

COMMUNITY FOUNDATION DATABOOK

PUBLISHED IN 2020

WELCOME

The Community Foundation Databook is one of the longest standing publications 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 publication is developed collaboratively within CMF, with multiple departments coming together to ensure we provide the best possible publication to meet your needs. This 2020 edition was made possible with outstanding support from Ammara Ansari, our CMF / Skillman Foundation Learning and Impact Fellow.

New this year: The databook features the results from a new set of questions asked in the 2020 survey focusing on COVID-19 response efforts. We asked community foundations whether you set up a new response fund specifically to support COVID-19 relief. Community foundations also shared how you have repurposed funds to support relief efforts. The results are reflected in a dedicated COVID-19 section within the databook.

We greatly appreciate your time in providing this information amid the many challenges of 2020. We received the same level of response to the survey during a crisis, demonstrating your strong commitment to your peers and to lifting up best practices, successes, challenges and opportunities that can inform the field. This data is critically important to providing visibility to overall trends and norms in community foundation giving.

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

Ahead of his retirement later this year, CMF would like to recognize the leadership and commitment of Dave Lindberg in championing this long-standing survey and annual data gathering to support and inform community philanthropy. We are grateful for his countless contributions to CMF and the field at large.

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METHODOLOGY AND DATA

The CMF Community Foundation Databook represents the most complete picture of community foundations in our state, with 52 of 57 Michigan community foundations responding to this year's survey.

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 data point in this publication notes the number of responses received.

The data represented in this databook was collected during the months of June-August 2020. 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

Community foundations were asked to submit data based on their latest year end, which in most cases was December 31, 2019.

SECTION I

Assets, Gifts & Grants

SECTION I: 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	\$1,008,706,323	\$96,625,269	\$86,965,501
Kalamazoo Community Foundation	\$554,714,725	\$10,199,707	\$17,538,072
Grand Rapids Community Foundation	\$346,436,963	\$10,621,219	\$13,888,250
Fremont Area Community Foundation	\$262,583,575	\$2,687,127	\$8,041,376
Community Foundation of Greater Flint	\$246,914,074	\$11,003,442	\$9,105,709
Community Foundation of Muskegon County	\$234,399,380	\$12,872,173	\$11,980,207
Ann Arbor Area Community Foundation	\$147,472,337	\$8,799,227	\$5,666,187
Grand Haven Area Community Foundation	\$144,542,964	\$8,238,681	\$7,997,765
Battle Creek Community Foundation	\$116,650,240	\$8,467,481	\$9,767,121
Capital Region Community Foundation	\$114,740,220	\$9,536,008	\$6,052,713
Midland Area Community Foundation	\$110,680,869	\$10,436,815	\$4,096,180
Community Foundation of the Holland/ZeeLand Area	\$93,720,564	\$12,767,946	\$13,583,943
Community Foundation of St. Clair County	\$81,526,325	\$4,056,480	\$2,833,567
Saginaw Community Foundation	\$76,289,202	\$5,828,135	\$3,664,744
Grand Traverse Regional Community Foundation	\$68,084,092	\$3,476,837	\$3,297,351
Community Foundation for Northeast Michigan	\$48,281,377	\$2,551,083	\$2,550,118
Bay Area Community Foundation	\$46,343,292	\$1,188,368	\$2,349,598
Charlevoix County Community Foundation	\$43,258,184	\$2,301,782	\$2,210,038
Greenville Area Community Foundation	\$39,698,939	\$1,592,848	\$1,455,833
Petoskey-Harbor Springs Area Community Foundation	\$39,491,853	\$3,263,405	\$3,153,715
Barry Community Foundation	\$35,206,754	\$3,009,687	\$2,185,631
Jackson Community Foundation	\$33,164,227	\$2,027,534	\$1,159,300
Manistee County Community Foundation	\$31,431,952	\$3,153,014	\$601,343
Community Foundation of the Upper Peninsula	\$30,122,045	\$2,045,380	\$1,507,640
Lenawee Community Foundation	\$29,992,948	\$2,930,721	\$2,314,371
Sturgis Area Community Foundation	\$24,544,870	\$252,225	\$1,025,930

Continued on Next Page

COMMUNITY FOUNDATION DATA SUMMARY, CONTINUED

Community Foundation	Assets	Gifts Received	Grants Made
Mt. Pleasant Area Community Foundation	\$23,406,262	\$1,075,453	\$1,676,877
Community Foundation of Marquette County	\$19,271,598	\$1,033,125	\$948,933
Michigan Gateway Community Foundation	\$18,945,115	\$558,027	\$677,093
Hillsdale County Community Foundation	\$18,628,343	\$1,905,812	\$1,090,154
Four County Community Foundation	\$18,561,938	\$945,605	\$550,955
Marshall Community Foundation	\$15,522,501	\$1,129,409	\$577,610
Mackinac Island Community Foundation	\$14,308,241	\$552,262	\$344,381
The Community Foundation of Greater Rochester	\$12,673,810	\$2,363,278	\$1,106,252
Cadillac Area Community Foundation	\$12,654,135	\$197,500	\$245,000
Tuscola County Community Foundation	\$11,924,329	\$836,559	\$478,403
Lapeer County Community Foundation	\$11,456,617	\$602,686	\$356,457
M&M Area Community Foundation	\$11,114,824	\$785,640	\$737,592
Shiawassee Community Foundation	\$9,796,372	\$375,826	\$385,136
Community Foundation of Monroe County	\$9,282,767	\$513,292	\$224,731
Roscommon County Community Foundation	\$8,306,913	\$295,205	\$251,497
Keweenaw Community Foundation	\$8,157,205	\$285,078	\$379,435
Sanilac County Community Foundation	\$8,142,829	\$1,448,681	\$215,702
Branch County Community Foundation	\$7,431,508	\$350,765	\$2,427,312
Leelanau Township Community Foundation	\$6,343,822	\$142,241	\$177,118
Otsego Community Foundation	\$5,495,340	\$1,016,302	\$238,132
Huron County Community Foundation	\$5,481,889	\$343,659	\$194,714
Chippewa County Community Foundation	\$4,323,523	\$453,226	\$245,502
Canton Community Foundation	\$4,233,703	\$1,626,885	\$227,100
Greater South Haven Area Community Foundation	\$980,146	\$132,000	\$30,604
2020 Survey Totals	\$4,275,442,024	\$258,901,110	\$238,778,892
Change from 2019 Totals	+11.5%	+3.6%	+0.9%

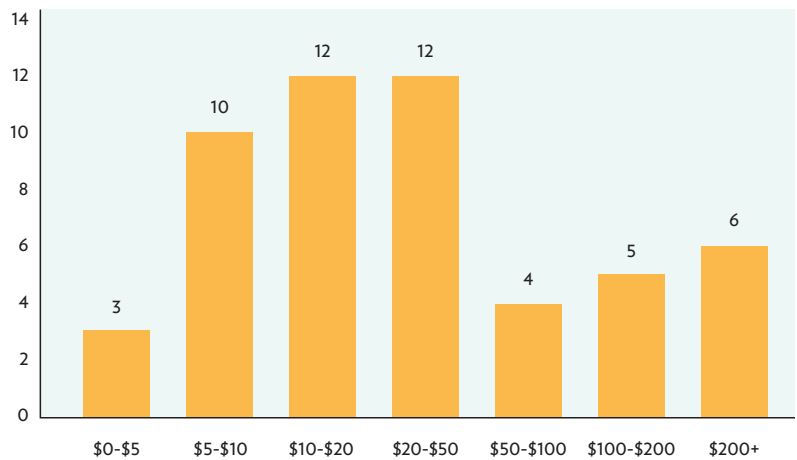
Responses: 52

Includes supporting organizations and affiliates

SECTION I: ASSETS, GIFTS & GRANTS

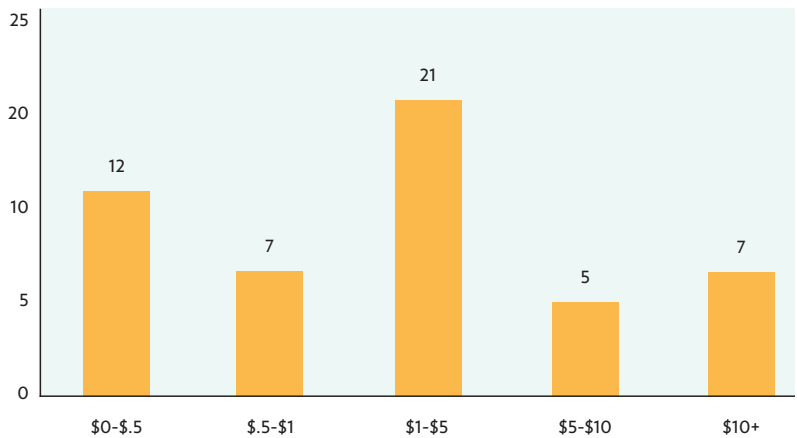
Number of Community Foundations by **ASSET SIZE**

