



AMAtlasSM

Advancement Metrics and Research for Education

How Does Your Foundation Measure Up?
*Results from CASE FY21 College and University
Foundation Survey (formerly IRF Data Book Survey)*

FY21 Participants

- 62 IRFs completed the survey

Institution Type	FY21
Community College	10%
Bachelor's	8%
Master's	5%
Research/Doctoral	76%
Professional/Specialty	2%



Lead/Manage Fundraising

Institution Type	Yes	No
Community College	100%	0%
Bachelor's	80%	20%
Master's	100%	0%
Research/Doc	74%	26%
Total	77%	23%



Foundation Independence

Institution Type	Independent	Interdependent	Dependent
Community College	33%	50%	17%
Bachelor's	60%	40%	0%
Master's	0%	100%	0%
Research/Doc	64%	34%	2%
Total	56%	40%	3%



FY21 Endowment

Endowment Value	Comm Coll	Bachelor's	Master's	Research/ Doc	All
Less than \$10 million	0%	0%	0%	0%	0%
\$10.1 to \$50 million	67%	20%	33%	2%	10%
\$50.1 to \$100 million	33%	0%	0%	4%	7%
\$100.1 to \$250 million	0%	80%	67%	22%	26%
\$250.1 to \$500 million	0%	0%	0%	15%	11%
More than \$500 million	0%	0%	0%	57%	46%



FY21 Fundraising

Private Support Raised (as reported in CASE Campaign survey and VSE)

	CASE Campaign Survey (median)	VSE (median)
Community College	\$0	\$3,461,086
Bachelor's	\$20,849,654	\$7,083,584
Master's	\$18,891,620	\$11,574,828
Research/Doc	\$110,383,781	\$71,376,976
All Foundations	\$44,000,000	\$40,207,200



FY20 & FY21 Campaigns

Campaign Status	FY20	FY21
Planning	21%	36%
In Progress	54%	37%
Just Completed	12%	16%
No Plans	11%	10%

Goal (median)	FY20	FY21
Community College	\$30 million	\$11.8 million
Bachelor's	\$50 million	\$125 million
Master's	\$60 million	\$25 million
Research/Doc	\$450 million	\$500 million
Total	\$212.5 million	\$250 million

- Median Timeline: 8 years



FY21 Funding Sources

Funding Source (All Respondents)	% Using Source	% of Foundation Funding (mean)
Institutional Support	76%	17%
Unrestricted Gift Funds	73%	3%
Gift Funds Restricted Operations	53%	6%
Investment Income Unrestricted	74%	10%
Cash Float	66%	8%
Endowment Mgmt Fee	97%	45%
Gift Fees	65%	6%
Real Estate	53%	3%

- **Most Common** – Endowment Mgmt. Fee, Inst. Support, Invest. Income Unrestrict.
- **Most Significant** – Endowment Mgmt. Fee, Inst. Support , Invest. Income Unrestrict.



FY20 & FY21 Endowment Mgmt Fee

Endowment Mgmt Fee	FY20	FY21
No Fee	12%	8%
Less than 1 percent	9%	6%
1 percent	23%	21%
Between 1 percent and 2 percent	49%	60%
2 percent	4%	3%
More than 2 percent	2%	2%
Median endowment fee	1.25%	1.33%
Median endowment	\$223,400,565	\$366,146,532



FY20 & FY21 Staffing

CSO Reports to...

	FY20	FY21
Foundation Board	60%	67%
Institution President/Chancellor	12%	6%
Institution VP or Vice Chancellor	5%	4%
Both Foundation Board & Institution President/Chancellor	23%	22%



FY21 Staffing

CSO also Institution VP/VC

	Yes	No
Community College	N/A	N/A
Bachelor's	67%	33%
Master's	N/A	N/A
Research/Doc	29%	71%
Total	26%	53%



FY21 Staffing

CSO in Institution Cabinet

	Yes	No
Community College	N/A	N/A
Bachelor's	100%	0%
Master's	N/A	N/A
Research/Doc	71%	29%
Total	58%	21%



FY20 & FY21 Gift Fees

Gift Fees	FY20	FY21
Assess Fees on Both Endowed and Non-endowed Gifts	35%	31%
Assess Fees on Non-endowed Only	15%	18%
Assess Fees on Endowed Only	2%	3%
No Gift Fees Assessed	48%	48%



FY21 Gift Fees

Gift Fees (mean)	FY21
Non-endowed Gift	3.9%
Endowed Gift	3.2%

Non-endowed Gifts

- 48% of foundations assessed fees on non-endowed gifts in FY21. Most common fee was 5% charged by 55% of foundations assessing the fee. The minimum fee was 3%, maximum fee was 6.5%.

Endowed Gifts

- 34% of foundations assessed fees on endowed gifts in FY21. Most common fee was 5% charged by 45% of foundations assessing the fee. The minimum fee was 1.25%, maximum fee was 6.5%.



Questions?

- Send feedback/question ideas
(mwestenburg@case.org)

