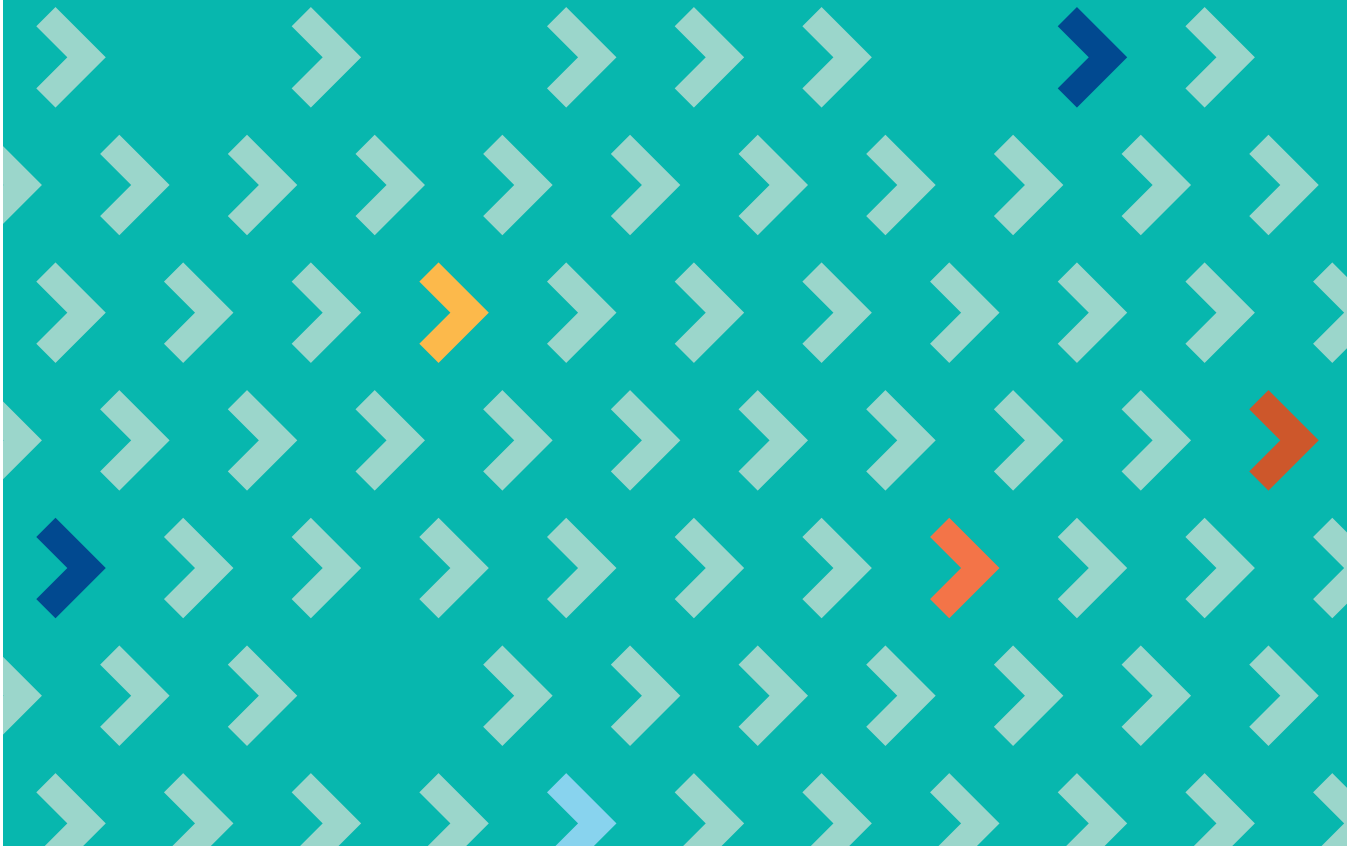


COMMUNITY FOUNDATION DATABOOK

PUBLISHED IN 2022



CMF Council of
Michigan
Foundations



WELCOME

As community conveners, partners and changemakers – you, our Michigan community foundations – are leaning in to support and engage nonprofits, donors, partners and all those you serve in innovative and reimagined ways, leveraging new approaches and deepening connections. 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 ranging from acceptance policies around gifts to donor advised fund policies and activities, from scholarship displacement to wage increases, and so much more.

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 2022 edition was made possible with outstanding support from a subcommittee of members of the Community Foundation Committee who volunteered additional time to review the survey and provide valuable input to ensure the final product could provide relevant information for their peers. In response to your inquiries, this year we reduced and refined the survey, focusing on key insights best captured on an annual basis.

The data that follows is critically important to providing visibility to overall trends and norms in community foundation giving. We hope the databook serves as a high-quality benchmarking tool relevant to your everyday work, informative and helpful in your strategy development and goal setting as you plan for the future. We are excited to look to the future with you, particularly as we come together in celebration of CMF’s 50th Anniversary. This milestone moment is made possible because of you and your peers throughout the Michigan community of philanthropy. Please know that CMF is here for you, now and in the decades ahead.

With gratitude,



Andrea Judd-Shurmur
Director of Learning Services
CMF

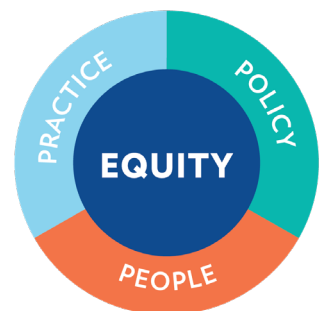


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METHODOLOGY AND DATA

The CMF Community Foundation Databook represents the most complete picture of community foundations in our state, with 51 of 57 Michigan community foundations responding to one or more items in this year's survey.

The Community Foundation Databook data is gathered through an online survey. Each community foundation receives a unique login 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 publication was collected during the months of June-July 2022. We have included a five-year analysis of key Databook results. The number of respondents varies year to year, and the specific community foundations that respond varies as well, therefore the five-year analysis is not an exact comparison and should not be taken as such.

Please be advised some percentages shown may not total 100% due to rounding. 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. Prior to finalizing the databook, each community foundation received back their raw data set as it was submitted and was given the opportunity to review the data and make any updates to account for any potential data entry errors.

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, 2021.

National Standards for Community Foundations

Together with the Community Foundation Committee, CMF wants to ensure all Michigan community foundations are well supported through the National Standards for U.S. Community Foundations accreditation process with resources and shared learning opportunities, and highlight the availability of endowment funds for applicable foundations to offset their related accreditation fees. Of the 47 community foundations that responded to a question in the databook asking whether they are accredited, 41 confirmed they are accredited and 6 are not.

2022 Databook Review Subcommittee

Zosia Eppensteiner, Community Foundation of Marquette County

Stephanie McGreevy, Mackinac Island Community Foundation

Amanda Schafer, Mt. Pleasant Area Community Foundation

Hadley Streng, Grand Haven Area Community Foundation

Select data sets traditionally included in the CMF Community Foundation Databook are now being captured on a three-year cycle. We invite you to explore CMF's Knowledge Center to access past databook publications if you are looking for information on spending policies, fees on funds, facility ownership or other areas.



SECTION I

ASSETS, GIFTS & GRANTS



SECTION I: ASSETS, GIFTS & GRANTS

Community Foundation Data Summary

By Assets as of Last Fiscal Year End

Responses: 51

| Community Foundation | Assets | Gifts Received | Grants Made |
|---|-----------------|----------------|---------------|
| Community Foundation for Southeast Michigan | \$1,338,937,929 | \$230,865,919 | \$103,150,711 |
| Kalamazoo Community Foundation | \$691,817,125 | \$11,979,091 | \$19,679,677 |
| Grand Rapids Community Foundation | \$425,971,455 | \$15,385,357 | \$18,983,108 |
| Fremont Area Community Foundation | \$312,365,846 | \$2,122,845 | \$8,621,637 |
| Community Foundation of Greater Flint | \$299,889,517 | \$11,326,389 | \$10,070,505 |
| Community Foundation for Muskegon County | \$275,928,683 | \$13,560,704 | \$11,470,682 |
| Ann Arbor Area Community Foundation | \$219,428,649 | \$15,407,938 | \$9,108,257 |
| Grand Haven Area Community Foundation | \$189,013,213 | \$12,338,553 | \$8,482,761 |
| Capital Region Community Foundation | \$150,060,130 | \$8,252,388 | \$5,223,546 |
| Battle Creek Community Foundation | \$143,312,196 | \$4,436,313 | \$8,120,240 |
| Midland Area Community Foundation | \$135,269,471 | \$7,809,720 | \$3,802,403 |
| Community Foundation of the Holland/Zeeland Area | \$119,879,744 | \$14,232,062 | \$7,384,021 |
| Community Foundation of St. Clair County | \$109,635,473 | \$6,720,156 | \$3,881,535 |
| Grand Traverse Regional Community Foundation | \$104,188,633 | \$5,754,828 | \$3,424,334 |
| Saginaw Community Foundation | \$99,854,493 | \$5,196,807 | \$4,185,996 |
| Berrien Community Foundation | \$93,389,245 | \$24,002,750 | \$10,796,551 |
| Community Foundation for Northeast Michigan | \$66,334,779 | \$7,899,378 | \$2,134,231 |
| Charlevoix County Community Foundation | \$63,074,524 | \$6,167,419 | \$2,520,116 |
| Bay Area Community Foundation | \$58,071,284 | \$1,188,137 | \$2,020,063 |
| Petoskey-Harbor Springs Area Community Foundation | \$56,689,445 | \$3,406,445 | \$3,708,464 |
| Barry Community Foundation | \$53,981,839 | \$4,287,378 | \$1,386,778 |
| Jackson Community Foundation | \$48,220,323 | \$7,391,354 | \$1,712,029 |
| Greenville Area Community Foundation | \$47,716,923 | \$851,528 | \$1,039,963 |
| Manistee County Community Foundation | \$38,560,839 | \$251,348 | \$1,074,638 |
| Lenawee Community Foundation | \$37,263,241 | \$3,436,921 | \$1,718,962 |
| Mt. Pleasant Area Community Foundation | \$30,622,523 | \$1,954,121 | \$789,175 |
| Sturgis Area Community Foundation | \$29,212,630 | \$409,076 | \$910,431 |

Continued on Next Page

Community Foundation Data Summary (continued)

| Community Foundation | Assets | Gifts Received | Grants Made |
|---|------------------------|----------------------|----------------------|
| Michigan Gateway Community Foundation | \$26,814,811 | \$389,524 | \$740,101 |
| Hillsdale County Community Foundation | \$25,212,566 | \$2,498,110 | \$764,347 |
| Allegan County Community Foundation | \$25,096,950 | NR | \$728,672 |
| Community Foundation of Marquette County | \$24,976,740 | \$1,358,512 | \$983,429 |
| Four County Community Foundation | \$24,732,011 | \$1,675,639 | \$592,807 |
| Mackinac Island Community Foundation | \$19,885,953 | \$718,630 | \$999,895 |
| Community Foundation for Oceana County | \$18,217,032 | \$1,286,133 | \$943,460 |
| Gratiot County Community Foundation | \$18,151,693 | \$353,205 | \$554,940 |
| Tuscola County Community Foundation | \$17,540,129 | \$550,000 | \$635,000 |
| Frankenmuth Community Foundation | \$17,021,000 | \$1,917,000 | NR |
| Cadillac Area Community Foundation | \$16,472,822 | \$435,028 | \$498,450 |
| Community Foundation of Monroe County | \$14,506,211 | \$3,246,503 | \$435,573 |
| Lapeer County Community Foundation | \$14,239,761 | \$483,726 | \$358,127 |
| Community Foundation of Greater Rochester | \$14,038,908 | \$2,154,719 | NR |
| Dickinson Community Foundation | \$13,968,845 | \$409,333 | \$447,801 |
| M&M Area Community Foundation | \$13,439,697 | NR | \$703,039 |
| Shiawassee Community Foundation | \$12,022,616 | \$181,422 | NR |
| Roscommon County Community Foundation | \$10,938,672 | \$822,845 | \$336,924 |
| Branch County Community Foundation | \$9,512,295 | \$336,236 | \$373,385 |
| Otsego Community Foundation | \$7,820,932 | \$728,334 | \$260,124 |
| Huron County Community Foundation | \$7,457,664 | \$821,675 | \$277,559 |
| Leelanau Township Community Foundation | \$7,370,553 | \$188,358 | \$161,899 |
| Chippewa County Community Foundation | \$6,627,812 | \$365,753 | \$187,179 |
| Canton Community Foundation | \$5,605,462 | \$735,916 | \$443,324 |
| 2022 Survey Totals | \$5,610,361,287 | \$448,291,526 | \$266,826,848 |
| Change from 2021 Totals | +19.7% | +38.5% | +1.3% |

