



FEG Investment Advisors Releases the FEG 2020 Community Foundation Survey Results

CINCINNATI, OHIO, UNITED STATES, July 17, 2020 /EINPresswire.com/ -- FEG Investment Advisors (FEG) released the results from the FEG 2020 Community Foundation Survey which saw spending rates decrease and adoption of responsive investing increase.

The 2020 survey covers fresh perspectives on topics such responsive investing, spending policy, externally managed funds, investment committee structure, and investment and administrative fees.

"In the current environment, enterprise considerations are vital to add perspective for community foundations," said consultant Jeff Weisker, Senior Vice President at FEG. "While our questions weren't focused on COVID, the survey results go beyond asset allocation and performance, allowing for discussion around trends and sentiment toward these topics of interest."

Some of the key findings on select investment and enterprise topics are provided below: This year nearly one-fourth of respondents utilize OCIO. Further, nearly half off those considering changing their model are looking at OCIO.

While the overall percentage is limited, nearly 50% of community foundations surveyed have investments in Responsive Investing Strategies—a broad term encompassing Environmental, Social and Governance, Mission Related Investing, Program-Related Investing, and Socially Responsible Investing.

Similar to previous years, the survey highlighted differences between smaller and larger community foundations. Larger foundations have less of a home country bias and allocate more to hedge funds. Average allocations for U.S. equities ranged from 47% for community foundations with less than \$25 million in assets, to 30% for community foundations with more than \$250 million in assets while hedge funds ranged from 1% to 12% respectively. Community foundations with externally managed funds have 16 on average, although smaller foundations only average two compared to 32 for larger foundations.

Spending policy findings showed that the average foundation spends 4.3% of its assets per annum, and the most common spending policy methodology is a rolling 12-quarter average.

The 2020 survey was issued to community foundations nationwide and received 90 responses from 31 states, with assets ranging from less than \$25 million to more than \$1 billion.

FEG first issued the survey in 2015 to clients with the explicit goal of providing a peer comparison for spending policy and asset allocation. Based on client feedback that current surveys available to community foundations often are too narrow in scope, FEG expanded their survey to include perspectives on enterprise topics such as externally managed and donor advised funds, investment board governance, and responsive / mission-based investing.

To learn more, visit www.feg.com/cfsurvey.

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About FEG Investment Advisors

FEG Investment Advisors has worked with community foundations for more than 30 years. FEG provides investment consulting, portfolio management, and research services to clients nationwide. Established in 1988, the independently-owned firm has approximately \$65 billion in total client assets under advisement as of March 31, 2019. FEG services include FEG Consulting, which provides traditional, nondiscretionary investment consulting services to institutions; Portfolio Management, which provides outsourced CIO and discretionary portfolio management services for institutions and financial intermediaries; and FEG Research Services, which provides traditional and alternative strategies' investment manager research, due diligence and monitoring. For more information, visit www.feg.com.

About the FEG Community Foundation Survey

The data is obtained from the proprietary FEG 2020 Community Foundation Survey. The survey was open from March 4, 2020 to May 22, 2020, during the height of the COVID-19 pandemic and received 90 responses. Participants also had the option to complete as a word document and email the results back to FEG. The data from this survey was grouped into five categories based on assets of the community foundation with assets ranging from less than \$25 million to greater than \$250 million. The information in this study is based on the responses provided by the participants and is meant for illustration and educational purposes only.

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