Assets shown in millions
Responses: 52



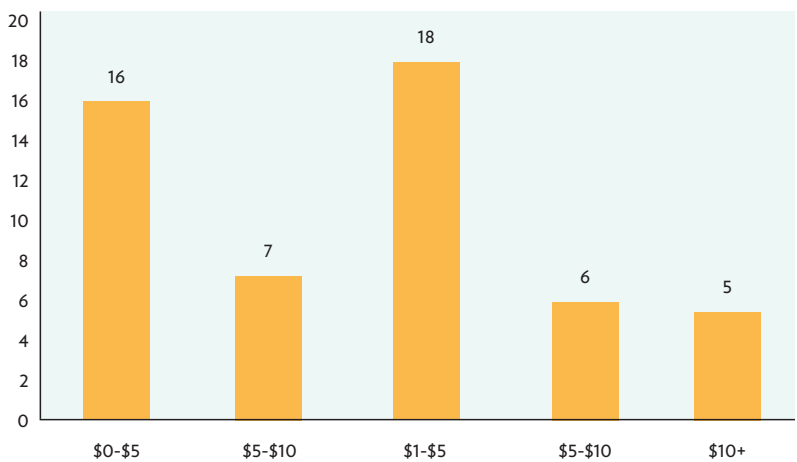
Number of Community Foundations by **GIFTS RECEIVED**

Gifts shown in millions
Responses: 52



Number of Community Foundations by **GRANTS MADE**

Grants shown in millions
Responses: 52

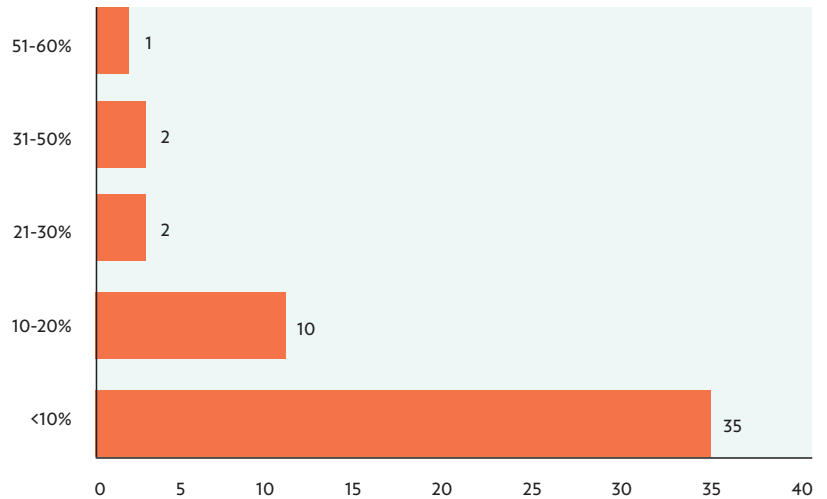


SECTION I: ASSETS, GIFTS & GRANTS

Number of Community Foundations by Percentage

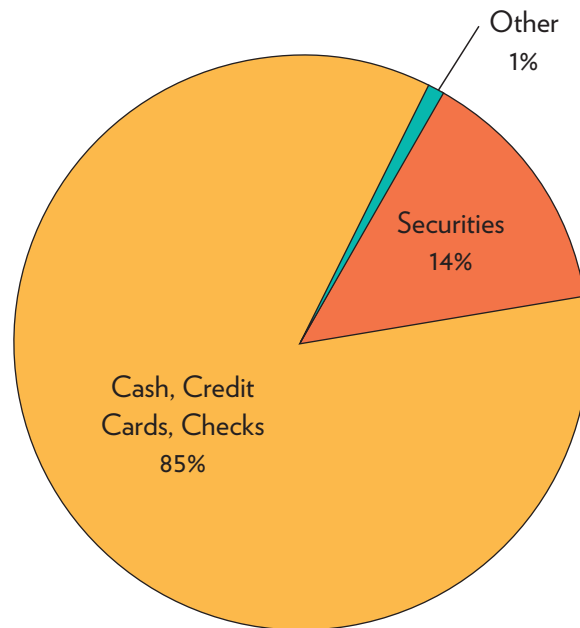
GIFTS FROM ONLINE GIVING

Responses: 50



GIFT TYPE BREAKDOWN

Responses: 52

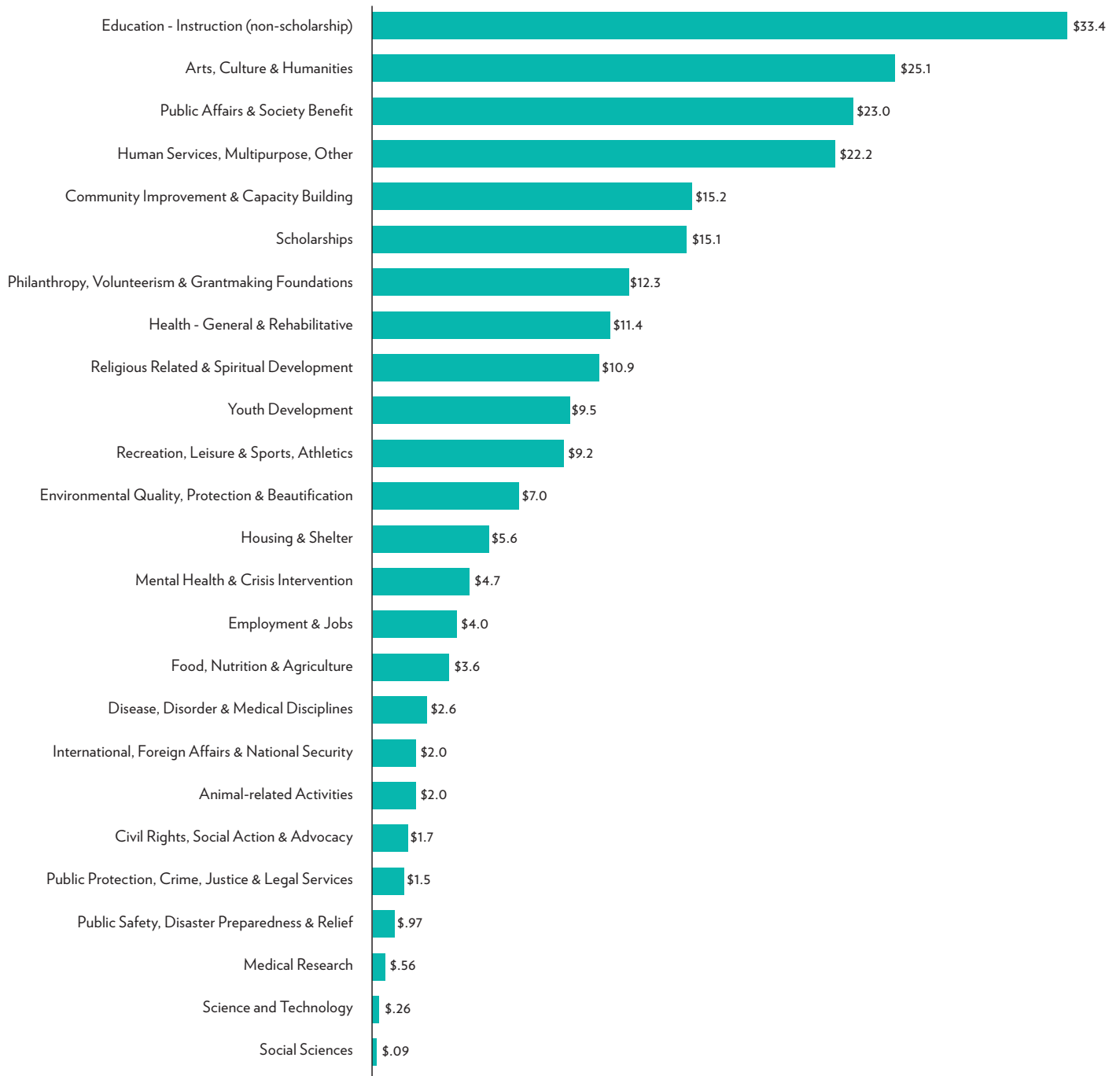


Examples of other responses include artwork and real estate.