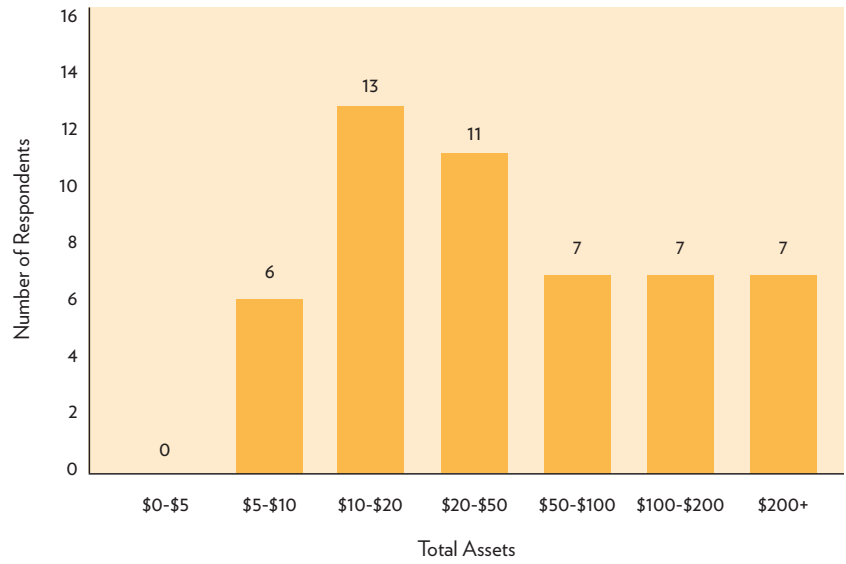
NR = Not Reported

Includes supporting organizations and affiliates

SECTION I: ASSETS, GIFTS & GRANTS

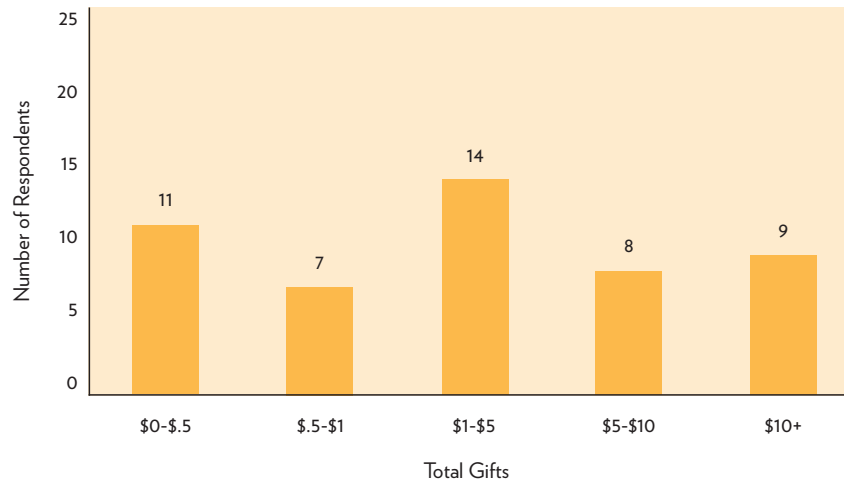
Number of Community Foundations by **Asset Size**

Assets shown in millions
Responses: 51



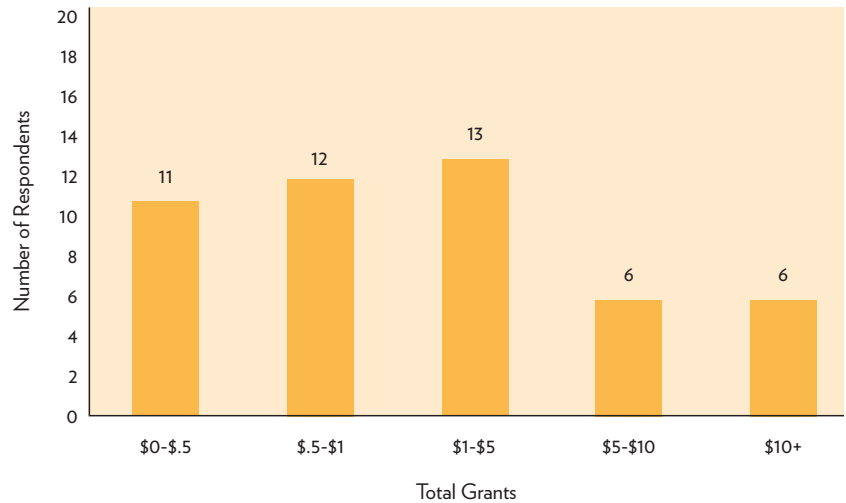
Number of Community Foundations by **Gifts Received**

Gifts shown in millions
Responses: 49



Number of Community Foundations by **Grants Made**

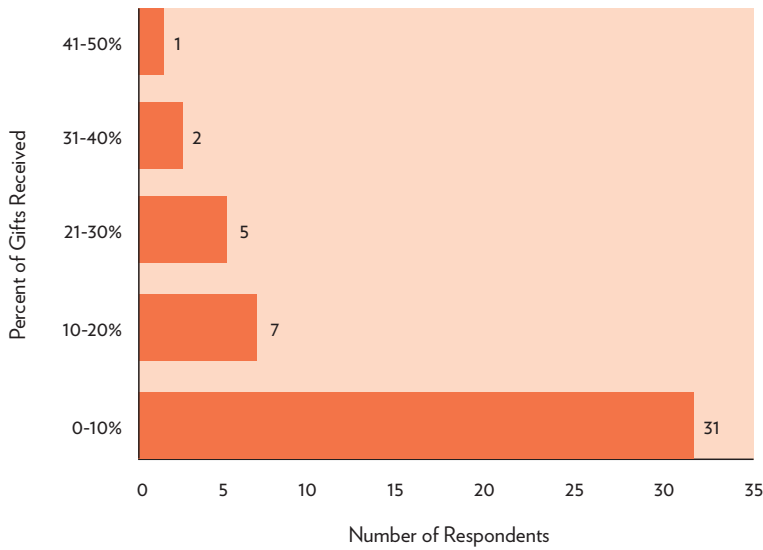
Grants shown in millions
Responses: 48



SECTION I: ASSETS, GIFTS & GRANTS

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

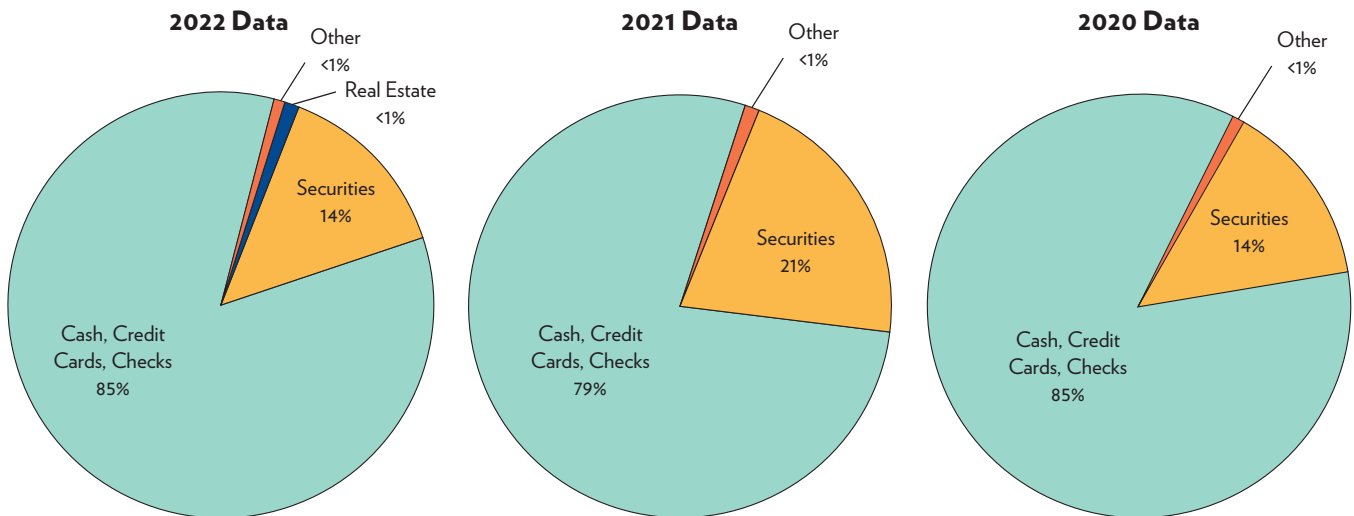
Responses: 46



Gift Type Breakdown

Among Gifts Received by Community Foundations

Responses: 48

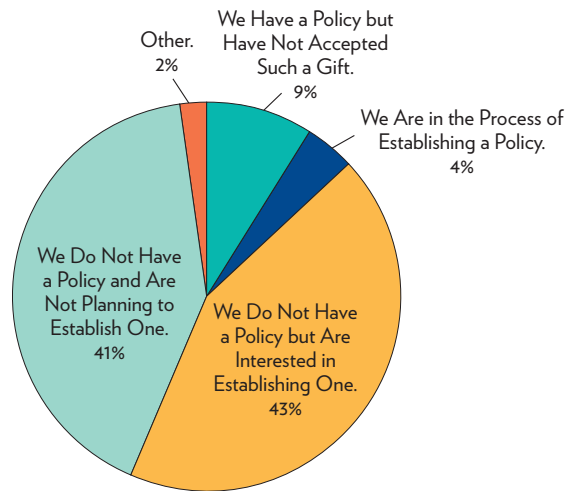


An example of an “Other” response in 2022 is artwork. In 2021 and 2020, real estate was included in “Other” and not broken out as its own area, as it was for 2022.

SECTION I: ASSETS, GIFTS & GRANTS

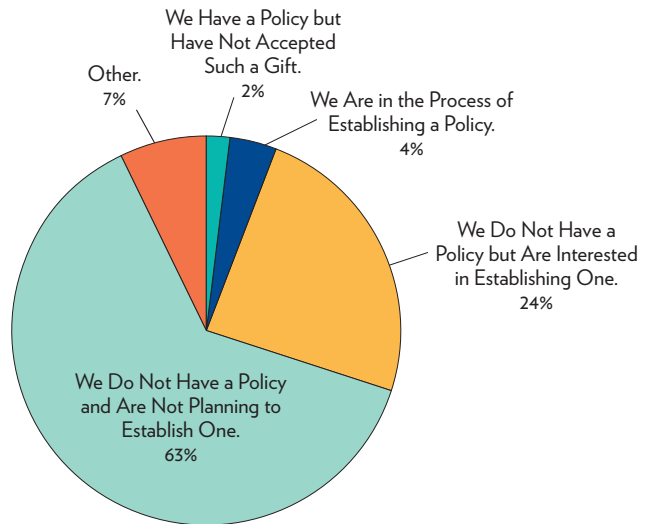
Percent of Community Foundations Establishing Gift Acceptance Policies on Cryptocurrency

Responses: 46



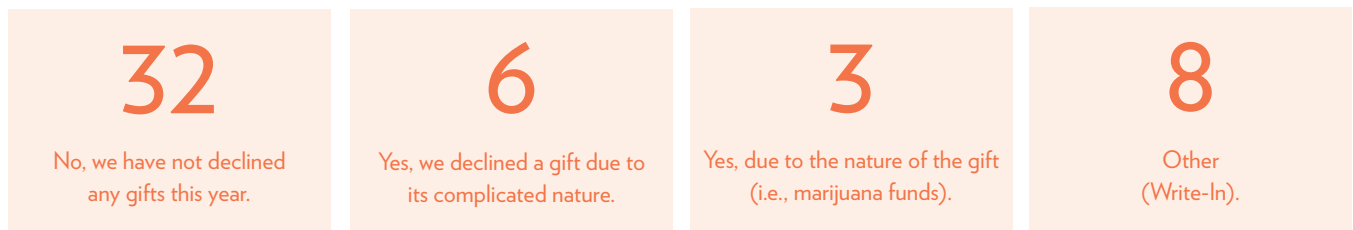
Percent of Community Foundations Establishing Gift Acceptance Policies on Marijuana Funds

Responses: 46



Number of Community Foundations That Declined Gifts by Reason Given

Responses: 47 (Respondents were invited to select all options that applied.)



“Other comments” included declining a gift due to a donor wanting to maintain control, because the wishes for the gift were not aligned with the foundation’s values or because the gift was meant to directly benefit a specific nonprofit. In at least one case, suggested donations were not in line with best practice or did not follow legal requirements for the field.

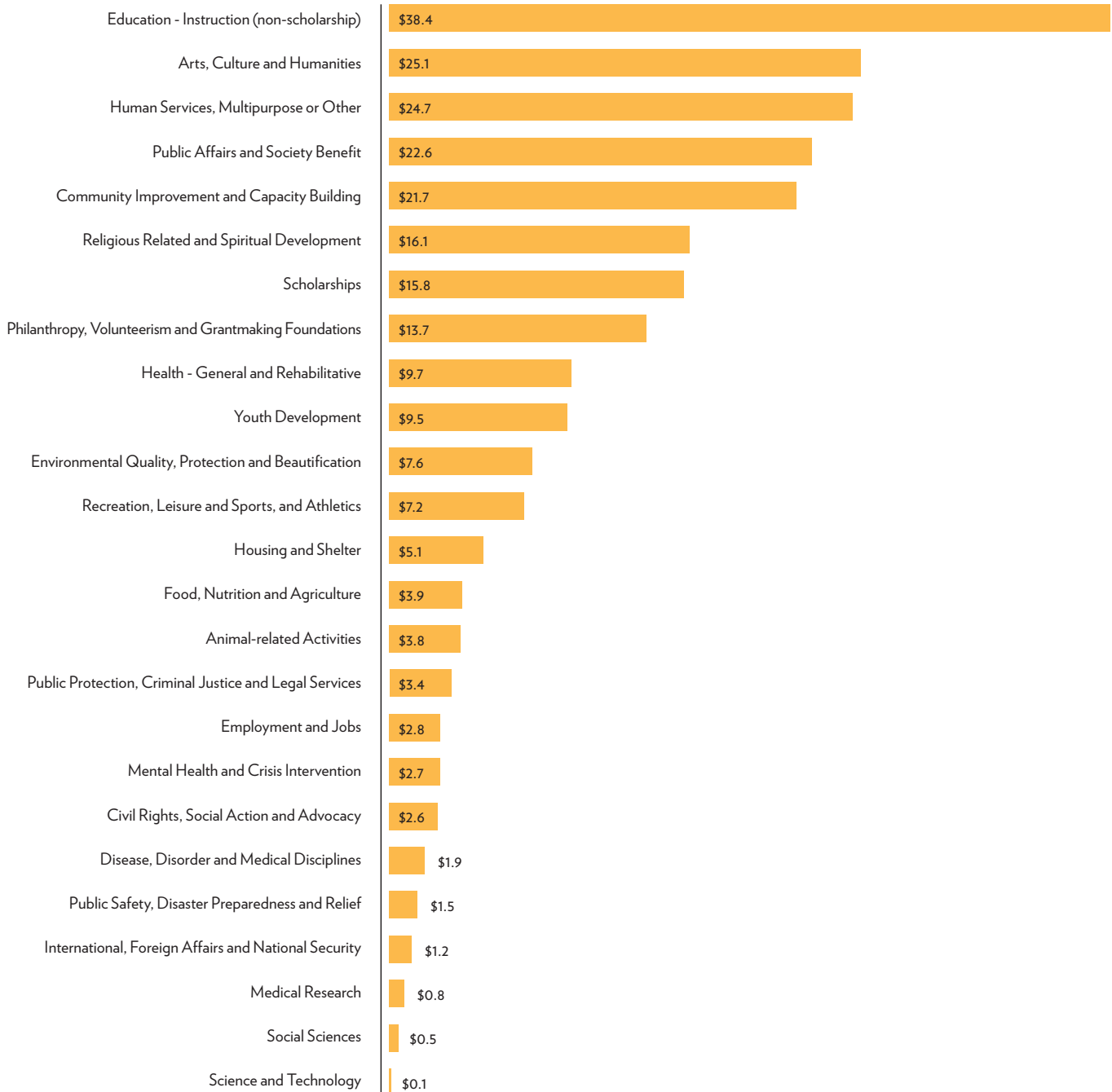
“A non-endowed agency outside our geographic region wanted to open a fund for investment purposes, whereby we saw no service benefits to our region. And we already we have a fund for a similar agency located and providing services within our geographic region.”

