11%
Community Improvement and Capacity Building	\$27.3	\$17.4	\$14.8	\$16.9	\$19.5	15%
Philanthropy, Volunteerism and Grantmaking Foundations	\$6.3	\$5.9	\$10.0	\$7.2	\$16.9	135%
Scholarships	N/A	N/A	N/A	\$19.2	\$15.6	-19%
Health: General and Rehabilitative	\$7.7	\$7.8	\$10.1	\$11.4	\$12.7	11%
Youth Development	\$6.0	\$7.6	\$8.3	\$8.9	\$9.8	10%
Recreation, Leisure and Sports, Athletics	\$4.7	\$5.2	\$5.2	\$7.2	\$9.1	26%
Religious Related and Spiritual Development	\$5.2	\$6.4	\$7.2	\$9.5	\$8.4	-12%
Housing and Shelter	\$4.7	\$3.8	\$4.2	\$4.2	\$6.2	48%
Environmental Quality, Protection, and Beautification	\$6.6	\$4.1	\$4.5	\$6.3	\$5.8	-8%
International, Foreign Affairs and National Security	\$0.5	\$0.3	\$0.3	\$0.4	\$3.3	725%
Food, Nutrition, and Agriculture	\$3.1	\$2.0	\$4.9	\$3.3	\$2.8	-15%
Mental Health and Crisis Intervention	\$1.0	\$1.2	\$1.3	\$2.3	\$2.6	13%
Employment and Jobs	\$2.3	\$2.0	\$2.4	\$1.8	\$2.5	39%
Animal-related Activities	\$1.5	\$1.9	\$1.4	\$2.3	\$1.8	-22%
Disease, Disorder, and Medical Disciplines	\$1.9	\$1.0	\$1.8	\$1.9	\$1.7	-11%
Civil Rights, Social Action, and Advocacy	\$1.4	\$0.6	\$1.0	\$0.9	\$1.5	67%
Public Safety, Disaster Preparedness and Relief	\$2.0	\$1.6	\$1.3	\$1.7	\$1.2	-29%
Medical Research	\$0.5	\$1.0	\$0.8	\$1.0	\$0.6	-40%
Public Protection, Crime, Justice, and Legal Services	\$0.4	\$0.6	\$0.6	\$0.8	\$0.6	-25%
Social Sciences	\$0.1	\$0.0	\$0.0	\$0.1	\$0.6	757%
Science and Technology	\$0.2	\$0.1	\$0.6	\$0.1	\$0.1	11%

*Historically, the "Education and Instruction" field of interest category included scholarships. For 2018 and 2019, "scholarships" has been broken out into its own category.

Year shown refers to year of publication • Values shown in millions

SECTION II

Finance & Operations



Section 2: Finance & Operations

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

Asset Category	CEO/Exec. Director	COO or Equivalent	Finance & Admin.	Program	Development	Communi-ications	Technology	General Support	Other	Total Staff Avg
\$0 to \$5	0.9	0.0	0.4	0.4	0.3	0.3	0.0	0.5	0.0	1.7
\$5+ to \$10	0.8	0.0	0.9	0.5	0.0	0.2	0.0	0.6	0.1	1.9
\$10+ to \$20	1.0	0.0	0.7	0.9	1.0	0.8	0.0	1.2	0.0	2.1
\$20+ to \$50	1.0	0.8	1.1	1.7	0.8	0.8	0.3	1.1	0.5	4.6
\$50+ to \$100	1.0	1.0	1.6	2.5	0.8	1.0	0.0	1.0	0.0	7.9
\$100+ to \$200	1.0	1.0	2.8	5.5	2.3	2.3	0.8	5.5	2.0	18.7
\$200+	1.4	0.0	5.6	8.1	5.5	2.3	1.5	1.5	1.7	25.2

