2026 Endowment and Foundation Survey

The survey included 144 total respondents, with the largest cohorts represented by operating nonprofits, community foundations, private foundations, higher education, and faith-based organizations. See additional demographics details in the appendix.

The survey findings reveal several notable trends shaping how nonprofits manage investments, respond to growing complexity, and position their organizations for the future. Five key themes emerged:

1. Portfolio sophistication is increasing as organizations face growing operational and governance demands.
2. Private markets are reshaping liquidity management.
3. OCIO adoption is rising as organizations seek help managing complexity.
4. AI adoption remains limited as organizations weigh time-saving opportunities against governance considerations.
5. Risk management is extending beyond the portfolio.

Download the 2026 Endowment and Foundation Survey Executive Summary Here

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