SECTION I: ASSETS, GIFTS & GRANTS

Total Annual Grants Made By Field of Interest

Values shown in millions

Responses: 51



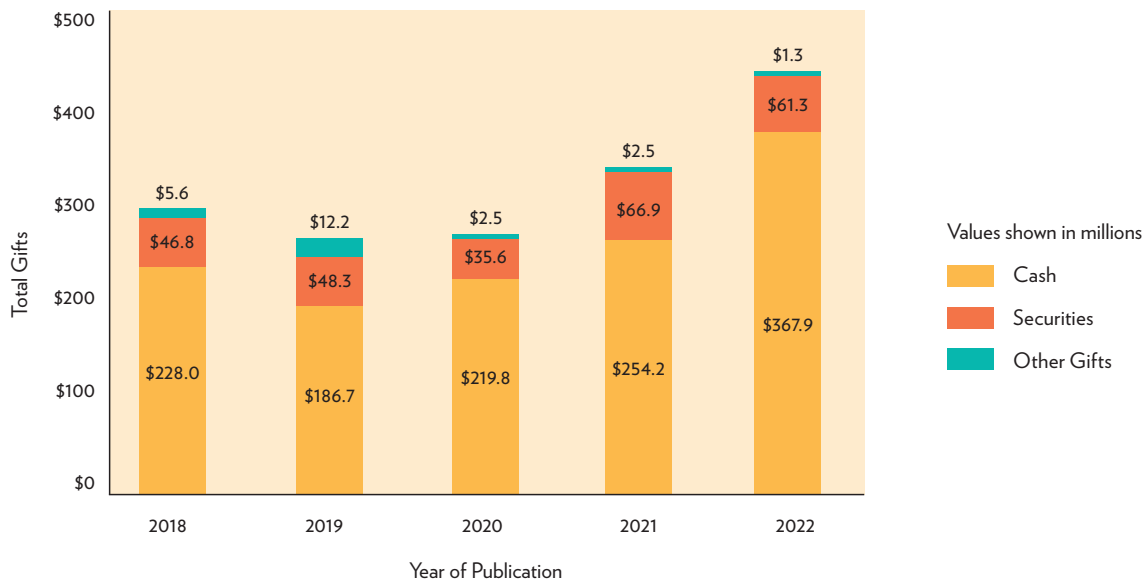
SECTION I: ASSETS, GIFTS & GRANTS

FIVE-YEAR ANALYSIS

The number of Community Foundation Databook Survey respondents varies year to year, and the specific community foundations that respond varies as well, therefore the five-year analysis is not an exact comparison and should not be taken as such.

Gift Type Breakdown

Over the Past Five Years (2018 - 2022). Year shown refers to year of publication.

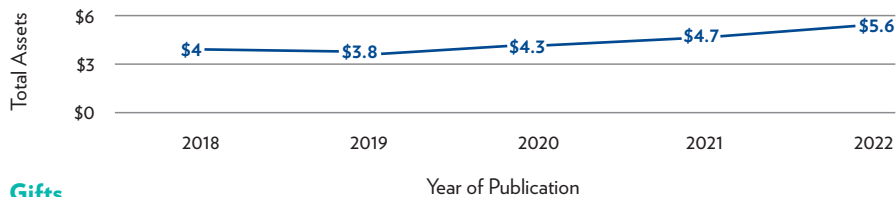


Assets, Gifts and Grants

Over the Last Five Years (2018 - 2022). Year shown refers to year of publication.

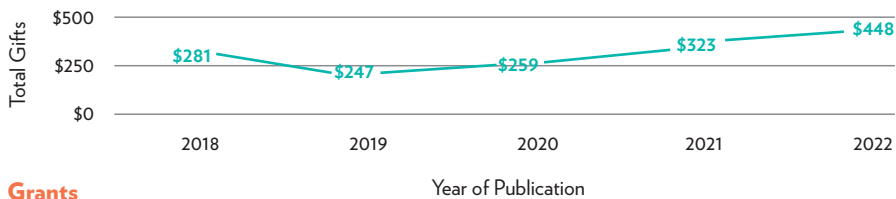
Assets

Values shown in billions



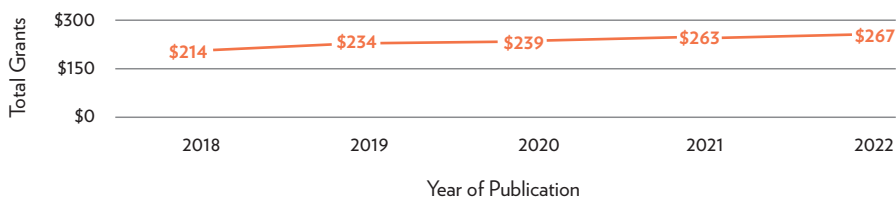
Gifts

Values shown in millions



Grants

Values shown in millions



SECTION I: ASSETS, GIFTS & GRANTS

FIVE-YEAR ANALYSIS

The number of Community Foundation Databook Survey respondents varies year to year, and the specific community foundations that respond varies as well, therefore the five-year analysis is not an exact comparison and should not be taken as such.

Grant Totals by Field of Interest

Over the Past Five Years (2018 - 2022). Year shown refers to year of publication.

| Field of Interest | 2018 | 2019 | 2020 | 2021 | 2022 | Change from 2021 |
|--|---------|--------|--------|--------|--------|------------------|
| Education - Instruction (non-scholarship) | \$38.5* | \$41.3 | \$33.5 | \$31.7 | \$38.4 | 21.14% |
| Arts, Culture & Humanities | \$23.1 | \$25.5 | \$25.2 | \$28.8 | \$25.1 | -12.85% |
| Human Services, Multipurpose, Other | \$19.5 | \$21.7 | \$22.3 | \$34.1 | \$24.7 | -27.57% |
| Public Affairs & Society Benefit | \$21.4 | \$22.3 | \$23.1 | \$18.6 | \$22.6 | 21.51% |
| Community Improvement & Capacity Building | \$16.9 | \$19.5 | \$15.2 | \$22.9 | \$21.7 | -5.24% |
| Religious Related & Spiritual Development | \$9.5 | \$8.4 | \$10.9 | \$14.0 | \$16.0 | 14.29% |
| Scholarships | \$19.2 | \$15.6 | \$15.2 | \$15.4 | \$15.8 | 2.60% |
| Philanthropy, Volunteerism & Grantmaking | \$7.2 | \$16.9 | \$12.3 | \$11.9 | \$13.7 | 15.13% |
| Health - General & Rehabilitative | \$11.4 | \$12.7 | \$11.4 | \$12.8 | \$9.7 | -24.22% |
| Youth Development | \$8.9 | \$9.8 | \$9.5 | \$11.1 | \$9.5 | -14.41% |
| Environmental Quality, Protection & Beautification | \$6.3 | \$5.8 | \$7.0 | \$4.4 | \$7.6 | 72.73% |
| Recreation, Leisure & Sports | \$7.2 | \$9.1 | \$9.2 | \$6.9 | \$7.2 | 4.35% |
| Housing & Shelter | \$4.2 | \$6.2 | \$5.6 | \$5.5 | \$5.0 | -9.09% |
| Food, Nutrition & Agriculture | \$3.3 | \$2.8 | \$3.6 | \$4.9 | \$3.9 | -20.41% |
| Animal-related Activities | \$2.3 | \$1.8 | \$2.0 | \$2.7 | \$3.8 | 40.74% |
| Employment & Jobs | \$1.8 | \$2.5 | \$4.0 | \$4.1 | \$2.8 | -31.71% |
| Mental Health & Crisis Intervention | \$2.3 | \$2.3 | \$4.6 | \$4.9 | \$2.7 | -44.90% |
| Civil Rights, Social Action & Advocacy | \$0.9 | \$1.5 | \$1.6 | \$3.5 | \$2.6 | -25.71% |
| Disease, Disorder & Medical Disciplines | \$1.9 | \$1.7 | \$2.6 | \$1.7 | \$1.9 | 11.76% |
| Public Safety, Disaster Preparedness & Relief | \$1.7 | \$1.2 | \$1.0 | \$2.9 | \$1.6 | -44.83% |
| Public Protection, Crime, Justice & Legal Services | \$0.8 | \$0.6 | \$1.5 | \$1.8 | \$1.6 | -11.11% |
| International, Foreign Affairs & National Security | \$0.4 | \$3.3 | \$2.0 | \$1.3 | \$1.2 | -7.69% |
| Medical Research | \$1.0 | \$0.6 | \$0.6 | \$0.5 | \$0.8 | 60.00% |
| Social Sciences | \$0.1 | \$0.6 | \$0.01 | \$0.07 | \$0.5 | 614.29% |
| Science & Technology | \$0.1 | \$0.1 | \$0.3 | \$0.08 | \$0.1 | 25.00% |

