

FEG Investment Advisors Releases 10th Annual Community Foundation Survey Findings

This year's survey had record participation from 113 community foundations representing more than \$41B in Assets.

CINCINNATI, OH, UNITED STATES, June 12, 2025 /EINPresswire.com/ -- [FEG Investment Advisors](#) (FEG), an independent, employee-owned

investment advisory firm, is proud to announce the release of its 10th annual Community Foundation Survey findings, featuring a record-breaking 113 U.S. community foundation participants representing more than \$41B in assets under advisement.* The Survey establishes year-over-year benchmarks on the evolution to OCIO services and trends in asset allocation and investment governance.



The survey empowers foundations to make informed, strategic decisions. We believe in the mission of community foundations and are excited to provide information that helps align their missions."

Alan Lenahan, CEO of FEG

The survey provides timely insights into the evolving landscape of community foundation investing, operations and risk management. Specific topics covered include asset allocation, spending policy, values-aligned investing and the emerging role of artificial intelligence in foundation strategy.

"The [FEG Community Foundation Survey](#) continues to be a resource for our clients and the broader philanthropic community," said [Alan Lenahan](#), CEO of FEG. "By providing

peer benchmarking and highlighting sector-wide trends, the survey empowers foundations to make informed, strategic decisions. We believe in the mission of community foundations and are excited to provide them with information that helps align their missions."

Survey data was provided January to March of this year. Key findings include:

1. Spending Rates: Average and median spending rates remained steady, although foundations



maintaining a 5% spending rate continued to decline.

2. OCIO Adoption: The OCIO model continues to gain momentum, though the traditional/non-discretionary model remains the most widely used.

3. Values-Aligned Investing: Responsive Investing remains the dominant approach. The average portfolio allocation increased from 15% to 20%, with a notable rise in foundations willing to accept below-market returns to align with mission-driven goals. Some foundations are shifting toward private capital as part of broader impact investing strategies.

4. Artificial Intelligence: Despite nearly 80% of community foundations anticipating vendors or investment partners will leverage AI in the future, only 20% are integrating AI into their own operations or investment strategies.

Now in its 10th year, the FEG Community Foundation Survey continues to serve as a trusted resource for community foundations seeking to navigate a complex and rapidly changing investment environment.

Methodology

The proprietary 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 completed primarily by senior-level investment decision-makers. FEG received 113 responses across 29 states, representing more than \$41B in assets.

For more information, visit <https://www.feg.com/studies/community-foundation-survey>.

About FEG Investment Advisors

FEG, an independent, employee-owned investment advisory firm with \$91.4B in AUA,** seeks to provide clients with the exceptional investment experience they deserve. For more than 35 years, FEG has provided services across the institutional portfolio management spectrum, from discretionary outsourced CIO to traditional nondiscretionary consulting services. FEG predominantly serves clients with a philanthropic mission to uplift individuals and local communities such as education endowments and foundations, community foundations, healthcare organizations, private foundations, faith-based organizations, charitable organizations, family offices, and other financial institutions.

About the Survey

What began as a simple flash poll in 2015 evolved into a robust, data-driven annual study, delivering critical insights to community foundations for a decade. Since 2016, the survey has engaged 250+ community foundations across 46 states, helping inform strategic decisions that drive meaningful impact in local communities.

The Survey is a proprietary research initiative designed to capture a wide range of financial and

enterprise data. Originally focused on peer comparisons for spending policy and asset allocation, it has expanded to include timely topics such as values-aligned investing and emerging technologies like artificial intelligence.

Open to all U.S. community foundations, the survey is primarily completed by senior-level investment and finance decision-makers, providing high-quality, relevant insights. The 2025 edition includes responses from 113 community foundations, representing a broad spectrum of asset sizes—from under \$25 million to over \$1 billion.

The survey was conducted online, January 15 to March 7, 2025, with participants given the option to submit responses via email. Participation was voluntary and free of charge. Data collected was categorized into 5-7 asset tiers to provide meaningful peer comparisons.

The findings presented are based on self-reported data and intended for educational and illustrative purposes only. FEG extends its sincere gratitude to all participating community foundations for their commitment to advancing the field and serving their communities.

*AUA were self-reported by respondents as of 9/30/2024.

**AUA as of 12/31/24 for FEG and its subsidiaries.

Delyse Lawless
FEG Investment Advisors
pr@feg.com
Visit us on social media:
[LinkedIn](#)

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