

# FEG Investment Advisors Releases 2024 Community Foundation Survey Results

CINCINNATI, OHIO, USA, June 14, 2024 /EINPresswire.com/ -- FEG Investment Advisors (FEG) announced on June 12 the release of the results from the [FEG 2024 Community Foundation Survey](#), an annual survey of more than 100 U.S. community foundations representing more than \$40 billion in assets under advisement. (Assets under advisement



were self-reported by respondents as of September 30, 2023.) The 2024 survey covered relevant perspectives on timely topics such as asset allocation, spending policy, responsive investing, diverse asset managers, donor development and investment governance.

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*Jeffrey Weisker*

“We continue to see momentum to the OCIO advisory model, although the non-discretionary/traditional advisory model is still the most popular among community foundations,” said advisor [Jeffrey Weisker](#). In response to the spending policy trend that reversed course from prior years, Weisker further commented, “the average and median spending rates slightly increased from last year.”

“Although Responsive Investing (RI) has been an increasing trend in overall adoption for community foundations over the long term, we have seen waning donor interest over the last two years,” said Jeff Davis. “Donor interest in RI is

at a seven-year low for the data set we have collected regarding RI topics going back to 2017. This could potentially be a byproduct of the politicization of the topic which may be amplified in 2024 as an election year.”

Some of the key findings on select investment and enterprise topics are provided below:

- The OCIO service model continues to gain traction among community foundations, although the traditional/non-discretionary model remains the most popular.
- Spending rates slightly increased this past year, reversing course since the survey's inception.

- Over 40% of community foundations have hired or are considering hiring diverse asset managers, but the topic declined in overall interest this past year.
- Allocation to Responsive Investing (RI) continues to be supported by 50% of respondents, although donor interest in the strategy declined for a second consecutive year.

### Survey Methodology

The proprietary FEG Community Foundation survey collects data on a variety of financial and enterprise topics to provide insights on issues affecting the community foundation field. The survey is open to [all U.S. community foundations](#) and was completed primarily by senior-level investment decision makers. FEG received 107 responses across 31 states, representing approximately \$40.9 billion in assets.

For more information about FEG's Community Foundation Survey, visit <https://www.feg.com/studies/community-foundation-survey>.

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### About FEG Investment Advisors

FEG Investment Advisors has more than 35 years' experience serving nonprofit organizations. FEG seeks to deliver an exceptional investment experience to clients by providing services across the institutional portfolio management spectrum, from discretionary outsourced chief investment officer (OCIO) to traditional nondiscretionary consulting services. FEG predominantly serves a deserving client base that improves our world and changes lives, such as education endowments and foundations, community foundations, healthcare organizations, private foundations, faith-based organizations, charitable organizations, family offices and other financial institutions. For more information, visit [www.feg.com](http://www.feg.com).

### About the FEG Community Foundation Survey

The proprietary FEG Community Foundation Survey collects data on a variety of financial and enterprise topics to provide insights on issues affecting the community foundation field. FEG first issued its community foundation survey in 2015 to clients with the explicit goal of providing a peer comparison for spending policy and asset allocation; additional topics have since been added to capture real-time trends and needs of the industry. Now open to all U.S. community foundations, the survey is completed primarily by senior-level investment/finance decision makers and more than 250 community foundations have participated since inception. This year's community foundation data is obtained from the proprietary FEG 2024 Community Foundation Survey. The study includes a survey of 107 U.S. community foundations. The survey was open for responses online from January 16 to March 8, 2024. Participants did not pay to be included in the survey. 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 to seven categories based on assets of the community foundation, with assets ranging from less than \$25 million to greater than \$1 billion. The information in this study is based on the responses provided by the participants and is meant for illustration and educational purposes only. FEG would like to extend thanks to all

the community foundations dedicated to serving the needs of their communities and for their contributions to the survey.

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