SECTION II

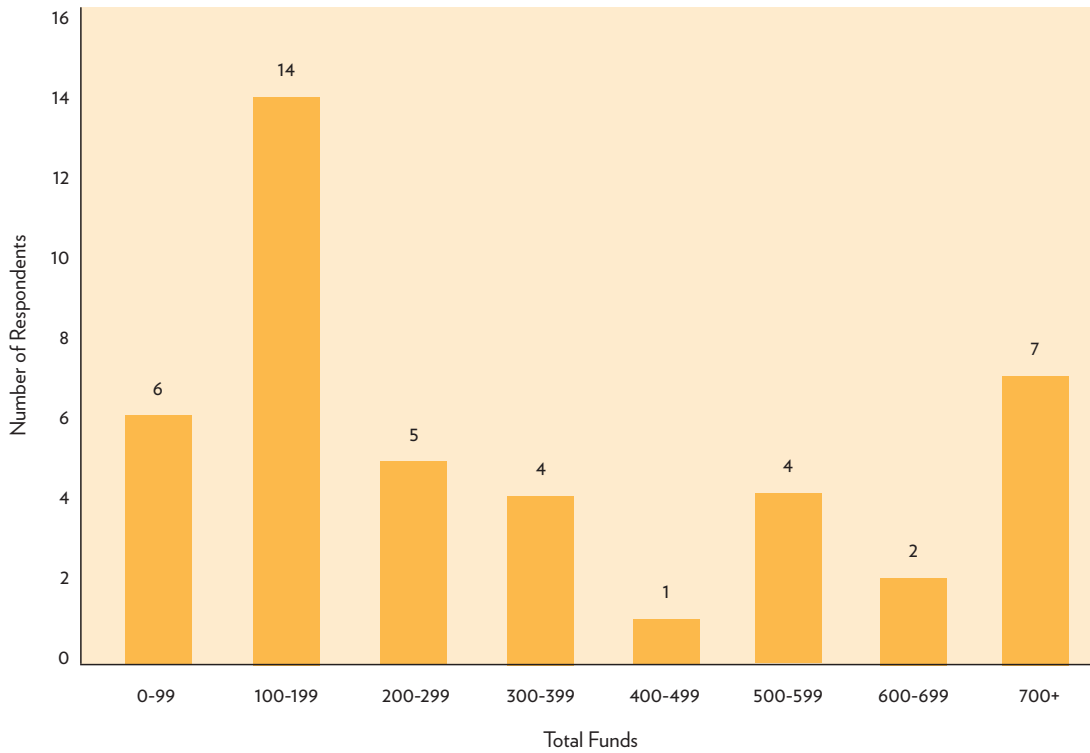
FINANCE AND OPERATIONS



SECTION II: FINANCE & OPERATIONS

Number of Community Foundations by Total Funds

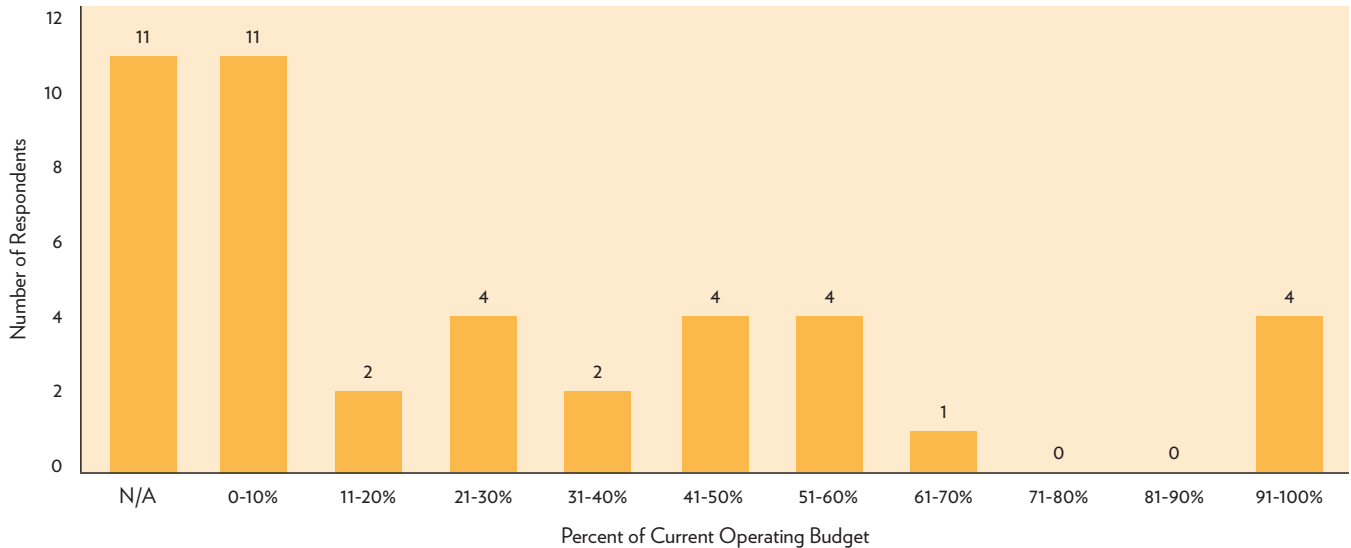
Responses: 43



The following five fund types have the highest total number of funds across all CFs: Scholarship (3,457), DAFs (2,806), Agency (2,514), Designated (2,299), Field of Interest (1,649).

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

Responses: 43



SECTION II: FINANCE & OPERATIONS

Average Percent of Operations Budget by Funding Area

Within this data set from respondents, there was considerable variance in the funding areas that serve as a source for foundations' operations budgets. For example, while 43 respondents have some portion coming out of "Fees on Funds" and 31 have some portion coming from an "Administrative Endowment Fund," only 7 reported that "In-Kind Support" dollars contribute to their operations budget, and 9 from "Annual Fundraising" events.

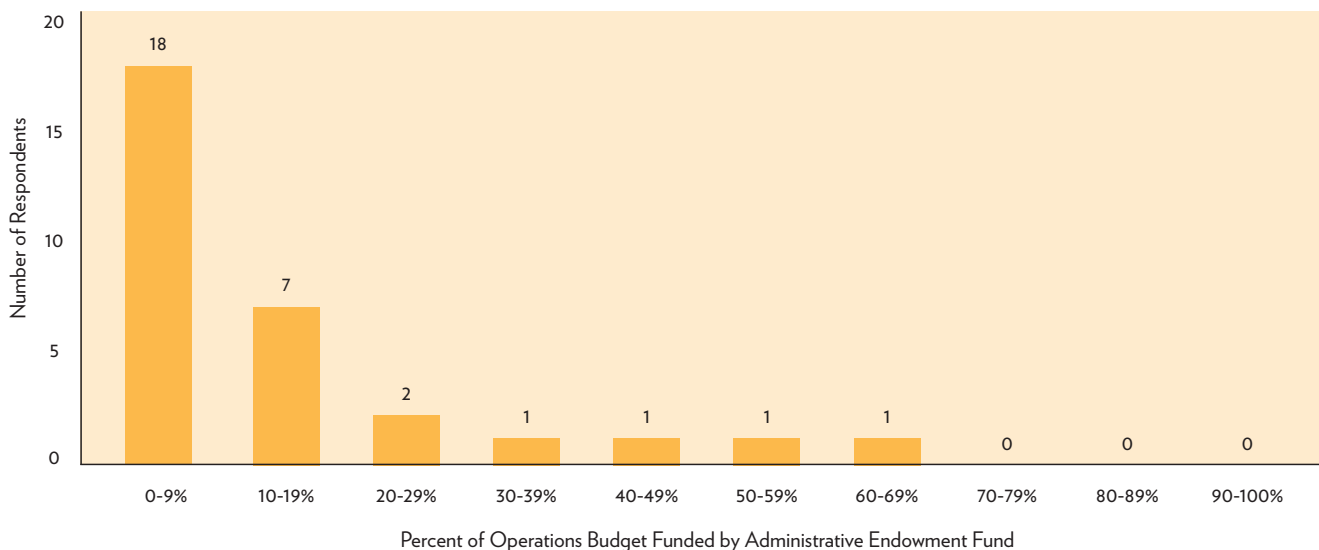
Further, with each funding area, there was considerable variance in the percentage that fund area contributes to foundations' operations budgets. For example, private donations made up more than 22% of one foundation's operations budget but 1% or less for three foundations. Third-party grants account for 16% of one foundation's operating budget, but only 1% or less for four foundations.

It is with this context in mind that this data should be considered thoughtfully in your benchmarking efforts. If you would value a more detailed overview of these data insights, the CMF team invites members to reach out and we will provide a comprehensive walk-through of the findings.

Given the above information, two key data sets have been highlighted below - Administrative Endowment Fund and Fees on Funds - as these categories had the strongest response rates across all funding areas.

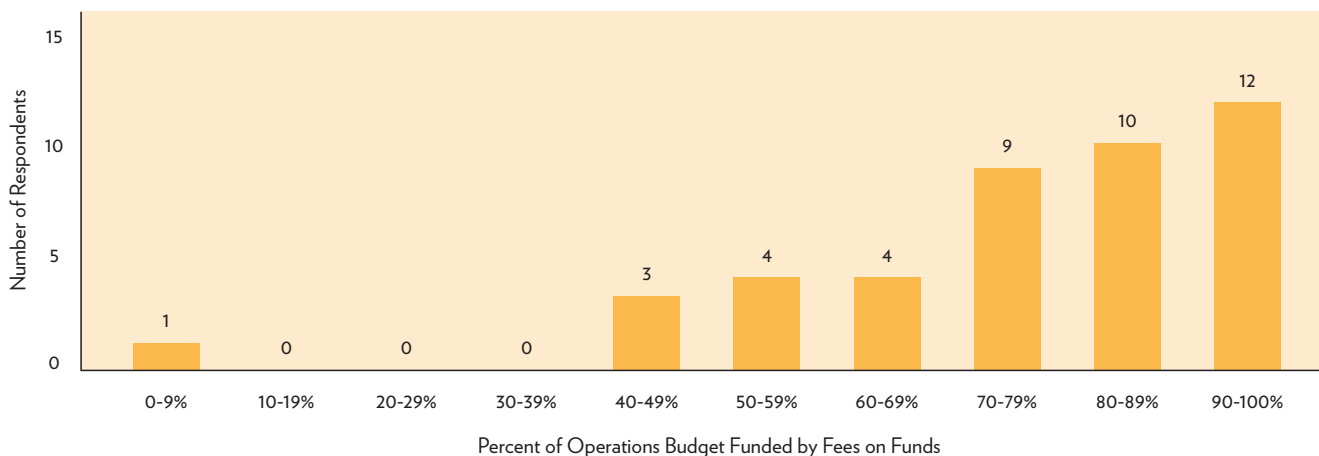
Key Data Set: Administrative Endowment Fund

Responses: 31. Average Percent 12.2%



Key Data Set: Fees on Funds

Responses: 43. Average Percent 77.2%



SECTION II: FINANCE & OPERATIONS

Average Assets Per Fund Type by Asset Band

Within this data set, there was considerable variance in the number of asset percentages across each fund type, even when looking at the data by asset category. For example, for respondents in the \$200M+ group, in the “Designated” fund type, for one foundation those dollars account for 41.5% of their total assets, but for another, “Designated” funds account for only 4.9%. As another example, in the \$1M-\$10M group, “Agency” funding accounts for less than 1% of the total assets of one foundation but more than 18% for another.

It is with this context in mind that this data should be considered thoughtfully in your benchmarking efforts. If you would value a more detailed overview of these data insights, the CMF team invites members to reach out and we will provide a comprehensive walk-through of the findings.

Values shown in millions.

Responses: 47

| Asset Band | \$200M Plus (6 responses) | \$100 - \$200M (7 responses) | \$50 - \$100M (7 responses) | \$20 - \$50M (10 responses) | \$10 - \$20M (11 responses) | \$5 - \$10M (6 responses) |
|---------------------------|------------------------------|---------------------------------|--------------------------------|--------------------------------|--------------------------------|------------------------------|
| Admin | 1.8% (0.2–2.9%) | 3.0% (1.2–5.9%) | 3.7% (0–14.3%) | 1.9% (0–5.2%) | 1.6% (0–5.6%) | 1.9% (0–7.7%) |
| Affiliate | 4.5% (0–9.4%) | 3.1% (0–13.7%) | 0.3% (0–2.2%) | 0.4% (0–3.9%) | 4.2% (0–43.2%) | 3.9% (0–23.3%) |
| Agency | 7.9% (0.2–18.6%) | 14.4% (0–47.7%) | 14.4% (0–23.2%) | 5.1% (0–18.2%) | 8.6% (3–15.5%) | 8.9% (0.4–18.3%) |
| Capital Campaign Funds | 0.4% (0–2.5%) | 0% (N/A) | 0.1% (0–0.7%) | 0% (0–0.1%) | 0.4% (0–4.1%) | 1.1% (0–5.3%) |
| Charitable Gift Annuities | 0.7% (0.1–2.3%) | 0.1% (0–0.4%) | 0.1% (0–0.5%) | 0.2% (0–2.2%) | 0% (N/A) | 2.2% (0–13%) |
| Designated | 15.7% (4.9–41.5%) | 13.7% (7.2–23.6%) | 15.8% (0–31.5%) | 14.5% (0–23.3%) | 15.3% (0–36.6%) | 12.6% (2.5–22.1%) |
| Donor Advised | 17.7% (2.7–27.4%) | 18.4% (6.1–40.5%) | 17.8% (0–32.5%) | 13.2% (0–48.2%) | 13.8% (0.3–38.7%) | 15.3% (0–37.9%) |
| Field of Interest | 14.8% (7.9–24.7%) | 17.7% (5–32.7%) | 10.7% (0–18.8%) | 20.5% (0–60%) | 17.2% (3.6–38.6%) | 10.8% (2.5–17.5%) |
| Scholarship | 6.5% (0.7–10.9%) | 13% (7–18.7%) | 13.1% (0–24.2%) | 16.9% (0–32.7%) | 26.2% (7–59.9%) | 25.2% (5.6–51.6%) |
| Special Project | 0.9% (0–4%) | 1.7% (0–5.1%) | 0.5% (0–1.1%) | 0.6% (0–3.8%) | 0.2% (0–1.9%) | 1.1% (0–5%) |
| Unrestricted | 21% (6.6–53.4%) | 12.4% (2.3–22.7%) | 8% (0–19.1%) | 15.8% (0–33.5%) | 11.1% (0–33.4%) | 16.4% (0–68.2%) |
| Other | 0.3% (0–1.7%) | 0.9% (0–10.6%) | 0.6% (0–2.9%) | 0.6% (0–8.1%) | 0.7% (0–6%) | 0% (N/A) |

*There were 23 “Other” Funds noted across all respondents, with assets ranging from approximately \$1,700 to nearly \$4 million.

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

*There were too few data points on Insurance Endowed Funds and Supporting Organization Funds to identify an average for those areas.

