



COMMUNITY FOUNDATION DATABOOK

PUBLISHED IN 2021



WELCOME

As community conveners, partners and changemakers – you, our Michigan community foundations – are leaning in to support and engage nonprofits, families, donors, partners and all those you serve in innovative and reimagined ways, leveraging new approaches and deepening connections like never before. You have led with tenacity and empathy, seeking bold solutions to not only respond to the effects of a global pandemic but to advance equity and adapt to new ways of working – and your exceptional leadership continues today.

In this year's Community Foundation Databook – CMF's longest standing publication and the most comprehensive statewide look at community foundations – we unpack the questions that are bubbling up in your staff and board conversations, highlighting key trends in COVID-19 collective response efforts, donor advised fund policies and activities, office space use, impact investing practices, scholarship displacement, policy and advocacy engagement and much more. In response to your inquiries, this year we've also added a new question on fund minimums.

We are proud to lift up your work and provide a high quality benchmarking tool relevant to your everyday work and to reference as you plan for the future.

This publication is developed collaboratively within CMF, with multiple departments coming together to ensure we provide the best possible resource to meet your needs. This 2021 edition was made possible with outstanding support from Ammara Ansari, our CMF/The Skillman Foundation Learning and Impact Fellow.

We greatly appreciate your time in providing this information amid the many challenges of the last 18 months. We received the same level of response to the survey during a continued 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 strategy development and goal setting. Please know that we welcome your comments or questions at any time.

With gratitude,



Andrea Judd-Shurmur
Director of Learning Services
CMF

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METHODOLOGY AND DATA

The CMF Community Foundation Databook represents the most complete picture of community foundations in our state, with 49 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 2021. 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 should not 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 potential 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, 2020.

SECTION I

ASSETS, GIFTS & GRANTS



SECTION I: ASSETS, GIFTS & GRANTS

Community Foundation Data Summary

By Assets as of Last Fiscal Year End

Responses: 48

Community Foundation	Assets	Gifts Received	Grants Made
Community Foundation for Southeast Michigan	\$1,113,329,647	\$121,068,526	\$100,935,380
Kalamazoo Community Foundation	\$591,864,521	\$14,169,921	\$25,019,597
Grand Rapids Community Foundation	\$339,948,284	\$21,407,319	\$13,487,488
Fremont Area Community Foundation	\$279,430,447	\$1,995,254	\$6,726,615
Community Foundation of Greater Flint	\$277,294,929	\$14,596,858	\$13,268,205
Community Foundation for Muskegon County	\$246,649,452	\$8,149,616	\$10,531,110
Ann Arbor Area Community Foundation	\$177,501,253	\$20,544,470	\$8,218,055
Grand Haven Area Community Foundation	\$161,890,865	\$6,591,582	\$8,152,571
Capital Region Community Foundation	\$128,769,257	\$6,514,057	\$4,780,375
Midland Area Community Foundation	\$121,202,704	\$9,134,283	\$4,651,994
Battle Creek Community Foundation	\$121,110,711	\$14,203,995	\$8,260,986
Community Foundation of Holland/Zeeland	\$102,848,837	\$10,275,995	\$11,521,606
Community Foundation of St. Clair County	\$94,897,834	\$9,030,565	\$6,087,031
Grand Traverse Regional Community Foundation	\$90,131,396	\$15,682,924	\$3,808,246
Saginaw Community Foundation	\$87,822,616	\$5,427,352	\$2,512,822
Petoskey-Harbor Springs Area Community Foundation	\$56,212,808	\$4,198,128	\$3,800,145
Charlevoix County Community Foundation	\$55,886,527	\$4,145,817	\$2,471,263
Bay Area Community Foundation	\$51,694,114	\$1,685,127	\$2,273,393
Community Foundation for Northeast Michigan	\$48,468,779	\$1,892,559	\$2,004,572
Greenville Area Community Foundation	\$41,947,030	\$464,524	\$1,678,996
Barry Community Foundation	\$39,605,380	\$8,052,365	\$893,213
Jackson Community Foundation	\$36,649,762	\$3,050,873	\$2,870,323
Manistee County Community Foundation	\$35,509,024	\$466,066	\$781,251
Lenawee Community Foundation	\$33,834,859	\$2,403,686	\$1,763,297
Community Foundation of the Upper Peninsula	\$30,114,732	\$2,341,472	\$1,267,943
Mt. Pleasant Area Community Foundation	\$26,267,232	\$1,132,818	\$1,176,859
Michigan Gateway Community Foundation	\$25,942,470	\$256,317	\$814,682

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Community Foundation Data Summary (continued)

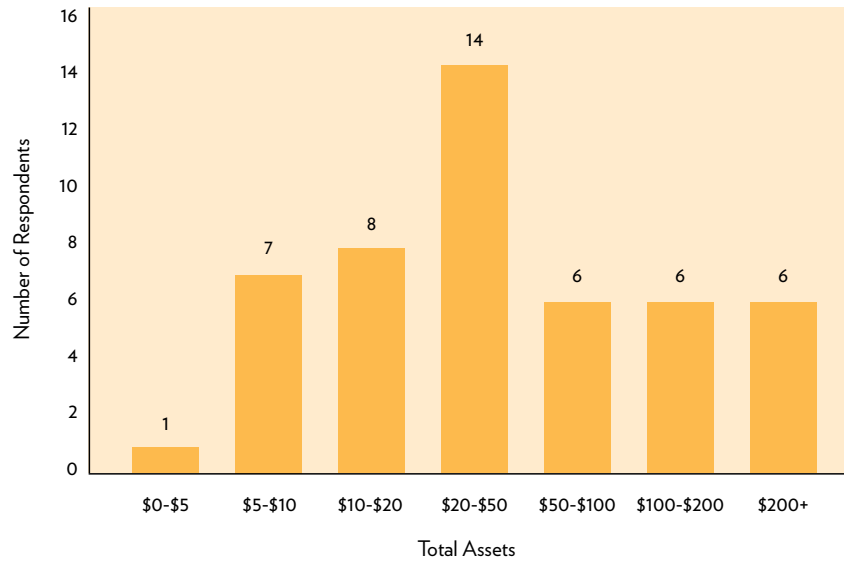
Community Foundation	Assets	Gifts Received	Grants Made
Sturgis Area Community Foundation	\$22,553,363	\$1,112,819	\$1,089,452
Community Foundation of Marquette County	\$21,704,560	\$1,074,950	\$861,591
Allegan County Community Foundation	\$20,759,720	\$616,306	\$714,354
Four County Community Foundation	\$20,689,186	\$567,643	\$565,988
Hillsdale County Community Foundation	\$20,098,111	\$1,211,290	\$921,072
Mackinac Island Comm. Foundation	\$17,333,208	\$212,128	\$551,611
Community Foundation for Oceana County	\$15,972,520	\$1,017,380	\$904,192
Gratiot County Community Foundation	\$15,743,867	\$535,263	\$504,617
Marshall Community Foundation	\$15,454,992	\$564,948	\$187,991
Community Foundation of Greater Rochester	\$13,323,276	\$2,205,699	\$1,472,974
Lapeer County Community Foundation	\$12,430,594	\$383,598	\$477,716
M&M Area Community Foundation	\$11,129,542	\$967,389	\$578,569
Shiawassee Community Foundation	\$10,202,940	\$161,556	\$364,931
Roscommon County Community Foundation	\$9,237,203	\$465,554	\$77,820
Community Foundation of Monroe County	\$8,449,986	\$353,843	\$303,211
Branch County Community Foundation	\$8,008,844	\$161,556	\$2,509,652
Otsego Community Foundation	\$6,724,279	\$701,755	\$350,762
Leelanau Township Community Foundation	\$6,588,711	\$180,103	\$297,711
Huron County Community Foundation	\$5,874,786	\$457,125	\$261,211
Chippewa County Community Foundation	\$5,861,066	\$1,219,787	\$200,519
Canton Community Foundation	\$4,149,000	\$665,250	\$436,800
2021 Survey Totals	\$4,689,115,224	\$323,718,410	\$263,390,763
Change from 2020 Totals	+9.7%	+25%	+10.3%

Includes supporting organizations and affiliates

SECTION I: ASSETS, GIFTS & GRANTS

Number of Community Foundations by **Asset Size**

Assets shown in millions
Responses: 48



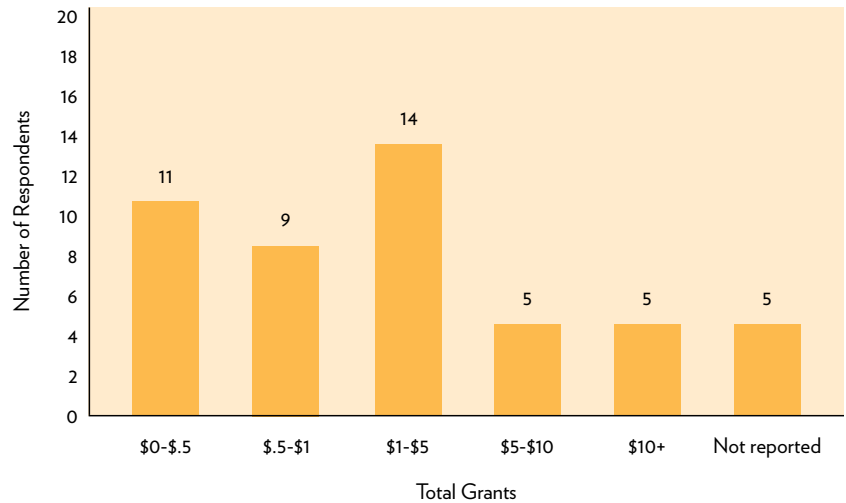
Number of Community Foundations by **Gifts Received**

Gifts shown in millions
Responses: 49



Number of Community Foundations by **Grants Made**

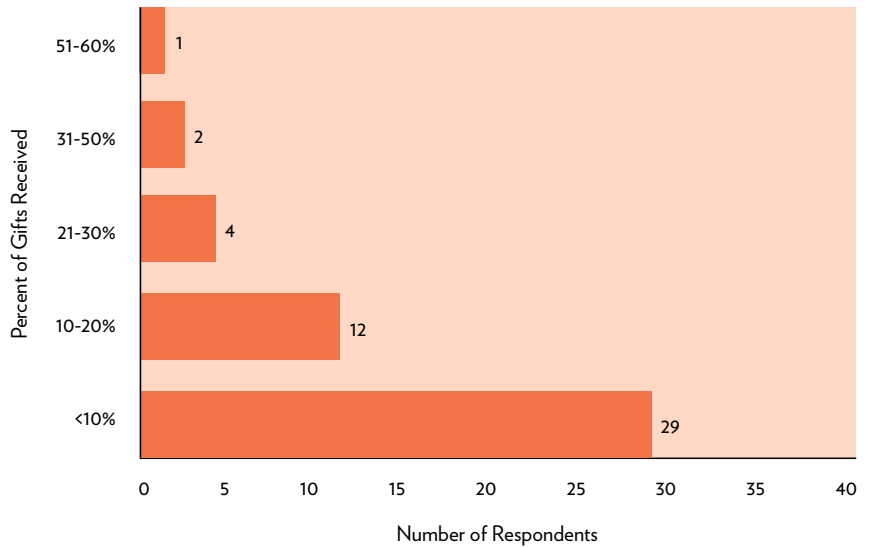
Grants shown in millions
Responses: 49



SECTION I: ASSETS, GIFTS & GRANTS

Number of Community Foundations That Received Gifts by Percent from Online Giving

Responses: 48

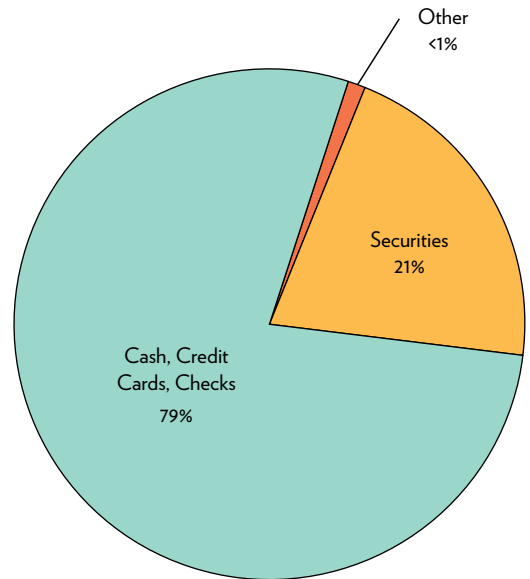


Gift Type Breakdown

Among Gifts Received by Community Foundations

Responses: 48

Examples of "Other" responses include artwork and real estate.

