



Benchmarking Investments in Advancement

Results of the Inaugural CASE Advancement Investment Metrics Study (AIMS)

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CASE is also indebted to the individuals and institutions who developed and contributed to the 1990 publication *Expenditures in Fundraising, Alumni Relations, and Other Constituent (Public) Relations*, often called the Lilly Study. The AIMS project and this report were significantly informed by and based on this earlier work.

Jackson Thomson, CASE research specialist, and Chris Thompson, former senior director of research at CASE, also contributed to the AIMS project.

THE ADVISORY GROUP

Members of the AIMS Advisory Group that guided the project were chosen because of their extensive personal experience with educational fundraising and their deep understanding of institutional issues and data.

Public colleges and universities

- Thomas J. Mitchell, chair, vice chancellor, university advancement, University of California, Irvine
- Lori Redfearn, assistant vice chancellor, advancement services, Division of Business and Finance, California State University
- Connie Kravas, vice president for development and alumni relations, University of Washington

Private colleges and universities

- Richard Boardman, associate dean for development and alumni relations and senior advisor, Harvard Law School
- Peyton R. Helm, president, Muhlenberg College
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CASE Educational Partners

- John Glier, principal, Grenzebach Glier & Associates
- Donald M. Fellows, president and CEO, Marts and Lundy

Other associations

- Ann E. Kaplan, director of the Voluntary Support of Education survey, Council for Aid to Education
- Matt Hamill, senior vice president, advocacy and issues analysis, National Association of College and University Business Officers

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INTRODUCTION: THE HISTORY OF AIMS

Lilly Study

Prior to conducting the Advancement Investment Metrics Study, or AIMS, the closest that CASE had come to measuring advancement expenses by educational institutions was in undertaking a study of 51 institutions that resulted in the publication *Expenditures in Fundraising, Alumni Relations, and Other Constituent (Public) Relations*. That work, published in 1990 and no longer in print, was funded by the Lilly Endowment and is often referred to as the Lilly Study. However, the Lilly Study's methodology was never applied to any broad and systematic survey. Furthermore, the world of advancement has changed significantly since the publication of the Lilly Study, which called for including the cost of typewriter ribbons but did not account for investments in technology. After more than two decades, it was time for a fresh approach.

AIMS Pilots

CASE appointed a volunteer advisory group of seasoned fundraising professionals and association representatives to guide the process of developing the AIMS survey and to determine what would be "counted" as advancement-related expenses. The goal was to develop a common survey instrument and clear definitions in order to provide consistent data for benchmarking across institutions.

The advisory group had extensive discussion around the difficult questions that needed to be answered to reach consensus about the methodology that would best serve the profession. Members reviewed the Lilly Study in detail and scanned other relevant literature and surveys to identify modern developments in cost-of-fundraising analysis and to arrive at key questions that remained open for interpretation. Members then agreed on scope, detail, working definitions and boundaries to resolve those questions before developing a pilot survey and a supporting document that would assist survey respondents.

Members conducted a pre-pilot test using their own institutional data before recruiting other institutions to participate in a pilot test, which took place in spring 2009. The pilot test of 39 institutions allowed wider testing of the approach and questions and provided preliminary calculations with real results.

Following the pilot, the methodology and survey questions were further refined prior to the launch of the full study.

AIMS Launch

AIMS was fully launched in 2011. Participation in the survey was open to CASE-member institutions of higher education in the United States.

AIMS was conducted using the CASE Benchmarking Toolkit, an online survey tool that helps advancement professionals benchmark activities, staffing, expenditures and other aspects of their programs. Use of the toolkit is a benefit of CASE membership.

Here's how AIMS participants are able to benchmark with their peers: Survey participants select a group of institutions by name (as long as there are at least six in the group, including the participating institution) within the CASE Benchmarking Toolkit and compare their institution's results with the results of the group as a whole (but not individually by name). In fact, CASE suggested that members of institutions interested in benchmarking their AIMS responses with a specific group encourage their peers to participate in the study. Peer institutions might be defined as those in a particular athletics conference, those within a particular region or those that share a particular characteristic, such as size or affiliation.

If 10 or more institutions in a peer group agreed to participate in AIMS and notified CASE of this agreement, CASE agreed to provide a report of findings, including calculations on return on investment, to the members of that group. The report looks at the aggregate responses of the peer group and does not include details associated with individual institutions by name.

CASE notified members of the opportunity to participate in AIMS by email and in CASE communications outlets, including *BriefCASE* and the CASE website, www.case.org.

To sign up, participants emailed CASE (research@case.org) the name of the institution and the name and contact information, including email address, of the individual designated to fill out the survey. The CASE research staff then activated the designee's access to the survey and notified him or her directly when the survey opened.

One hundred forty-four (144) colleges and universities completed the study. These institutions captured their expenditure data for fundraising, alumni relations, communications and marketing, advancement services and advancement management/leadership in the manner prescribed by the guidelines and definitions that had been developed (see Appendix D). Institutions reported this data to CASE for fiscal year 2009–2010. They also reported their total private voluntary support, institutional expenses, endowment value, alumni of record and fall enrollment as published in the Council for Aid to Education's (CAE) yearly Voluntary Support of Education survey.

Throughout the study, CASE staff communicated with the institutions to verify the accuracy of the data submitted, clarify the intent of the guidelines and respond to participants' questions.

This project required considerable time and effort on the part of the participating institutions. For many, compiling the requested information proved to be more time-consuming and difficult than they expected. A primary reason for the difficulty was the fact that not all the costs for one activity were included in the budget for that department. For example, fundraising costs could be incurred in the alumni relations or the communications and marketing department or in various

other units on the campus. Extracting and sorting the data from multiple departmental budgets was not always easy, especially in larger, more complex institutions.

CASE recognizes the commitment and perseverance these 144 institutions exhibited throughout the project. A list of the participating institutions appears in Appendix E.

1 ABOUT AIMS

Why CASE Undertook AIMS

One of the most frequent questions members ask of CASE is this: “How much do I need to spend to raise a dollar?” Unfortunately, there is no simple or universal answer. An institution building its fundraising infrastructure or preparing to launch a campaign, for example, may need to spend significantly more per dollar than one with a mature fundraising operation. Institution type, size, location, mission, fundraising goals, donor base and many other factors influence how much a college or university should invest in fundraising operations. The only certainty is that a lack of investment will yield a lack of results.

Complicating the question is the fact that fundraising success is supported by investments in other areas of advancement, including alumni relations and communications and marketing. Should these investments be considered and, if so, how should they be factored into the calculation?