Asset categories shown in millions • Responses: 51

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

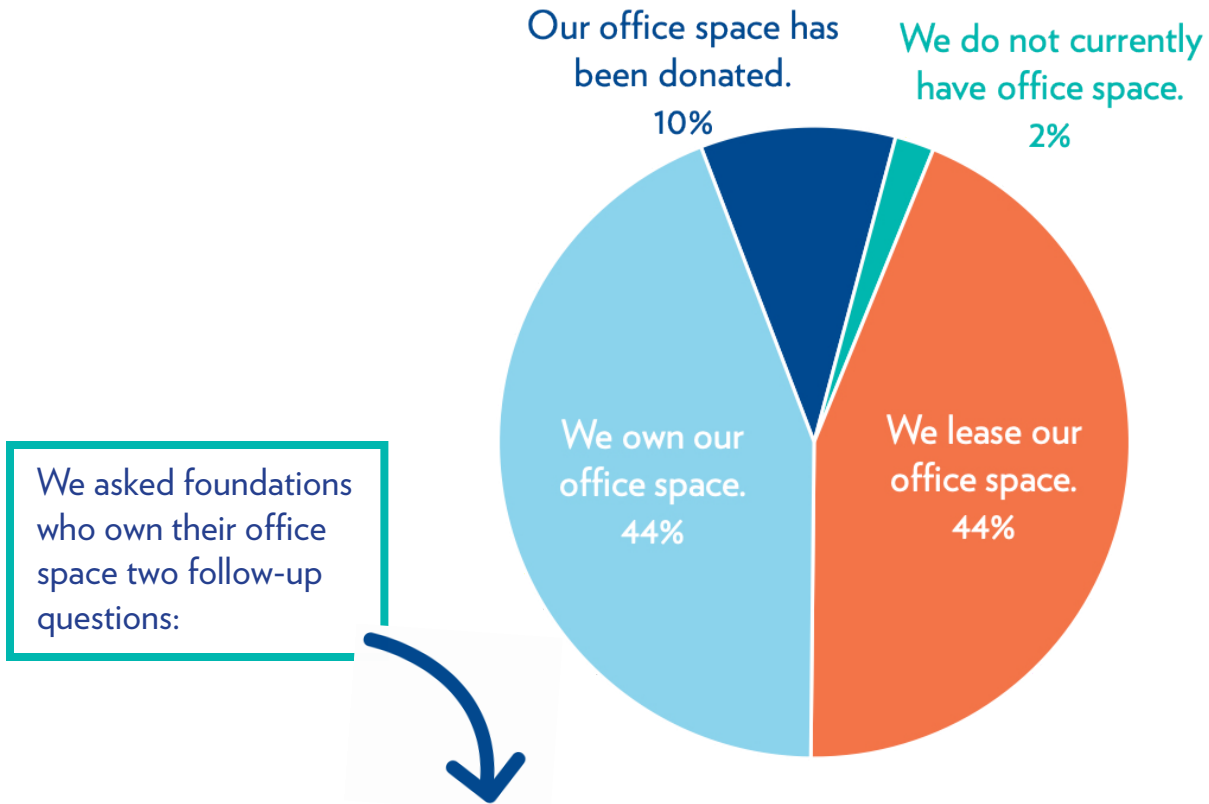


Responses: 46

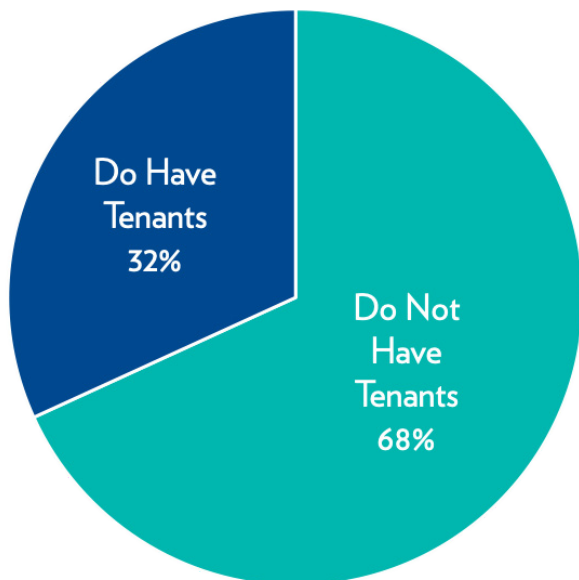
Section 2: Finance & Operations

Breakdown of Community Foundation **Office Space**

Responses: 50

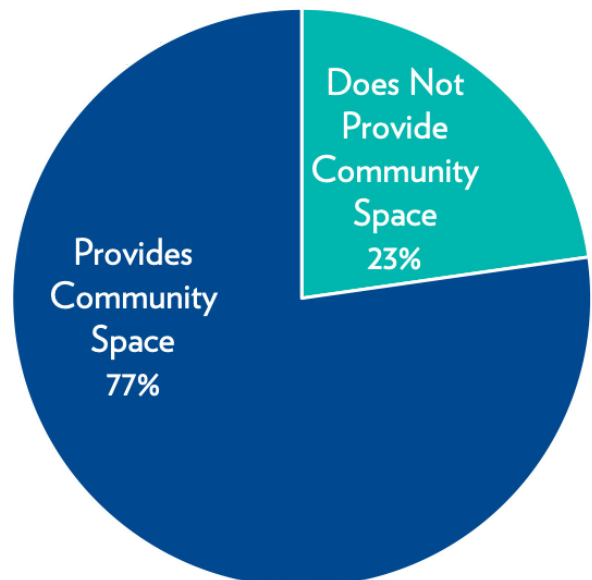


Community Foundations that Own Office Space and **Have Tenants**



Responses: 22

Community Foundations that Own Office Space and **Provide Community Convening Space**



Responses: 22

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	134	77	582	80
\$5+ to \$10	333	111	508	101
\$10+ to \$20	328	252	1,108	146
\$20+ to \$50	512	465	1,942	272
\$50+ to \$100	1,080	721	2,506	468
\$100+ to \$200	1,865	1,351	3,108	851
\$200+	2,455	1,912	2,741	922

Asset categories shown in millions • Responses: 49

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%+	Multiple / Tiered Fees
Pass-Through	7	3	8	6	6	3	8	7
Scholarship	1	4	12	15	22	1	1	6
Agency	3	10	25	10	2	1	1	11
Designated Fund	3	9	26	11	4	2	1	9
Field of Interest	1	4	19	18	9	1	1	5
Donor Advised	2	5	23	17	8	1	1	7
Unrestricted	1	4	17	21	7	1	1	5
Affiliate	2	1	8	6	3	1	1	5
Supporting Org	1	1	4	6	2	1	1	3
Other	1	1	4	4	2	2	4	2