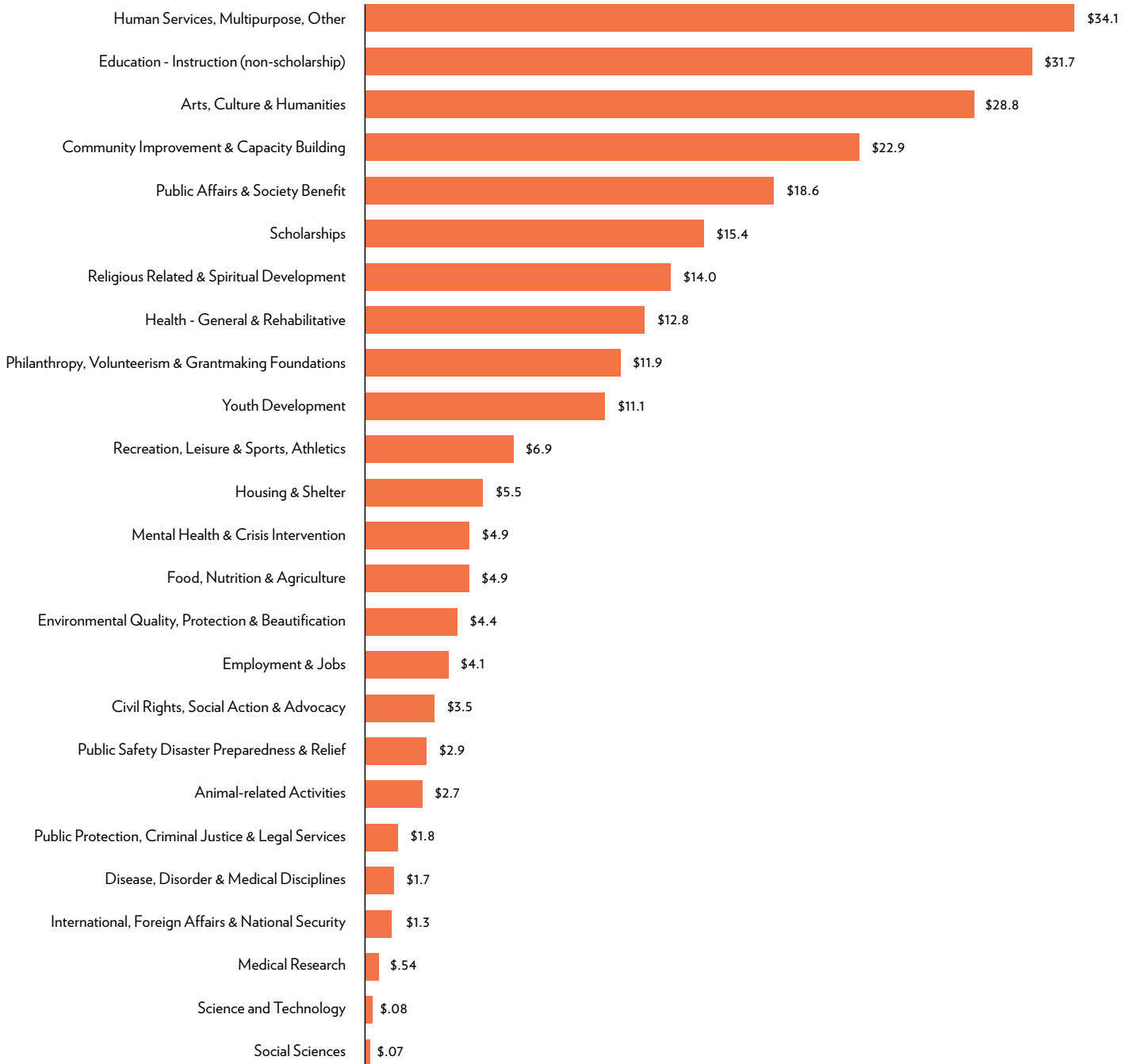


SECTION I: ASSETS, GIFTS & GRANTS

Total Annual Grants Made By Field of Interest

Values shown in millions

Responses: 49



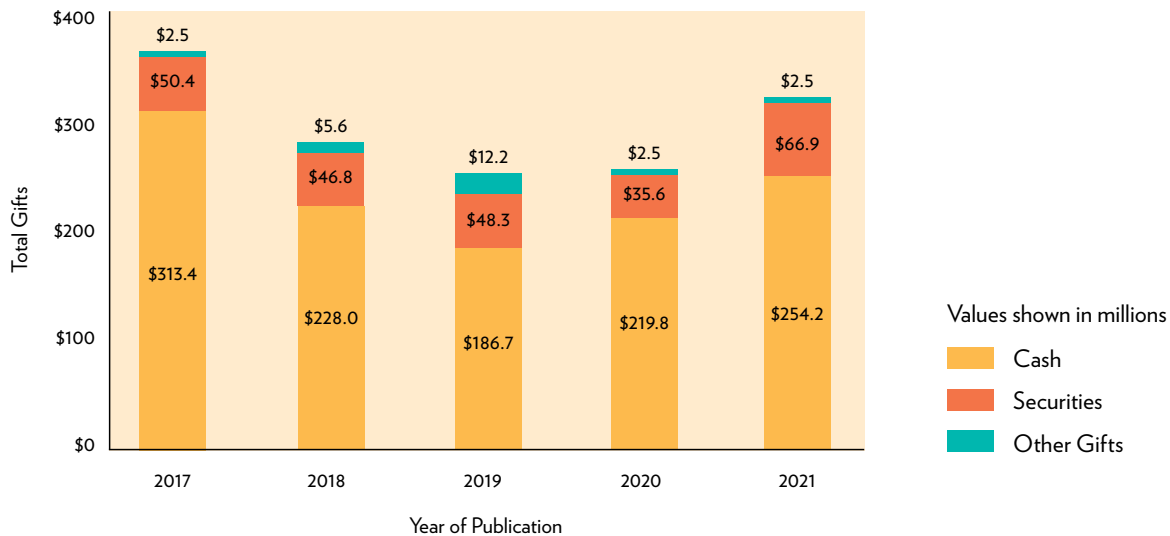
SECTION I: ASSETS, GIFTS & GRANTS

FIVE-YEAR ANALYSIS

The Community Foundation Databook Survey responses vary each year in total number of responses and which community foundations choose to respond, therefore data across a five-year period is not an exact comparison and should not be taken as such.

Gift Type Breakdown

Over the Past Five Years (2017 - 2021). Year shown refers to year of publication.

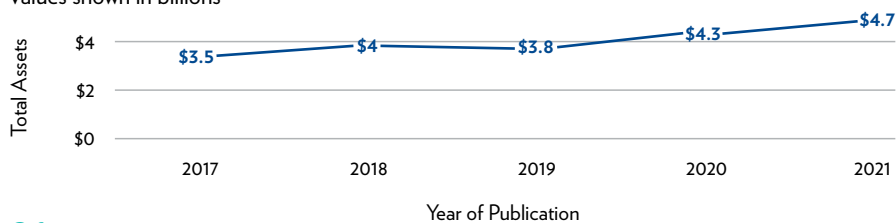


Assets, Gifts and Grants

Over the Last Five Years (2017 - 2021). Year shown refers to year of publication.

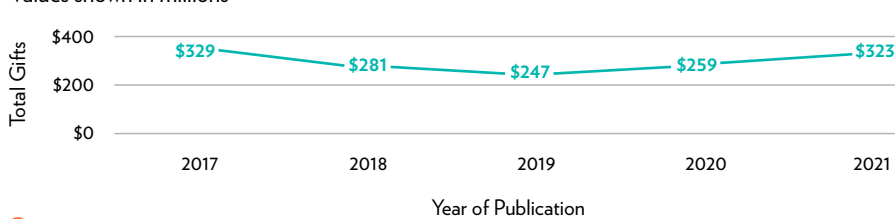
Assets

Values shown in billions



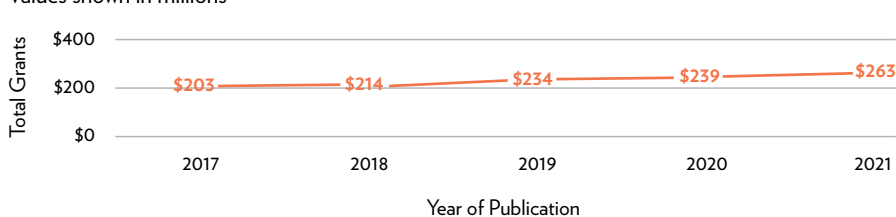
Gifts

Values shown in millions



Grants

Values shown in millions



SECTION I: ASSETS, GIFTS & GRANTS

FIVE-YEAR ANALYSIS

The Community Foundation Databook Survey responses vary each year in total number of responses and which community foundations choose to respond, therefore data across a five-year period is not an exact comparison and should not be taken as such.

Grant Totals by Field of Interest

Over the Past Five Years (2017 - 2021). Year shown refers to year of publication.

Field of Interest	2017	2018	2019	2020	2021	Change from 2020
Human Services, Multipurpose, Other	\$16.7	\$19.5	\$21.7	\$22.3	\$34.1	53%
Education - Instruction (non-scholarship)	\$48.4	\$38.5*	\$41.3	\$33.5	\$31.7	-5%
Arts, Culture & Humanities	\$21.4	\$23.1	\$25.5	\$25.2	\$28.8	14%
Community Improvement & Capacity Building	\$14.8	\$16.9	\$19.5	\$15.2	\$22.9	50%
Public Affairs & Society Benefit	\$21.4	\$21.4	\$22.3	\$23.1	\$18.6	-19%
Scholarships	N/A	\$19.2	\$15.6	\$15.2	\$15.4	1%
Religious Related & Spiritual Development	\$7.2	\$9.5	\$8.4	\$10.9	\$14.0	29%
Health - General & Rehabilitative	\$10.1	\$11.4	\$12.7	\$11.4	\$12.8	12%
Philanthropy, Volunteerism & Grantmaking	\$10.0	\$7.2	\$16.9	\$12.3	\$11.9	-4%
Youth Development	\$8.3	\$8.9	\$9.8	\$9.5	\$11.1	18%
Recreation, Leisure & Sports	\$5.2	\$7.2	\$9.1	\$9.2	\$6.9	-25%
Housing & Shelter	\$4.2	\$4.2	\$6.2	\$5.6	\$5.5	-2%
Food, Nutrition & Agriculture	\$4.9	\$3.3	\$2.8	\$3.6	\$4.9	34%
Mental Health & Crisis Intervention	\$1.3	\$2.3	\$2.3	\$4.6	\$4.9	6%
Environmental Quality, Protection & Beautification	\$4.5	\$6.3	\$5.8	\$7.0	\$4.4	-38%
Employment & Jobs	\$2.4	\$1.8	\$2.5	\$4.0	\$4.1	2%
Civil Rights, Social Action & Advocacy	\$1.0	\$0.9	\$1.5	\$1.6	\$3.5	114%
Public Safety, Disaster Preparedness & Relief	\$1.3	\$1.7	\$1.2	\$1.0	\$2.9	194%
Animal-related Activities	\$1.4	\$2.3	\$1.8	\$2.0	\$2.7	32%
Public Protection, Crime, Justice & Legal Services	\$0.6	\$0.8	\$0.6	\$1.5	\$1.8	20%
Disease, Disorder & Medical Disciplines	\$1.8	\$1.9	\$1.7	\$2.6	\$1.7	-37%
International, Foreign Affairs & National Security	\$0.3	\$0.4	\$3.3	\$2.0	\$1.3	-34%
Medical Research	\$0.8	\$1.0	\$0.6	\$0.6	\$0.5	-5%
Science & Technology	\$0.6	\$0.1	\$0.1	\$0.3	\$0.08	-68%
Social Sciences	\$0.0	\$0.1	\$0.6	\$0.01	\$0.07	728%

*Historically, the “education and instruction” field of interest category included scholarships. Since 2018, “scholarships” has been broken out into its own category. Values shown in millions.

SECTION II

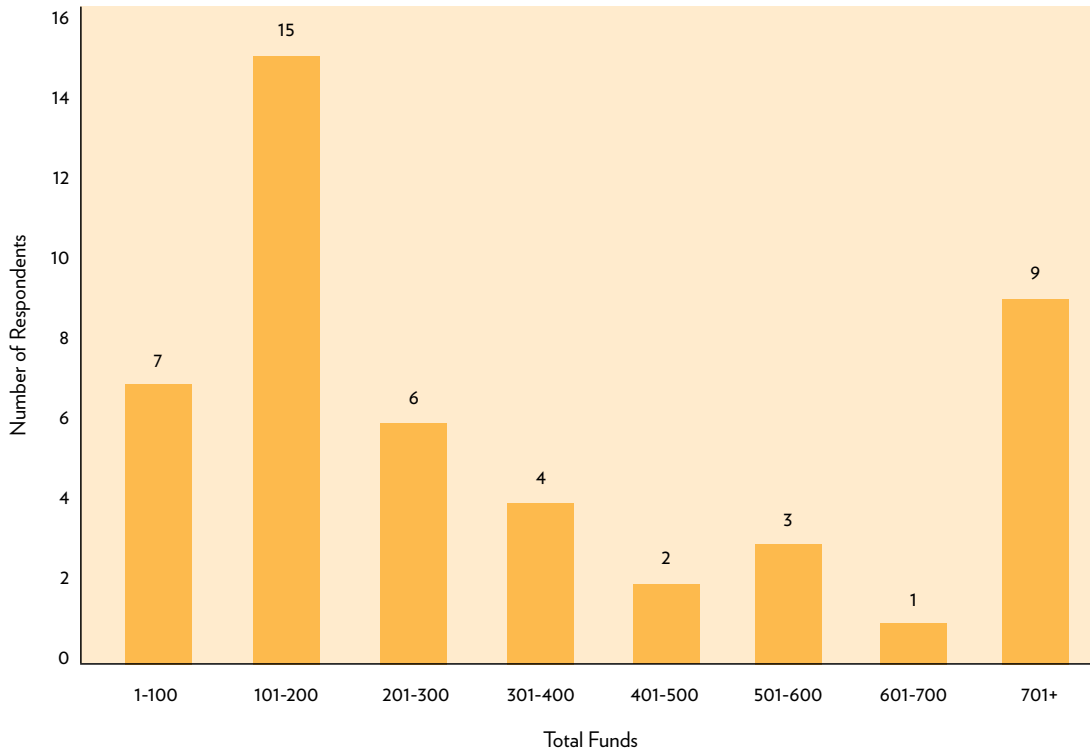
FINANCE AND OPERATIONS



SECTION II: FINANCE & OPERATIONS

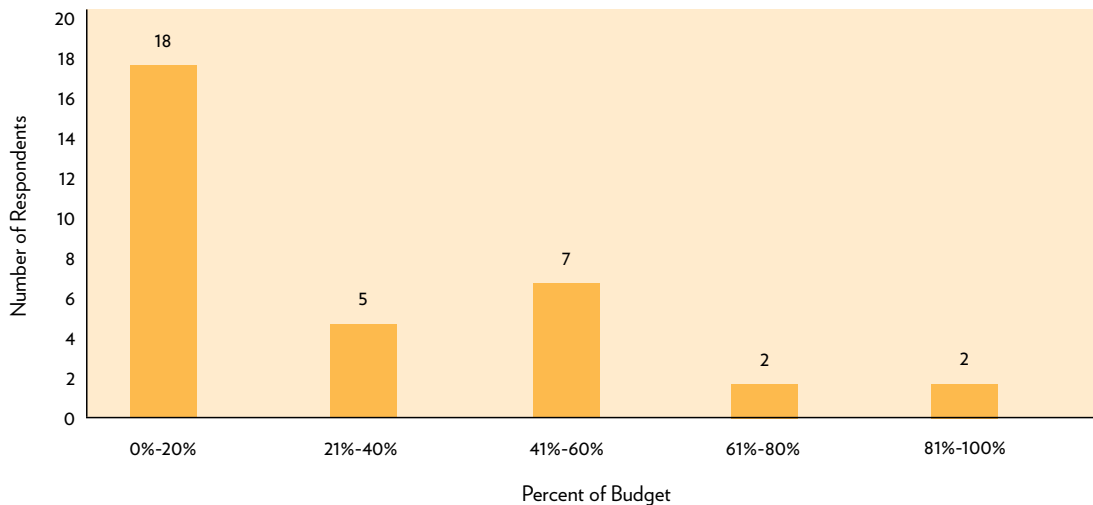
Number of Community Foundations by **Total Funds**