SECTION I: ASSETS, GIFTS & GRANTS

TOTAL ANNUAL GRANTS MADE

By Field of Interest



Values shown in millions

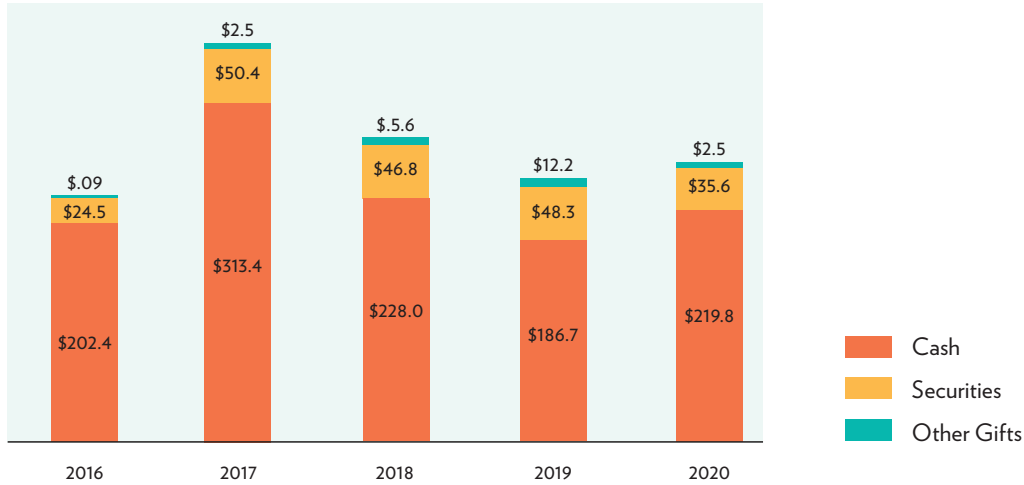
Responses: 49

SECTION I: ASSETS, GIFTS & GRANTS

Five-Year Analysis

GIFT TYPE BREAKDOWN

Over the Past Five Years (2016 - 2020)



Responses: 49

Year shown refers to year of publication

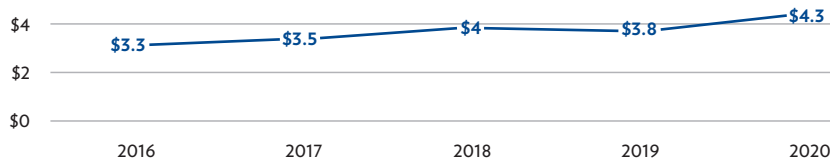
Values shown in millions

ASSETS, GIFTS AND GRANTS

Over the Last Five Years (2016 - 2020)

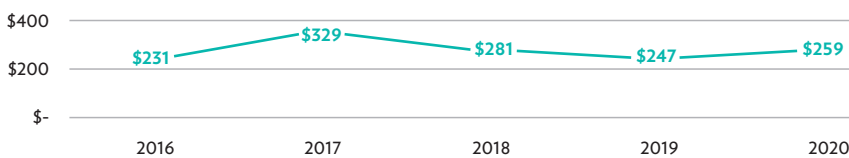
ASSETS

Values shown in billions



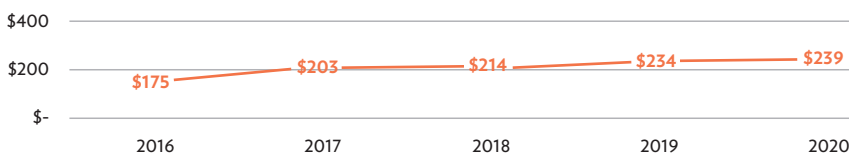
GIFTS

Values shown in millions



GRANTS

Values shown in millions



GRANT TOTALS BY FIELD OF INTEREST

Over the Past Five Years (2016 - 2020)

Interest	2016	2017	2018	2019	2020	Change from 2019
Education - Instruction (non-scholarship)	\$42.2	\$48.4	\$38.5*	\$41.3	\$33.5	-19%
Arts, Culture & Humanities	\$23.4	\$21.4	\$23.1	\$25.5	\$25.2	-1%
Public Affairs & Society Benefit	\$1.2	\$21.4	\$21.4	\$22.3	\$23.1	3%
Human Services, Multipurpose, Other	\$15.8	\$16.7	\$19.5	\$21.7	\$22.3	3%
Community Improvement & Capacity Building	\$17.4	\$14.8	\$16.9	\$19.5	\$15.2	-22%
Scholarships	N/A	N/A	\$19.2	\$15.6	\$15.2	-3%
Philanthropy, Volunteerism & Grantmaking	\$5.9	\$10.0	\$7.2	\$16.9	\$12.3	-27%
Health - General & Rehabilitative	\$7.8	\$10.1	\$11.4	\$12.7	\$11.4	-10%
Religious Related & Spiritual Development	\$6.4	\$7.2	\$9.5	\$8.4	\$10.9	30%
Youth Development	\$7.6	\$8.3	\$8.9	\$9.8	\$9.5	-4%
Recreation, Leisure & Sports	\$5.2	\$5.2	\$7.2	\$9.1	\$9.2	0%
Environmental Quality, Protection & Beautification	\$4.1	\$4.5	\$6.3	\$5.8	\$7.0	21%
Housing & Shelter	\$3.8	\$4.2	\$4.2	\$6.2	\$5.6	-9%
Mental Health & Crisis Intervention	\$1.2	\$1.3	\$2.3	\$2.3	\$4.6	80%
Employment & Jobs	\$2.0	\$2.4	\$1.8	\$2.5	\$4.0	62%
Food, Nutrition & Agriculture	\$2.0	\$4.9	\$3.3	\$2.8	\$3.6	30%
Disease, Disorder & Medical Disciplines	\$1.0	\$1.8	\$1.9	\$1.7	\$2.6	51%
International, Foreign Affairs & National Security	\$0.3	\$0.3	\$0.4	\$3.3	\$2.0	-38%
Animal-related Activities	\$1.9	\$1.4	\$2.3	\$1.8	\$2.0	12%
Civil Rights, Social Action & Advocacy	\$0.6	\$1.0	\$0.9	\$1.5	\$1.6	11%
Public Protection, Crime, Justice & Legal Services	\$0.6	\$0.6	\$0.8	\$0.6	\$1.5	158%
Public Safety, Disaster Preparedness & Relief	\$1.6	\$1.3	\$1.7	\$1.2	\$1.0	-22%
Medical Research	\$1.0	\$0.8	\$1.0	\$0.6	\$0.6	-4%
Science & Technology	\$0.1	\$0.6	\$0.1	\$0.1	\$0.3	133%
Social Sciences	\$0.0	\$0.0	\$0.1	\$0.6	\$0.01	-98%

*Historically, the "education and instruction" field of interest category included scholarships. Since 2018, "scholarships" has been broken out into its own category.