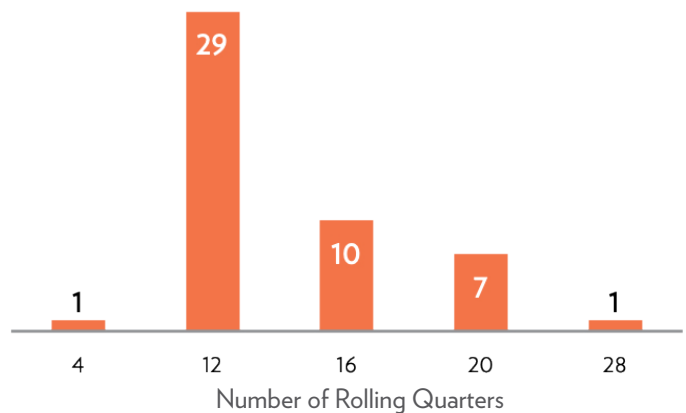
Responses: 49

Number of Community Foundations by **General Spending Policy (GSP)**

GSP %	Admin Fee Included	Admin Fee Excluded
3-3.9%	0	2
4-4.9%	1	18
5-5.9%	12	10
6-6.9%	2	0
Other	1	2
Total	16	32

Responses: 48

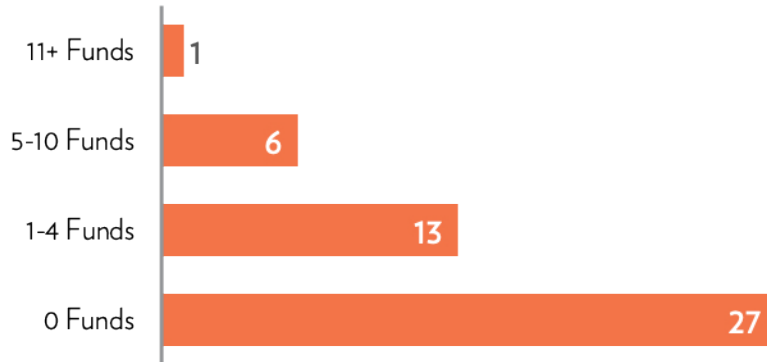
Number of Community Foundations by **Rolling Quarters** in Spending Policy



Section 2: Finance & Operations

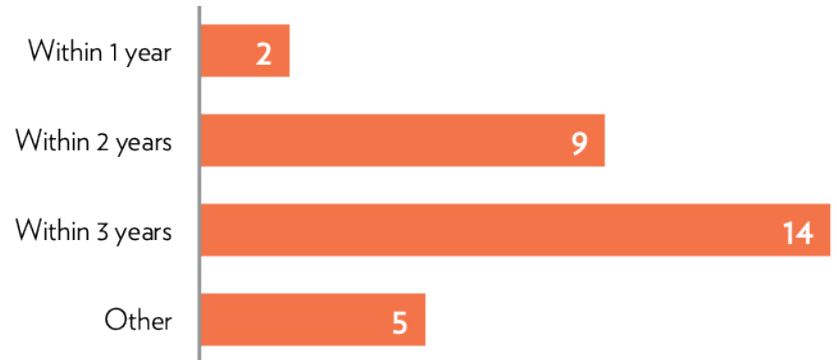
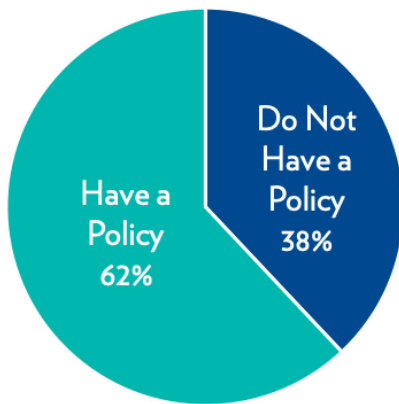
Number of Community Foundations with **Donor Advised Funds (DAFs) that Receive Contributions from Private Foundations** by Number of Applicable DAFs

Responses: 47



Percent of Community Foundations that have a **Policy on Inactive Donor Advised Funds**

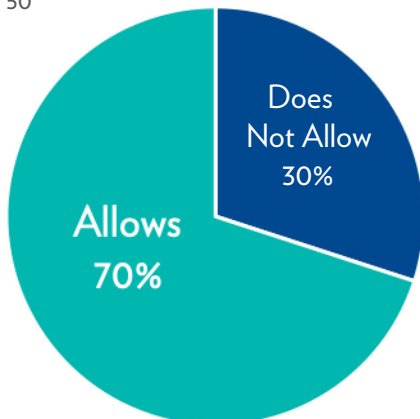
Responses: 50



Responses: 30

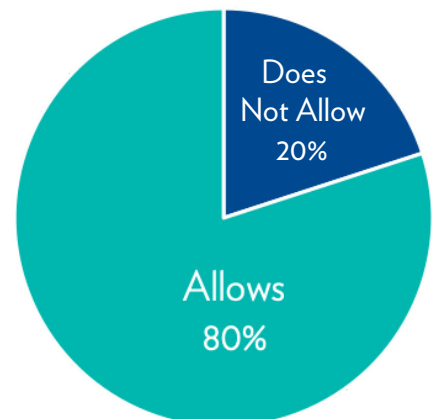
Percent of Community Foundations that **Allow Disbursements from Underwater Funds**

Responses: 50



Percent of Community Foundations that **Allow Unused Spendable Income to Rollover to the Next Fiscal Year**