Responses: 47



Number of Community Foundations by **Non-Endowed Operating Budget as a Percent of Current Operating Budget**

Responses: 34



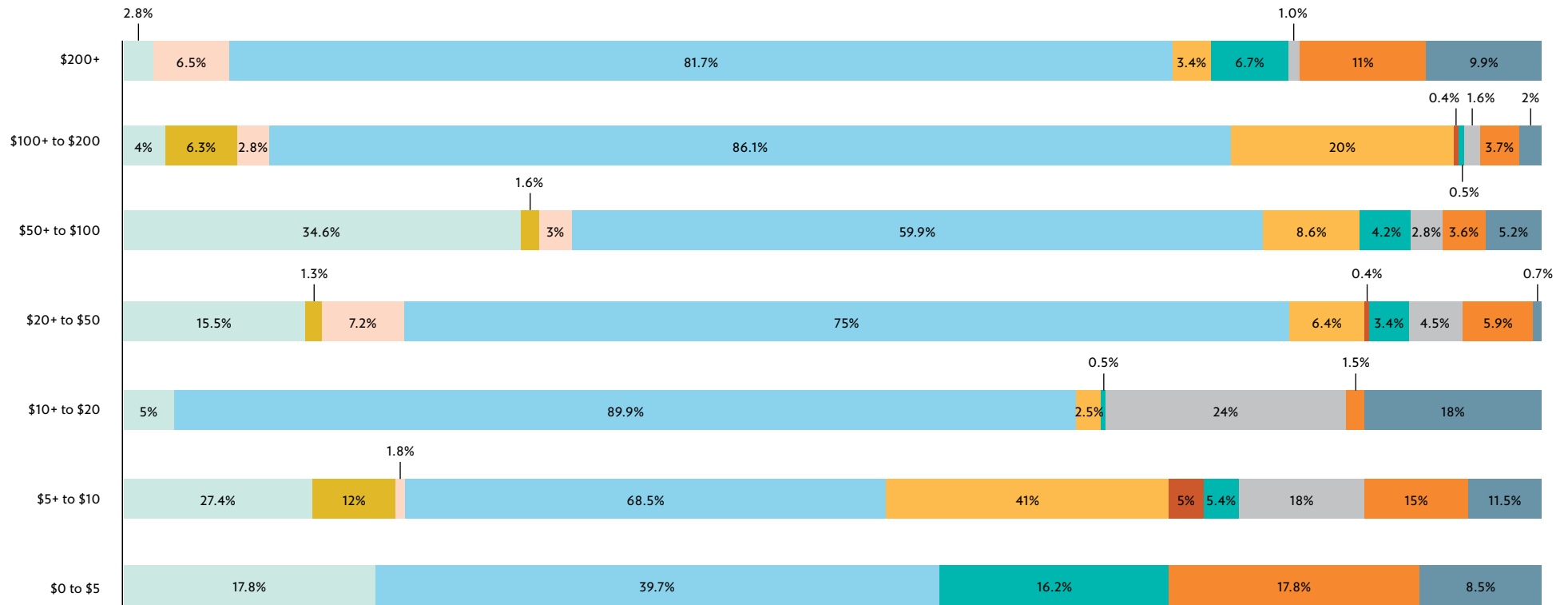
SECTION II: FINANCE & OPERATIONS

Average Percent of Operations Budget by Funding Area

By Asset Size

Values shown in millions

Responses: 47



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

"Other" examples include Programming, PPP Loan Forgiveness, Rental Income and Prior Year Surplus/Reserve, and more.

Please be advised averages were calculated within each funding area/type, within each asset band, therefore percentages across an asset band may not equal 100%.

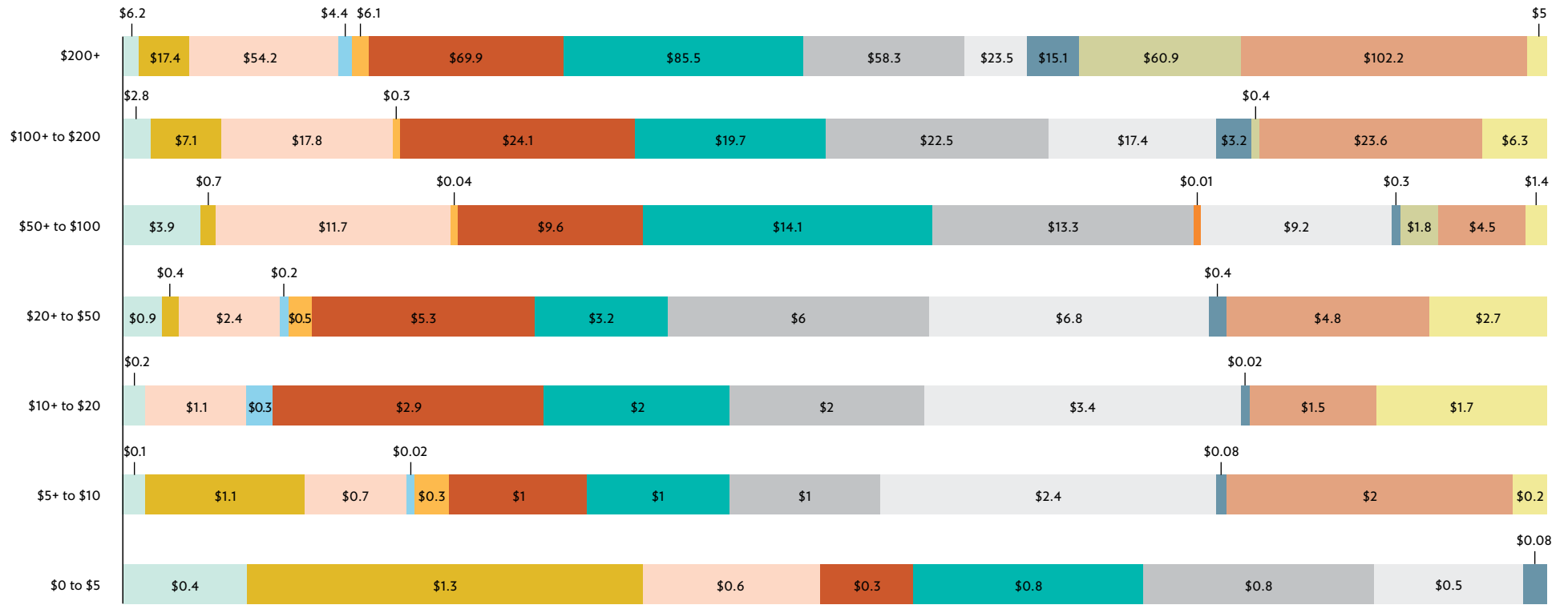
SECTION II: FINANCE & OPERATIONS

Average Assets Per Fund Type

By Asset Size

Values shown in millions

Responses: 47



- Admin
- Affiliate
- Agency
- Capital Campaign Funds
- Charitable Gift Annuities
- Designated
- Donor Advised
- Field of Interest
- Insurance Endowed Funds
- Scholarship
- Special Project Funds
- Supporting Organizations
- Unrestricted
- Other

"Other" examples include General or Multi-Purpose Funds, Children's Savings Account Fund, Board-Designated Funds, Build a Fund and PRIs, and more.

Please be advised averages were calculated within each funding area/type, within each asset band, therefore percentages across an asset band may not equal 100%.

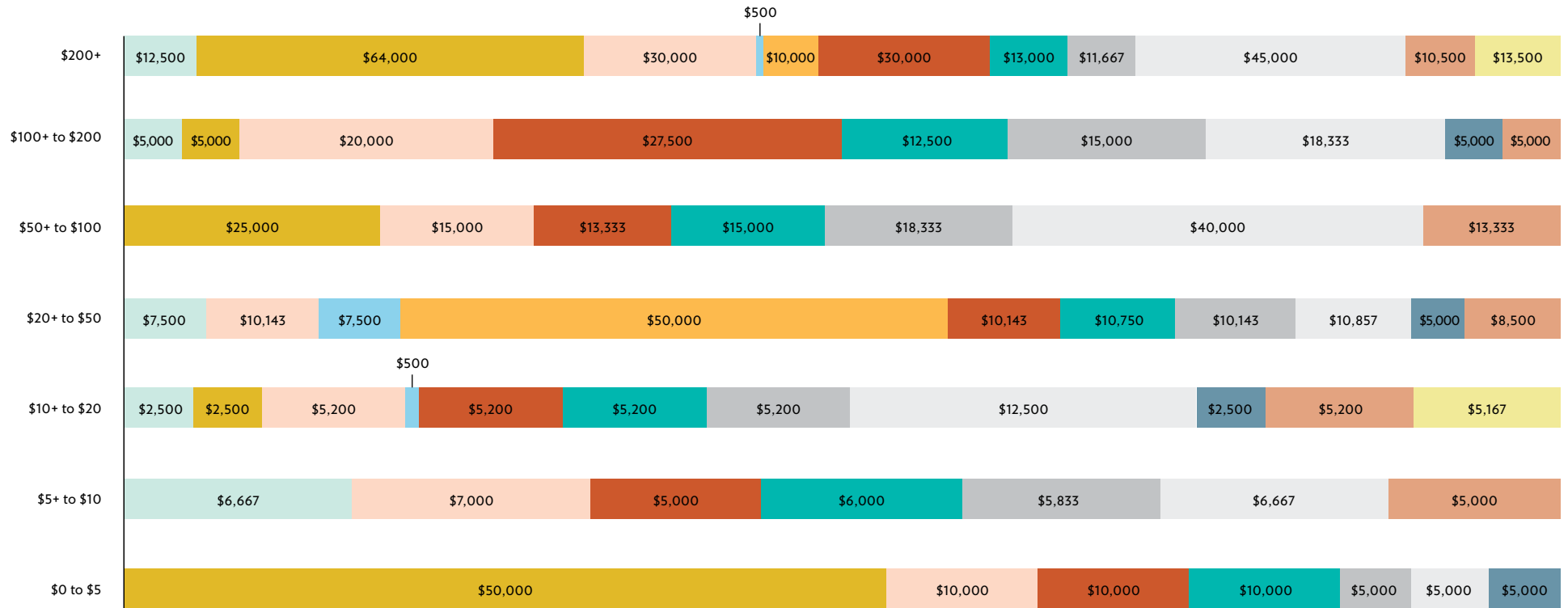
SECTION II: FINANCE & OPERATIONS

Average Fund Minimum Per Fund Type

By Asset Band

Asset band values shown in millions

Responses: 34



- Admin
- Affiliate
- Agency
- Capital Campaign Funds
- Charitable Gift Annuities
- Designated
- Donor Advised
- Field of Interest
- Insurance Endowed Funds
- Scholarship
- Special Project Funds
- Supporting Organizations
- Unrestricted
- Other