In short, a seemingly simple question is actually quite complex and difficult to answer, given the many variables to consider, a lack of consensus around definitions of which expenditures to include and a lack of comparable data. CASE launched the Advancement Investment Metrics Study, or AIMS, to fill this vacuum with a practical survey tool that gives members common definitions for what to count and the ability to select their own variables to compare their expenditures and results—anonously—with those of peer institutions at similar stages of development.

CASE defines *advancement* as all of the functions charged with building relationships with an institution’s constituents in order to benefit the institution. The advancement disciplines reflected in this report include advancement services, alumni relations, communications and marketing, fundraising/development and advancement management/leadership (the oversight of multiple disciplines). The AIMS study includes expenses for all advancement disciplines with a specific focus on the return on the investment in fundraising.

Study Goals

The specific objectives of AIMS were to:

- Benchmark expenses and staffing in advancement (including advancement services, alumni relations, communications and marketing, fundraising/development and advancement management/leadership) and identify variances by type and size of institution, campaign status, staffing and other factors,
- Demonstrate the value of advancement to institutions in terms of return on investment and give members systematic, comparable, well-grounded information to help make the case to invest,

- Encourage the strategic business use of data for data-driven planning and decision-making in the advancement field,
- Develop practical methods and strategies for predicting return on investment that can be used by members when planning and expanding their advancement operations to meet given goals,
- Help CASE members articulate the rationale for investing in advancement, assess the effectiveness of their fundraising operations, understand how to interpret resulting numbers and use the information for continuous internal improvement of programs,
- Give members the tools to benchmark their programs with those of their peers through the CASE Benchmarking Toolkit and
- Gather information on overall advancement investment for the benefit of members and the profession.

Study Respondents

One hundred forty-four (144) U.S. colleges and universities completed the study.

Responses from 24 of the 144 participants were excluded from this analysis because they were incomplete. Including data from these institutions in the totals would have weighted the results inappropriately and contributed to misleading or inaccurate comparisons. Of the 24 institutions excluded from the CASE analysis, 5 were omitted because they were missing a significant amount of the most pertinent data (advancement staffing and/or advancement expenditures) and 19 because they reported either staffing but not associated expenses, or expenses and not associated staffing.

The 120 participants whose data were used include both private and public institutions and institutions in the following categories:

- Baccalaureate private (36 institutions) and baccalaureate public (2 institutions),
- Master's private (18 institutions) and master's public (27 institutions),
- Doctoral private (5 institutions) and doctoral public (23 institutions),
- Professional specialized private (5 institutions) and
- Two-year institutions (4 respondents).

Eighteen of these 120 participants considered their advancement program to be at the start-up stage (meaning that they have been in existence 0–10 years), 42 described it as emerging (11–25 years) and 60, or 50 percent of the 120, as mature (26 or more years).

Of the 120 institutions, 71, or 59 percent, were conducting a capital campaign during the period of the study. Collectively, in the 2009–10 fiscal year, the 120 respondents:

- Reported \$724 million in operating expenses for all five advancement areas, of which \$345 million (48 percent) was associated with fundraising/development,
- Engaged 6,861 staff FTEs in all five areas, of whom 3,163 (46 percent) worked in fundraising/development,

- Raised \$3.1 billion in voluntary support and
- Had institutional operating expenses totaling \$36.5 billion.

Table 1.1 provides a profile of the 120 survey respondents whose data were used in this analysis.

TABLE 1.1
Profile of 120 Survey Respondents, All Five Disciplines

	Institution Type											
	AA		BA		MA		PhD		Specialty		Total	
	#	%	#	%	#	%	#	%	#	%	#	%
Public	4	100%	2	5%	27	60%	23	82%	1	20%	57	48%
Private	0	0%	36	95%	18	40%	5	18%	4	80%	63	53%
Start-up	2	50%	9	24%	5	11%	1	4%	1	20%	18	15%
Emerging	1	25%	3	8%	26	58%	9	32%	3	60%	42	35%
Mature	1	25%	26	68%	14	31%	18	64%	1	20%	60	50%
In a Campaign	1	25%	24	63%	23	51%	20	71%	3	60%	71	59%
Not in a Campaign	3	75%	14	37%	22	49%	8	29%	2	40%	49	41%
Total	4	3%	38	32%	45	38%	28	23%	5	4%	120	100%

Note: 144 U.S. higher education institutions responded to the survey. Five were excluded from the CASE analysis because they were missing a significant amount of the most pertinent data (advancement staffing and/or expenditures) and another 19 because they reported staffing but not the associated expenditures, or expenditures and not the associated staffing.

Benefits of the Project

The primary purpose of the AIMS project, and its greatest benefit, has been the development of standardized guidelines, definitions and a methodology to gather expenditure data. Each institution can use these tools to:

- Assemble its advancement program cost information in the same way each year—that is, by the same rules—and measure progress from one year to the next in generating the appropriate net return on the dollars invested and
- Make informed comparisons of program costs and benefits using data from other, peer institutions.

An additional benefit of the project has been the resulting data set produced by participating institutions using study guidelines and definitions. This report presents these data in aggregate form so that other universities and colleges have, in effect, a ready set of peer institutions with which to compare themselves. As AIMS is repeated in the future, CASE and its members will also be able to track trends over time.

University and college advancement professionals now have access to expenditure data from

private and public institutions of three major types—doctoral, master’s and baccalaureate. Data are also broken down by various stages of fundraising program maturity—start-up, emerging and mature—and by institutions in a campaign or not. The AIMS data will enable participants and others to benchmark their programs in a variety of ways.

Challenges of the Project

Several challenges had to be met in designing the guidelines and definitions for this project. Paramount among them was determining what might reasonably be defined as an expense.

For example, fundraising expenses obviously include letterhead, envelopes and brochures designed to solicit an annual gift, but what about the expenses of preparing and publishing alumni magazine articles that describe fundraising initiatives? Should general institutional overhead expenses, such as those for electricity and custodial support, be included? What about technology support provided by the institution, as opposed to that expensed within the advancement operation?

How much of the president’s salary and benefits should be included in fundraising costs? How much of the compensation for the various deans? And how should the compensation for an advancement vice president who spends half of her time on administrative responsibility and half on direct fundraising be accounted for?

The members of the advisory group charged with overseeing the project knew that if they were to develop an instrument to measure expenses across the advancement disciplines, they would have to decide where to draw the lines. The precise placement of those lines was a matter of debate, but eventually the group reached consensus and developed a survey instrument (see Appendix B) and accompanying guidelines for expenses to be included and excluded (see Appendix D).