Year shown refers to year of publication

Values shown in millions

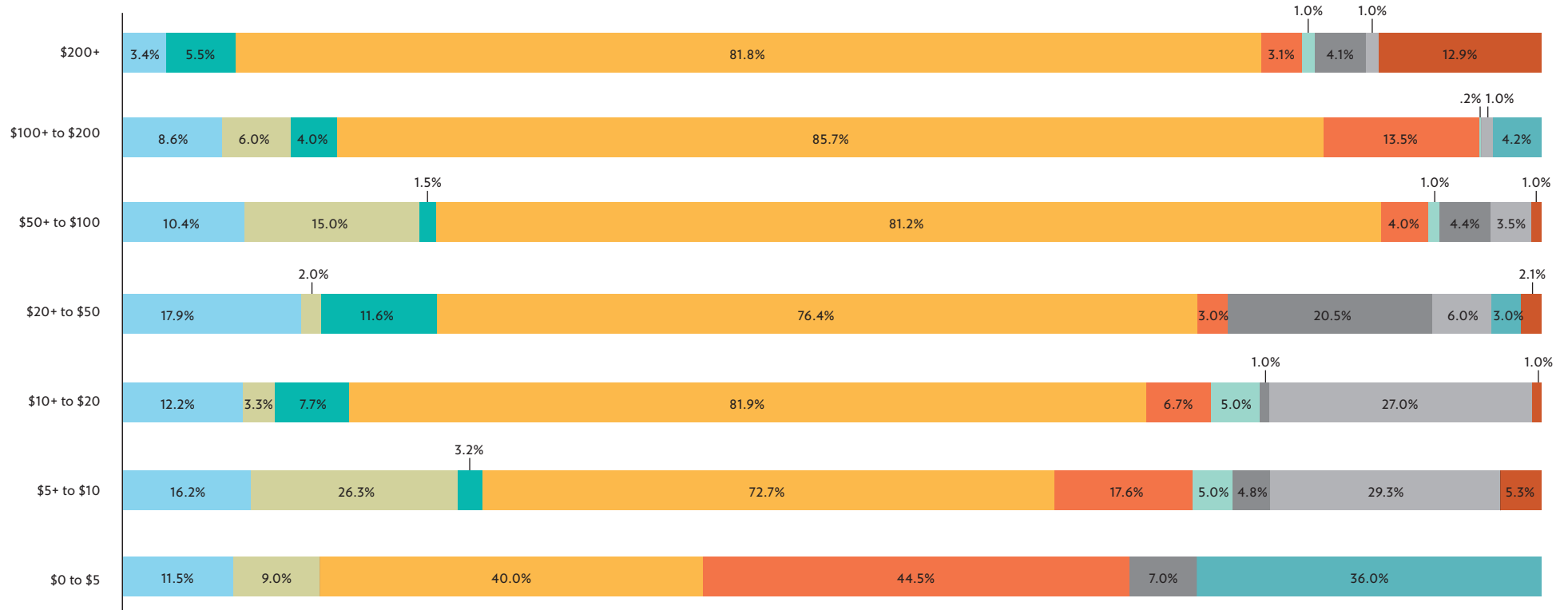
SECTION II

Finance and Operations

SECTION I: ASSETS, GIFTS & GRANTS

AVERAGE PERCENT OF OPERATIONS BUDGET BY FUNDING AREA

By Asset Size



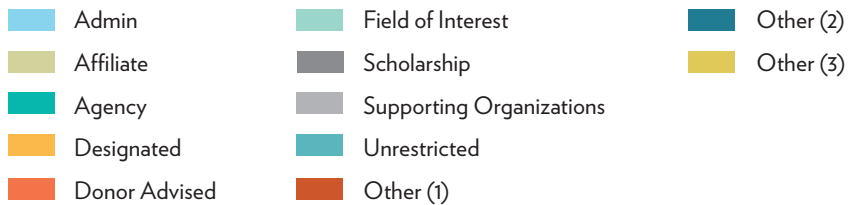
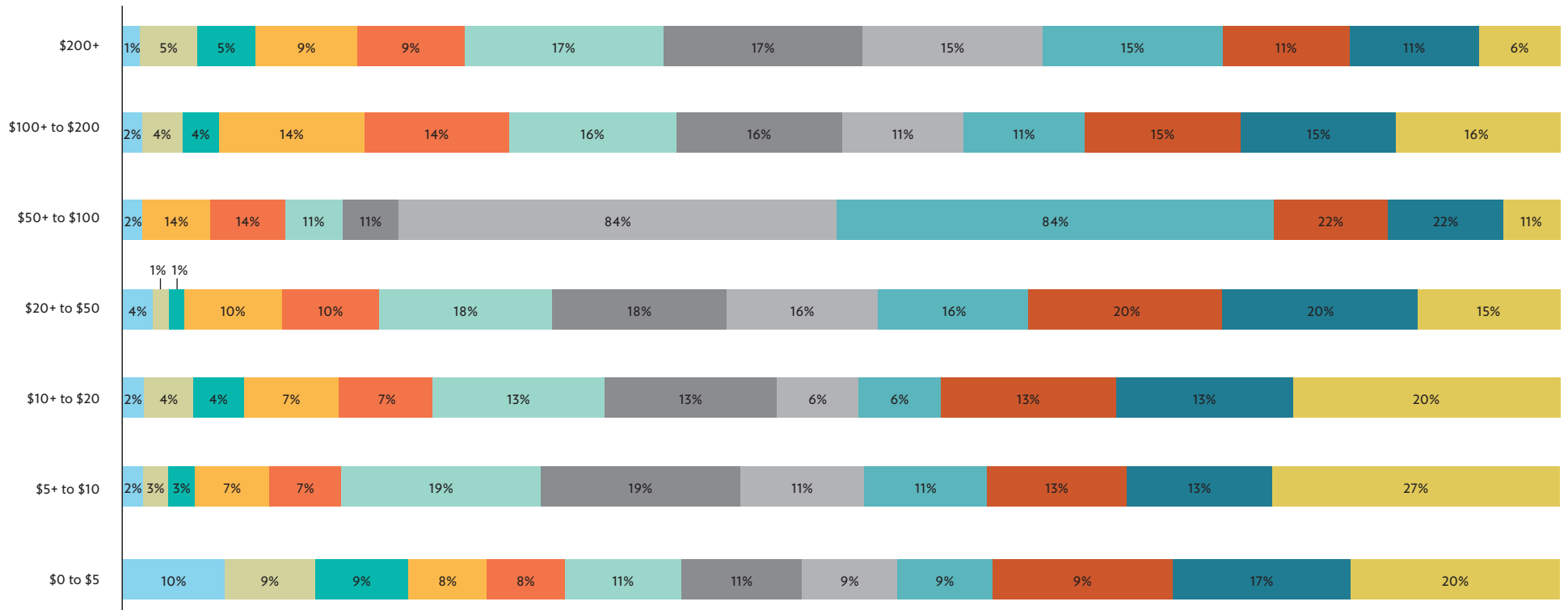
- Administrative Endowment Fund
- Annual Fundraising Event
- Fee for Service (i.e. fiscal sponsorship, account hub, etc.)
- Fees on Funds
- Grants to Yourself
- In-kind Support
- Private Donations
- Sponsorships
- Third-party Grants
- Other

Values shown in millions
Responses: 51

SECTION I: ASSETS, GIFTS & GRANTS

AVERAGE FUND TYPE

By Asset Size



Values shown in millions
Responses: 51

SECTION I: ASSETS, GIFTS & GRANTS

AVERAGE ASSETS PER FUND TYPE

By Asset Size



- Admin
- Affiliate
- Agency
- Designated
- Donor Advised
- Field of Interest
- Scholarship
- Supporting Organizations
- Unrestricted
- Other (1)
- Other (2)
- Other (3)

Values shown in millions
Responses: 51

SECTION II: 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	Comms	Tech	General Support	Average # of FTEs	Other
\$0 to \$5	0.6	0.0	0.3	0.0	0.0	0.0	0.0	0.3	.9	0.0
\$5+ to \$10	0.9	0.0	0.7	0.3	1.0	0.4	0.0	0.6	1.85	0.3
\$10+ to \$20	1.0	0.0	0.9	0.9	0.0	0.5	0.0	0.8	2.2	0.0
\$20+ to \$50	1.0	1.0	1.1	1.7	0.8	0.6	0.0	1.4	5.0	0.0
\$50+ to \$100	1.0	0.0	2.1	2.4	1.5	1.0	0.0	1.0	8.5	0.0
\$100+ to \$200	1.0	1.0	3.0	7.3	1.9	1.4	0.7	2.5	16.2	0.0
\$200+	1.0	0.0	5.8	7.2	5.5	2.9	1.2	1.5	28.0	4.3