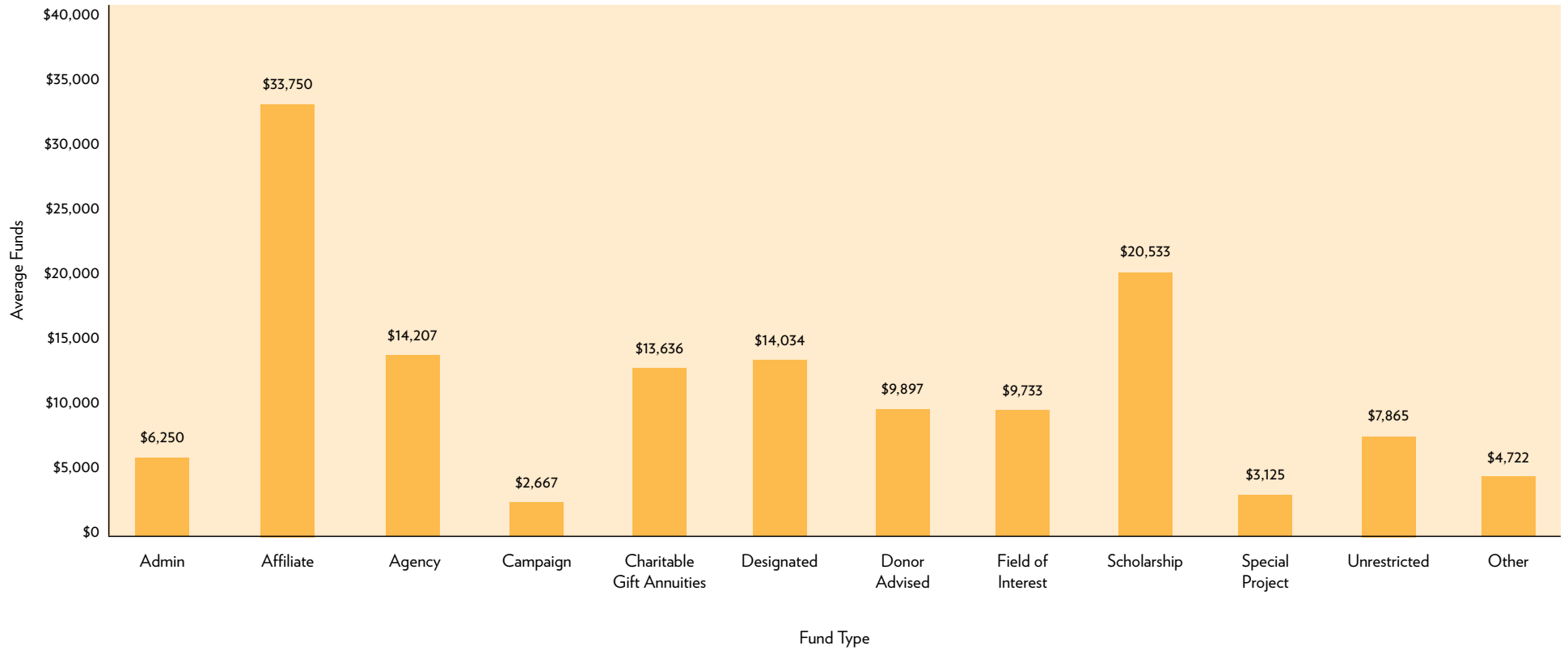
No respondents indicated maintaining a fund minimum for Insurance Endowed Funds; four respondents specifically indicated a \$0 minimum. Only one respondent indicated a specific fund minimum for Supporting Organizations; their fund minimum is \$5 Million.

SECTION II: FINANCE & OPERATIONS

Average Fund Minimum Per Fund Type

Across All Asset Bands

Responses: 34



No respondents indicated maintaining a fund minimum for Insurance Endowed Funds; four respondents specifically indicated a \$0 minimum. Only one respondent indicated a specific fund minimum for Supporting Organizations; their fund minimum is \$5 Million.

SECTION II: FINANCE & OPERATIONS

Average Number of Transactions Per Year

By Asset Category

Asset categories shown in millions

Responses: 45

Asset Category	Grant Requests Received	Grants Approved	Gifts Received	Funds
\$0 to \$5	200	90	1210	104
\$5+ to \$10	104	89	757	96
\$10+ to \$20	641	207	951	131
\$20+ to \$50	425	330	1141	244
\$50+ to \$100	1099	775	1781	357
\$100+ to \$200	1718	1476	2372	727
\$200+	2833	2148	2426	971

Number of Community Foundations by

Fees on Funds

Responses: 48

Fund Type	0-0.49%	0.5-0.99%	1.0-1.49%	1.5-1.99%	2.0-2.49%	2.5-2.99%	3%+	Multiple/Tiered Fees	N/A
Affiliate	0	1	6	4	1	0	0	4	20
Agency	0	3	19	7	5	0	0	11	1
Capital Campaign	1	0	3	2	0	0	1	4	18
Charitable Gift Annuities	3	0	8	1	1	0	0	1	15
Designated Fund	0	3	18	10	5	0	0	8	0
Donor Advised	0	0	19	15	7	1	0	6	0
Field of Interest	0	0	14	18	11	0	0	3	0
Insurance Endowment Funds	1	0	3	0	0	0	0	0	25
Pass-Through	5	0	3	3	6	2	6	4	11
Scholarship	0	0	6	12	23	1	2	5	0
Special Project	1	0	6	4	6	1	7	4	7
Supporting Org	1	0	4	2	1	0	0	2	18
Unrestricted	0	0	14	17	10	0	0	1	1
Other	0	0	1	0	1	1	0	0	15

SECTION II: FINANCE & OPERATIONS

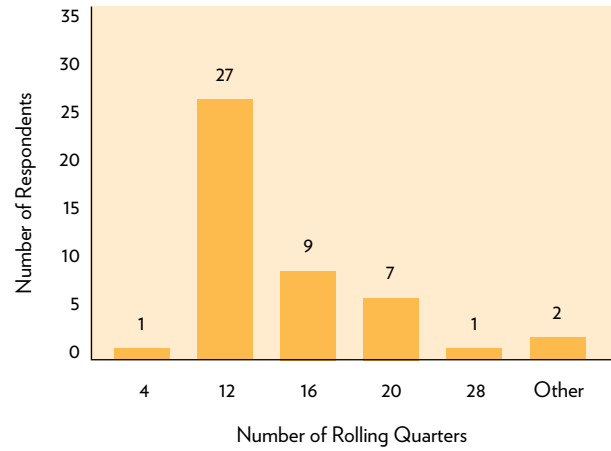
Number of Community Foundations by General Spending Policy (GSP)

Responses: 34

GSP Percentage	Admin Fee Included	Admin Fee Excluded
3-3.9%	1	3
4-4.9%	2	21
5-5.9%	4	2
Other	0	1
Total	7	27

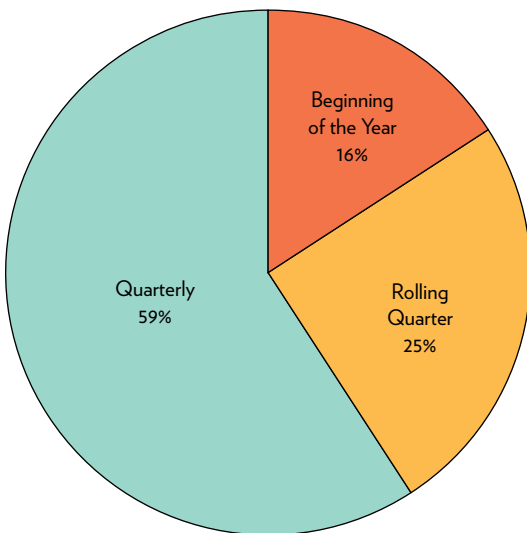
Number of Community Foundations by Rolling Quarters in Spending Policy

Responses: 47



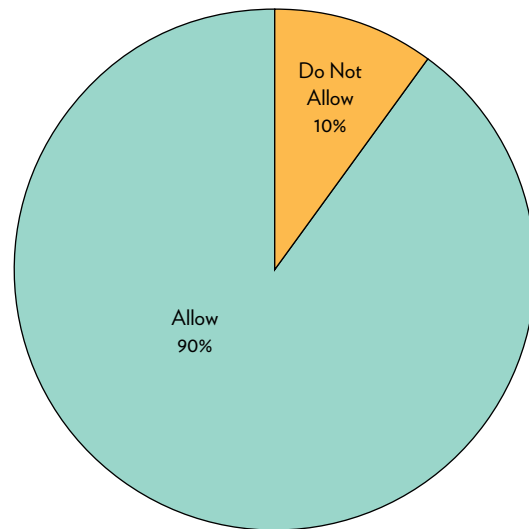
Percent of Community Foundations Timing of Calculating Fees on Funds

Responses: 49



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

Responses: 28



SECTION II: FINANCE & OPERATIONS

Annualized Rate of Return

as of 12/31/2020

Asset categories shown in millions

Responses: 45

Community Foundation	Asset Band	1 Year	3 Years	5 Years	10 Years
Foundation 1	\$0 to \$5	18.34%	11.92%	12.07%	9.90%
Foundation 2	\$5+ to \$10	11.06%	7.23%	9.16%	7.26%
Foundation 3	\$5+ to \$10	13.48%	8.58%	-	-
Foundation 4	\$5+ to \$10	9.25%	7.95%	9.12%	8.28%
Foundation 5	\$5+ to \$10	16.20%	8.10%	8.00%	7.00%
Foundation 6	\$5+ to \$10	14.53%	9.27%	10.41%	8.62%
Foundation 7	\$5+ to \$10	11.40%	7.40%	8.80%	6.80%
Foundation 8	\$5+ to \$10	11.80%	8.13%	9.74%	-
Foundation 9	\$10+ to \$20	11.48%	-	-	-
Foundation 10	\$10+ to \$20	7.66%	6.24%	8.56%	6.79%
Foundation 11	\$10+ to \$20	10.24%	6.98%	8.55%	7.06%
Foundation 12	\$10+ to \$20	12.41%	8.10%	8.49%	7.44%
Foundation 13	\$10+ to \$20	14.00%	-	-	-
Foundation 14	\$10+ to \$20	20.70%	15.30%	13.40%	11.50%
Foundation 15	\$20+ to \$50	0%	0%	0%	0%
Foundation 16	\$20+ to \$50	12.62%	8.24%	9.86%	-
Foundation 17	\$20+ to \$50	14.19%	9.56%	10.80%	-
Foundation 18	\$20+ to \$50	13.52%	8.91%	9.77%	-
Foundation 19	\$20+ to \$50	11.80%	7.70%	8.50%	-
Foundation 20	\$20+ to \$50	42.70%	-	-	-
Foundation 21	\$20+ to \$50	13.94%	8.04%	8.96%	-
Foundation 22	\$20+ to \$50	15.22%	9.61%	9.83%	-
Foundation 23	\$20+ to \$50	15.41%	9.53%	12.30%	-
Foundation 24	\$20+ to \$50	12.15%	8.31%	9.13%	7.16%
Foundation 25	\$20+ to \$50	12.28%	4.25%	6.46%	5.18%

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Annualized Rate of Return (continued)

as of 12/31/2020

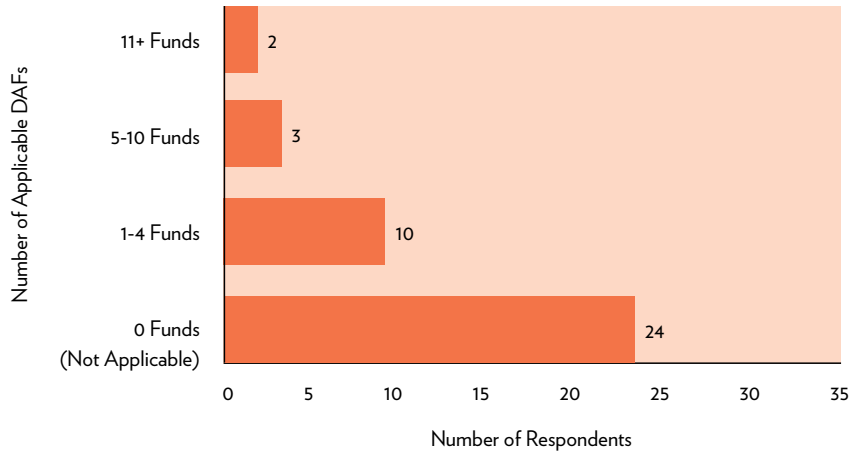
Community Foundation	Asset Band	1 Year	3 Years	5 Years	10 Years
Foundation 26	\$20+ to \$50	16.43%	10.79%	11.97%	9.25%
Foundation 27	\$20+ to \$50	10.74%	8.36%	11.02%	12.53%
Foundation 28	\$50+ to \$100	17.60%	9.80%	10.70%	8.60%
Foundation 29	\$50+ to \$100	18.10%	10.20%	11.50%	8.50%
Foundation 30	\$50+ to \$100	16.90%	9.90%	11.40%	9.40%
Foundation 31	\$50+ to \$100	15.80%	8.20%	10.00%	7.70%
Foundation 32	\$50+ to \$100	14.90%	8.70%	10.10%	7.40%
Foundation 33	\$50+ to \$100	12.42%	8.08%	9.13%	8.22%
Foundation 34	\$100+ to \$200	11.89%	7.92%	9.33%	6.55%
Foundation 35	\$100+ to \$200	9.30%	8.00%	11.00%	12.60%
Foundation 36	\$100+ to \$200	10.20%	7.00%	8.30%	7.30%
Foundation 37	\$100+ to \$200	12.26%	7.89%	9.68%	11.50%
Foundation 38	\$100+ to \$200	15.05%	19.00%	-0.40%	14.30%
Foundation 39	\$100+ to \$200	13.40%	8.60%	9.90%	7.70%
Foundation 40	\$200+	14.01%	8.97%	10.17%	8.22%
Foundation 41	\$200+	16.50%	8.10%	9.70%	7.20%
Foundation 42	\$200+	11.60%	7.00%	9.40%	7.30%
Foundation 43	\$200+	8.20%	5.30%	7.70%	6.30%
Foundation 44	\$200+	9.00%	6.30%	9.30%	8.30%
Foundation 45	\$200+	12.80%	8.30%	9.60%	7.20%