The parameters around what is considered to be an advancement expense include more than they exclude and are drawn widely enough to incorporate most if not all of the direct and incremental costs of running an advancement program. This will allow an institution to produce a valid reading of the magnitude of its investment and compare it with those of other institutions that collected their own data using the same guidelines.

The Future of AIMS

As noted in the previous sections, one of the greatest values of benchmarking is to determine where an institution fits within a range of peers, use this information to set new goals and measure progress against goals over time. For this reason, CASE intends to conduct AIMS at least biennially. The next AIMS survey will launch in fall 2012 and will include total support and advancement expenses for the 2011–12 fiscal year. The next survey will include U.S. and Canadian independent schools, colleges and universities.

Interpreting the Data

As with any study, the resulting data should be interpreted with care. Advancement programs do not exist in isolation from the environment in which the college or university must operate. And as noted earlier, institutions have different missions, programs and goals; they have different alumni and donor bases; they are based in different regions of the country; and their advancement operations are at different levels of maturity.

When looking at fundraising specifically, efficiency should not be confused with effectiveness. The objective of an institution's program should be, not to spend as little as possible each year to raise money, but to maximize the net return on the investment. A program that annually costs \$2 million and produces \$10 million, or \$5 for every \$1 invested, may look good and is indeed efficient, but one that costs \$2.5 million and yields \$15 million, or \$6 for every \$1 invested, is presumably of more help to the institution, since it secures net results of \$5 million more.

Other factors affect fundraising costs per dollar raised. Institutions in campaigns will generally have higher fundraising expenses, for example. Fundraising programs in the start-up phase—those that have been in existence 10 years or less—will often have lower returns on investment as they build their programs.

In short, an institution needs to review the full results of this report within its own context and goals. A simplistic reading of one data point from this report, made in isolation from other points or the broader institutional context, can be misleading. Instead, the report can help an institution understand where it fits within a range of other institutions on a number of benchmarks. This understanding can lead to internal conversations about and further exploration of the factors that may be influencing where its results falls within the ranges, which in turn can help the institution set new goals and measure progress over time.

Following are two examples of how institutions might assess the status of their fundraising operations using the AIMS data.

Institution A is a baccalaureate institution that participated in AIMS with a cohort of peer institutions. Table 1.2 looks at several data points for the institution, its peer cohort and all baccalaureate institutions participating in AIMS.

Comparing its medians with those of its peer group, we see that Institution A has fewer staff, has raised significantly less in total support and spends less on fundraising and advancement services. It has more staff, raises more and spends more than all responding institutions of its type, but it is lower in funds raised per staff member and return on investment (calculated by CASE to be the total funds raised divided by total expenses for fundraising and advancement services) than the medians for peer institutions as well as all institutions of its type.

Given the correlation of staffing to total support raised, these data might suggest that the

relatively small fundraising staff could be overextended, a factor that may be contributing to the lower figures for funds raised per staff member—especially in comparison with peer institutions. A greater investment in staff might yield a greater return in terms of total private support to the institution as well as a greater return on the investment.

Of course, the numbers can't say specifically that this is the case, and there are a number of other potential explanations for the differences, but the information does signal that an exploration of the underlying factors driving the data would be appropriate.

TABLE 1.2

Example A: A Private, Baccalaureate Institution (medians)

	# of fundraising staff	Total support raised*	Total fundraising and advancement services expenses*	\$ raised per fundraising staff member*	Return on investment
Institution A	16	\$11.25	\$2.48	\$0.70	\$4.54
Peer Group	26	\$33.89	\$3.41	\$1.12	\$7.39
All BA Institutions	12	\$10.51	\$1.74	\$0.79	\$5.89

*in millions

The results for another institution, a public, doctoral institution called Institution B in table 1.3, might lead to a different conclusion. The number of fundraising staff at the institution is exactly at the median for public institutions of its type as well as all public and private institutions of its type. Yet the institution has raised more overall and per staff member and has fewer expenses than either of the two comparator groups, yielding a relatively high return on investment. These data suggest that the institution is maximizing its investment in its fundraising operations.

TABLE 1.3

Example B: A Public, Doctoral Institution (medians)

	# of fundraising staff	Total support raised*	Total fundraising and advancement services expenses*	\$ raised per fundraising staff member*	Return on investment
Institution B	56	\$71.07	\$6.80	\$1.28	\$10.45
Public PhD institutions	56	\$58.04	\$7.71	\$0.91	\$6.71
All PhD Institutions	56	\$57.68	\$7.39	\$0.91	\$6.23

*in millions

Both institutions could further compare their institutions with these or other, self-defined peer groups on other factors, such as campaign status or program maturity, by selecting data from within the CASE Benchmarking Toolkit and applying the ratio formulas in Appendix C. Institutions can select institutions with which they want to benchmark from within the toolkit as long as there are at least six institutions in the group, including the institution making the comparison. In order to protect confidentiality, results from the toolkit are presented in the aggregate and not by institution name.

Users of the data and this report will note that CASE has reframed one of the key questions addressed in the 1990 Lilly Study. The Lilly Study and other studies of advancement expenses, especially those related to fundraising, have framed the key question as “How much do I need to spend to raise a dollar?” This report on the findings of AIMS asks, instead, “What is the anticipated return on investment of a dollar?” and provides the data in this context. The goal is to help advancement professionals reframe discussions about advancement by moving them from a focus on costs to one on returns.

Further, CASE believes that there is no single, universally “correct” figure for how much an institution should invest to raise a dollar, since institutions are at different phases in their fundraising programs, have different missions and goals and draw upon different donor bases. For this reason, the tables throughout this report provide results in ranges, in addition to median and means, in order to allow institutions to benchmark themselves within the range rather than on a single, absolute figure.

Participants in the survey and users of this report may decide what to provide their own constituents related to how they compare with their peers and with the whole.

Understanding the Tables

The tables in the following sections are provided to give context to the findings and to help members understand, explain and use the data.

The U.S. colleges and universities participating in the study were asked to calculate their expenditures on the basis of the detailed instructions provided in Appendix D. (See Appendix B for the full survey.) If they participated in CAE’s Voluntary Support of Education survey for the year specified, they were to use the fundraising revenue figures reported in the VSE. The expenditures they reported were those actually incurred during same fiscal year.

Please note that the calculations in all but one of the 22 tables that follow do not include capital expenditures, even though those data were requested.

The data have been organized to show the median, or midpoint, of the range of values received; the mean, or average value, of the range; and the low and high values of the middle 50 percent, or second and third quartiles, as well as the minimum and maximum of the range. See

Appendix A for more specific information on how to interpret the statistics used in the tables.