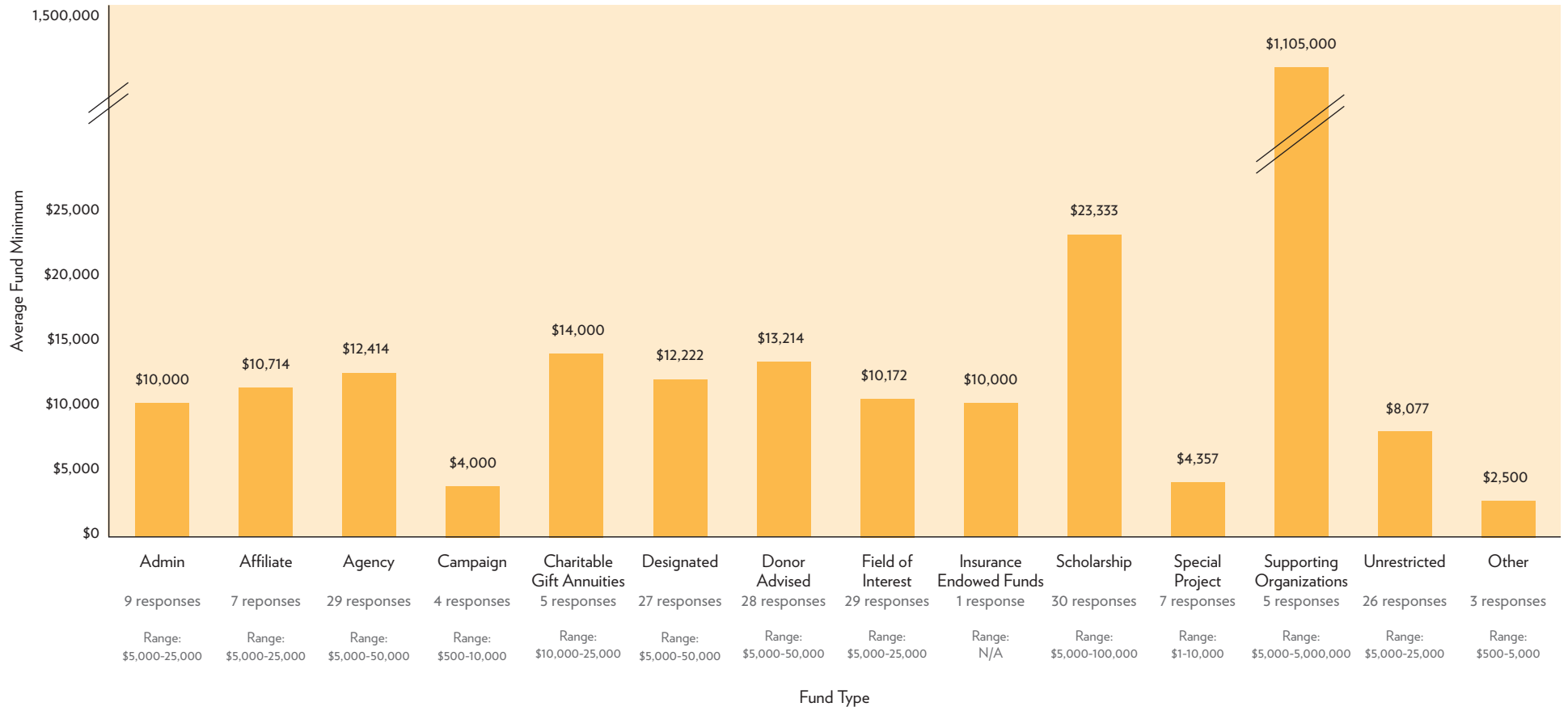
SECTION II: FINANCE & OPERATIONS

Average Fund Minimum Per Fund Type

Within this data set from respondents, there was considerable variance in the number of community foundations reporting fund minimums. For example, while 30 foundations have a “Scholarship” fund minimum, only four reported having a “Capital Campaign” fund minimum and five reported having a “Charitable Gift Annuities” fund minimum. Further, there was considerable variance within fund type. For example, the fund minimum for “Scholarship” funds varies between \$5,000 and \$100,000 between foundations, and the fund minimum for “Designated” funds varies between \$5,000 and \$50,000.

It is with this context in mind that this data should be considered thoughtfully in your benchmarking efforts. If you would value a more detailed overview of these data insights, the CMF team invites members to reach out and we will provide a comprehensive walk-through of the findings.

Responses: 47



One respondent indicated a fund minimum for Supporting Organizations of \$5 Million.
 One respondent indicated a fund minimum for “Insurance Endowed” (\$10,000).

SECTION II: FINANCE & OPERATIONS

Average Number of Transactions Per Year

By Asset Category

Asset categories shown in millions

Responses: 47

| Asset Category | Grant Requests Received | Grants Approved | Gifts Received | Funds |
|-----------------|-------------------------|-----------------|----------------|-------|
| \$200+ | 2817 | 1845 | 2251 | 934 |
| \$100+ to \$200 | 1468 | 1170 | 3022 | 648 |
| \$50+ to \$100 | 644 | 710 | 1954 | 425 |
| \$20+ to \$50 | 398 | 224 | 1089 | 211 |
| \$10+ to \$20 | 64 | 114 | 659 | 115 |
| \$5+ to \$10 | 77 | 63 | 716 | 93 |

Number of Community Foundations by Fees on Funds

Community foundations were asked to estimate their average fee, taking into account the fees across all funds. Responses ranged from 0.78 to 2.25, with an average across all respondents of 1.42.

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 | 4 | 7 | 3 | 0 | 0 | 3 | 21 |
| Agency | 0 | 3 | 21 | 11 | 4 | 0 | 0 | 8 | 0 |
| Capital Campaign | 1 | 0 | 2 | 1 | 3 | 1 | 0 | 3 | 24 |
| Charitable Gift Annuities | 3 | 0 | 6 | 1 | 2 | 0 | 0 | 1 | 20 |
| Designated Fund | 0 | 2 | 20 | 12 | 3 | 0 | 0 | 9 | 0 |
| Donor Advised | 0 | 1 | 12 | 16 | 7 | 0 | 0 | 9 | 0 |
| Field of Interest | 0 | 0 | 13 | 20 | 9 | 0 | 0 | 4 | 0 |
| Insurance Endowment Funds | 1 | 0 | 0 | 1 | 0 | 0 | 0 | 1 | 31 |
| Pass-Through | 3 | 1 | 5 | 5 | 6 | 0 | 6 | 7 | 9 |
| Scholarship | 0 | 0 | 3 | 9 | 24 | 1 | 1 | 8 | 0 |
| Special Project | 1 | 0 | 5 | 2 | 7 | 1 | 7 | 9 | 8 |
| Supporting Org | 1 | 0 | 5 | 2 | 1 | 0 | 0 | 4 | 22 |
| Unrestricted | 1 | 0 | 13 | 18 | 9 | 0 | 0 | 3 | 1 |
| Other | 0 | 0 | 1 | 1 | 1 | 0 | 0 | 1 | 21 |

SECTION II: FINANCE & OPERATIONS

Annualized Investment Rate of Return

as of 12/31/2021

Asset categories shown in millions

Responses: 42

| Community Foundation | Asset Band | 1 Year | 3 Years | 5 Years | 10 Years |
|----------------------|----------------|--------|---------|---------|----------|
| Foundation 1 | \$200+ | 11.90% | 14.40% | 10.40% | 8% |
| Foundation 2 | \$200+ | 15.70% | 13.10% | 9.00% | 8.30% |
| Foundation 3 | \$200+ | 16.30% | 15.80% | 10.80% | 9.40% |
| Foundation 4 | \$200+ | 10.90% | 14.10% | 10.70% | 8.50% |
| Foundation 5 | \$200+ | 14.45% | 16.66% | 11.53% | 12.00% |
| Foundation 6 | \$200+ | 20.60% | 17.40% | 12.40% | 9.90% |
| Foundation 7 | \$100 to \$200 | 16.90% | 18.90% | 13.50% | 11.90% |
| Foundation 8 | \$100 to \$200 | 15.36% | 15.85% | 11.11% | 8.13% |
| Foundation 9 | \$100 to \$200 | 8.21% | 5.01% | 2.37% | 6.46% |
| Foundation 10 | \$100 to \$200 | 14.40% | 14.40% | 10.00% | 9.00% |
| Foundation 11 | \$100 to \$200 | 17.09% | 16.05% | 11.24% | 8.57% |
| Foundation 12 | \$100 to \$200 | 16.03% | 15.39% | 10.80% | 10.40% |
| Foundation 13 | \$100 to \$200 | 15% | 16.90% | 11.30% | 9.20% |
| Foundation 14 | \$50 to \$100 | 13.20% | 16.10% | 10.70% | 9.30% |
| Foundation 15 | \$50 to \$100 | 10.53% | 18.19% | 8.23% | 7.67% |
| Foundation 16 | \$50 to \$100 | 14.19% | 17.56% | 14.01% | 16.82% |
| Foundation 17 | \$50 to \$100 | 17.10% | 19.70% | 13.50% | 10.60% |
| Foundation 18 | \$50 to \$100 | 15.20% | 18.10% | 12.00% | 10.40% |
| Foundation 19 | \$50 to \$100 | 13.40% | 17.50% | 12.50% | 11.00% |
| Foundation 20 | \$20 to \$50 | 15.61% | 15.85% | 11.13% | 8.97% |
| Foundation 21 | \$20 to \$50 | 14.72% | 18.05% | 13.30% | 11.00% |
| Foundation 22 | \$20 to \$50 | 14.58% | 17.18% | 11.98% | - |
| Foundation 23 | \$20 to \$50 | 11.68% | 15.64% | 11.08% | 7.55% |
| Foundation 24 | \$20 to \$50 | 15.90% | 16.65% | 10.62% | 8.56% |
| Foundation 25 | \$20 to \$50 | 11.45% | 14.02% | 9.60% | - |

Continued on Next Page

Annualized Rate of Return (continued)

as of 12/31/2021

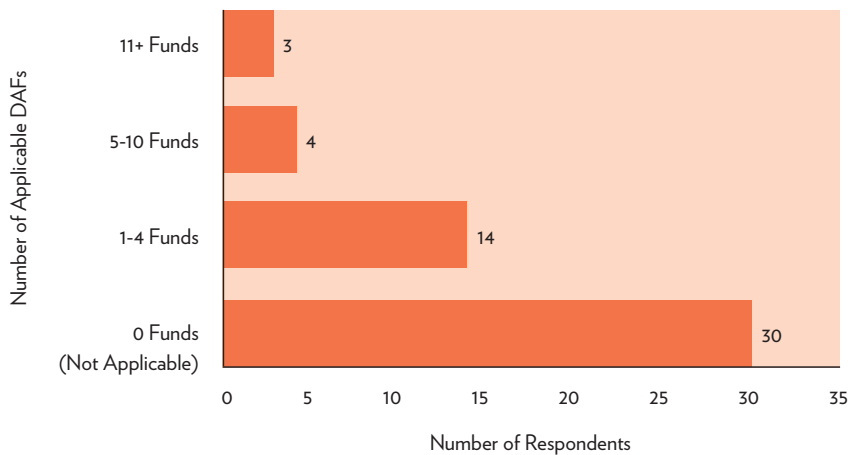
| Community Foundation | Asset Band | 1 Year | 3 Years | 5 Years | 10 Years |
|----------------------|--------------|--------|---------|---------|----------|
| Foundation 26 | \$20 to \$50 | 14.20% | 16.41% | 11.45% | - |
| Foundation 27 | \$20 to \$50 | 15.63% | 16.48% | 11.30% | 9.81% |
| Foundation 28 | \$10 to \$20 | 17.30% | 20.80% | 16.60% | 13.00% |
| Foundation 29 | \$10 to \$20 | 13.81% | 0% | 0% | 0% |
| Foundation 30 | \$10 to \$20 | 14.33% | 15.24% | 10.21% | 8.98% |
| Foundation 31 | \$10 to \$20 | 2.70% | 8.80% | 7.70% | 7.80% |
| Foundation 32 | \$10 to \$20 | 17.78% | 15% | 15.90% | - |
| Foundation 33 | \$10 to \$20 | 12.30% | 14.20% | 9.90% | 8.27% |
| Foundation 34 | \$10 to \$20 | 14.76% | 14.51% | 9.67% | 8.54% |
| Foundation 35 | \$10 to \$20 | 11.92% | 13.44% | 9.50% | 8.23% |
| Foundation 36 | \$10 to \$20 | 14.46% | 11.89% | - | - |
| Foundation 37 | \$10 to \$20 | 16.26% | 16.80% | 11.56% | - |
| Foundation 38 | \$5 to \$10 | 16.40% | 18% | 10.90% | 8.60% |
| Foundation 39 | \$5 to \$10 | 15.57% | 16.48% | 11.36% | - |
| Foundation 40 | \$5 to \$10 | 16.41% | 15.41% | 10.55% | 9.64% |
| Foundation 41 | \$5 to \$10 | 14.70% | 16.06% | 11.45% | 8.23% |
| Foundation 42 | \$5 to \$10 | 10.42% | 16.33% | 13.21% | 10.97% |

SECTION II: FINANCE & OPERATIONS

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

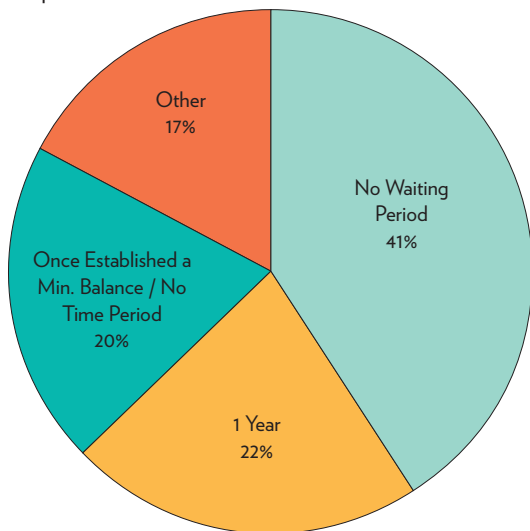
by Number of Applicable DAFs

Responses: 51



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

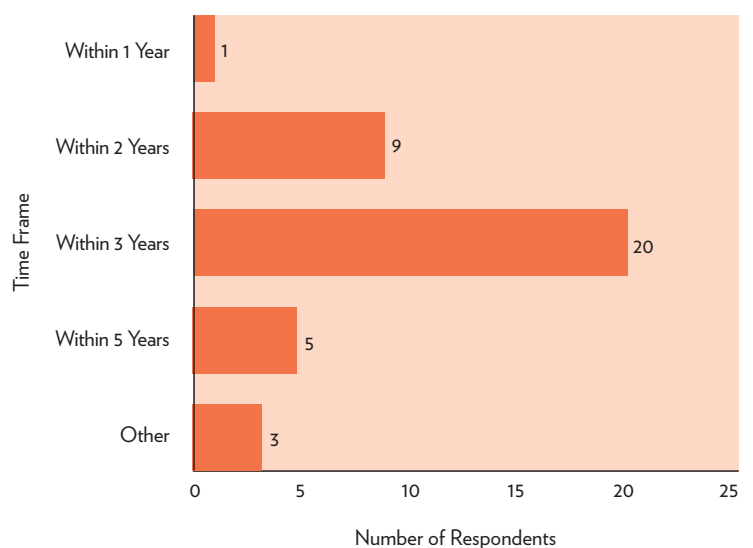
Responses: 46



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.