SECTION II: FINANCE & OPERATIONS

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

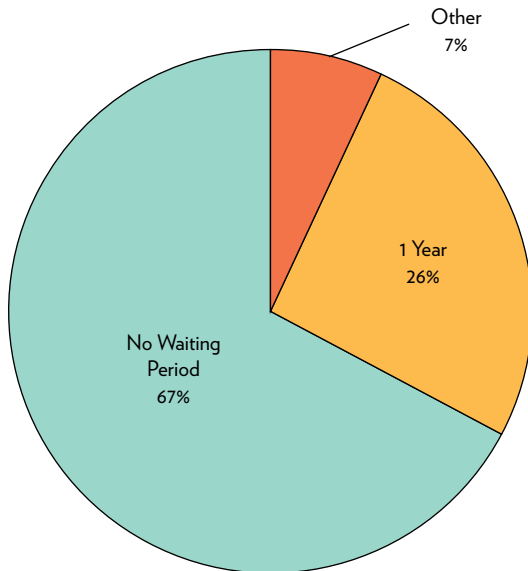
by Number of Applicable DAFs

Responses: 39



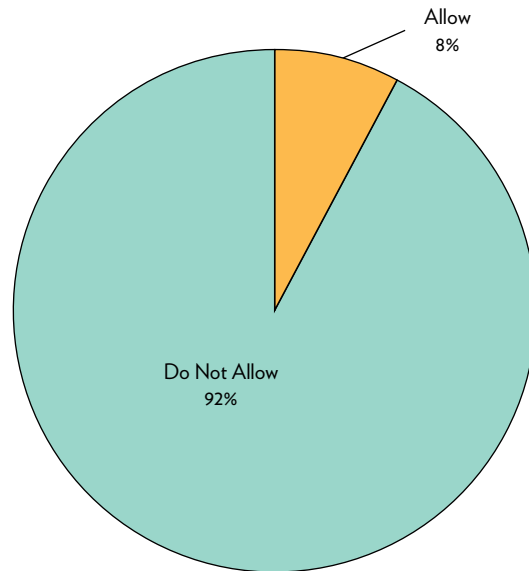
Percent of Community Foundations by Waiting Period Before Donors May Recommend Grants from their Newly Established DAF

Responses: 46



Percent of Community Foundations that Allow Fund Holders to Engage in Investment Decisions

Responses: 49

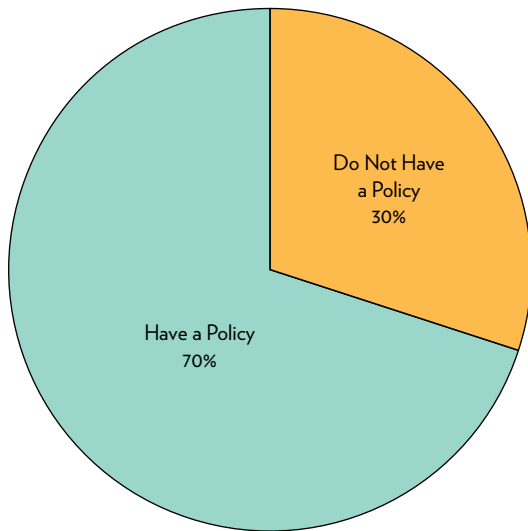


In "Other" comments, some indicated that while there is no waiting period for non-endowed DAFs, for endowed DAFs the fund must have enough investment earnings accumulated to maintain the spending policy before grants may be recommended. For some, the waiting period is dependent on whether the fund has achieved an identified minimum balance.

SECTION II: FINANCE & OPERATIONS

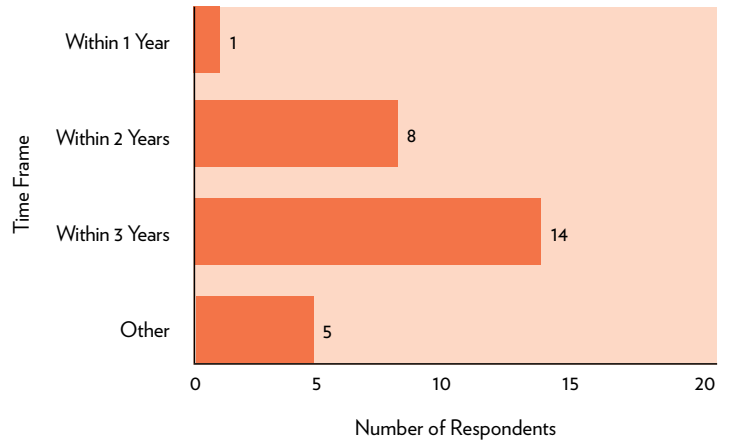
Percent of Community Foundations that have a **Policy on Inactive DAFs**

Responses: 40



Number of Community Foundations by **Time Frame in Which DAF Holder Must Make Distributions**

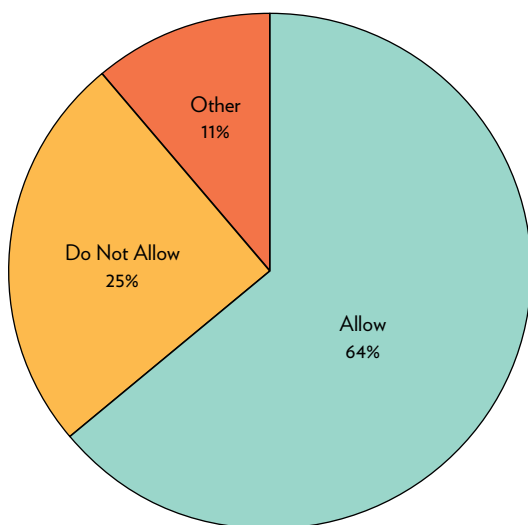
Responses: 28



"Other" responses included 18 months, within 4 years, within 5 years and flexibility based on donor contact.

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

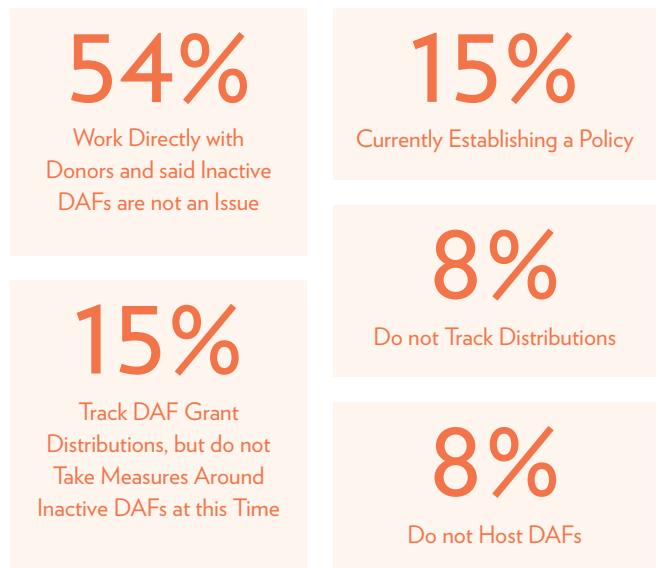
Responses: 28



"Other" responses indicated disbursements are permitted under special circumstances or only for select fund types.

Community foundations that do not have a policy on inactive DAFs were asked to indicate what measures, if any, they take to **ensure DAF distributions occur regularly (within 1-3 years)**.

Responses: 13



SECTION II: FINANCE & OPERATIONS

Average Number of Full-Time Employees By Department

By Asset Category

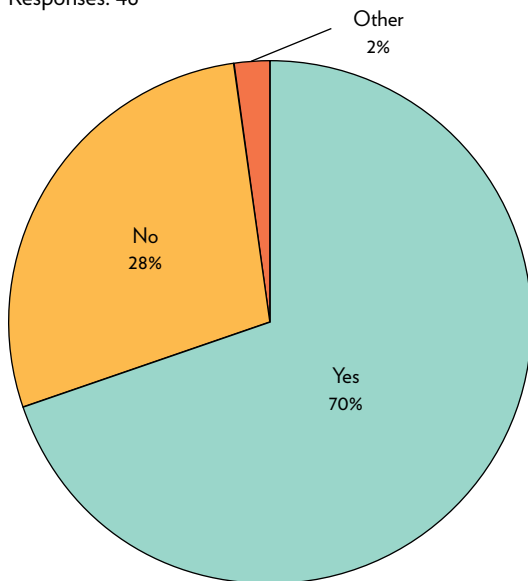
Asset categories shown in millions

Responses: 44

Asset Category	CEO/ Exec. Director	COO or Equivalent	Finance & Admin	Program	Development	Communications	Technology	General Support	Other
\$0 to \$5	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
\$5+ to \$10	0.9	0	0.9	0.6	0.8	1.0	0	0	0.3
\$10+ to \$20	1.0	0	0.6	0.8	0	0.3	0	0.5	1.0
\$20+ to \$50	1.0	1.0	0.9	1.4	0.5	0.5	0.3	0.9	0.5
\$50+ to \$100	1.0	0.5	1.5	2.4	1.1	0.8	0	0.8	0
\$100+ to \$200	1.0	1.0	2.8	7.7	2.3	1.0	0.5	1.4	1.0
\$200+	1.0	0	5.7	9.7	5.0	2.9	1.4	1.7	3.9

Percent of Community Foundations that have Staff Positions with Dual or Split Responsibilities

Responses: 46

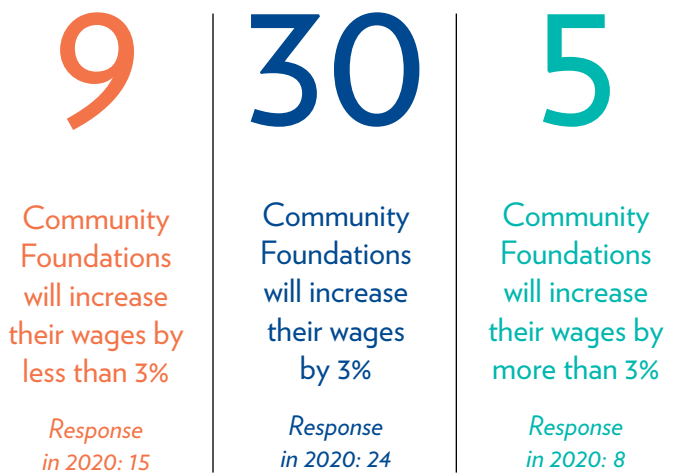


Many examples of dual/split roles were identified, such as Development and Communications, Marketing and Administrative Assistant, Finance and Program Director, YAC Advisor and Office Manager, and Scholarship Coordinator and Impact Assistant.

Planned Budget Wage Increase

for Next Fiscal Year

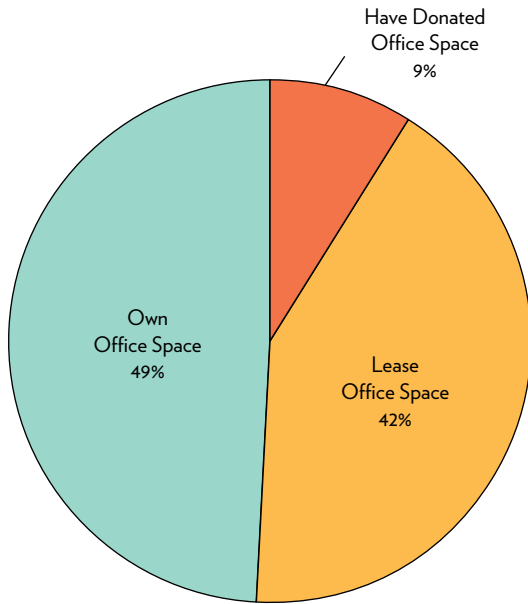
Responses: 44



SECTION II: FINANCE & OPERATIONS

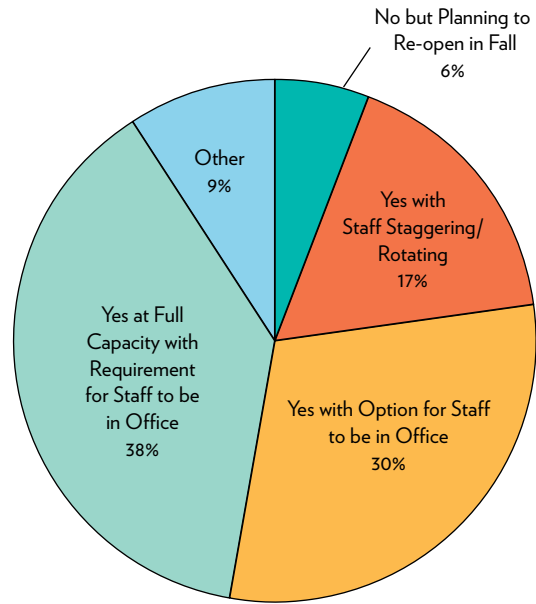
Community Foundations Office Space Breakdown

Responses: 47



Percent of Staff Members Currently Working in the Physical Office Space

Responses: 47

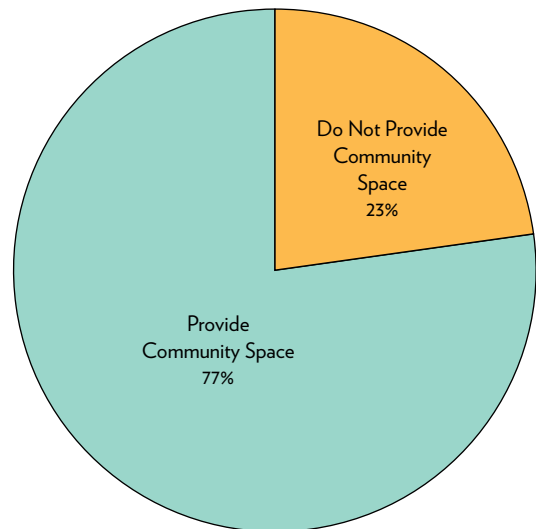
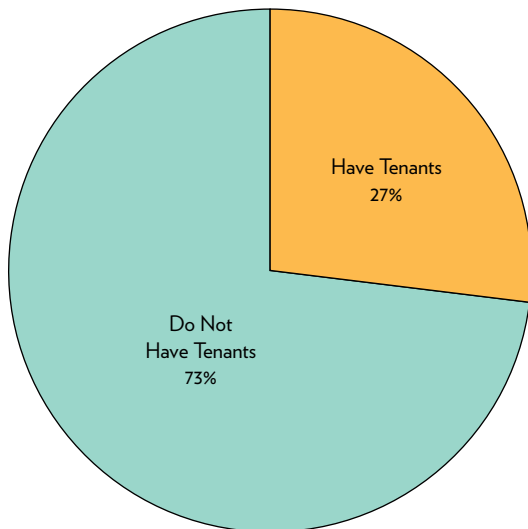


“Other” responses indicated primarily combinations of these options for various hybrid approaches.