Each table presents the statistics for all 120 respondents, as well as by these four groupings:

Institution affiliation

- Public
- Private

Institution type

- BA (baccalaureate)
- MA (master's)
- PhD (doctoral)

State of fundraising program maturity

- Start-up (0–10 years)
- Emerging (11–25 years)
- Mature (26 or more years)

Campaign status

- In a campaign
- Not in a campaign

The 22 tables are organized in three sections—advancement expenses, advancement staffing and voluntary support raised. Each table indicates the formula used to derive the calculations. For example, the figures in table 2.5, “Total Fundraising/Development Operating Expenses,” reflect responses from question B5 in the survey. The figures in table 4.6, “Return on Investment: Fundraising/Development Operating Expenses and Advancement Services Operating Expenses per Dollar of Voluntary Support Raised,” are based on the responses to question D1 (total voluntary support raised) divided by the sum of questions B5 (development/fundraising operating expenses) and B11 (advancement services operating expenses). The survey questions appear in Appendix B, and the formulas used in deriving the ratios are in Appendix C.

2 ADVANCEMENT EXPENSES

Tables 2.1 through 2.11 focus on advancement operating expenses, with table 2.1 presenting the statistics for total advancement operating expenses, all five disciplines summed together.

Note: In tables 2.1 through 4.7, the institutional breakdown by highest degree offered does not sum to 120 because it does not reflect the five respondents from specialty institutions or the four respondents from associate institutions.

TABLE 2.1

Total Advancement Operating Expenses, All Five Disciplines (B5+B7+B9+B11+B13)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$4,650,531	\$7,946,424	\$2,183,991	\$11,270,977	\$441,917	\$43,307,288	57
Private	\$2,959,616	\$4,302,374	\$1,716,529	\$5,295,187	\$217,000	\$25,682,787	63
BA	\$2,763,212	\$3,263,240	\$1,840,033	\$4,832,234	\$217,000	\$7,791,003	38
MA	\$2,804,940	\$3,672,697	\$1,882,657	\$4,990,677	\$950,567	\$13,275,725	45
PhD	\$11,689,557	\$15,025,401	\$7,454,563	\$17,613,383	\$3,728,417	\$43,307,288	28
Start-up	\$1,410,082	\$2,428,850	\$803,911	\$2,280,994	\$217,000	\$15,584,591	18
Emerging	\$2,900,736	\$4,440,473	\$1,689,306	\$5,768,402	\$441,917	\$23,699,760	42
Mature	\$5,305,459	\$8,229,609	\$2,780,954	\$8,716,946	\$950,567	\$43,307,288	60
In a Campaign	\$4,477,109	\$6,633,154	\$2,319,771	\$7,446,981	\$441,917	\$43,307,288	71
Not in a Campaign	\$2,446,298	\$5,164,119	\$1,547,059	\$5,316,590	\$217,000	\$35,998,953	49
All	\$3,731,503	\$6,033,298	\$1,861,079	\$6,999,537	\$217,000	\$43,307,288	120

Table 2.2 analyzes advancement operating expenditures for all five disciplines as a percentage of total institutional operating expenses. (As defined in the Voluntary Support of Education survey, the total institutional operating expenses include instruction, research, public service, academic support, student services, institutional support, operation and maintenance of plant, scholarships and fellowships and mandatory and nonmandatory transfers to those activities. It does not include auxiliary enterprises, hospital operations and independent operations.) Data received from the participating colleges and universities indicate that they spent a median of 2.57 percent of their total FY 2010 institutional budgets for fundraising.

TABLE 2.2

Total Advancement Operating Expenses as a Percentage of Total Institutional Operating Expenses ((B5+B7+B9+B11+B13)/A3)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	1.75%	1.89%	1.10%	2.36%	0.09%	5.25%	57
Private	3.98%	4.06%	3.21%	4.95%	1.07%	8.04%	63
BA	4.37%	4.73%	3.87%	5.67%	1.97%	8.04%	38
MA	2.12%	2.39%	1.34%	3.34%	0.77%	4.82%	45
PhD	1.94%	2.14%	1.34%	2.36%	0.81%	5.25%	28
Start-up	3.21%	3.22%	2.16%	3.73%	0.53%	8.04%	18
Emerging	1.91%	2.22%	1.29%	3.20%	0.09%	4.97%	42
Mature	3.79%	3.53%	2.03%	4.88%	0.94%	8.00%	60
In a Campaign	2.68%	3.07%	1.65%	4.30%	0.09%	8.00%	71
Not in a Campaign	2.51%	2.97%	1.47%	3.97%	0.53%	8.04%	49
All	2.57%	3.03%	1.57%	4.17%	0.09%	8.04%	120

Table 2.3 provides data on dollars collectively spent for all five advancement disciplines per student enrolled. The means, medians and ranges were derived by dividing all expenditures incurred for fundraising, advancement services, alumni relations, communications and marketing and advancement management by the number of students enrolled at the beginning of the fall semester.

TABLE 2.3

Total Advancement Operating Expenses per Student ((B5+B7+B9+B11+B13)/A5)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$247.30	\$405.81	\$172.99	\$520.67	\$6.40*	\$2,451.57	57
Private	\$1,243.92	\$1,449.27	\$815.71	\$2,142.85	\$86.60	\$3,626.21	63
BA	\$1,696.69	\$1,798.69	\$1,202.99	\$2,415.59	\$209.80	\$3,626.21	38
MA	\$265.36	\$458.89	\$205.77	\$597.10	\$58.49	\$1,436.26	45
PhD	\$456.88	\$652.70	\$372.19	\$736.62	\$116.05	\$2,771.92	28
Start-up	\$580.71	\$704.65	\$288.02	\$919.23	\$26.61	\$2,646.34	18
Emerging	\$249.27	\$509.36	\$200.38	\$725.45	\$6.40*	\$2,157.68	42
Mature	\$1,183.80	\$1,339.31	\$506.24	\$2,139.70	\$75.73	\$3,626.21	60
In a Campaign	\$694.67	\$1,010.15	\$268.46	\$1,497.85	\$6.40*	\$3,416.06	71
Not in a Campaign	\$569.04	\$871.73	\$235.74	\$1,192.51	\$26.61	\$3,626.21	49
All	\$614.05	\$953.63	\$246.11	\$1,421.74	\$6.40*	\$3,626.21	120

* A community college with an institutional budget of about \$500 million, an advancement staff of six and a student population of almost 70,000.