Responses: 47



Annualized Rate of Return as of 12-31-18

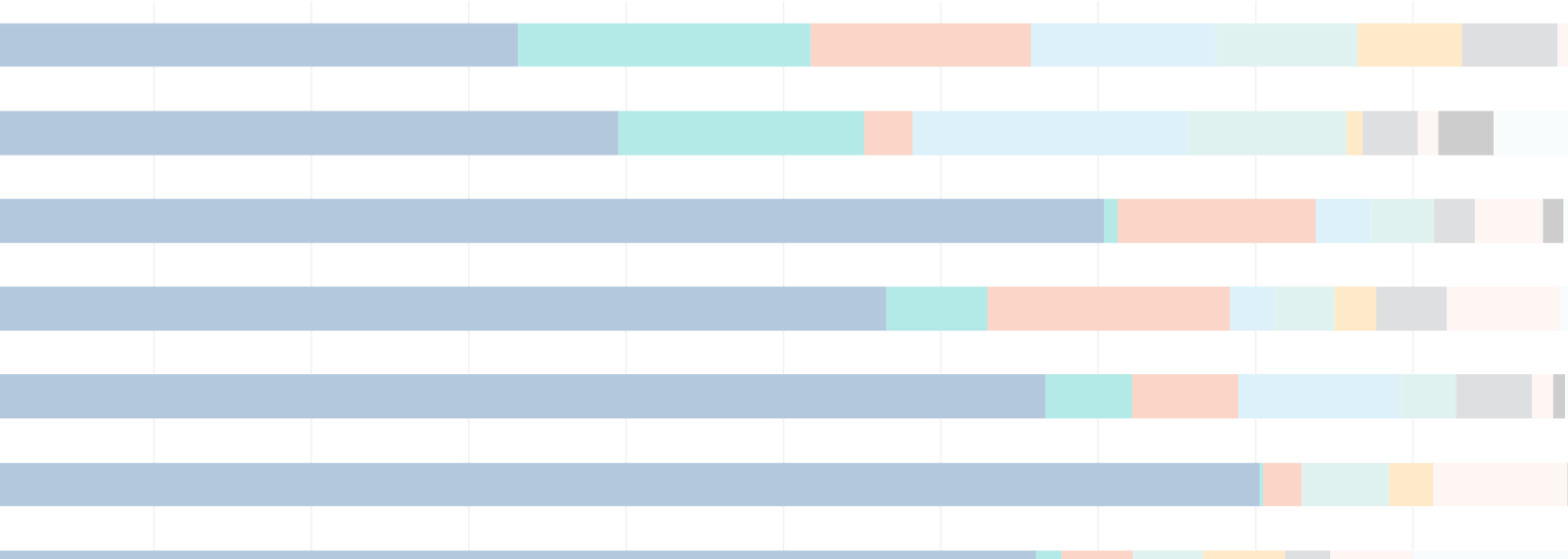
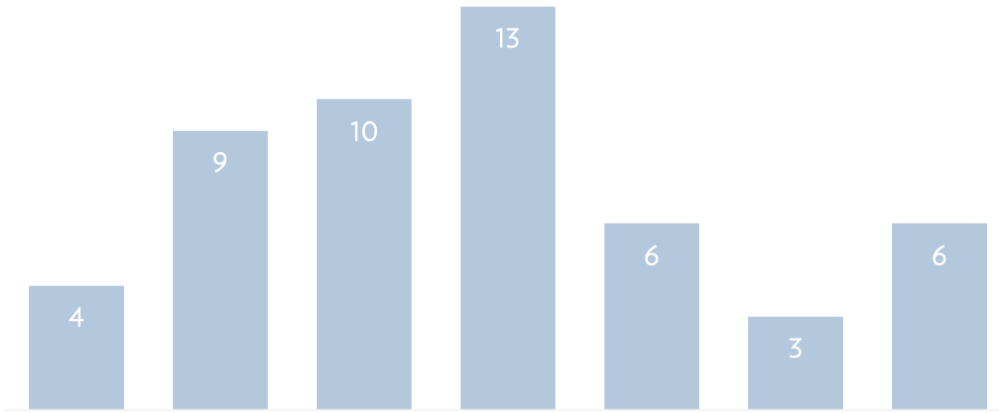
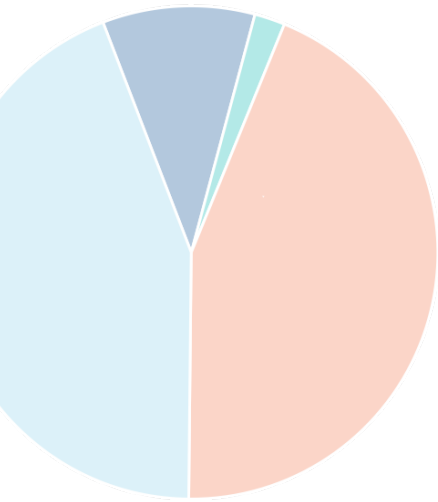
Fndtn	Asset Size	1 Year	3 Yrs	5 Yrs	10 Yrs
1	\$0 to \$5	-10.40%	1.40%	1.50%	-
2	\$0 to \$5	-3.88%	6.64%	5.06%	10.07%
3	\$0 to \$5	-6.60%	-	-	-
4	\$0 to \$5	-9.23%	3.99%	2.34%	-
5	\$5+ to \$10	-4.72%	5.43%	4.28%	8.56%
6	\$5+ to \$10	-	-	-	-
7	\$5+ to \$10	-7.80%	5.10%	2.90%	-
8	\$5+ to \$10	-6.26%	5.63%	4.00%	8.26%
9	\$5+ to \$10	-6.50%	4.80%	3.30%	7.30%
10	\$5+ to \$10	-6.97%	4.27%	3.35%	-
11	\$5+ to \$10	-6.10%	5.20%	3.80%	6.20%
12	\$5+ to \$10	-	5.00%	3.60%	7.10%
13	\$5+ to \$10	-5.10%	4.00%	3.20%	7.50%
14	\$10+ to \$20	-	-	-	-
15	\$10+ to \$20	-2.88%	5.82%	7.14%	-
16	\$10+ to \$20	-7.45%	5.18%	3.92%	8.98%
17	\$10+ to \$20	2.00%	7.60%	6.40%	-
18	\$10+ to \$20	7.80%	9.70%	7.76%	7.57%
19	\$10+ to \$20	-7.25%	5.39%	3.91%	-
20	\$10+ to \$20	-5.26%	4.15%	-	-
21	\$10+ to \$20	-6.72%	4.47%	2.12%	0.00%
22	\$10+ to \$20	3.78%	5.03%	0.00%	0.00%
23	\$10+ to \$20	-	-	-	-
24	\$20+ to \$50	-8.46%	3.68%	1.92%	-
25	\$20+ to \$50	-7.32%	17.08%	5.67%	-3.87%