Office Space Tenants and Community Use

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: 22



SECTION III

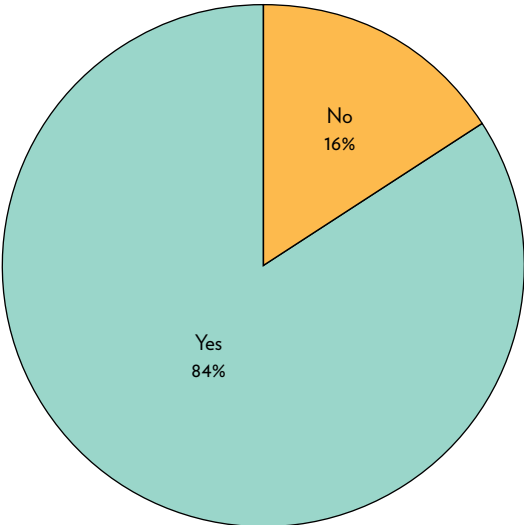
COVID-19

SECTION III: COVID-19

Community Foundations that **Set Up a New Response Fund Specifically to Support COVID-19 Relief and Recovery Efforts**

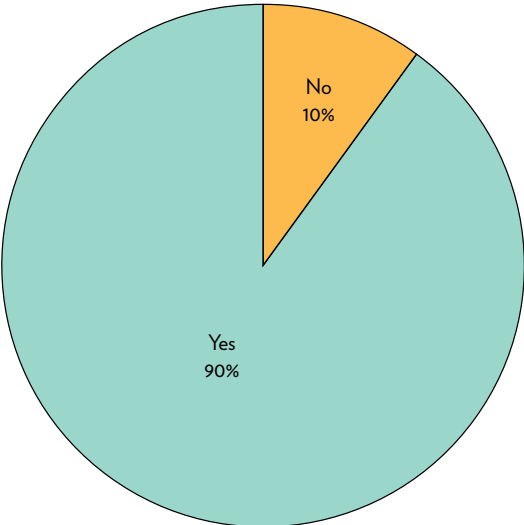
Responses: 49

Out of 41 affirmative responses to this question, nearly half noted that there were partners involved in standing up that fund. Most of these partners were the local United Way or DTE in different regions of the state.



Community Foundations with a **Fund That is Still Active/Open**

Responses: 41

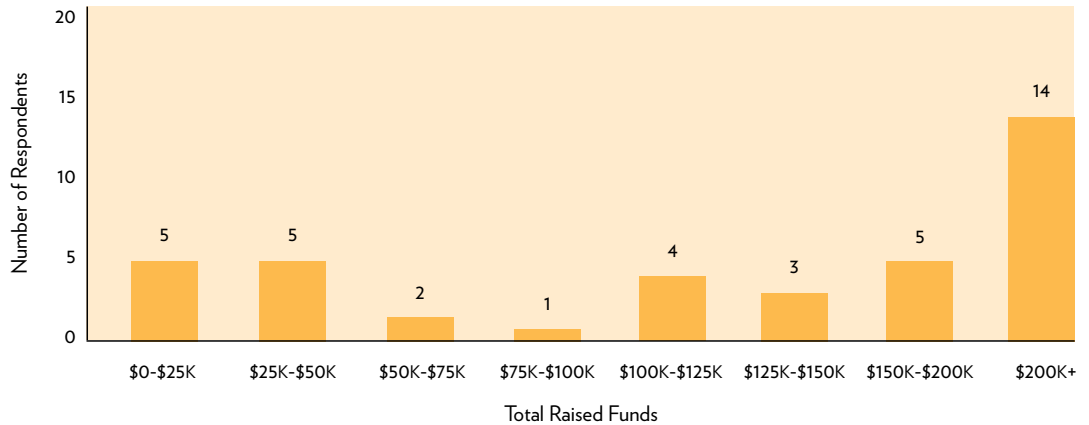


SECTION III: COVID-19

We asked community foundations that set up a response fund to support COVID-19 relief and recovery to tell us more about their fund’s activity and funding levels.

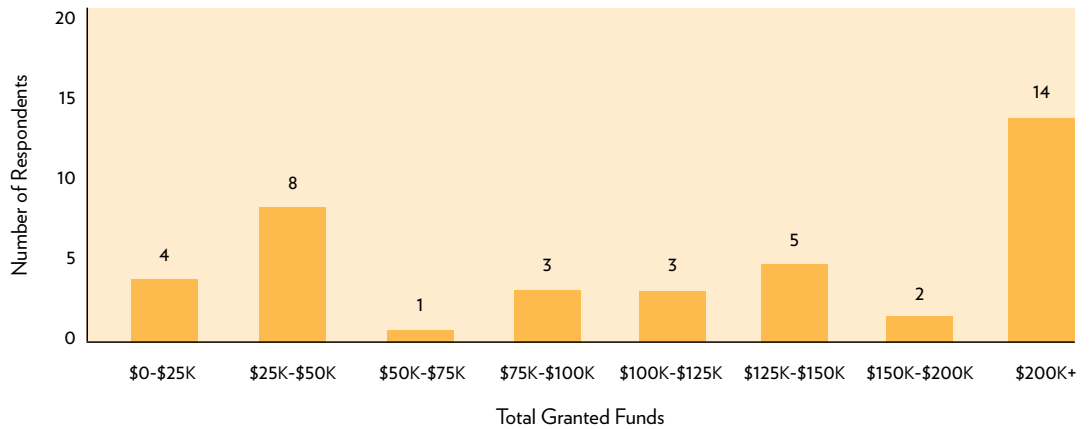
Amount Raised in Total to Date

Responses: 39



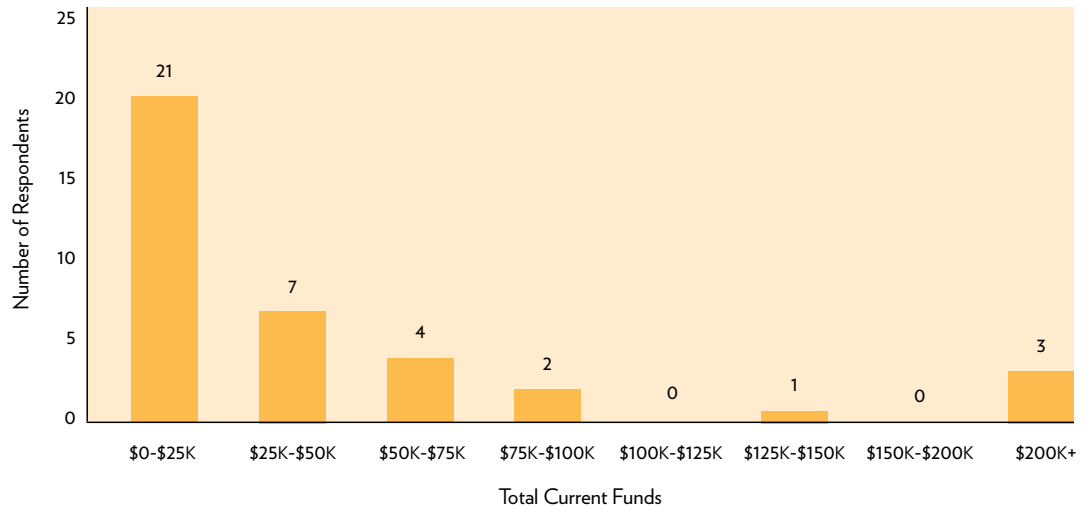
Amount Granted to Date

Responses: 40



Current Amount

Responses: 38

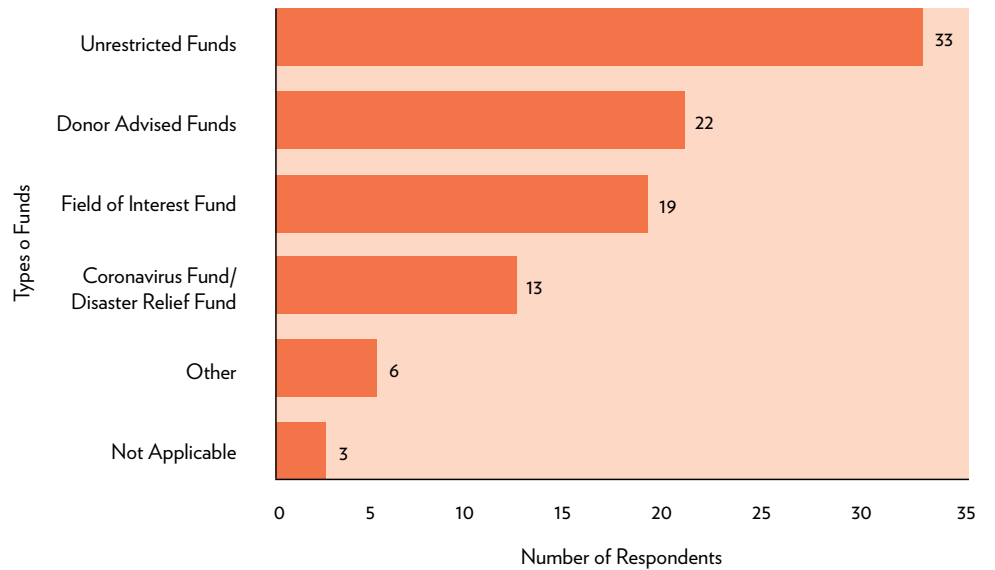


There was also a respondent who marked a negative dollar amount

SECTION III: COVID-19

Number of Community Foundations that Repurposed Funds/Made Grants from an Existing Fund

Responses: 48

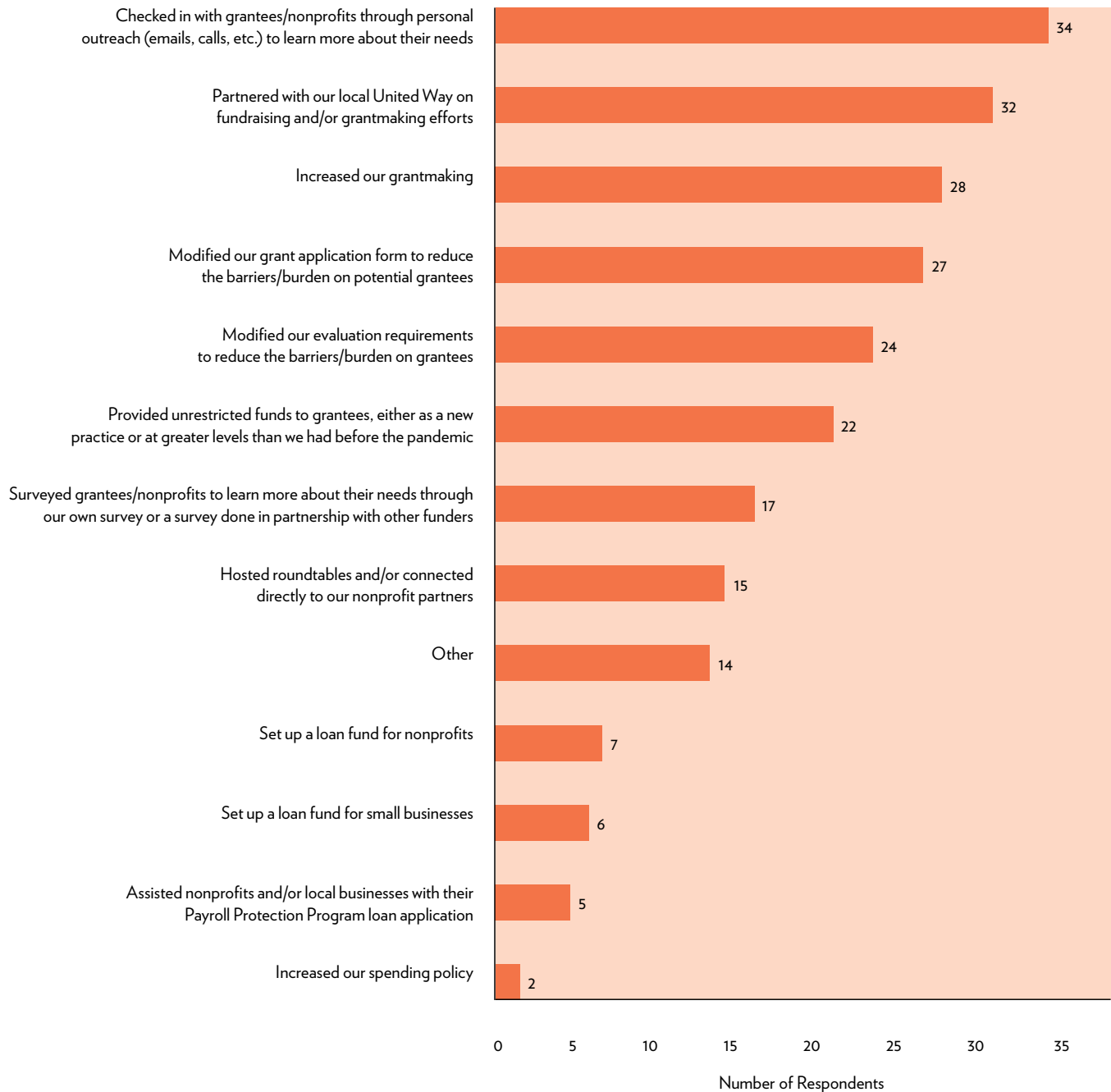


"Other" responses indicated a Matching Fund, Grant Reserve Fund or Special Projects.