Table 2.4 provides information on how colleges and universities deploy their collective advancement resources among the five individual advancement disciplines. The data suggest that a little less than half (48 percent) of collective advancement operating expenses are associated with fundraising/development, about 16 percent with advancement services and about 36 percent with other three areas, and that these proportions remain more or less constant across the categories (institution type, highest degree offered, stage of maturity and campaign status). The proportion spent on advancement management is the smallest of the five areas. Alumni relations accounts for about one-eighth of the collective cost of advancement.

The proportion of collective advancement expenses devoted to fundraising is slightly higher for institutions in a campaign, at private institutions, at doctoral institutions and among those higher education institutions that have had an advancement program for 26 or more years (i.e., mature programs).

TABLE 2.4

Advancement Discipline Operating Expenses as a Percentage of Overall Advancement Operating Expenses

Category	Fundraising/ Development	Advancement Services	Alumni Relations	Communications & Marketing	Advancement Management/ Leadership	ALL
Public	47.2%	18.3%	11.6%	15.1%	7.8%	100.0%
Private	48.6%	11.6%	13.0%	17.5%	9.3%	100.0%
BA	46.5%	10.9%	15.2%	17.0%	10.3%	100.0%
MA	41.2%	15.9%	12.1%	20.9%	10.0%	100.0%
PhD	50.4%	17.5%	11.4%	13.7%	7.0%	100.0%
Start-up	48.8%	13.0%	11.4%	14.4%	12.4%	100.0%
Emerging	43.5%	15.0%	12.1%	18.2%	11.2%	100.0%
Mature	49.2%	16.3%	12.2%	15.3%	7.0%	100.0%
In a Campaign	48.7%	15.2%	12.1%	15.2%	8.7%	100.0%
Not in a Campaign	45.9%	16.9%	12.2%	17.4%	7.7%	100.0%
All	47.7%	15.8%	12.1%	16.0%	8.4%	100.0%

Tables 2.5, 2.6, 2.7, 2.9 and 2.10 present the operating expense statistics for the five advancement disciplines separately—fundraising/development, advancement services, alumni relations, communications and marketing and advancement management/leadership.

Of particular interest in table 2.8 is how much institutions spend on each alumnus/a through their alumni relations programs. The reader can compare figures with the amounts contributed on the average by all members of the alumni body.

TABLE 2.5
Total Fundraising/Development Operating Expenses (B5)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$2,179,952	\$3,748,771	\$745,809	\$4,967,495	\$111,872	\$25,435,638	57
Private	\$1,631,026	\$2,089,798	\$671,782	\$2,588,254	\$131,539	\$14,613,653	63
BA	\$1,358,290	\$1,518,538	\$660,762	\$2,267,847	\$131,539	\$3,558,779	38
MA	\$944,345	\$1,511,553	\$700,632	\$2,003,225	\$230,840	\$6,478,727	45
PhD	\$5,636,827	\$7,569,218	\$3,559,123	\$9,250,158	\$1,144,550	\$25,435,638	28
Start-up	\$475,461	\$1,185,452	\$248,444	\$770,817	\$131,539	\$9,486,024	18
Emerging	\$1,111,578	\$1,931,317	\$682,977	\$2,387,126	\$111,872	\$12,571,940	42
Mature	\$2,353,908	\$4,048,063	\$1,436,444	\$4,917,918	\$395,850	\$25,435,638	60
In a Campaign	\$2,048,393	\$3,228,809	\$819,648	\$3,631,903	\$111,872	\$18,367,140	71
Not in a Campaign	\$944,144	\$2,369,219	\$567,359	\$2,340,998	\$131,539	\$25,435,638	49
All	\$1,718,261	\$2,877,810	\$698,930	\$3,031,618	\$111,872	\$25,435,638	120

TABLE 2.6
Total Advancement Services Operating Expenses (B11)

Category	Median	Mean	Middle 50%		Range		Number Reporting a Value of \$0	Count
			25th %ile	75th %ile	Minimum	Maximum		
Public	\$679,380	\$1,454,807	\$339,825	\$1,499,826	\$0	\$13,749,777	5	57
Private	\$249,195	\$499,199	\$139,434	\$550,516	\$0	\$3,885,473	7	63
BA	\$251,929	\$355,152	\$148,386	\$453,179	\$0	\$1,459,027	5	38
MA	\$450,713	\$584,484	\$249,195	\$730,969	\$0	\$2,789,221	3	45
PhD	\$1,771,968	\$2,626,475	\$982,363	\$3,414,692	\$0	\$13,749,777	1	28
Start-up	\$394,483	\$667,583	\$217,578	\$719,514	\$0	\$4,006,125	5	42
Emerging	\$550,516	\$1,344,370	\$225,611	\$1,439,538	\$0	\$13,749,777	4	60
Mature	\$146,209	\$315,157	\$12,210	\$287,281	\$0	\$2,282,294	3	18
In a Campaign	\$451,578	\$1,010,212	\$213,433	\$1,311,513	\$0	\$6,988,284	6	71
Not in a Campaign	\$338,201	\$870,378	\$167,454	\$679,380	\$0	\$13,749,777	6	49
All	\$435,185	\$953,113	\$205,054	\$1,083,492	\$0	\$13,749,777	12	120

TABLE 2.7
Total Alumni Relations Operating Expenses (B7)

Category	Median	Mean	Middle 50%		Range		Number Reporting a Value of \$0	Count
			25th %ile	75th %ile	Minimum	Maximum		
Public	\$521,945	\$922,855	\$201,376	\$1,059,333	\$0	\$8,146,843	3	57
Private	\$393,427	\$559,750	\$209,684	\$636,783	\$0	\$2,727,405	1	63
BA	\$373,054	\$497,389	\$199,181	\$554,210	\$0	\$1,978,775	1	38
MA	\$403,421	\$444,552	\$201,376	\$588,666	\$85,604	\$1,186,361	0	45
PhD	\$1,147,783	\$1,714,295	\$639,073	\$2,103,424	\$0	\$8,146,843	1	28
Start-up	\$148,957	\$275,897	\$66,500	\$295,916	\$0	\$1,574,891	2	18
Emerging	\$432,878	\$535,363	\$200,583	\$610,704	\$0	\$2,346,000	1	42
Mature	\$530,859	\$1,006,926	\$331,685	\$1,113,259	\$0	\$8,146,843	1	60
In a Campaign	\$428,934	\$804,467	\$219,623	\$814,181	\$0	\$8,146,843	2	71
Not in a Campaign	\$368,161	\$627,548	\$195,000	\$683,637	\$0	\$3,782,358	2	49
All	\$422,889	\$732,225	\$204,951	\$796,050	\$0	\$8,146,843	4	120