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

Responses: 38

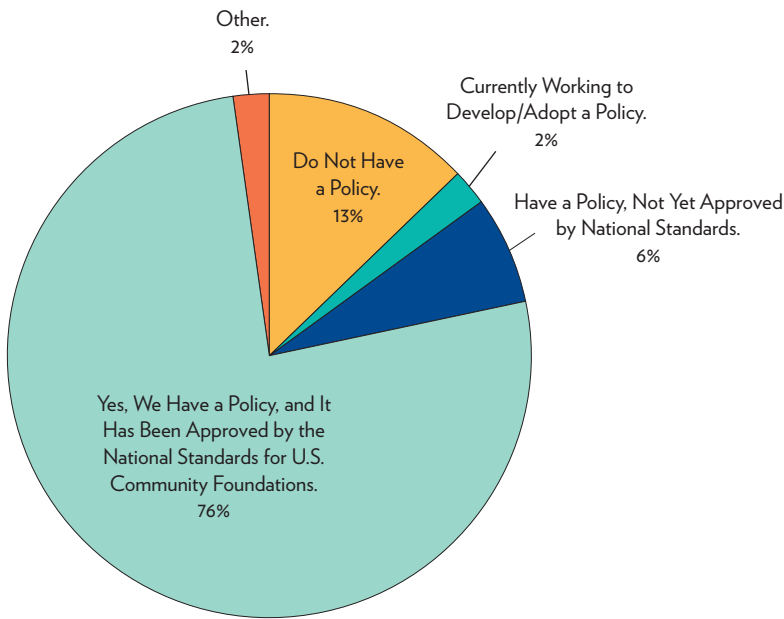


"Other" responses included 18 months, within 4 years, flexibility based on donor contact.

SECTION II: FINANCE & OPERATIONS

Percent of Community Foundations that have a Policy on Inactive DAFs

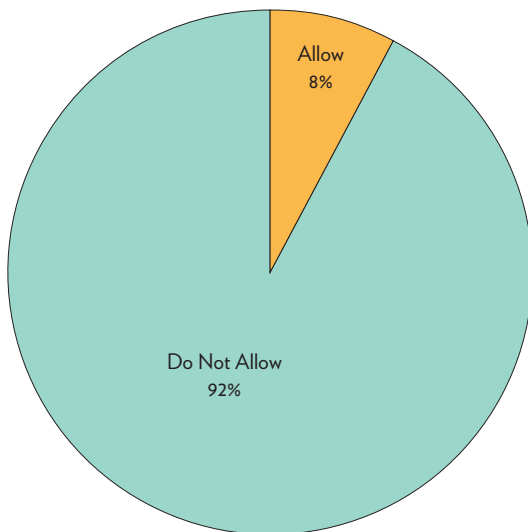
Responses: 46



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). Of those six respondents, three indicated they do not take measures around inactive DAFs at this time, and three indicated they work directly with the donor and so inactive DAFs are not an issue.

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

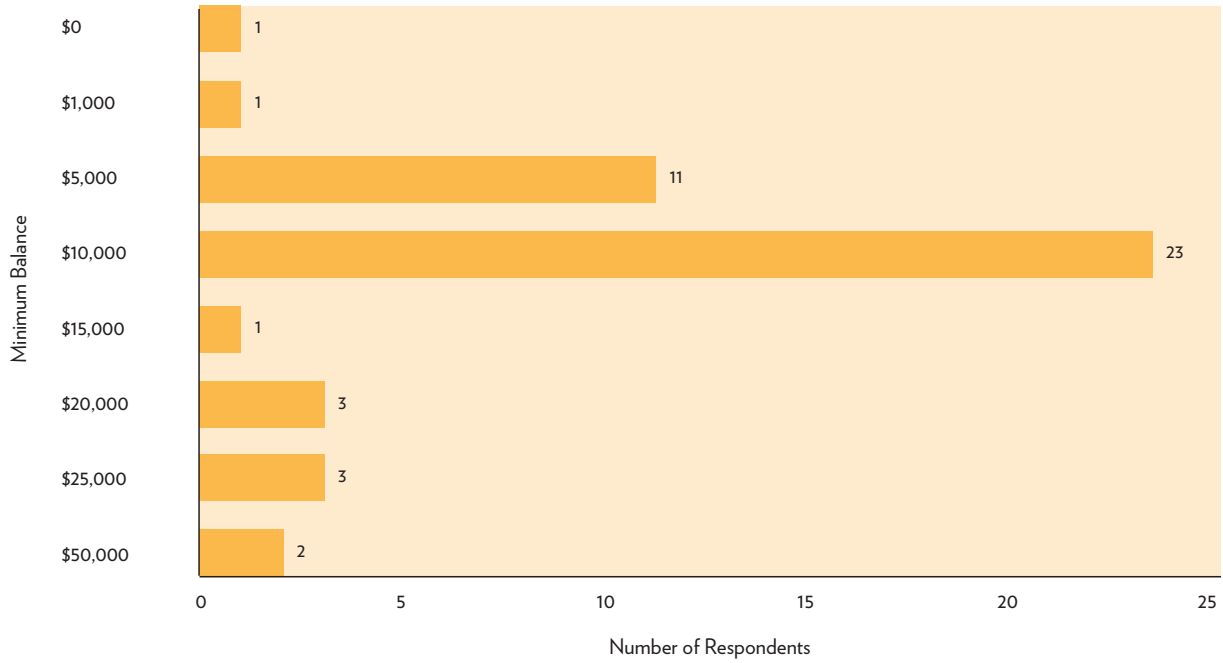
Responses: 46



SECTION II: FINANCE & OPERATIONS

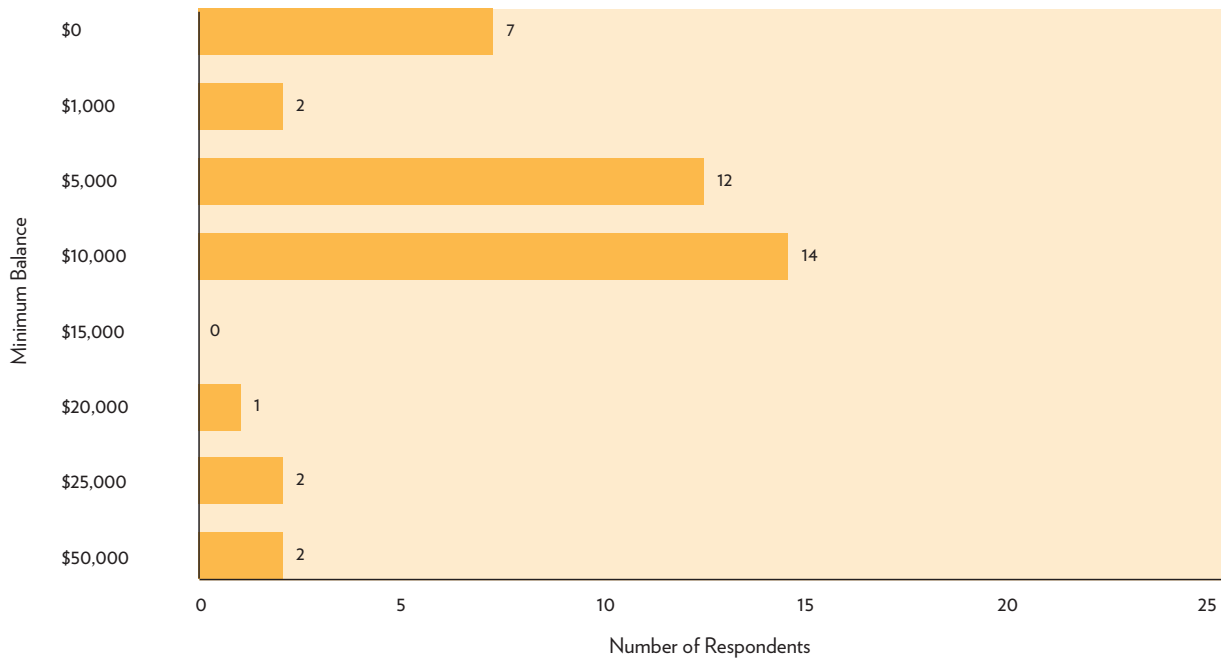
Minimum Balance Required for Donor to Establish an Endowed DAF

Responses: 45



Minimum Balanced Required for Donor to Establish a Non-Endowed DAF

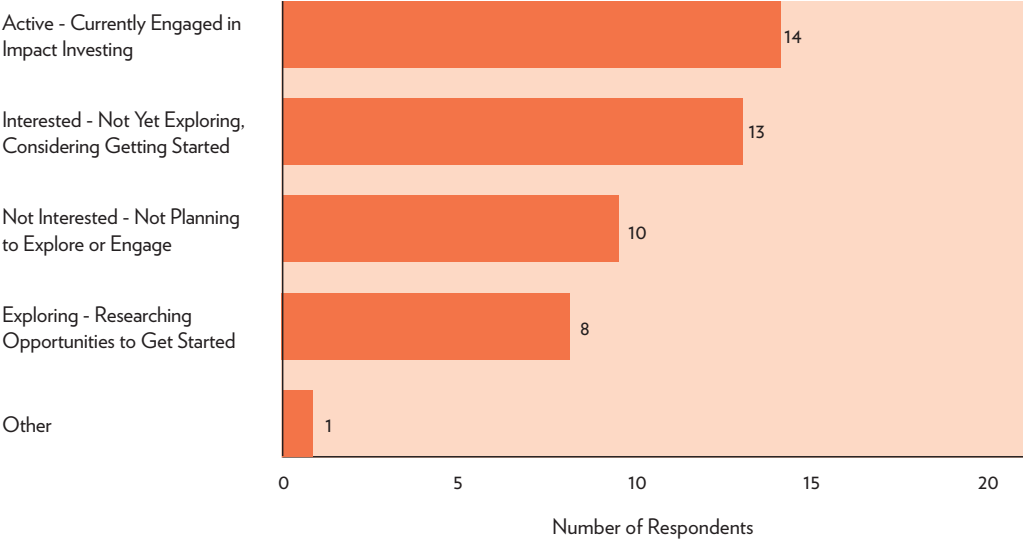
Responses: 40



SECTION II: FINANCE & OPERATIONS

Status of Foundation Engagement in Impact Investing

Responses: 46



SECTION II: FINANCE & OPERATIONS

Average Number of Full-Time Employees By Department

By Asset Category

Asset categories shown in millions

Responses: 47

| Asset Category | CEO/ Exec. Director | COO or Equivalent | Finance & Admin | Program | Dev. | Comms. | Tech. | General Support | Affiliate or Supporting Org. Staff | Other |
|-----------------|---------------------|-------------------|-----------------|---------|------|--------|-------|-----------------|------------------------------------|-------|
| \$200+ | 1 | 0 | 6.1 | 8.5 | 4.8 | 2 | 1.3 | 0.9 | 0.8 | 2.1 |
| \$100+ to \$200 | 1 | 1 | 2.8 | 3.2 | 2.2 | 1 | 0 | 1.2 | 3.7 | 8.9 |
| \$50+ to \$100 | 1 | 1 | 1.4 | 2.3 | 0.9 | 0.9 | 0 | 0.7 | 0 | 0 |
| \$20+ to \$50 | 1 | N/A | 0.9 | 1.2 | 0.8 | 0.5 | 0.5 | 0.9 | N/A | 0.3 |
| \$10+ to \$20 | 0.9 | N/A | 0.8 | 1 | 1 | 0.3 | N/A | 0.6 | N/A | 0.8 |
| \$5+ to \$10 | 0.8 | N/A | 0.5 | 0.7 | 0.7 | 0.1 | N/A | 0.4 | N/A | 0.5 |

Wage Increase Considerations

for Next Fiscal Year

Responses: 44 (Respondents were invited to select all options that applied.)

Base Wage Increase on:

32 Based on Cost of Living
 29 Based on Merit
 3 Based on Endowment Perform.
 8 Based on Other



Percent of Community Foundations that have

Staff Positions with Dual or Split Responsibilities

Responses: 42

67% of CFs referenced having staff with dual responsibilities

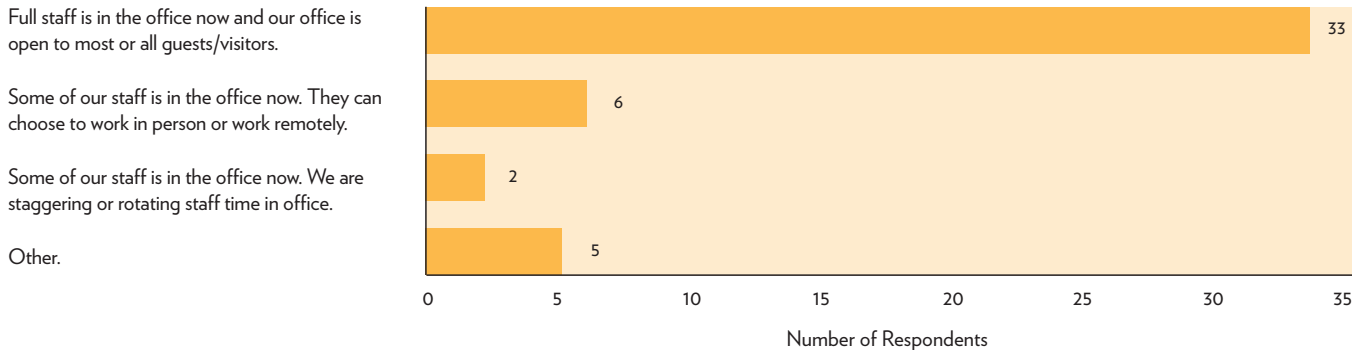
Many examples of dual/split roles were identified, such as Development and Communications, Marketing and Administrative Assistant, Finance and Program Director, YAC Advisor and Office Manager, and Scholarship Coordinator and Impact Assistant.