Asset categories shown in millions

Responses: 51

PLANNED BUDGET WAGE INCREASE

for Next Fiscal Year



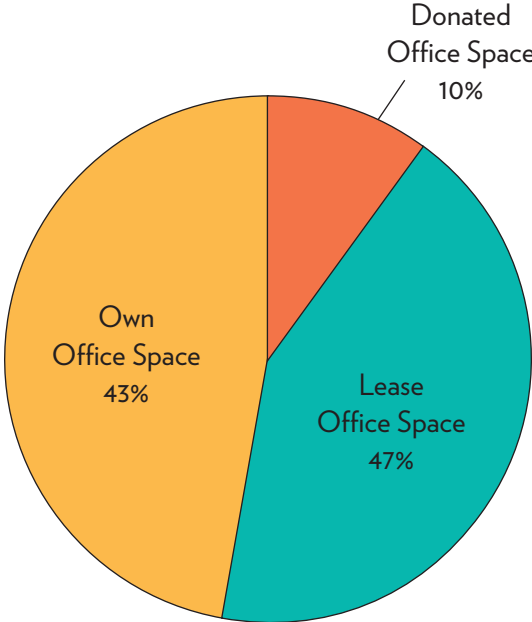
Responses: 47

SECTION II: FINANCE & OPERATIONS

Community Foundations

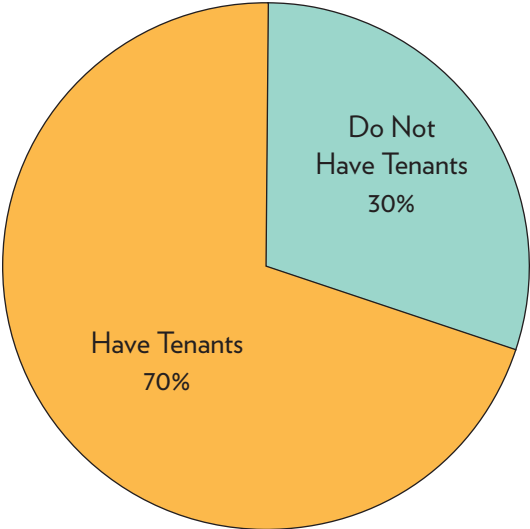
OFFICE SPACE BREAKDOWN

Responses: 51

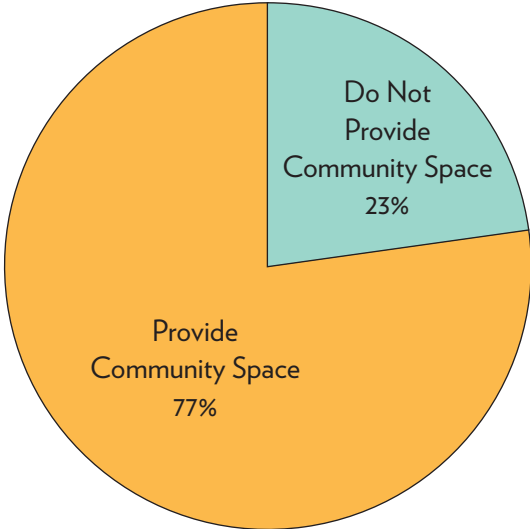


USE OF SPACE

We asked community foundations who own their office space two follow-up questions regarding whether they have tenants and/or make the space available to the community:



Responses: 23



Responses: 22

AVERAGE NUMBER OF TRANSACTIONS PER YEAR

by Asset Category

Asset Category	Grant Requests Received	Grants Approved	Gifts Received	Funds
\$0 to \$5	125	105	495	68
\$5+ to \$10	340	97	747	97
\$10+ to \$20	217	148	982	130
\$20+ to \$50	500	470	2053	293
\$50+ to \$100	2084	1249	2431	428
\$100+ to \$200	1205	1158	2112	745
\$200+	2435	1936	2842	947

Asset categories shown in millions
Responses: 50

Number of Community Foundations by FEES ON FUNDS

Fund Type	0-0.49%	.5-.99%	1.0-1.49%	1.5-1.99%	2.0-2.49%	2.5-2.99%	3%+	Multiple/Tiered Fees
Affiliate	1	0	10	4	4	0	0	2
Agency	1	4	25	7	4	0	0	11
Designated Fund	1	5	25	9	4	0	0	7
Donor Advised	1	1	21	14	9	0	0	7
Field of Interest	0	1	19	17	9	0	1	3
Other	0	1	4	1	1	1	1	1
Pass-Through	6	1	8	4	9	3	5	6
Scholarship	0	2	8	16	23	0	0	6
Supporting Orgs	1	0	3	3	1	0	0	4
Unrestricted	1	1	17	19	8	0	0	2

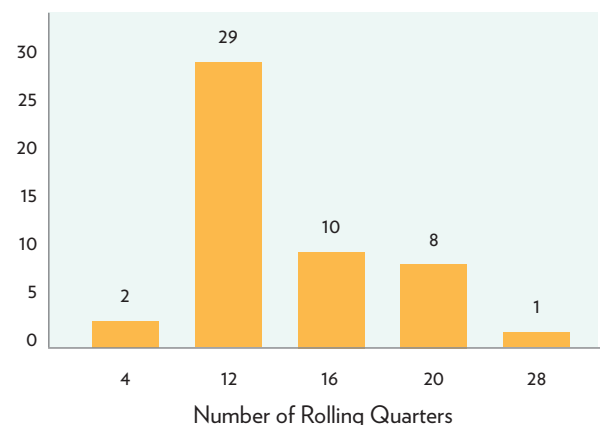
Responses: 49

Number of Community Foundations by GENERAL SPENDING POLICY (GSP)

GSP Percentage	Admin Fee Included	Admin Fee Excluded
3-3.9%	0	2
4-4.9%	2	21
5-5.9%	11	9
Other	2	3
Total	15	35

Responses: 51

Number of Community Foundations by ROLLING QUARTERS in Spending Policy

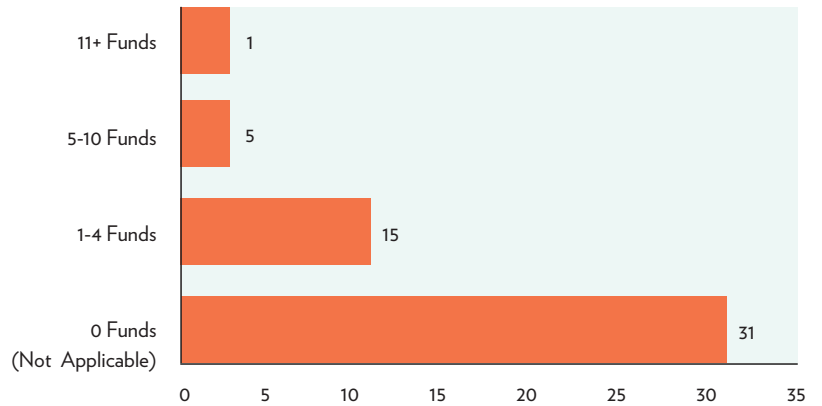


SECTION II: FINANCE & OPERATIONS

Number of Community Foundations with **DONOR ADVISED FUNDS (DAFs) THAT RECEIVE CONTRIBUTIONS FROM PRIVATE FOUNDATIONS**

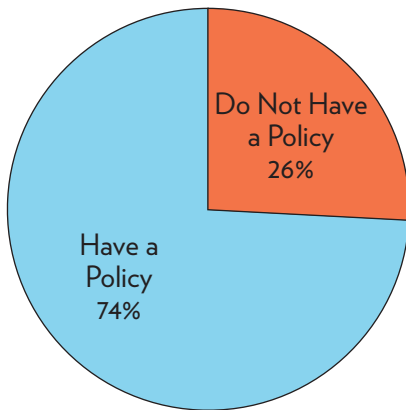
by Number of Applicable DAFs

Responses: 47



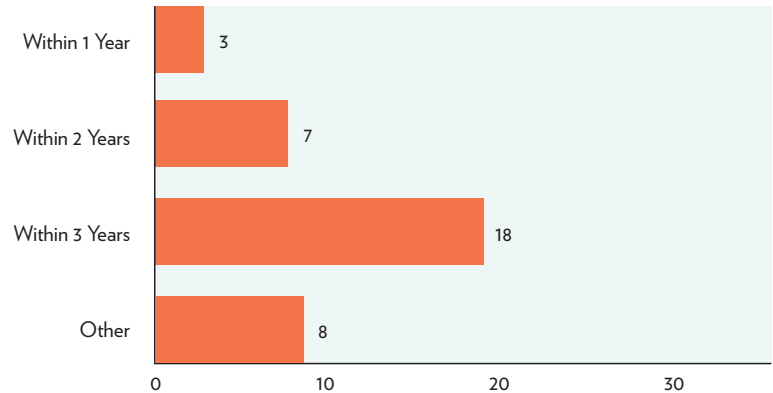
Percent of Community Foundations that have a **POLICY ON INACTIVE DAFs**

Responses: 50



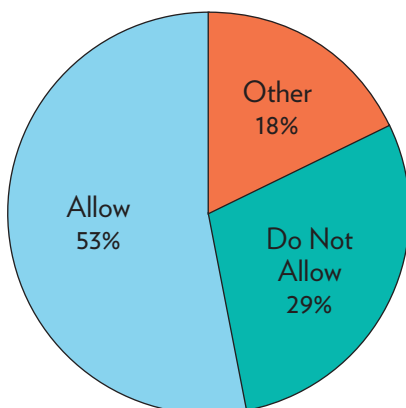
Number of Community Foundations by **TIME FRAME IN WHICH DAF HOLDER MUST MAKE DISTRIBUTIONS**

Responses: 37



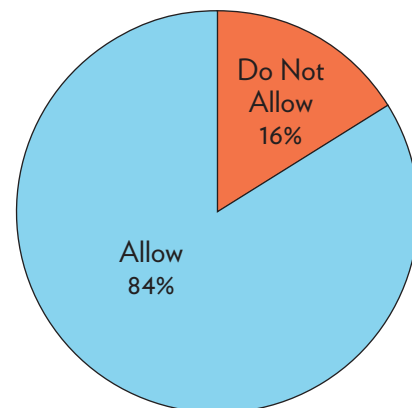
Percent of Community Foundations that **ALLOW DISBURSEMENTS FROM UNDERWATER FUNDS**