TABLE 2.8
Total Operating Expenses for Alumni Relations per Alumnus/a (B7/A4)

Category	Median	Mean	Middle 50%		Range		Count*
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$5.70	\$8.23	\$3.43	\$8.96	\$0.16**	\$46.00	54
Private	\$17.40	\$20.40	\$11.76	\$25.64	\$1.14	\$60.50	62
BA	\$20.89	\$24.36	\$14.88	\$29.49	\$1.14	\$60.50	37
MA	\$7.22	\$9.34	\$4.23	\$11.96	\$1.25	\$38.89	45
PhD	\$8.06	\$10.90	\$5.05	\$13.83	\$1.95	\$46.00	27
Start-up	\$11.28	\$13.43	\$6.07	\$18.33	\$0.16**	\$38.89	16
Emerging	\$6.95	\$9.75	\$4.31	\$11.96	\$1.25	\$42.04	41
Mature	\$14.88	\$18.54	\$8.85	\$24.43	\$0.83#	\$60.50	59
In a Campaign	\$11.77	\$14.57	\$6.25	\$18.62	\$1.25	\$60.50	69
Not in a Campaign	\$10.29	\$14.97	\$4.97	\$23.20	\$0.16**	\$46.00	47
All	\$11.46	\$14.73	\$5.44	\$20.32	\$0.16**	\$60.50	116

* Excludes four respondents who indicated that they had no staff in alumni relations and \$0 in alumni relations operating expenses. Two of the respondents are community colleges.

** A community college with less than \$10,000 in alumni relations operating expenses and almost 46,000 alumni.

A community college with about \$70,000 in alumni relations operating expenses and almost 85,000 alumni.

TABLE 2.9
Total Communications and Marketing Operating Expenses (B9)

Category	Median	Mean	Middle 50%		Range		Number Reporting a Value of \$0	Count
			25th %ile	75th %ile	Minimum	Maximum		
Public	\$787,581	\$1,196,582	\$253,432	\$1,652,125	\$0	\$8,953,076	3	57
Private	\$477,062	\$753,825	\$210,750	\$1,004,870	\$0	\$4,273,297	9	63
BA	\$417,636	\$554,594	\$197,875	\$877,977	\$0	\$1,692,442	4	38
MA	\$647,307	\$766,388	\$240,301	\$963,493	\$0	\$3,421,077	6	45
PhD	\$2,045,727	\$2,057,136	\$599,547	\$2,579,900	\$0	\$8,953,076	2	28
Start-up	\$354,732	\$350,195	\$166,010	\$410,464	\$0	\$1,100,697	1	18
Emerging	\$512,344	\$807,281	\$226,200	\$1,192,020	\$0	\$4,302,268	4	42
Mature	\$855,954	\$1,258,113	\$362,658	\$1,716,489	\$0	\$8,953,076	7	60
In a Campaign	\$671,814	\$1,009,730	\$235,651	\$1,243,962	\$0	\$8,953,076	9	71
Not in a Campaign	\$483,359	\$898,068	\$221,500	\$1,102,258	\$0	\$4,273,297	3	49
All	\$579,006	\$964,134	\$227,016	\$1,242,533	\$0	\$8,953,076	12	120

TABLE 2.10
Total Advancement Leadership/Management Operating Expenses (B13)

Category	Median	Mean	Middle 50%		Range		Number Reporting a Value of \$0	Count
			25th %ile	75th %ile	Minimum	Maximum		
Public	\$327,691	\$623,409	\$254,733	\$772,725	\$0	\$3,060,000	4	57
Private	\$343,318	\$399,803	\$196,317	\$580,636	\$0	\$1,162,696	6	63
BA	\$299,894	\$337,568	\$184,176	\$505,571	\$0	\$1,048,063	4	38
MA	\$302,987	\$365,720	\$250,000	\$392,753	\$0	\$1,176,928	2	45
PhD	\$976,808	\$1,058,276	\$578,237	\$1,135,584	\$0	\$3,060,000	2	28
Start-up	\$215,989	\$302,149	\$86,250	\$290,245	\$0	\$2,071,181	3	18
Emerging	\$310,709	\$498,929	\$242,095	\$595,005	\$0	\$3,060,000	2	42
Mature	\$427,908	\$572,136	\$248,759	\$694,930	\$0	\$2,984,673	5	60
In a Campaign	\$406,868	\$579,936	\$247,622	\$677,983	\$0	\$3,060,000	3	71
Not in a Campaign	\$287,500	\$398,907	\$192,634	\$481,794	\$0	\$2,501,944	7	49
All	\$337,900	\$506,016	\$229,157	\$609,569	\$0	\$3,060,000	10	120

Table 2.11 is the only table that includes capital expenditures (expenses such as equipment and software; see definitions in Appendix D). Only 54 respondents supplied a non-zero value for capital expenses, leaving 66 of the 120 institutions that reported \$0 capital expenses in all five advancement areas.

TABLE 2.11**MEDIAN Advancement Operating Expenses, Capital Expenses and Total Expenses**

Category	Operating Expenses	Expenses	Capital Expenses		Count*
			Number Reporting a Value of \$0*	Total Expenses	
Public	\$4,650,531	\$25,656	22	\$4,962,531	57
Private	\$2,959,616	\$0	44	\$2,959,616	63
BA	\$2,763,212	\$0	29	\$2,815,582	38
MA	\$2,804,940	\$3,752	22	\$2,804,940	45
PhD	\$11,689,557	\$106,412	10	\$11,909,035	28
Start-up	\$1,410,082	\$0	11	\$1,419,007	18
Emerging	\$2,900,736	\$8,923	19	\$2,900,736	42
Mature	\$5,305,459	\$0	36	\$5,345,547	60
In a Campaign	\$4,477,109	\$0	44	\$4,693,702	71
Not in a Campaign	\$2,446,298	\$6,812	22	\$2,450,973	49
All	\$3,731,503	\$0	66	\$3,900,962	120

*All 120 respondents supplied a value for operating expenses and total expenses. Only 54 of the 120 supplied a value for capital expenses, leaving 66 respondents who reported a value of \$0 for capital expenses.