SECTION II: FINANCE & OPERATIONS

Status of Staff Members

Working in the Physical Office Space

Responses: 46

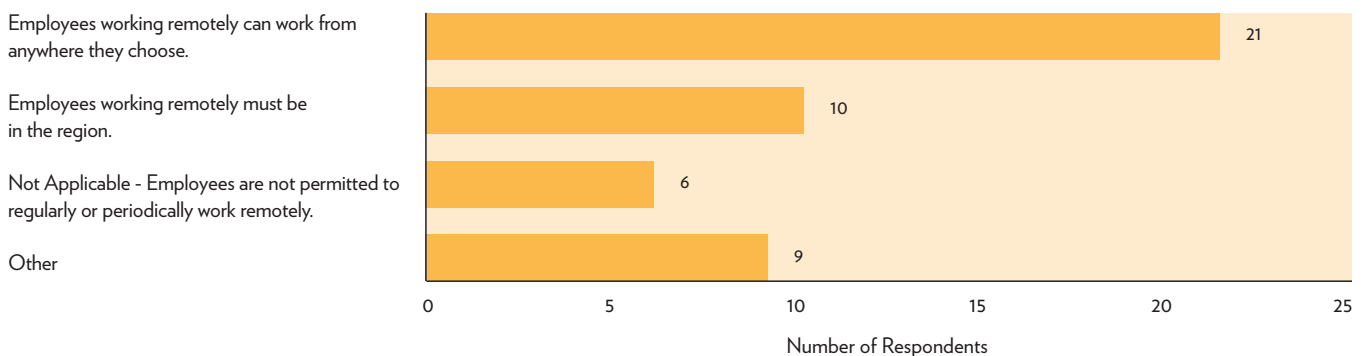


“Other” responses and “Comments” included one note that a foundation has no operating office and many shared hybrid approaches. For example, one foundation is open Tuesday – Thursday, and then staff work virtually Mondays and Fridays. In other cases, staff are offered flexibility (i.e., as long as they are in office three days per week, or once per week). For some foundations, the hybrid offering varies by staff position and responsibilities. At least one foundation closes the office on Fridays except by appointment. One respondent noted that while their office is open to visitors, conference rooms are not yet open to nonprofit organizations, a pre-pandemic offering.

Location of Staff Members

Working Remotely

Responses: 46



“Other” responses and “Comments” included clarification by some respondents that when employees are working remotely, they are primarily doing so from the region, and if they need to work remotely from another location, it is discussed (or approved) in advance by their supervisor or the CEO. At least one foundation noted that while working remotely out of the region is permissible on occasion (i.e., while traveling), a staff member would not be allowed to permanently relocate outside the general service area. One respondent shared that their policy allows employees to work from anywhere they choose when remote, however they may only have one remote day per week and one consecutive remote work week.

SECTION III

ADDITIONAL INSIGHTS

SECTION III: OTHER

SCHOLARSHIP DISPLACEMENT

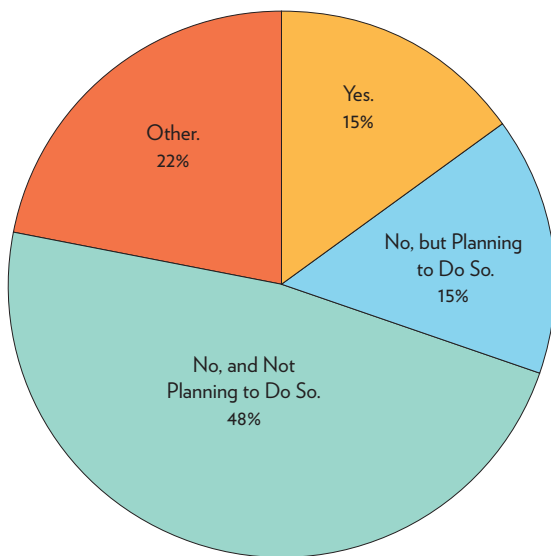
Scholarship displacement is the college or university practice of reducing or eliminating a student’s financial assistance when their financial aid exceeds the total cost of attendance for the academic year. The practice goes against donor intent and hinders access to higher education, educational attainment 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.

In your last scholarship cycle, how many students reported being affected?

Eight foundations tracking this issue reported a total of 39 students affected by scholarship displacement.

Community Foundations that are **Actively Tracking Scholarship Displacement**

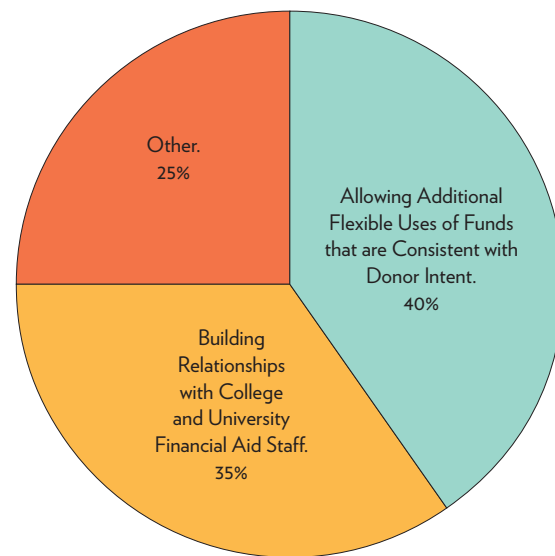
Responses: 46



“Other” responses included clarification that the foundation is informally tracking displacement among core scholarship recipients but not those outside of the core program; actively communicating with recipients; or not tracking formally but monitoring/recording student feedback. Several respondents indicated interest in learning practices for tracking. At least one respondent highlighted that the issue is rare among its recipients. One respondent highlighted that based on their prior work experience, they believe the issue does not happen purposefully, as financial aid officers follow Dept. of Education regulations.

Practices Used to **Prevent Scholarship Displacement**

Responses: 52



“Other” responses included several comments on methods for deferring receipt of the scholarship. Several foundations highlighted that they provide educational resources to students and families in award letters explaining displacement, how it affects them and steps to take if they see evidence of the issue, including an offer of support from the foundation. One respondent highlighted that grant distribution to institutions discourages displacement. One respondent highlighted that they trust their higher education colleagues to fairly apply financial aid resources for all students.

SECTION III: OTHER

Scholarship Type Breakdown

Community foundations were asked to provide a breakdown (by percentage) of the scholarship types they have available between need-based only, merit-based only and a combination of the two (scholarships that are both need- and merit-based). Data shows that while most community foundations have a mix of all three types, ten foundations have only one kind of scholarship available. Of those, two foundations have only merit-based scholarships, and eight foundations have only combination scholarships.

Responses: 40

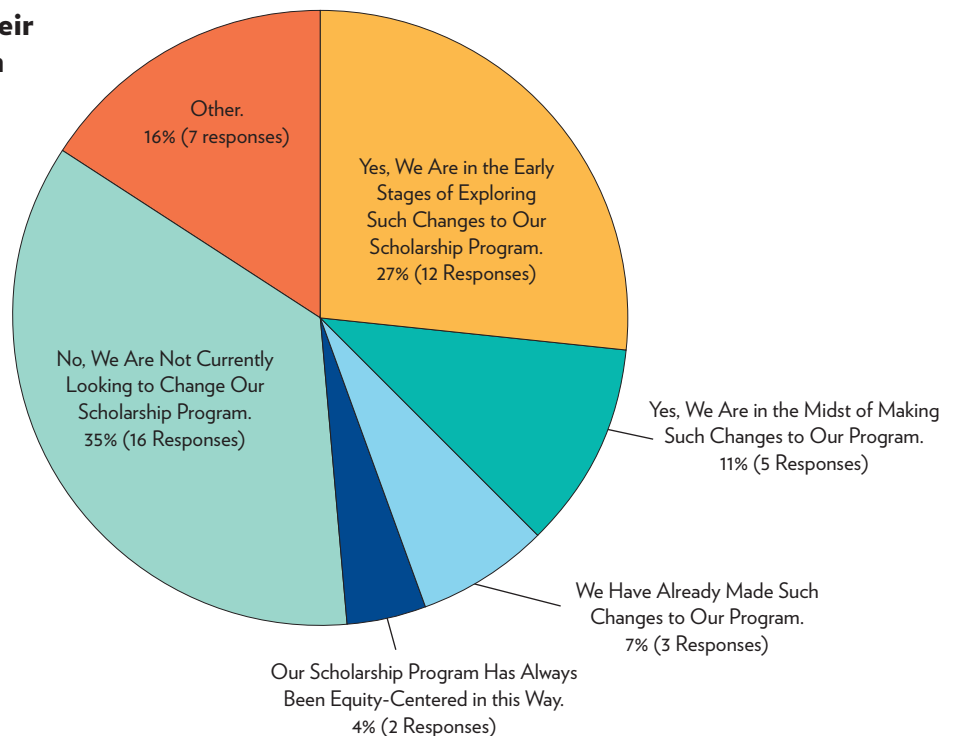
| Need-Based Only | Number of Respondents |
|-----------------|-----------------------|
| 1-10% | 7 |
| 11-20% | 9 |
| 21-30% | 6 |
| 31-40% | 2 |
| 41-50% | 1 |
| 51-60% | 0 |
| 61-70% | 1 |
| 71-80% | 1 |
| 81-90% | 1 |
| 91-100% | 0 |

| Merit-Based Only | Number of Respondents |
|------------------|-----------------------|
| 1-10% | 10 |
| 11-20% | 8 |
| 21-30% | 5 |
| 31-40% | 1 |
| 41-50% | 5 |
| 51-60% | 0 |
| 61-70% | 1 |
| 71-80% | 3 |
| 81-90% | 0 |
| 91-100% | 2 |

| Combination (Need- and Merit-Based) | Number of Respondents |
|-------------------------------------|-----------------------|
| 1-10% | 3 |
| 11-20% | 5 |
| 21-30% | 3 |
| 31-40% | 4 |
| 41-50% | 2 |
| 51-60% | 2 |
| 61-70% | 2 |
| 71-80% | 5 |
| 81-90% | 6 |
| 91-100% | 8 |

Community Foundations that are Actively Working to Shift Their Scholarship Program to Align with Equity-Centered Community Needs

Responses: 45



SECTION III: OTHER

COVID-19

Respondents were asked whether there were policies or practices shifted in their practices during the COVID-19 pandemic that they plan to continue.

The majority of respondents indicated that they explored new ways of working internally and with partners through the pandemic that they are eager to maintain. In some cases, the examples of reimagination highlighted below were started prior to March 2020, and the pandemic moved that work faster or deepened its value. For others, the impact of COVID-19 on their community required new conversations and changes the foundation hadn't yet considered.

- Maintaining Community Response Fund or COVID Relief Fund to meet ongoing and emergent needs caused by the pandemic.
- Continuing focus areas on food for seniors and children, and mental health programs.
- Making rapid response grants available to nonprofits.
- Establishing a rolling Urgent Needs cycle.
- Building an undesignated fund for future unforeseen needs.
- Allowing organizations to convert programming grants to be used for operations.
- Streamlining the grantmaking process (i.e., fewer, more targeted questions in the application; fewer pieces of financial information such as audits and audited financials).
- Assisting potential grantees with the application process and inviting them to tell their story.
- Moving the grant application process online.
- Reducing or eliminating grantee reporting requirements, having more listening-focused conversations.
- Reviewing applications more frequently (i.e., moving quarterly to monthly, some year-round grant cycles).
- Maintaining a grantmaking program providing relief to individuals (i.e., those most heavily impacted by lockdowns).
- Welcoming and seeking out applications from grant partners the foundation has never worked with before.
- Creating greater consistency in efforts to be increasingly accessible to more diverse parts of the region.

Across these responses, many shifts can be aligned with the tenets of trust-based philanthropy practices designed to address power dynamics between foundations, nonprofit partners and communities, to build stronger relationships and create deeper impact.

“Potential applicants were able to participate in an opportunity meeting via Zoom, which was recorded and available at their convenience. We prefer the in-person meeting, but believe the recording is a great thing to continue.”

“We are in the process of formalizing our overall grantmaking strategy, particularly from undesignated endowments and lessons learned through the pandemic, and part of our conversations and planning are more proactively considering equity.”

“One change that we made during COVID is to no longer require official transcripts from scholarship applicants, but to allow unofficial transcripts. This removes several barriers, namely the cost to the student for obtaining the transcript and/or incidents where colleges won't allow them to obtain if they have any balance due. This change was made to reduce burdens on guidance counselors as well, who have been under great stress during COVID.”

COVID-19 (CONTINUED)

“Our role as a community foundation is to bring together the doers and donors from among our constituents, our residents, other nonprofits, business, government and other sectors – all the people who care about our community and know how to get things done. As with any major crisis/disaster impacting our region, at this COVID pandemic’s inception, we proactively assessed immediate community needs and identified ways in which we could best help address those needs and support those providing the much-needed services. While that temporarily involved adapting our grant-making processes to expeditiously deploy funding and resources amidst government-mandated shutdown, once community resources and government support systems were in place, our direct role ended. It was time to get back in the office and to the business of carrying out our foundation’s mission, tackling other big challenges facing our region and seizing new opportunities that transform our communities, improve the quality of life and increase regional vibrancy and prosperity.”

“During the COVID-19 pandemic, we added the opportunity for nonprofits to apply for operating funding, something we have not done in the past. We practiced for the last two years and have now approved operating funding as a regular opportunity in our grantmaking policies and procedures going forward.”