SECTION III: COVID-19

COVID-19 Response Activities



“Other” responses highlighted support of food pantries, schools, senior centers, emergency services and medical personnel; partnerships with community development financial institutions (CDFIs); network building among community organizations; conversation events; supplying PPE to frontline workers; mask wearing campaign support; a call to action for DAF holders; serving as a fiduciary for other partners and beyond.

SECTION IV

IMPACT INVESTMENTS



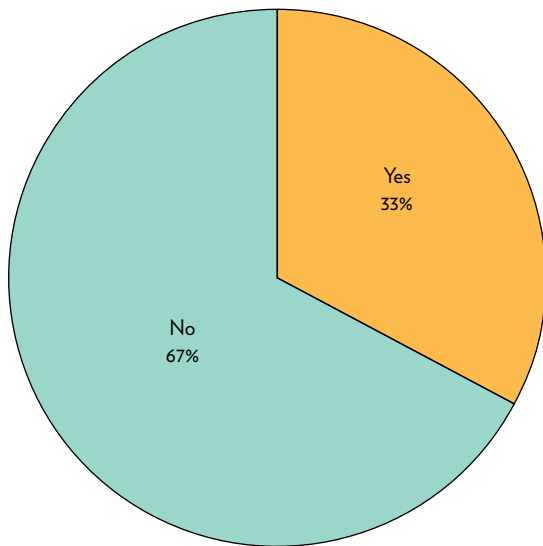
SECTION IV: IMPACT INVESTMENTS

Programmatic investments (called “PRIs” when they relate to private foundations) are made to support charitable activities but with an expectation of a return of the capital and often an additional return on the capital. Programmatic investments come from program (not investment) funds, tend to seek below market returns and may take many forms, such as loans, guarantees, linked deposits or equity investments.

A mission-related investment (MRI) can be any investment made with the intention to generate both a positive social impact and a financial return. MRIs may be below-market or market-rate. (For purposes of this survey, ESG investments (“screens”) were not included.)

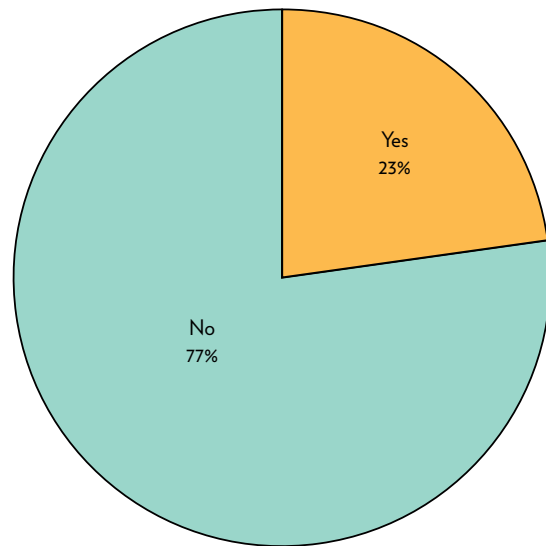
Percent of Community Foundations that Engage in **Program Related Investments (PRIs)**

Responses: 48



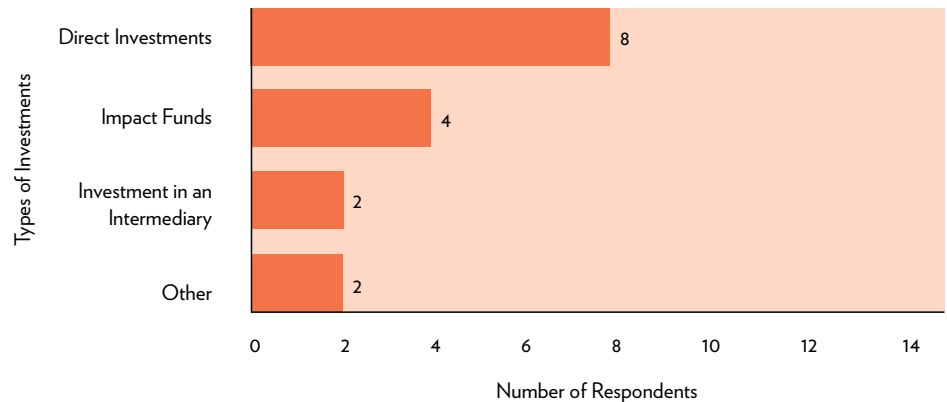
Percent of Community Foundations that Engage in **Mission Related Investments (MRIs)**

Responses: 48



Types of Investments Community Foundations made with **Mission Related Investments (MRIs)**

Responses: 11



SECTION IV: IMPACT INVESTMENTS

Percent of Community Foundations' Investment Pool Designated for MRIs

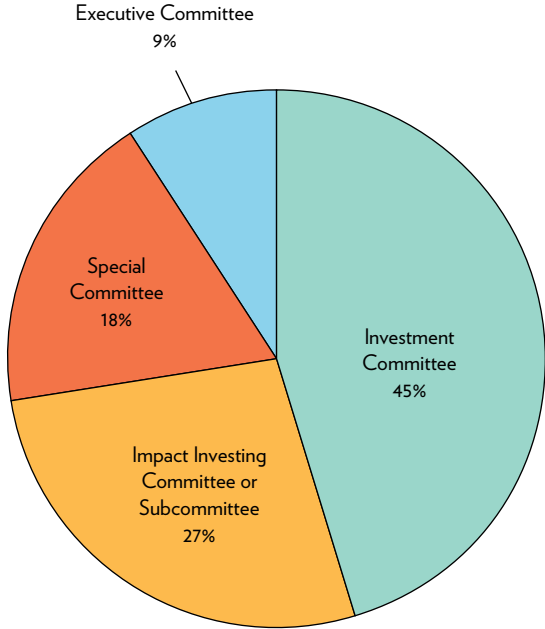
Responses: 11



Group Providing Oversight on the Investment Selection Process for MRIs

Responses: 11

In most cases respondents identified that the Board of Trustees additionally has a role in providing direct oversight.

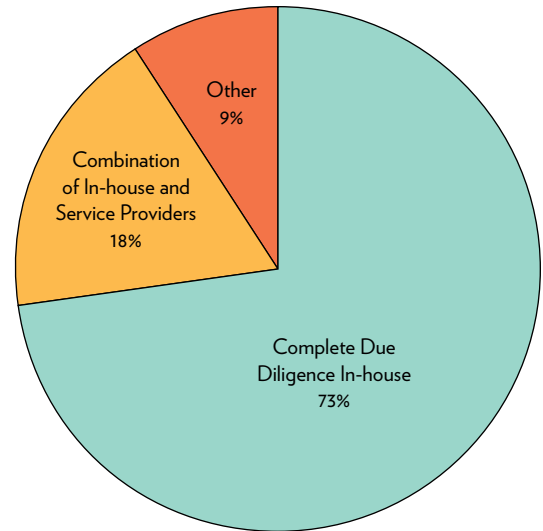


SECTION IV: IMPACT INVESTMENTS

How Community Foundations Perform Due Diligence on the Potential MRI

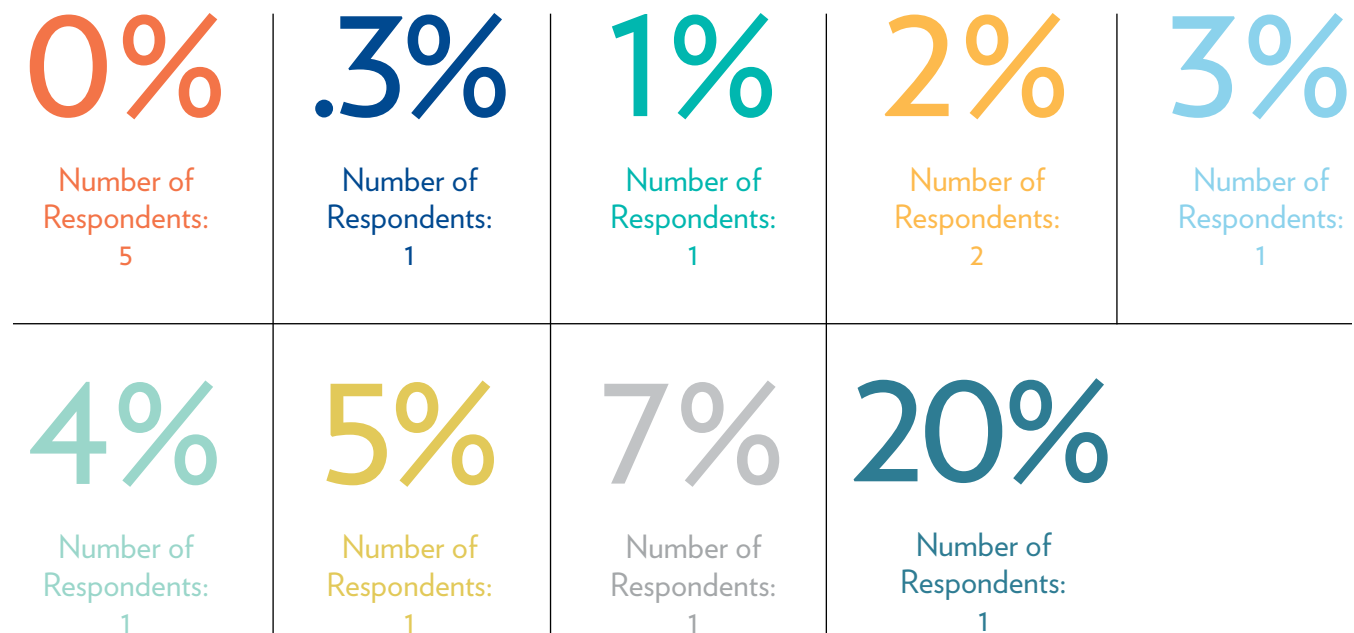
Responses: 11

Some respondents noted that they use a firm to support due diligence efforts or engage the skillsets of committee members, bringing in other supports as needed.



Percent of Community Foundations' Corpus Included in the PRI Pool

Responses: 14



SECTION IV: IMPACT INVESTMENTS

Percent of Community Foundations' Grantmaking Dollars Included in the PRI Pool

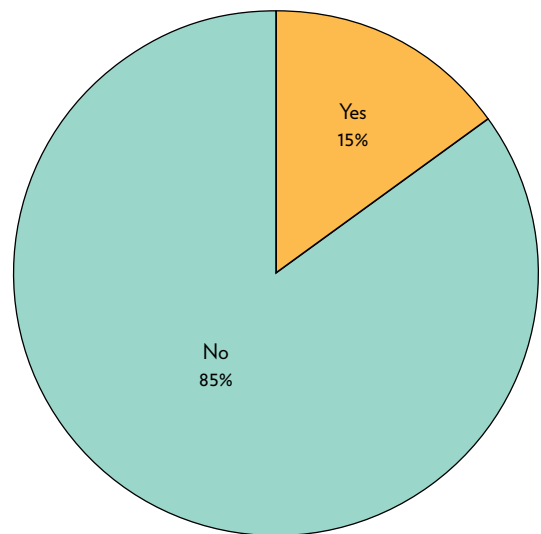
Responses: 15



Percent of Community Foundations that Conduct "ESG" Investing – Positive or Negative "Screens"

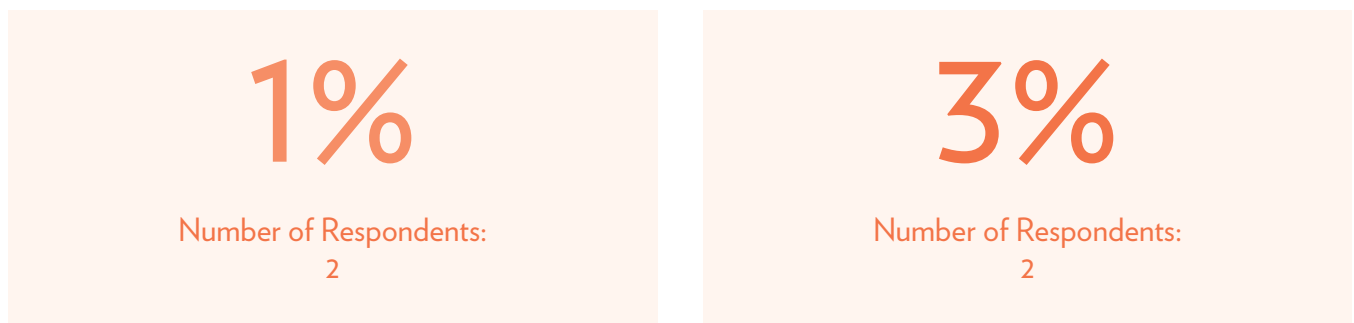
or otherwise target investment products that are said to be ESG screened, aside from MRIs

Responses: 47



Percent of Community Foundations' Investment Portfolio Designated for ESG Investments