MEAN Advancement Operating Expenses, Capital Expenses and Total Expenses

Category	Operating Expenses	Expenses	Capital Expenses		Count*
			Number Reporting a Value of \$0*	Total Expenses	
Public	\$7,946,424	\$112,772	22	\$8,059,196	57
Private	\$4,302,374	\$30,889	44	\$4,333,263	63
BA	\$3,263,240	\$36,200	29	\$3,299,440	38
MA	\$3,672,697	\$54,770	22	\$3,727,468	45
PhD	\$15,025,401	\$157,303	10	\$15,182,704	28
Start-up	\$2,428,850	\$53,098	11	\$2,481,948	18
Emerging	\$4,440,473	\$66,172	19	\$4,506,645	42
Mature	\$8,229,609	\$77,318	36	\$8,306,927	60
In a Campaign	\$6,633,154	\$80,496	44	\$6,713,650	71
Not in a Campaign	\$5,164,119	\$54,261	22	\$5,218,380	49
All	\$6,033,298	\$69,784	66	\$6,103,081	120

*All 120 respondents supplied a value for operating expenses and total expenses. Only 54 of the 120 supplied a value for capital expenses, leaving 66 respondents who reported a value of \$0 for capital expenses.

3 ADVANCEMENT STAFFING

Tables 3.1 through 3.4 address advancement staffing. Table 3.1 looks at advancement staffing collectively, with staff in each of the five disciplines added together.

TABLE 3.1
Total Advancement Staff FTEs (C1+C2+C3+C4+C5)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	54.4	74.2	20.7	96.0	6.0	375.0	57
Private	32.0	41.8	19.3	50.8	1.5	258.9	63
BA	29.0	32.7	20.9	40.7	1.5	73.2	38
MA	32.0	37.5	17.3	53.8	5.5	105.8	45
PhD	113.5	135.5	72.8	149.9	26.0	375.0	28
Start-up	13.8	21.3	8.3	21.4	1.5	108.0	18
Emerging	30.5	42.3	17.6	62.5	5.5	228.5	42
Mature	54.1	78.4	31.3	98.3	10.5	375.0	60
In a Campaign	40.0	61.2	24.5	72.5	5.0	375.0	71
Not in a Campaign	26.6	51.3	16.2	54.0	1.5	356.8	49
All	38.4	57.2	20.1	67.0	1.5	375.0	120

Table 3.2 provides information on how colleges and universities deploy their collective advancement staff FTE among the five individual advancement disciplines. Not surprisingly, staffing patterns parallel the expense patterns seen in table 2.4, given that salaries and benefits are typically an advancement program's single biggest expense. The data suggest that less than half (46 percent) of advancement staff FTEs work in fundraising/development, about 20 percent in advancement services, 17 percent in communications and marketing and about 17 percent in the other two areas, and that these proportions remain more or less constant across the categories (institution type, stage of maturity and campaign status). The proportion of staff devoted to advancement management is the smallest of the five areas, at about 5 percent. Alumni relations staff account for about one-eighth of all advancement FTEs reported.

The proportion of collective advancement staffing devoted to fundraising/development is somewhat higher for institutions in a campaign, those at doctoral institutions and among those higher education institutions that have had an advancement program for 26 or more years (i.e., mature programs).

TABLE 3.2

Advancement Discipline Staffing as a Percentage of Overall Advancement Staffing

Category	Fundraising/ Development	Advancement Services	Alumni Relations	Communications & Marketing	Advancement Management/ Leadership	ALL
Public	46.0%	22.1%	10.6%	16.5%	4.9%	100.0%
Private	46.4%	17.3%	13.3%	16.9%	6.2%	100.0%
BA	44.8%	16.9%	14.8%	16.7%	6.8%	100.0%
MA	39.3%	20.3%	12.6%	21.6%	6.3%	100.0%
PhD	49.3%	21.6%	10.3%	14.5%	4.3%	100.0%
Start-up	45.8%	15.4%	12.1%	18.5%	8.2%	100.0%
Emerging	41.8%	19.5%	11.9%	19.8%	6.9%	100.0%
Mature	47.7%	20.9%	11.5%	15.3%	4.6%	100.0%
In a Campaign	48.2%	19.6%	11.4%	14.9%	5.8%	100.0%
Not in a Campaign	42.4%	21.3%	11.9%	19.8%	4.6%	100.0%
All	46.1%	20.2%	11.6%	16.7%	5.4%	100.0%

Table 3.3 presents median and mean advancement staff FTEs, by discipline and in total, and table 3.4 shows the median and mean fundraising/development staff FTE as a percentage of total advancement staff FTE (all five disciplines added together).

TABLE 3.3
 Median and Mean Total Advancement Staff FTEs, by Discipline and in Total (C1+C2+C3+C4+C5)

Category	Fundraising/ Development		Advancement Services		Alumni Relations		Comms & Marketing		Advancement Mgt/Ldrshp		Total Advancement Staff FTEs		
	Median	Mean	Median	Mean	Median	Mean	Median	Mean	Median	Mean	Median	Mean	Count
Public	22.2	34.1	8.8	16.4	5.0	7.8	8.8	12.3	2.5	3.6	54.4	74.2	57
Private	13.5	19.4	5.0	7.2	4.0	5.6	5.0	7.1	2.0	2.6	32.0	41.8	63
BA	12.3	14.6	4.5	5.5	4.0	4.8	4.3	5.5	2.0	2.2	29.0	32.7	38
MA	11.3	14.7	5.5	7.6	4.0	4.7	7.5	8.1	2.0	2.4	32.0	37.5	45
PhD	55.8	66.8	23.0	29.3	11.0	14.0	16.3	19.6	4.8	5.8	113.5	135.5	28
Start-up	4.7	9.7	2.0	3.3	1.7	2.6	3.0	3.9	1.5	1.8	13.8	21.3	18
Emerging	10.5	17.7	5.5	8.2	4.0	5.0	5.3	8.4	2.0	2.9	30.5	42.3	42
Mature	24.5	37.4	7.9	16.4	6.0	9.0	8.0	12.0	3.0	3.6	54.1	78.4	60
In a Campaign	21.0	29.5	7.0	12.0	5.0	7.0	6.4	9.1	2.5	3.6	40.0	61.2	71
Not in a Campaign	9.0	21.8	4.6	10.9	3.6	6.1	5.3	10.1	2.0	2.4	26.6	51.3	49
All	15.1	26.4	5.7	11.6	4.0	6.6	5.7	9.5	2.0	3.1	38.4	57.2	120

TABLE 3.4

Fundraising/Development Staff FTE as a Percentage of Total Advancement Staff FTE
(C1/(C1+C2+C3+C4+C5))