“We had several nonprofits request excess distributions from their agency endowments to bridge funding gaps. In response, we developed a policy allowing agencies to take one-time additional distributions of 5% from their fund as a grant and allowed access to an additional loan equivalent to four years of annual spending. The loan could be paid back via direct contributions or by future unspent spendable dollars. The practice has been a helpful tool to nonprofits experiencing temporary cash flow concerns or unplanned capital expenses, and we will keep the policy in place.”

No Changes or Reverting to Pre-Pandemic Practices

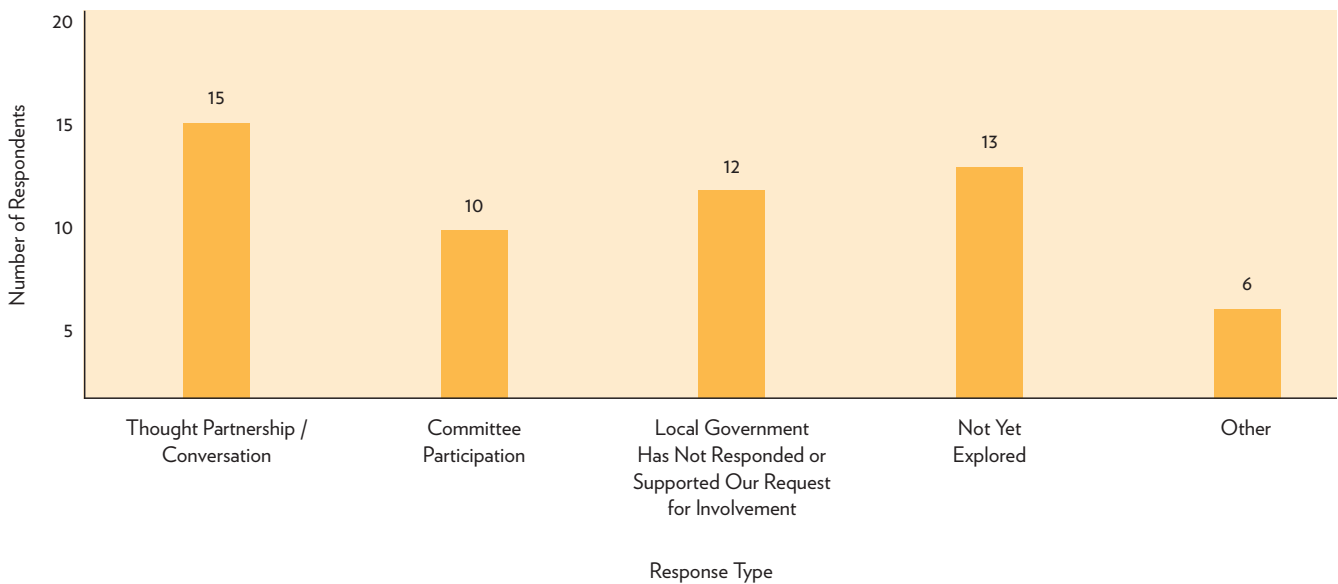
A number of foundations indicated they have not made shifts during the pandemic. One foundation commented that during the height of the pandemic (in 2020 and 2021) the foundation loosened restrictions on grant awards to allow funding to be used for more general operations. In 2022, the foundation has stepped that practice back and has an expectation grant awards are being used as requested in the application. One foundation commented that they explored a closer working relationship with their local United Way, but given challenges with timing, reporting differences, promotion and other factors, they do not anticipate continuing that collaboration.

SECTION III: OTHER

AMERICAN RESCUE PLAN ACT DOLLARS

Foundations Working with Local Government on Distribution of ARPA Dollars

Responses: 45 (Respondents were invited to select all options that applied.)



“Other” responses and “Comments” included two foundations noting they have been awarded funds to distribute (one is forming a committee to do so), and a foundation sharing they hosted a workshop for all government entities on ARPA funding. Some commented that they are being engaged in specific issue areas or line items particularly relevant to the foundation’s areas of work (i.e., small business support, emergency housing, basic needs). One respondent noted they are leading a county-wide housing study and strategic plan, and ARPA funds will be used for the project. One foundation reported that their local government rejected any equity lens or human service options, and put all funds toward capital improvement projects. One respondent noted they were unaware of the opportunity to engage in this process with their local government and were not invited to do so.

“We made sure that we had 100% acceptance of ARPA dollars across all of our municipalities - village/city, townships, etc. Some were planning to refuse it. I serve on the County ARPA committee to recommend up to \$1 Million (20% of funds) in competitive grant process to county departments, municipalities, nonprofits.”

“We convene a cross-sector Community Development Coalition, with 30+ contributors, working toward a set of shared goals/outcomes. As part of this work, we co-funded (with three other partners) having an organization come in to conduct an inventory of local projects and programs that may be eligible for ARPA dollars. As a follow-up we are convening further conversations about ARPA and how to actually access the funding.”

SECTION III: OTHER

Reported Geographic Affiliates

Responses: 18

| Community Foundation Name | Affiliate Name | Affiliate Asset Size |
|---|---|----------------------|
| Ann Arbor Area Community Foundation | Ypsilanti Area Community Foundation | \$6,126,980 |
| Barry Community Foundation | Delton Kellogg Education Foundation | \$4,470,716 |
| Barry Community Foundation | Thornapple Area Enrichment Foundation | \$2,466,897 |
| Battle Creek Community Foundation | Athens Area Community Foundation | \$1,644,110 |
| Battle Creek Community Foundation | Homer Area Community Foundation | \$3,852,521 |
| Bay Area Community Foundation | Arenac Community Fund | \$1,263,939 |
| Cadillac Area Community Foundation | Missaukee Area Community Foundation | \$466,799 |
| Canton Community Foundation | Community Foundation of Plymouth | \$1,300,000 |
| Community Foundation for Muskegon County | Community Foundation for Mason County | \$25,000,000 |
| Community Foundation for Northeast Michigan | Iosco County Community Foundation | \$7,026,863 |
| Community Foundation for Northeast Michigan | North Central Michigan Community Foundation | \$7,524,040 |
| Community Foundation for Northeast Michigan | Straits Area Community Foundation | \$3,767,462 |
| Community Foundation for Southeast Michigan | Chelsea Community Foundation | \$3,071,912 |
| Community Foundation for Southeast Michigan | Community Foundation for Livingston County | \$1,739,082 |
| Community Foundation of Marquette County | Greater Ishpeming Area Community Fund | \$1,895,909 |
| Community Foundation of Marquette County | Gwinn Area Community Fund | \$1,808,525 |
| Community Foundation of Marquette County | Negaunee Area Community Fund | \$1,638,628 |
| Community Foundation of Monroe County | Greater Milan Area Community Foundation | \$6,752,829 |
| Community Foundation of St. Clair County | Algonac/Clay Community Fund | \$365,864 |
| Community Foundation of St. Clair County | Citizens for St. Clair Fund | \$767,118 |
| Community Foundation of St. Clair County | Marysville Community Fund | \$69,427 |
| Fremont Area Community Foundation | Lake County Community Foundation | \$6,286,158 |
| Fremont Area Community Foundation | Mecosta County Community Foundation | \$7,431,433 |
| Fremont Area Community Foundation | Osceola County Community Foundation | \$12,505,327 |
| Grand Haven Area Community Foundation | Allendale Community Foundation | \$4,118,854 |
| Grand Haven Area Community Foundation | Coopersville Area Community Foundation | \$8,447,572 |

Reported Geographic Affiliates (continued)

| Community Foundation Name | Affiliate Name | Affiliate Asset Size |
|--------------------------------------|--|----------------------|
| Grand Rapids Community Foundation | Hudsonville/Jenison Community Foundation | \$424,025 |
| Grand Rapids Community Foundation | Ionia County Community Foundation | \$9,475,754 |
| Grand Rapids Community Foundation | Sparta Area Community Foundation | \$1,078,354 |
| Grand Rapids Community Foundation | The Lowell Area Community Fund | \$16,597,172 |
| Grand Rapids Community Foundation | Wyoming Community Fund | \$587,820 |
| Greenville Area Community Foundation | Lakeview Area Community Fund | \$2,080,965 |
| Greenville Area Community Foundation | Montcalm Panhandle Community Fund | \$425,524 |
| Midland Area Community Foundation | Clare County Community Foundation | \$4,621,509 |
| Midland Area Community Foundation | Gladwin County Community Foundation | \$5,326,599 |
| Sturgis Area Community Foundation | Constantine Area Community Foundation | \$623,987 |
| Sturgis Area Community Foundation | White Pigeon Area Community Foundation | \$518,762 |
| Total | | \$163,569,435 |

SECTION III: OTHER

TECHNOLOGY/SOFTWARE

Software by Area of Work

| Donor Database | |
|--|---|
| Blackbaud Raisers Edge | 8 |
| Bromelkamp akoyaGo for Community Foundations | 8 |
| Foundant for Community Foundations | 8 |
| Blackbaud FIMS | 6 |
| Stellar Technology Solutions (iPhiCore) | 6 |
| Bromelkamp Community Pearl | 4 |
| Microsoft Excel | 2 |
| Blackbaud eTapestry | 1 |
| Bromelkamp eGrant | 1 |
| Gift Works | 1 |
| HubSpot | 1 |
| Microsoft Word | 1 |

| Gifts | |
|--|---|
| Foundant for Community Foundations | 8 |
| Bromelkamp akoyaGo for Community Foundations | 6 |
| Stellar Technology Solutions (iPhiCore) | 6 |
| Blackbaud FIMS | 5 |
| Blackbaud Raisers Edge | 4 |
| Bromelkamp Community Pearl | 3 |
| Microsoft Excel | 3 |
| Microsoft Word | 3 |
| Blackbaud Financial Edge | 1 |
| Blackbaud Net Community | 1 |
| Bromelkamp eGrant | 1 |
| Gift Works | 1 |
| Jot Form | 1 |
| Microsoft Access | 1 |
| None - No Software Used | 1 |

| Grant Applications | |
|--|---|
| Foundant for Grantmakers | 9 |
| Stellar Technology Solutions (iPhiCore) | 6 |
| Jot Form | 5 |
| Microsoft Word | 4 |
| Bromelkamp akoyaGo for Community Foundations | 3 |
| Microsoft Excel | 3 |
| None - No Software Used | 3 |
| Blackbaud FIMS | 2 |
| Bromelkamp Community Pearl | 2 |
| Bromelkamp eGrant | 2 |
| AwardSpring | 1 |
| Blackbaud Raisers Edge | 1 |
| CommunityForce | 1 |
| Fluxx Grantmaker | 1 |
| Foundant for Community Foundations | 1 |
| Fusion Labs GrantedGE (Grant Edge) | 1 |
| Microsoft Access | 1 |
| Microsoft Forms | 1 |
| Smarter Select | 1 |
| SmartSimple Community Foundation Grants Management | 1 |
| Website Fillable PDF | 1 |

Software by Area of Work

| Grants Management | |
|--|---|
| Foundant for Grantmakers | 9 |
| Bromelkamp akoyaGo for Community Foundations | 6 |
| Stellar Technology Solutions (iPhiCore) | 6 |
| Blackbaud FIMS | 5 |
| Microsoft Excel | 5 |
| Bromelkamp Community Pearl | 3 |
| Microsoft Word | 3 |
| Bromelkamp eGrant | 2 |
| Blackbaud Financial Edge | 1 |
| Blackbaud Raisers Edge | 1 |
| Fluxx Grantmaker | 1 |
| Foundant for Community Foundations | 1 |
| Fusion Labs GrantedGE (Grant Edge) | 1 |
| Microsoft Access | 1 |

| Fund Accounting | |
|--|----|
| Foundant for Community Foundations | 10 |
| Blackbaud Financial Edge | 8 |
| Blackbaud FIMS | 7 |
| Bromelkamp akoyaGo for Community Foundations | 6 |
| Stellar Technology Solutions (iPhiCore) | 6 |
| Bromelkamp Community Pearl | 4 |
| Microsoft Excel | 3 |
| Microsoft Word | 3 |
| AkoyaGO | 1 |
| Blackbaud Raisers Edge | 1 |
| Bromelkamp eGrant | 1 |
| Gift Works | 1 |
| Microsoft Access | 1 |

| Scholarships | |
|--|---|
| AwardSpring | 7 |
| Bromelkamp eGrant | 6 |
| Stellar Technology Solutions (iPhiCore) | 6 |
| Foundant for Scholarships Providers | 5 |
| Jot Form | 5 |
| Microsoft Word | 4 |
| Bromelkamp akoyaGo for Community Foundations | 3 |
| CommunityForce | 3 |
| None - No Software Used | 3 |
| Microsoft Access | 2 |
| Microsoft Excel | 2 |
| Blackbaud FIMS | 1 |
| Bromelkamp Community Pearl | 1 |
| Fluxx Grantmaker | 1 |
| Foundant for Community Foundations | 1 |
| Foundant for Grantmakers | 1 |
| Google forms | 1 |
| Kaliedscope | 1 |
| Smarter Select | 1 |
| Submittable | 1 |
| Website Fillable PDF | 1 |

Software by Area of Work

| HR/Payroll | |
|-------------------------|----|
| Other - Write In | 12 |
| Outsourced | 8 |
| ADP | 6 |
| Basic | 5 |
| None - No Software Used | 6 |
| Paychex | 4 |
| Quick Books | 2 |
| Blackbaud | 1 |
| FIMS | 1 |
| Paycor | 1 |

Software Transitions Planned

| Software Transitions Planned | |
|------------------------------|----|
| Maybe / In Discussion | 2 |
| No | 33 |
| Yes | 11 |





50
YEARS

CMF Council of
Michigan
Foundations