

2010-2011 President's Annual Report to the CASE Membership

On June 30, 2011, CASE institutional membership registered the highest year-end total in our 37-year history. That's just one indication that in fiscal year 2011 CASE continued to grow and prosper in the aftermath of the global recession. Our success can be attributed to the loyalty of our members, to the commitment of our volunteers, and to our ongoing efforts to enhance core services while adding new initiatives designed to meet the current and emerging needs of the advancement profession.

Initiatives launched during the recession that continued to serve members well in 2010-11 include the CASE on Campus program, which brings tailored workshops directly to institutions; simulcasts of live conference sessions that can be viewed from desktops; a revamped career center; and a website that continues to grow with sample collections, white papers and other resources for advancement professionals around the world.

This year, CASE built on these services in a number of ways.

We conducted 22 research projects, including a new study to explore the return on investment in advancement; published new reports and white papers to serve senior professionals; and added new books to the CASE store, including our first-ever e-book. We kept members engaged through the new CASE Social Media blog, the addition of two official CASE Twitter accounts and new subgroups for communities of practice on LinkedIn and other social networks. And we strengthened our commitment to community colleges by expanding our services and appointing a director to lead the new CASE Center for Community College Advancement.

In addition to the 101 conferences in North America, we grew service to members in Europe, the Asia-Pacific, Africa and other parts of the world with 57 conferences, networking sessions and workshops. These include new conferences in Bangkok, Mexico and Nigeria. Our staff and volunteer advocacy efforts helped lead to favorable

CASE by the Numbers, 2010-2011

3,418 institutional members in **74** countries

64,538 advancement practitioners, including
18,773 individual professional members

Nearly **16,500** participants at **158** in-person conferences and workshops worldwide

34 Online Speaker Series programs delivered to
1,927 sites and nearly **9,000** individuals worldwide

Nearly **3,500** volunteer leaders, conference planners, speakers, moderators, judges and authors

186 Educational Partners providing products and services for educational advancement

(continued next page)

legislation for foundations and alumni associations in the United States and the continuation of a government-funded matched funding program in the United Kingdom.

CASE could not have achieved the progress documented in this report without the exceptional support of the nearly 3,500 volunteers who give back to their profession through CASE. Thanks to all of you for your contributions to your institutions, your profession and your professional association.

Sincerely,



John Lippincott
President, CASE

Key Events in 2010-2011

- Strengthened commitment to community colleges with new resources and appointment of director to lead new CASE Center for Community College Advancement
- Received first place awards for CURRENTS and the CASE book *Across Frontiers: New International Perspectives in Educational Fundraising* in a prestigious competition by Association Media and Publishing
- Expanded CASE on Campus to bring tailored workshops of content-specific training to advancement staff on college and university campuses in Europe and the Asia-Pacific region
- Introduced student philanthropy awareness initiatives via CASE ASAP to help member institutions engage and educate students about philanthropy
- Grew corporate support through the launch of an associate partner level for Educational Partners to enable smaller firms to participate in CASE community
- Grew content and resources with the addition of 10 new white papers and reports; 14 books, including the first-ever release of an e-book; and new sample collections
- Expanded advocacy efforts with media interviews on advancement-related topics and direct efforts with lawmakers
- Expanded research initiatives with launch of 22 research projects, including a revised compensation survey, social media surveys and a new study on the return on investment in advancement programs
- Initiated and hosted a live debate with Universities UK on British philanthropy, boosting the visibility and importance of higher education fundraising
- Launched a social media blog, two official CASE Twitter accounts and subgroups for communities of practice on LinkedIn and other social networks

CASE by the Numbers, 2010-2011, continued

More than **1 million** visits to the CASE website from nearly **210** different countries and territories

More than **22,000** advancement professionals engaged through listservs and online communities

Close to **3,100** entries to international awards programs honoring leadership, service and best practices

More than **16,000** books and other resources purchased from CASE Books

2,214 jobs posted to CASE Career Central

More than **33,000** responses to **22** CASE research projects

- Grew presence in Africa, Thailand and other regions of the world with new networking sessions, workshops, campus tours and other training
- Received charity status in Singapore, which carries with it both tax advantages and flexibility in seeking private support for activities in the region
- Continued to expand offerings of non-English resources in Spanish, French and Chinese

Financials

CASE finished the 2011 fiscal year on a positive financial note. For the year ending June 30, 2011, CASE's financial projections show a modest operating surplus of nearly \$300,000. That surplus, combined with the strong performance of CASE's long-term investments, has brought unrestricted net assets to a record level of more than \$12 million.

Unrestricted Operating Budget. Total unrestricted operating revenue for FY 11 is projected to be up 8.5 percent from the previous year due primarily to higher than expected conference attendance. The unrestricted operating budget

for FY2012, approved by the CASE Board of Trustees in March, anticipates a further increase in revenue of 3 percent.

Reserves. As a matter of fiscal prudence, the CASE Board of Trustees approved a policy that the organization should maintain reserves (unrestricted net assets) equal to an amount between 50 and 100 percent of annual expenses. Based on current year-end estimates, the reserves stand at roughly the midpoint within the range, their highest level since the policy was established.

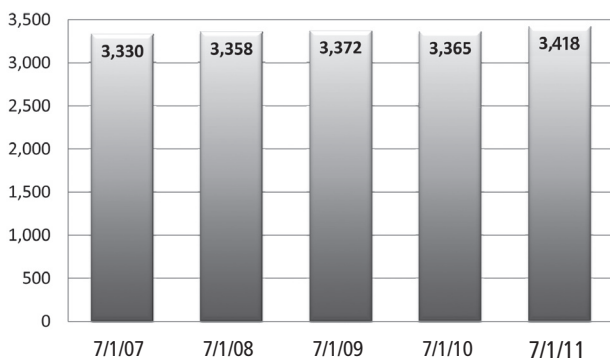
CASE Five-Year Financial Summary

	FY11 Projected	FY10 Actual	FY09 Actual	FY08 Actual	FY07 Actual
Operating Revenue	\$16,630,888	\$15,331,639	\$17,053,004	\$19,230,861	\$18,061,097
Operating Expenses	16,357,913	15,233,538	17,514,729	17,940,233	16,547,995
Net Operating - Unrestricted	272,975	98,101	(461,725)	1,290,628	1,513,102
Net-Restricted Grants	(725,790)	(1,029,695)	2,370,093	(141,768)	164,163
Net Operating	(\$452,815)	\$931,594	\$ 1,908,368	\$ 1,148,860	\$1,677,265
Non-Operating	2,314,675	(1,282,723)	(2,348,890)	(954,692)	1,101,719
Change in Net Assets	\$ 1,861,860	\$ (351,129)	\$ (440,522)	\$ 194,168	\$ 2,778,984

Membership

Institutional memberships in fiscal year 2011 grew from 3,365 schools, colleges and universities to 3,418. Paid individual memberships (professional members), however, fell for the fourth consecutive year from 19,294 to 18,773. Following an examination of the structure and benefits of the professional members program, CASE announced plans to launch a new, upgraded membership level that provides an enhanced suite of premium-level resources, including CURRENTS magazine, monthly podcasts, customized service from the InfoCenter and more.

Institutional Membership 2007–2011



Professional Membership 2007–2011