Fndtn	Asset Size	1 Year	3 Yrs	5 Yrs	10 Yrs
26	\$20+ to \$50	-6.43%	8.92%	6.40%	8.53%
27	\$20+ to \$50	-5.26%	5.12%	4.22%	6.64%
28	\$20+ to \$50	-6.20%	4.20%	2.80%	-
29	\$20+ to \$50	-	-	-	-
30	\$20+ to \$50	-7.01%	4.57%	2.44%	8.01%
31	\$20+ to \$50	-7.06%	6.80%	4.73%	9.18%
32	\$20+ to \$50	-4.51%	4.84%	3.02%	6.84%
33	\$20+ to \$50	-8.40%	5.60%	3.40%	8.70%
34	\$20+ to \$50	-7.30%	5.20%	3.40%	9.10%
35	\$20+ to \$50	-7.20%	6.20%	5.60%	10.30%
36	\$20+ to \$50	-5.98%	5.97%	4.92%	11.96%
37	\$50+ to \$100	-7.30%	5.20%	3.60%	7.60%
38	\$50+ to \$100	-8.10%	5.40%	3.30%	7.40%
39	\$50+ to \$100	-3.68%	5.89%	5.13%	8.94%
40	\$50+ to \$100	-5.83%	5.40%	3.10%	6.20%
41	\$50+ to \$100	-6.30%	4.40%	2.70%	8.60%
42	\$50+ to \$100	-6.86%	5.56%	3.89%	12.22%
43	\$100+ to \$200	-11.20%	7.00%	5.40%	9.90%
44	\$100+ to \$200	-4.80%	6.00%	4.20%	8.20%
45	\$100+ to \$200	-4.80%	6.50%	5.60%	17.40%
46	\$200+	-6.71%	5.38%	4.27%	8.18%
47	\$200+	-6.80%	5.40%	2.90%	6.90%
48	\$200+	-8.30%	5.50%	3.20%	8.40%
49	\$200+	-6.60%	4.90%	2.60%	7.50%
50	\$200+	-7.40%	6.30%	4.60%	10.00%
51	\$200+	-5.30%	5.60%	3.40%	7.30%
Averages		-5.88%	5.68%	3.89%	7.82%

Asset categories shown in millions • Responses: 51

SECTION III

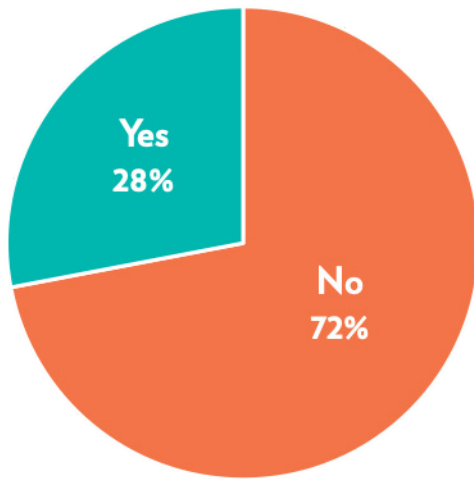
Other



Section 3

Impact Investing

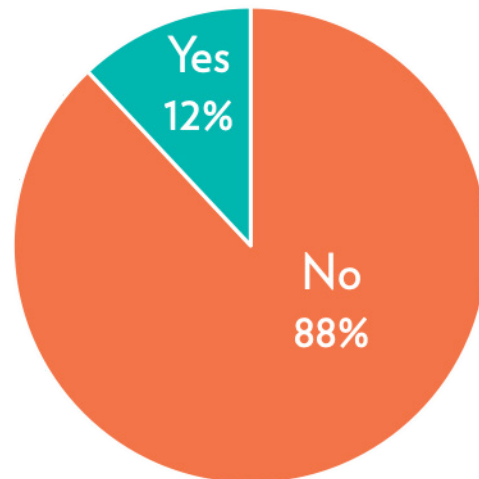
Percent of Community Foundations who do **Program Related Investing (PRI)**



Responses: 50

- Of 12 respondents, 11 report that none of their grantmaking dollars are included in the PRI pool, and 1 reports that 3% of their grantmaking dollars are included.
- 6 community foundations say that 1-2% of their corpus is included in their PRI pool and 6 community foundations report that 0% is included.