Responses: 51



Percent of Community Foundations that **ALLOW UNUSED SPENDABLE INCOME TO ROLLOVER TO THE NEXT FISCAL YEAR**

Responses: 51



ANNUALIZED RATE OF RETURN

as of 12/31/2019

Community Foundation	Asset Band	1 Year	3 Years	5 Years	10 Years
Greater South Haven Area Community Foundation	\$0 to \$5	20.21%	0%	0%	8.10%
Canton Community Foundation	\$0 to \$5	20.50%	11.46%	8.27%	9.36%
Chippewa County Community Foundation	\$0 to \$5	21.30%	9.29%	6.31%	7.28%
Huron County Community Foundation	\$5+ to \$10	20.50%	9.31%		
Otsego Community Foundation	\$5+ to \$10	21.40%	7.40%	4.50%	
Foundation 1	\$5+ to \$10				
Leelanau Township Community Foundation	\$5+ to \$10	20.84%	9.09%	6.98%	8.57%
Branch County Community Foundation	\$5+ to \$10	21.52%	9.85%	7.09%	8.23%
Foundation 2	\$5+ to \$10				
Foundation 3	\$5+ to \$10				
Roscommon County Community Foundation	\$5+ to \$10	22.64%	9.97%	6.95%	
Community Foundation of Monroe County	\$5+ to \$10	18.90%	8.60%	6.20%	7.00%
Shiawassee Community Foundation	\$5+ to \$10	4.20%	7.90%	6.30%	
M&M Area Community Foundation	\$10+ to \$20	21.15%	9.32%	6.95%	7.17%
Lapeer County Community Foundation	\$10+ to \$20	18.69%	7.84%	6.17%	
Foundation 4	\$10+ to \$20				
Cadillac Area Community Foundation	\$10+ to \$20	7%	6.70%	6.80%	7.10%
The Community Foundation of Greater Rochester	\$10+ to \$20	19.00%	9.55%	6.77%	6.93%
Mackinac Island Community Foundation	\$10+ to \$20	16.50%	14.10%	8.90%	10.70%
Foundation 5	\$10+ to \$20				
Marshall Community Foundation	\$10+ to \$20	22%	9.90%	6.98%	8.63%
Four County Community Foundation	\$10+ to \$20	21.41%	9.47%	6.92%	
Foundation 6	\$10+ to \$20				
Foundation 7	\$10+ to \$20				
Community Foundation of Marquette County	\$10+ to \$20	21.14%	9.41%	5.72%	6.80%
Mt. Pleasant Area Community Foundation	\$20+ to \$50	20.91%	8.11%	5.27%	

Continued on Next Page

Asset categories shown in millions
Responses: 44

SECTION II: FINANCE & OPERATIONS

ANNUALIZED RATE OF RETURN, CONTINUED

Community Foundation	Asset Band	1 Year	3 Years	5 Years	10 Years
Sturgis Area Community Foundation	\$20+ to \$50	18.90%	8.30%	5.70%	
Lenawée Community Foundation	\$20+ to \$50	21.03%	9.54%	6.69%	7.22%
Foundation 8	\$20+ to \$50				
Manistee County Community Foundation	\$20+ to \$50	21.69%	10.06%	9.60%	8.67%
Jackson Community Foundation	\$20+ to \$50	20%	9%	6%	7%
Barry Community Foundation	\$20+ to \$50	12.34%	5.99%	4.88%	5.96%
Petoskey-Harbor Springs Area Community Foundation	\$20+ to \$50	22.40%	10.80%	7.70%	9.30%
Greenville Area Community Foundation	\$20+ to \$50	22.99%	10.92%	8.34%	9.14%
Charlevoix County Community Foundation	\$20+ to \$50	23.80%	10.80%	7.20%	8.30%
Bay Area Community Foundation	\$20+ to \$50	21.90%	9.30%	6.60%	8.40%
Community Foundation for Northeast Michigan	\$20+ to \$50	20.17%	10.66%	12.40%	9.37%
Grand Traverse Regional Community Foundation	\$50+ to \$100	20.80%	9.00%	6.60%	7.40%
Saginaw Community Foundation	\$50+ to \$100	19.60%	8.50%	6.30%	7.50%
Community Foundation of St. Clair County	\$50+ to \$100	17.50%	8.50%	7.32%	8.47%
Community Foundation of the Holland/ZeeLand Area	\$50+ to \$100	19.30%	9.30%	6.30%	6.30%
Midland Area Community Foundation	\$100+ to \$200	18.80%	8.50%	5.60%	7.70%
Capital Region Community Foundation	\$100+ to \$200	20.06%	9.34%	6.83%	8.53%
Battle Creek Community Foundation	\$100+ to \$200	20.14%	10.62%	8.04%	13.55%
Grand Haven Area Community Foundation	\$100+ to \$200	25.42%	11.75%	9.51%	10.53%
Ann Arbor Area Community Foundation	\$100+ to \$200	18.50%	9.50%	6.70%	7.70%
Community Foundation for Muskegon County	\$200+	21.67%	9.76%	7.23%	
Community Foundation of Greater Flint	\$200+	16.20%	8.20%	5.60%	6.60%
Fremont Area Community Foundation	\$200+	19.60%	8.70%	6.40%	7.70%
Grand Rapids Community Foundation	\$200+	15.40%	7.10%	5.10%	6.70%
Kalamazoo Community Foundation	\$200+	19.20%	8.40%	7.00%	9.20%
Community Foundation for Southeast Michigan	\$200+	18.80%	9.10%	6.30%	7.10%

Asset categories shown in millions
Responses: 44

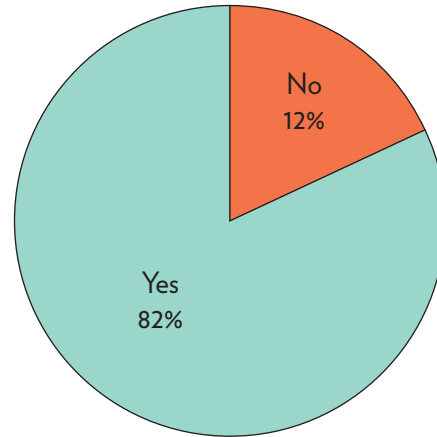
SECTION III

COVID-19

SECTION III: COVID-19

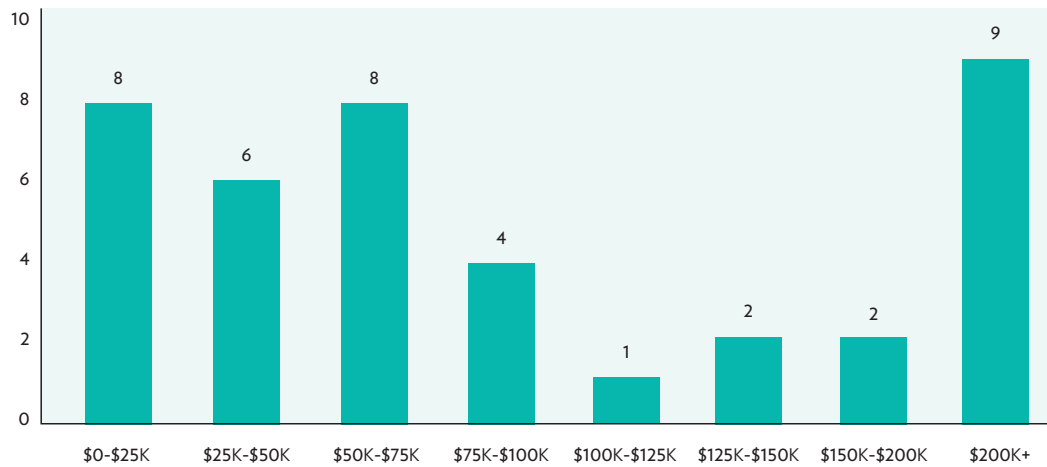
Community Foundations that **SET UP A NEW RESPONSE FUND SPECIFICALLY TO SUPPORT COVID-19 RELIEF AND RECOVERY EFFORTS**

Among the 40 respondents who launched a fund, 26 indicated they engaged with partners in standing up a fund.