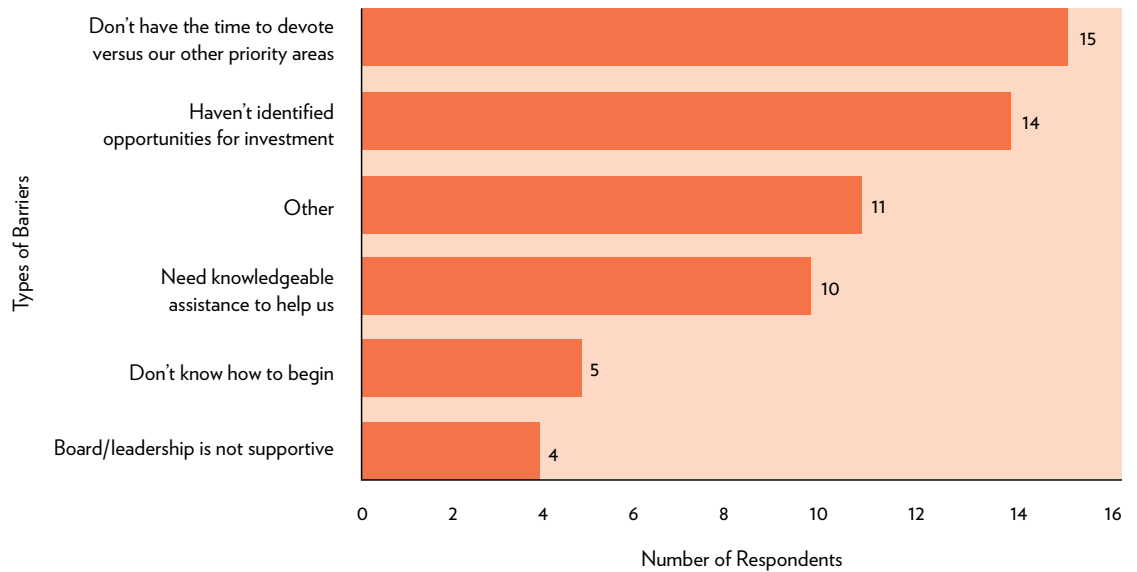
Responses: 4



SECTION IV: IMPACT INVESTMENTS

Barriers to Organizations' Impact Investing

Responses: 38

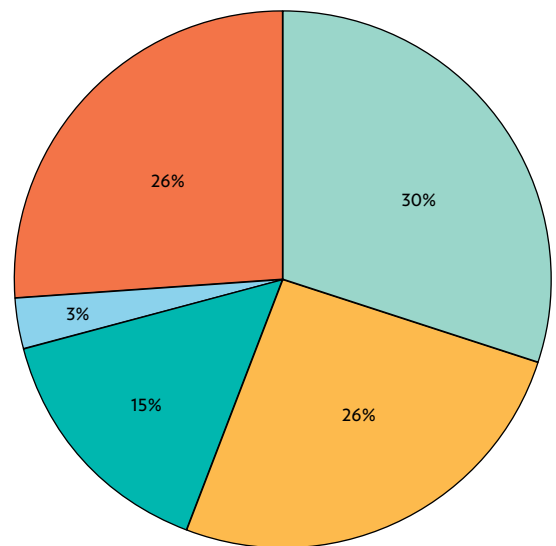


"Other" responses included limited funds to meet demand, need to ensure a strong return, finding the right fit and project, and being in the early stages of the work.

CMF Support that Would be Helpful to Advance Impact Investing

Responses: 38

- Webinars/learning programs
- Opportunity to participate in a small cohort deep dive on practices
- One-on-one technical assistance
- Other
- Written resources



SECTION V

OTHER



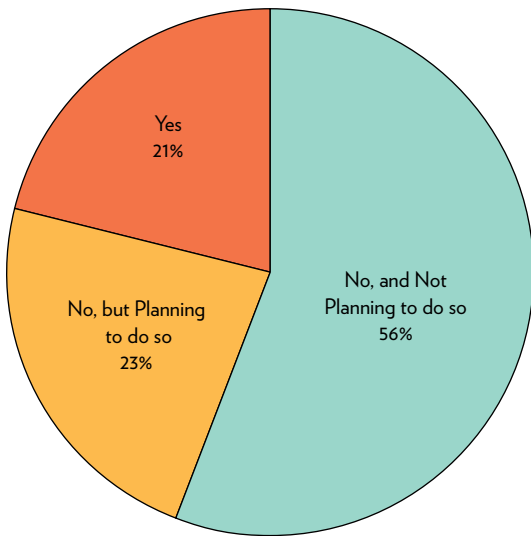
SECTION V: OTHER

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 that is happening until a check is returned to a foundation or institutional aid is decreased.

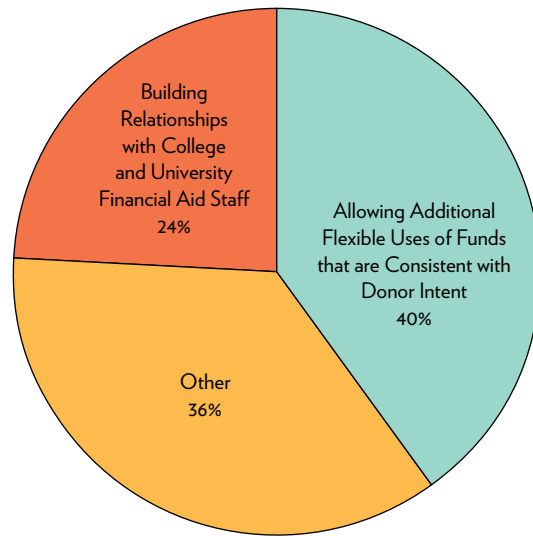
Community Foundations that are Actively Tracking Scholarship Displacement

Responses: 47



Practices Used to Prevent Scholarship Displacement

Responses: 45



“Other” practices noted include allowing postponement of the grant, asking students to provide information about other financial offers in their application, asking about displacement in follow up before payment is made and working with school staff.

Number of Students Reported Being Affected by Scholarship Displacement

Responses: 24

We asked community foundations to share the number of students who reported being affected by scholarship displacement, and the dollar amount of funds displaced.



\$39,800: Total Dollar Amount of Scholarship Funds Reported as Displaced in Last Scholarship Cycle, Across All Respondents

SECTION V: OTHER

Reported Geographic Affiliates

Responses: 17

Community Foundation Name	Affiliate Name	Affiliate Asset Size
Ann Arbor Area Community Foundation	Ypsilanti Area Community Foundation	\$5,090,151
Battle Creek Community Foundation	Athens Community Foundation	\$1,608,131
Battle Creek Community Foundation	Homer Community Foundation	\$3,839,742
Battle Creek Community Foundation	Springfield Community Foundation	\$19,441
Bay Area Community Foundation	Arenac Community Fund	\$1,104,796
Canton Community Foundation	Community Foundation of Plymouth	\$1,100,000
Community Foundation for Muskegon County	Community Foundation for Mason County	\$22,607,811
Community Foundation for Northeast Michigan	Iosco County Community Foundation	\$6,140,237
Community Foundation for Northeast Michigan	North Central Michigan Community Foundation	\$6,526,373
Community Foundation for Northeast Michigan	Straits Area Community Foundation	\$3,157,387
Community Foundation for Southeast Michigan	Chelsea Community Foundation	\$2,578,957
Community Foundation for Southeast Michigan	Community Foundation for Livingston County	\$1,394,037
Community Foundation of Marquette County	Gwinn Area Community Fund	\$1,623,033
Community Foundation of Marquette County	Ishpeming Area Community Fund	\$1,714,886
Community Foundation of Marquette County	Negaunee Area Community Fund	\$1,101,871
Community Foundation of Monroe County	Greater Milan Area Community Foundation	\$2,227,899
Community Foundation of St. Clair County	Algonac-Clay Community Fund	\$318,895
Community Foundation of St. Clair County	Citizens for St. Clair	\$670,075
Community Foundation of St. Clair County	Marysville Community Fund	\$89,533
Community Foundation of the Upper Peninsula	Alger Regional Community Foundation	\$4,127,438
Community Foundation of the Upper Peninsula	Community Foundation for Delta County	\$19,932,134
Community Foundation of the Upper Peninsula	Community Foundation of the Upper Peninsula	\$2,182,920
Community Foundation of the Upper Peninsula	Gogebic-Ontonogon Community Foundation	\$160,655
Community Foundation of the Upper Peninsula	Les Cheneaux Community Foundation	\$4,130,121
Community Foundation of the Upper Peninsula	Paradise Area Community Foundation	\$562,645
Community Foundation of the Upper Peninsula	Rudyard Area Community Foundation	\$324,694
Community Foundation of the Upper Peninsula	Schoolcraft County Community Foundation	\$742,047

Continued on Next Page

Reported Geographic Affiliates (continued)

Community Foundation Name	Affiliate Name	Affiliate Asset Size
Community Foundation of the Upper Peninsula	St. Ignace Area Community Foundation	\$1,913,087
Fremont Area Community Foundation	Lake County Community Foundation	\$5,514,979
Fremont Area Community Foundation	Mecosta County Community Foundation	\$6,509,803
Fremont Area Community Foundation	Osceola County Community Foundation	\$11,121,177
Grand Haven Area Community Foundation	Allendale Community Foundation	\$3,609,183
Grand Haven Area Community Foundation	Coopersville Area Community Foundation	\$7,382,501
Grand Rapids Community Foundation	Cascade Community Foundation	\$421,813
Grand Rapids Community Foundation	East Grand Rapids Community Foundation	\$214,648
Grand Rapids Community Foundation	Hudsonville-Jenison Community Foundation	\$364,559
Grand Rapids Community Foundation	Ionia County Community Foundation	\$8,167,957
Grand Rapids Community Foundation	Sparta Community Foundation	\$953,188
Grand Rapids Community Foundation	The Lowell Area Community Foundation	\$14,496,868
Grand Rapids Community Foundation	Wyoming Community Foundation	\$521,690
Greenville Area Community Foundation	Lakeview Area Community Fund	\$1,786,184
Greenville Area Community Foundation	Montcalm Panhandle Community Fund	\$369,728
Midland Area Community Foundation	Clare County Community Foundation	\$4,053,330
Midland Area Community Foundation	Gladwin County Community Foundation	\$4,516,957
Sturgis Area Community Foundation	Constantine Area Community Foundation	\$488,889
Sturgis Area Community Foundation	White Pigeon Area Community Foundation	\$387,946
Total		\$167,870,396

SECTION V: OTHER

TECHNOLOGY/SOFTWARE

Number of Community Foundations Utilizing
Software by Area of Work

Responses: 47

Software	Donor/Gifts	Grants	Accounting	Scholarships
Microsoft Excel	14	13	13	14
Microsoft Word	12	12	10	12
Bromelkamp Akoya	11	9	4	7
Blackbaud Raisers Edge	10	1	2	1
Blackbaud FIMS	9	8	10	4
Foundant for Community Foundations	8	6	8	5
Stellar Technology Solutions (iPhiCore)	6	6	6	6
Blackbaud DonorCentral	3	2	1	0
Bromelkamp Community Pearl	3	2	3	3
Blackbaud Grantmaking/GIFTS Online	1	0	0	0
HubSpot	1	0	0	0
Jot Form	1	4	0	5
Microsoft Access	1	3	1	2
Salesforce	1	1	0	2
AwardSpring	0	1	0	5
Blackbaud Financial Edge	0	0	8	0
Blackbaud Scholarship	0	0	0	1
Bromelkamp Business Central	0	0	4	0
Bromelkamp eGrant	0	2	0	5
Business Central	0	0	1	0
CommunityForce	0	1	0	2
Fluxx Grantmaker	0	1	0	0
Form Assembly	0	1	0	1
Foundant for Grantmakers	0	2	0	0
Foundant for Scholarships Providers	0	0	0	1
Fusion Labs GrantedGE (Grant Edge)	0	5	0	3
Gift Works	0	0	0	0

Continued from Previous Page

Number of Community Foundations Utilizing
Software by Area of Work (continued)

Software	Donor/Gifts	Grants	Accounting	Scholarships
Google Forms / Microsoft Forms	0	1	0	0
GradSnap	0	0	0	1
Kaliedscope	0	0	0	2
Quick Books	0	0	1	0
Sage Intacct	0	0	0	0
Smarter Select	0	2	0	1
SmartSimple Community Foundation Grants Management	0	0	0	0
SmartSimple Donor Management	0	0	0	0
Submittable	0	1	0	1
Survey Monkey Apply	0	1	0	0
Youreka Forms	0	0	0	0
None	0	0	0	0

Number of Planned Software Transitions

by Transitioning-to Software

Responses: 7

Software	Donor/Gifts	Grants	Accounting	Scholarships
Blackbaud FIMS	1	1	1	1
Blackbaud Financial Edge	1	1	1	1
Bromelkamp GoApply	0	1	0	1
Bromelkamp Community Pearl	1	1	1	1
Foundant for Community Foundations	1	1	1	0
Foundant for Scholarships Providers	0	0	0	1
Jot Form	0	1	0	1
Microsoft Excel	1	1	1	1
Salesforce	1	0	0	0
None	1	1	1	1

SECTION V: OTHER

Number of Community Foundations Utilizing HR / Payroll Software

Responses: 44

Software	Community Foundation Users
Other	9
Outsourced	7
Quick Books	7
None	6
ADP	4
Basic	4
FIMS	4
Paychex	4
Blackbaud	2
Paycor	2
Dominion Payroll Systems	1
Excel - Paychex	1
Maxwell Health	1
PayrollMate	1
Pearl and outsource	1
IOI	0
Paychoice	0
Sage Payroll Services	0

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