Percent of Community Foundations who do **Mission Related Investing (MRI)**



Responses: 50

- Mission Related Investing has remained consistent from the 2018 databook publication among respondents in percentage.
- 4 of 5 respondents who engage in Mission Related Investing perform due diligence in-house.
- Oversight of the investments selection process for MRIs varied across each organization. The most common responses were the board of trustees, executive committee and impact investment committee.

Section 3

Reported Geographic Affiliates

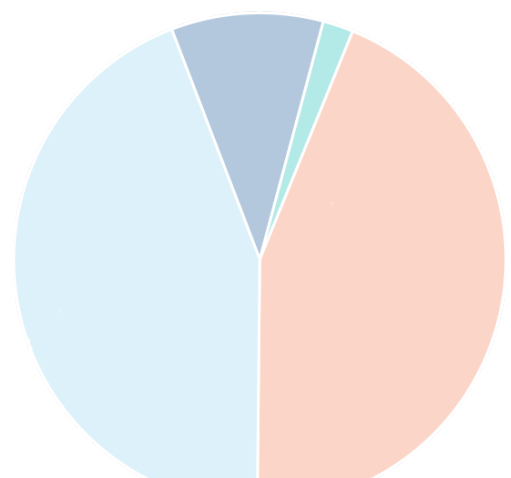
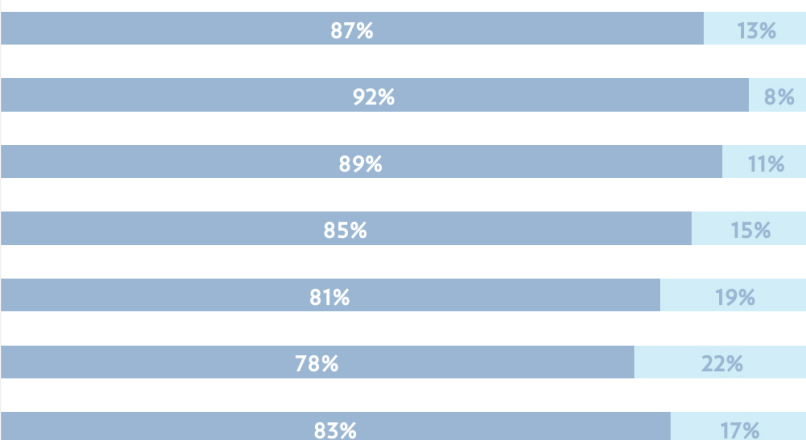
Lead Foundation	Affiliate	Assets
Ann Arbor Area Community Foundation	Ypsilanti Area Community Foundation	\$2,376,263
Barry Community Foundation	Delton Kellogg Education Foundation	\$796,157
Barry Community Foundation	Thornapple Area Enrichment Foundation	\$2,000,547
Battle Creek Community Foundation	Athens Area Community Foundation	\$1,290,021
Battle Creek Community Foundation	Homer Area Community Foundation	\$3,158,199
Bay Area Community Foundation	Arenac Community Fund	\$840,989
Canton Community Foundation	Community Foundation of Plymouth	\$1,000,000
Community Foundation for Muskegon County	Community Foundation	\$15,636,968
Community Foundation for Muskegon County	Community Foundation	\$11,519,231
Community Foundation for Northeast Michigan	Iosco County Community Foundation	\$5,293,220
Community Foundation for Northeast Michigan	North Central Michigan Community Foundation	\$5,082,237
Community Foundation for Northeast Michigan	Straits Area Community Foundation	\$2,407,066
Community Foundation for Southeast Michigan	Chelsea Community Foundation Fund	\$2,231,313
Community Foundation for Southeast Michigan	Community Foundation for Livingston County Fund	\$1,205,954
Community Foundation of Marquette County	Greater Ishpeming Area Community Fund	\$1,254,775
Community Foundation of Marquette County	Gwinn Area Community Fund	\$1,133,339
Community Foundation of Marquette County	NEgaunee Area Community Fund	\$801,790
Community Foundation of Monroe County	Greater Milan Area Community Foundation	\$2,306,751
Community Foundation of St. Clair County	Algonac-Clay Community Fund	\$251,739
Community Foundation of St. Clair County	Citizens for St. Clair Fund	\$583,760
Community Foundation of St. Clair County	Marysville Community Fund	\$70,932
Community Foundation of the Upper Peninsula	Alger Regional Area Community Foundation	\$3,157,601
Community Foundation of the Upper Peninsula	Community Foundation for Delta County	\$16,322,258
Community Foundation of the Upper Peninsula	Community Foundation of the Upper Peninsula	\$1,817,549
Community Foundation of the Upper Peninsula	Gogebic Ontonagon Community Foundation	\$132,937
Community Foundation of the Upper Peninsula	Les Cheneaux Area Community Foundation	\$2,503,318
Community Foundation of the Upper Peninsula	Paradise Area Community Foundation	\$441,625
Community Foundation of the Upper Peninsula	Rudyard Area Community Foundation	\$264,976
Community Foundation of the Upper Peninsula	Schoolcraft County Community Foundation	\$602,600
Community Foundation of the Upper Peninsula	St Ignace Community Foundation	\$1,538,972
Fremont Area Community Foundation	Lake County Community Foundation	\$4,487,553
Fremont Area Community Foundation	Mecosta County Community Foundation	\$5,110,892