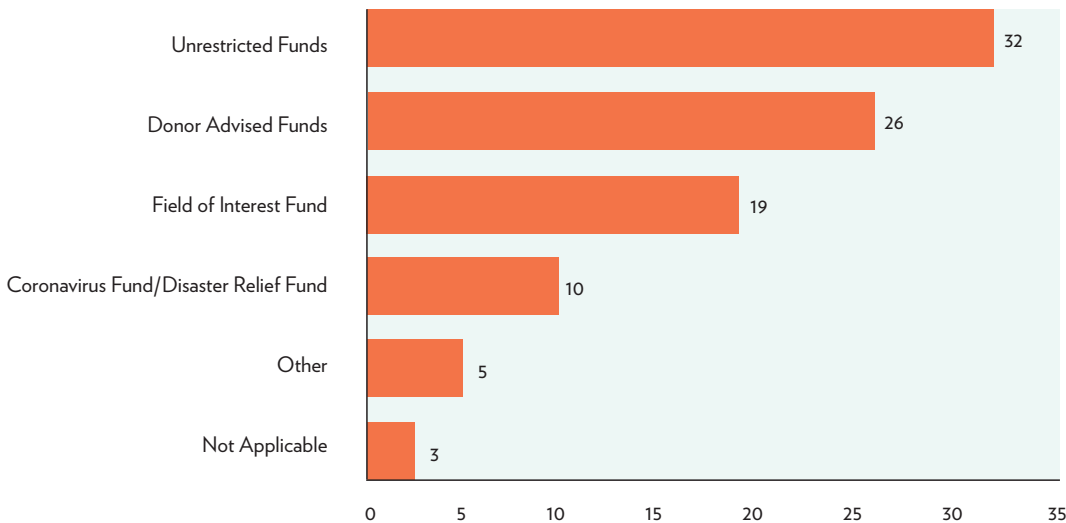
Number of Community Foundations that **ESTABLISHED COVID-19 FUNDS AND THE DOLLAR AMOUNT OF FUNDS**

Responses: 52



Number of Community Foundations that **REPURPOSED FUNDS/MADE GRANTS FROM AN EXISTING FUND**

Responses: 52



SECTION III: COVID-19

COMMUNITY FOUNDATIONS DEMONSTRATE THEIR ADAPTABILITY IN CHALLENGING TIMES

We asked community foundations who repurposed funds or made grants from an existing fund for COVID-19 response and relief to tell us more about the repurposing of funds.

21 community foundations reported that their DAF holders provided additional support for COVID-19 relief and response efforts.

Example:

A community foundation activated its Community Urgent Relief Fund in partnership with United Way to support nonprofits on the front lines during the pandemic. The community foundation then had a DAF holder issue a \$15,000 match challenge which was met in less than one week. Many of their DAFs initiated an interfund grant transfer to the urgent relief fund.

5 community foundations reported providing funding specifically for nonprofits and/or small businesses that were affected by the pandemic.

Example:

A community foundation had a major donor utilize a gift of stock to deploy \$1 million in a grant to a local economic development agency to make up to make grants up to \$5,000 available to small businesses. Through this effort, 297 small businesses were supported. The community foundation helped establish processes and facilitate a community-led committee to make funding decisions.

12 community foundations reported repurposing their unrestricted funds for COVID-19 relief efforts.

Example:

A community foundation made grants to support COVID-19 from existing unrestricted and field of interest endowment funds as well as donor advised funds. Special project programs were evaluated to determine how they could respond to the pandemic.

3 community foundations reported that they revised their grantmaking guidelines and/or streamlined processes, adding more flexibility in their grantmaking for 2020.

Example:

A community foundation shared that all funding was provided without the need for application. They also converted all current grants from the unrestricted fund to general operating, at the discretion of the grantee.

SECTION IV

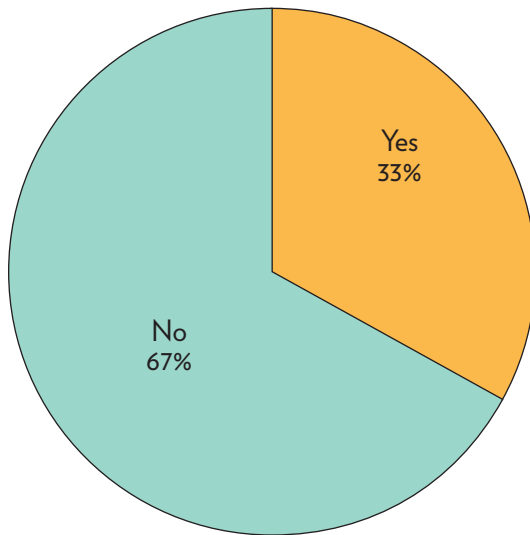
Other

SECTION IV: OTHER

Impact Investing

Percent of Community Foundations who engage in **PROGRAM RELATED INVESTMENTS (PRIs)**

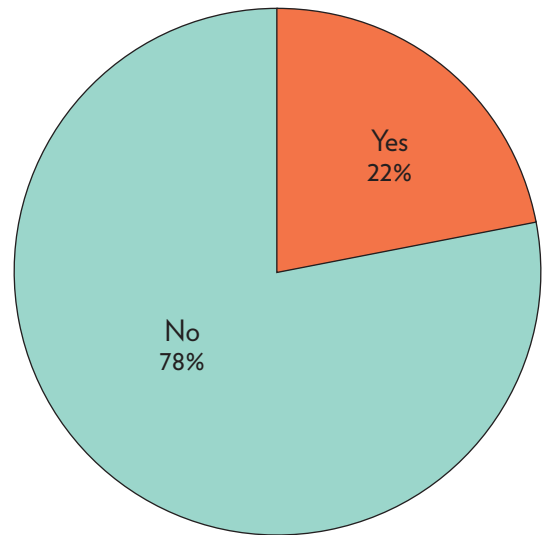
Responses: 51



- Of 15 respondents, 14 report that none of their grantmaking dollars are included in the PRI pool, and 1 reports that 6% of their grantmaking dollars are included.
- Of 15 respondents who shared the percentage of their corpus included in their PRI pool, data shows:
 - 0% (1)
 - 1-2% (6)
 - 3-4% (2)
 - 5-6% (1)
 - Over 6% (1)

Percent of Community Foundations who engage in **MISSION RELATED INVESTMENTS (MRIs)**

Responses: 51



- The number of community foundations reporting that they engage in MRIs has increased from 12% in 2019 to 22% in 2020.
- 4 of 5 respondents who engage in MRIs 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.

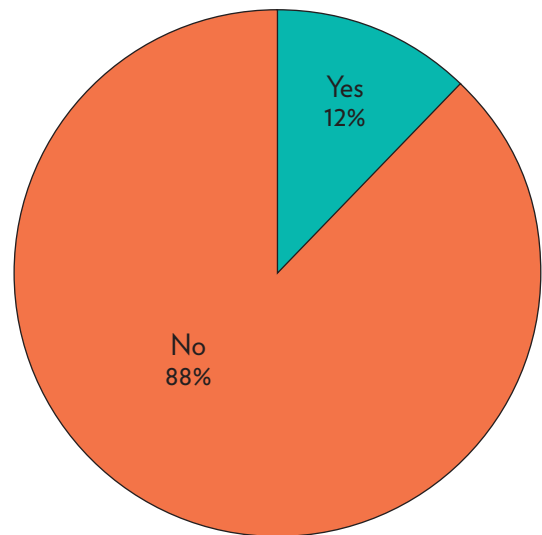
SECTION IV: OTHER

Scholarship Displacement

Scholarship displacement is the college or university practice of reducing or eliminating a student's financial assistance when their financial aid exceeds the total cost of attendance for the academic year. The practice goes against donor intent and hinders access to higher education, educational attainment and the state's potential growth in economic mobility. Further, students, families and scholarship providers often don't know it's happening until a check is returned to a foundation or institutional aid is decreased.

Community Foundations that are
**ACTIVELY TRACKING
SCHOLARSHIP DISPLACEMENT**

Responses: 49



Among all respondents, **7 community foundations** shared that they have had at least one student report being affected by scholarship displacement.

In total, **27 students** reported to their community foundation that scholarship displacement affected them.