Lead Foundation	Affiliate	Assets
Fremont Area Community Foundation	Osceola County Community Foundation	\$8,404,599
Grand Haven Area Community Foundation	ALLendale Community Foundation	\$2,572,199
Grand Haven Area Community Foundation	Coopersville Area Community Foundation	\$5,516,580
Grand Rapids Community Foundation	Cascade Community Foundation	\$481,389
Grand Rapids Community Foundation	East Grand Rapids Community Foundation	\$210,071
Grand Rapids Community Foundation	Hudsonville-Jenison Community Foundation	\$367,259
Grand Rapids Community Foundation	Ionia County Community Foundation	\$8,505,366
Grand Rapids Community Foundation	Sparta Community Foundation	\$1,019,951
Grand Rapids Community Foundation	The Lowell Area Community Fund	\$16,225,541
Grand Rapids Community Foundation	Wyoming Community Foundation	\$570,044
Greenville Area Community Foundation	Lakeview Area Community Fund	\$1,090,297
Greenville Area Community Foundation	Montcalm Panhandle Community Fund	\$257,764
Midland Area Community Foundation	Clare County Community Foundation	\$3,057,604
Midland Area Community Foundation	Gladwin County Community Foundation	\$3,046,105
Sturgis Area Community Foundation	Constantine Area Community Foundation	\$558,126
Sturgis Area Community Foundation	White Pigeon Area Community Foundation	\$433,666

35%
Of respondents reported having geographic affiliates

14
Respondents have more than one geographic affiliate

1
Community foundation reported plans to add more geographic affiliates



Section 3

Technology Vendors

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

Software	Donor/Gifts	Grants	Accounting	Scholarships
AcademicWorks	0	0	0	1
Akoya	1	0	0	0
Akoya-Bromelkamp	0	0	0	1
Asana	0	1	0	1
AwardSpring	0	1	0	9
Blackbaud DonorCentral	1	0	0	0
Blackbaud FIMS	18	11	18	6
Blackbaud Financial Edge	0	2	9	2
Blackbaud Grantmaking/GIFTS OnLine	0	3	0	2
Blackbaud Raisers Edge	12	1	1	1
Bromelkamp Akoya	1	0	1	0
Bromelkamp Community Akoya	1	1	0	0
Bromelkamp Community Pearl	9	9	8	7
Bromelkamp eGrant	0	2	0	7
CFUP third party admin	1	1	1	0
Community Impact System/Intuit	0	1	0	0
CommunityForce	0	0	0	2
FIMS IGAM	0	1	0	0
FLuxx Grantmaker	0	0	0	0
Foundant for Community Foundations	1	1	1	1
Foundant for Grantmakers	0	4	0	0
Foundant for Scholarships Providers	0	0	0	2
Fusion Labs GrantedGE (Grant Edge)	0	4	0	3
Gift Works	0	0	0	0
Intacct	0	0	1	0
Jot Form	0	2	0	0
Mailchimp	1	1	0	1
Microsoft Access	0	0	0	1
Microsoft Excel	10	9	11	10
Microsoft Word	8	9	6	9
None	0	0	0	0
Questica	0	0	1	0
Quick Books	0	0	1	0

(Continued on next page)

Software	Donor Gifts	Grants	Accounting	Scholarships
Quicken	0	0	1	0
Sage Intacct	0	0	0	0
Salesforce	1	1	0	1
Smarter Select	0	1	0	1
SmartSimple CF Grants Management	0	0	0	0
SmartSimple Donor Management	0	1	0	0
Stellar Tech. Solutions (iPhiCore)	6	6	6	6
Survey Monkey Apply	1	1	0	0
Yureka Forms	0	1	0	1

HR / Payroll Software Used by Community Foundations

Software	Community Foundation Users
Basic	2
Blackbaud	1
Dominion Payroll Systems	1
Excel - Paychex	1
FIMS	3
IOI	1
Paychex	3
Paycor	2
PayrollMate	1
Pearl and Outsource	2
Quick Books	6
Sage Payroll Services	1
Maxwell Health	1
Paychoice	0
None	16
Other	10

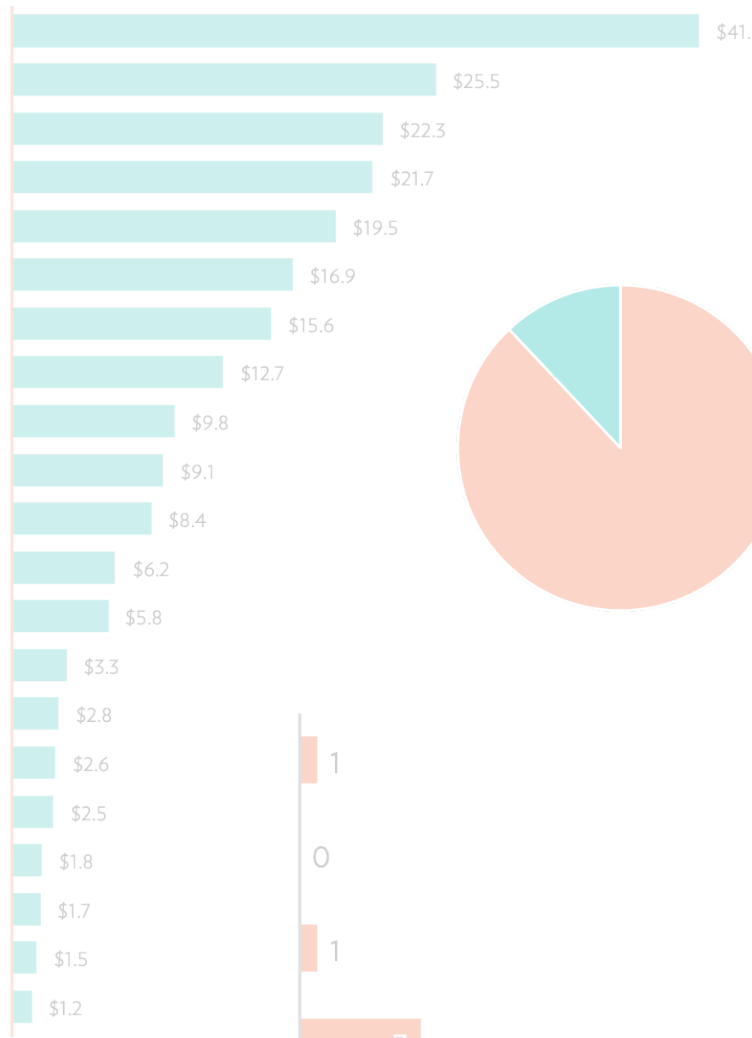
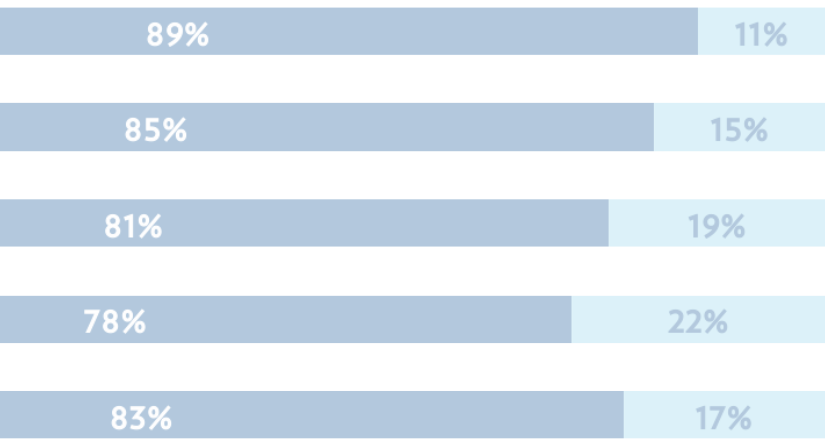
“Other” respondents most frequently report using ADP or outsourcing for their HR and Payroll services.



Section 3

Number of **Planned Software Transitions** by Transitioning-to Software

Software	Donor Gifts	Grants	Accounting	Scholarships
AwardSpring	0	0	0	0
Blackbaud DonorCentral	0	0	0	0
Blackbaud FIMS	0	0	0	0
Blackbaud Financial Edge	0	0	0	0
Blackbaud Grantmaking/GIFTS OnLine	0	0	0	0
Blackbaud Raisers Edge	1	0	0	0
Blackbaud via CFUP	1	1	1	0
Bromelkamp	1	1	0	1
Bromelkamp - Business Central	0	0	1	0
Bromelkamp Community Akoya	0	0	1	0
Bromelkamp Community Pearl	1	1	1	1
Bromelkamp eGrant	0	1	0	3
Community Akoya	1	1	1	1
CommunityForce	0	0	0	0
CommunitySuite by Foundant	1	1	1	1
Fluxx Grantmaker	0	1	0	1
Foundant for Community Foundations	1	1	1	0
Foundant for Grantmakers	0	0	0	0
Foundant for Scholarships Providers	0	0	0	0
Fusion Labs GrantedGE (Grant Edge)	0	0	0	0
Gift Works	0	0	0	0
Jot Form	0	0	0	0
KaLiedescope	0	0	0	1
Microsoft Access	0	0	0	0
Microsoft Excel	0	0	0	0
Microsoft Word	0	0	0	0
None	1	1	1	1
Sage Intacct	0	0	0	0
Salesforce	0	0	0	0
Smarter Select	0	0	0	0
SmartSimple CF Grants Management	0	0	0	0
SmartSimple Donor Management	0	0	0	0
Stellar Tech. Solutions (iPhiCore)	0	0	0	0
Survey Monkey Apply	0	0	0	0
Youreka Forms	0	0	0	0



3%	10%	9%	1%	0%	0%
0%	2%	7%	3%	7%	10%
5%	0%	3%	5%	2%	1%
5%	4%	6%	10%	0%	1%
5%	0%	6%	2%	1%	0%
5%	3%	0%	9%	0%	0%
5%	6%	4%	6%	0%	12%