\$37.1K

Total dollar amount of funds displaced as reported by 4 community foundations

REPORTED GEOGRAPHIC AFFILIATES

Community Foundation Name	Affiliate Name	Affiliate Asset Size
Ann Arbor Area Community Foundation	Ypsilanti Area Community Foundation	\$2,791,579.44
Barry Community Foundation	Delton Kellogg Education Foundation	\$1,485,071.00
Barry Community Foundation	Thornapple Area Enrichment Foundation	\$2,217,306.00
Battle Creek Community Foundation	Athens Community Foundation	\$1,298,263.00
Battle Creek Community Foundation	Homer Community Foundation	\$2,223,146.00
Bay Area Community Foundation	Arenac Community Fund	\$999,565.00
Cadillac Area Community Foundation	Missaukee Area Community Foundation	\$553,393.00
Canton Community Foundation	Community Foundation of Plymouth	\$1,000,000.00
Community Foundation for Muskegon County	Community Foundation for Mason County	\$19,323,111.00
Community Foundation for Muskegon County	Community Foundation for Oceana County	\$14,120,427.00
Community Foundation for Northeast Michigan	Iosco County Community Foundation	\$5,562,967.00
Community Foundation for Northeast Michigan	North Central Michigan Community Foundation	\$5,339,625.00
Community Foundation for Northeast Michigan	Straits Area Community Foundation	\$2,513,505.00
Community Foundation for Southeast Michigan	Community Foundation for Livingston County	\$918,953.00
Community Foundation of Marquette County	Greater Ishpeming Area Community Fund	\$1,504,541.00
Community Foundation of Marquette County	Gwinn Area Community Fund	\$1,351,317.00
Community Foundation of Marquette County	Negaunee Area Community Fund	\$909,947.00
Community Foundation of Monroe County	GMACF	\$2,448,624.00
Community Foundation of St. Clair County	Algonac-Clay Community Fund	\$292,957.00
Community Foundation of St. Clair County	Citizens for St. Clair	\$630,310.00
Community Foundation of St. Clair County	Marysville Community Fund	\$81,190.00
Community Foundation of the Upper Peninsula	Alger Regional Community Foundation	\$3,835,330.36
Community Foundation of the Upper Peninsula	Community Foundation for Delta County	\$18,211,159.82
Community Foundation of the Upper Peninsula	Community Foundation of the Upper Peninsula	\$1,894,188.20
Community Foundation of the Upper Peninsula	Gogebic-Ontonogon Community Foundation	\$148,801.28
Community Foundation of the Upper Peninsula	Les Cheneaux Community Foundation	\$2,791,956.02
Community Foundation of the Upper Peninsula	Paradise Area Community Foundation	\$505,262.15

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SECTION IV: OTHER

REPORTED GEOGRAPHIC AFFILIATES, CONTINUED

Community Foundation Name	Affiliate Name	Affiliate Asset Size
Community Foundation of the Upper Peninsula	Rudyard Area Community Foundation	\$294,041.37
Community Foundation of the Upper Peninsula	Schoolcraft County Community Foundation	\$677,243.20
Community Foundation of the Upper Peninsula	St Ignace Area Community Foundation	\$1,764,022.49
Fremont Area Community Foundation	Lake County Community Foundation	\$5,205,414.00
Fremont Area Community Foundation	Mecosta County Community Foundation	\$5,952,991.00
Fremont Area Community Foundation	Osceola County Community Foundation	\$9,773,991.00
Grand Haven Area Community Foundation	Allendale Community Foundation	\$3,210,132.00
Grand Haven Area Community Foundation	Coopersville Area Community Foundation	\$6,644,547.00
Grand Rapids Community Foundation	Cascade Community Foundation	\$466,704.00
Grand Rapids Community Foundation	East Grand Rapids	\$218,963.00
Grand Rapids Community Foundation	Hudsonville-Jenison	\$386,229.00
Grand Rapids Community Foundation	Ionia County	\$8,433,366.00
Grand Rapids Community Foundation	Sparta	\$1,012,374.06
Grand Rapids Community Foundation	The Lowell Area	\$16,099,901.00
Grand Rapids Community Foundation	Wyoming	\$561,202.00
Greenville Area Community Foundation	Lakeview Area Community Fund	\$1,449,634.85
Greenville Area Community Foundation	Montcalm Panhandle Fund	\$324,133.13
Midland Area Community Foundation	Clare County Community Foundation	\$3,200,000.00
Midland Area Community Foundation	Gladwin County Community Foundation	\$3,300,000.00
Sturgis Area Community Foundation	Constantine Area Community Foundation	\$558,126.37
Sturgis Area Community Foundation	White Pigeon Area Community Foundation	\$433,666.10
Total		\$164,919,176.84

39%
of respondents reported having geographic affiliates

13
respondents have more than one geographic affiliate

1
community foundation reported plans to add more geographic affiliates

SECTION IV: OTHER

Technology Vendors

Number of Community Foundations utilizing
SOFTWARE BY AREA OF WORK

Software	Donor/Gifts	Grants	Accounting	Scholarships
Blackbaud FIMS	13	10	13	7
Blackbaud Raisers Edge	12	2	2	2
Microsoft Excel	11	12	13	13
Microsoft Word	8	8	7	9
Stellar Technology Solutions (iPhiCore)	6	6	6	6
Bromelkamp Community Pearl	6	6	5	4
Blackbaud Financial Edge	2	3	10	2
Foundant for Community Foundations	2	3	2	3
Bromelkamp Community Akoya	2	2	2	2
Bromelkamp Akoya	2	0	0	0
AdobeSign	1	1	1	1
Akoya-Brommelkamp	1	1	1	1
Community Akoya	1	1	1	0
Mailchimp	1	1	0	1
Salesforce	1	1	0	1
Blackbaud DonorCentral	1	1	0	0
Gift Works	1	0	0	1
Jot Form	0	5	0	5
Fusion Labs GrantedGE (Grant Edge)	0	4	0	3
Bromelkamp eGrant	0	3	0	6
Smarter Select	0	2	0	1
Foundant for Grantmakers	0	2	0	0
AwardSpring	0	1	0	5
Microsoft Access	0	1	0	2
Blackbaud Grantmaking/GIFTS OnLine	0	1	0	1
FLUxx Grantmaker	0	1	0	1
Youreka Forms	0	1	0	1
Community Impact System/Intuit	0	1	0	0

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Number of Community Foundations Utilizing

SOFTWARE BY AREA OF WORK, CONTINUED

Software	Donor/Gifts	Grants	Accounting	Scholarships
Submittable	0	1	0	0
Survey Monkey Apply	0	1	0	0
Sage Intacct	0	0	3	0
Quick Books	0	0	2	0
Bromelkamp Business Central	0	0	1	0
Questica	0	0	1	0
CommunityForce	0	0	0	3
Kaleidoscope	0	0	0	1
None	0	0	0	1

HR / PAYROLL SOFTWARE

Used by Community Foundations

Software	Community Foundation Users
None	14
Other	12
ADP	5
Basic	5
Quick Books	5
Paychex	3
Blackbaud	2
FIMS	2
Outsourced	2
Paycor	2
Dominion Payroll Systems	1
Excel - Paychex	1
Maxwell Health	1
PayrollMate	1
Sage Payroll Services	1
IOI	0
Paychoice	0
Pearl and Outsource	0

“Other” respondents most frequently report using ADP, AME, iSolved, BASIC Payroll Services, Payroll4Free, Midwest HR

SECTION IV: OTHER

NUMBER OF PLANNED SOFTWARE TRANSITIONS

by Transitioning-to Software

Software	Donor/Gifts	Grants	Accounting	Scholarships
AcademicWorks	0	0	0	0
AdobeSign	0	0	0	0
Community Akoya	0	0	0	0
Akoya-Brommelkamp	0	0	0	0
Asana	0	0	0	0
AwardSpring	0	1	0	1
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	0	0	0	0
Bromelkamp Akoya	1	1	0	1
Bromelkamp Business Central	0	0	1	0
Bromelkamp Community Akoya	0	0	0	0
Bromelkamp Community Pearl	0	0	0	0
Bromelkamp eGrant	0	2	0	3
CFUP third party admin	1	1	1	1
Community Impact System/Intuit	0	0	0	0
CommunityForce	0	0	0	0
FIMS ICAM	0	0	0	0
FLuxx Grantmaker	0	0	0	0
Foundant for Community Foundations	5	3	5	3
Foundant for Grantmakers	0	1	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
Intacct	0	0	0	0
Jot Form	0	0	0	0

Continued on Next Page

NUMBER OF PLANNED SOFTWARE TRANSITIONS, CONTINUED

by Transitioning-to Software

Software	Donor/Gifts	Grants	Accounting	Scholarships
Mailchimp	0	0	0	0
Microsoft Access	0	0	0	0
Microsoft Dnamics	0	0	1	0
Microsoft Excel	0	0	0	0
Microsoft Word	0	0	0	0
None	1	1	1	1
Questica	0	0	0	0
Quick Books	0	0	0	0
Quicken	0	0	0	0
Sage Intacct	0	0	0	0
Salesforce	0	0	0	0
Smarter Select	0	0	0	0
SmartSimple Community Foundation Grants Management	0	0	0	0
SmartSimple Donor Management	0	0	0	0
Stellar Technology Solutions (iPhiCore)	0	0	0	0
Submittable	0	0	0	0
Survey Monkey Apply	0	0	0	0
Youreka Forms	0	0	0	0