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	38.3%	40.9%	31.6%	50.4%	11.8%	80.6%	57
Private	41.3%	42.4%	33.1%	51.8%	17.4%	74.1%	63
BA	42.3%	42.8%	33.0%	49.9%	20.0%	74.1%	38
MA	37.5%	38.2%	32.0%	42.9%	11.8%	77.6%	45
PhD	49.2%	46.5%	34.6%	56.7%	26.0%	67.3%	28
Start-up	33.3%	39.5%	25.9%	57.5%	16.1%	66.7%	18
Emerging	36.0%	37.3%	31.7%	42.7%	11.8%	62.6%	42
Mature	44.5%	45.4%	36.3%	51.9%	23.8%	80.6%	60
In a Campaign	42.3%	43.4%	34.5%	51.3%	16.1%	80.6%	71
Not in a Campaign	34.6%	39.3%	29.8%	48.8%	11.8%	74.1%	49
All	40.6%	41.7%	32.1%	50.8%	11.8%	80.6%	120

4 VOLUNTARY SUPPORT RAISED AND RETURN ON INVESTMENT

Tables 4.1 through 4.7 are all related to voluntary support raised. Table 4.1 looks at the median and mean amount of total voluntary support raised by the 120 institutions for the fiscal year covered by the study.

TABLE 4.1
Median and Mean Total Voluntary Support Raised (D1)

Category	Median	Mean	Count
Public	\$11,500,500	\$34,857,350	57
Private	\$9,164,389	\$17,083,863	63
BA	\$10,431,161	\$14,133,958	38
MA	\$5,517,797	\$8,196,251	45
PhD	\$57,679,332	\$75,147,345	28
Start-up	\$1,880,444	\$8,012,482	18
Emerging	\$5,612,115	\$13,370,833	42
Mature	\$15,171,743	\$39,289,211	60
In a Campaign	\$11,816,336	\$27,575,313	71
Not in a Campaign	\$5,517,797	\$22,557,248	49
All	\$9,550,384	\$25,526,269	120

Table 4.2 suggests another way of measuring an advancement program. As it shows, for the middle 50 percent of the institutions participating in the study, the amount of voluntary support raised (as reported to the CAE) in FY 2010 represented between 3.2 percent and 14.6 percent of the amount spent that year through their total institutional operating budget.

TABLE 4.2

Total Voluntary Support Raised as a Percentage of Total Institutional Operating Expenses (D1/A3)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	4.0%	5.7%	2.4%	7.1%	0.3%	22.5%	57
Private	10.7%	14.7%	7.0%	18.1%	1.6%	71.8%	63
BA	16.6%	19.5%	10.3%	23.7%	5.6%	71.8%	38
MA	3.5%	5.1%	2.4%	6.4%	0.6%	18.3%	45
PhD	8.0%	8.7%	3.8%	13.0%	1.7%	29.2%	28
Start-up	6.0%	13.7%	2.4%	13.6%	0.6%	71.8%	18
Emerging	3.5%	5.4%	2.4%	6.2%	0.3%	18.3%	42
Mature	10.3%	13.0%	7.1%	17.3%	1.6%	39.1%	60
In a Campaign	7.7%	11.1%	4.1%	14.9%	0.3%	71.8%	71
Not in a Campaign	6.0%	9.5%	3.0%	13.4%	0.9%	51.7%	49
All	7.1%	10.5%	3.2%	14.6%	0.3%	71.8%	120

Table 4.3 shows how much voluntary support is raised per fundraising/development staff member. The data suggest that each fundraising staff member accounts for a median of about \$680,000 of the voluntary support raised (or between \$470,000 and \$1.06 million for the middle 50 percent) and that the amounts generated by a college or university development program exceed the salaries paid to development personnel by a factor of 10 or more. Those institutions that successfully involve volunteers and members of the administration beyond the development office in fundraising efforts presumably will show even higher ratios of dollars raised per development staff member.

TABLE 4.3

Total Voluntary Support Raised per Fundraising/Development Staff FTE (D1/C1)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$676,732	\$885,356	\$469,975	\$906,869	\$164,220	\$6,854,250	57
Private	\$694,553	\$848,618	\$484,054	\$1,080,689	\$172,910	\$2,861,441	63
BA	\$744,660	\$1,114,618	\$574,093	\$1,219,376	\$357,991	\$6,854,250	38
MA	\$551,303	\$572,181	\$378,185	\$676,782	\$164,220	\$1,533,333	45
PhD	\$905,346	\$1,026,692	\$652,540	\$1,305,137	\$302,328	\$2,686,104	28
Start-up	\$680,707	\$1,150,292	\$331,187	\$917,398	\$165,249	\$6,854,250	18
Emerging	\$599,994	\$722,112	\$498,033	\$799,807	\$172,910	\$2,686,104	42
Mature	\$733,755	\$881,572	\$512,623	\$1,186,018	\$164,220	\$2,323,791	60
In a Campaign	\$688,431	\$924,281	\$527,215	\$1,091,111	\$164,220	\$6,854,250	71
Not in a Campaign	\$676,732	\$781,721	\$410,416	\$861,032	\$172,910	\$2,300,000	49
All	\$681,188	\$866,069	\$471,175	\$1,062,284	\$164,220	\$6,854,250	120

Table 4.4 displays how much voluntary support is raised per advancement staff member, with staff in all five disciplines added together.

TABLE 4.4

Total Voluntary Support Raised per Total Advancement Staff FTE (D1/(C1+C2+C3+C4+C5))

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$226,448	\$336,113	\$163,719	\$460,519	\$39,624	\$1,523,167	57
Private	\$270,268	\$357,421	\$204,010	\$450,754	\$62,174	\$1,178,240	63
BA	\$314,705	\$436,219	\$234,466	\$524,389	\$114,557	\$1,523,167	38
MA	\$195,972	\$212,699	\$127,412	\$246,102	\$39,624	\$836,364	45
PhD	\$475,993	\$469,847	\$284,519	\$632,826	\$84,010	\$882,136	28
Start-up	\$194,617	\$399,953	\$147,529	\$525,439	\$39,624	\$1,523,167	18
Emerging	\$207,918	\$265,584	\$164,471	\$284,400	\$62,174	\$882,136	42
Mature	\$330,314	\$388,715	\$229,139	\$544,795	\$82,776	\$998,654	60
In a Campaign	\$277,821	\$375,243	\$200,191	\$483,904	\$39,624	\$1,523,167	71
Not in a Campaign	\$231,658	\$306,810	\$161,245	\$338,491	\$62,174	\$987,783	49
All	\$250,671	\$347,300	\$188,138	\$457,240	\$39,624	\$1,523,167	120

Table 4.5 shows voluntary support raised per operating dollar expended on the fundraising/development area alone.

TABLE 4.5
Total Voluntary Support Raised per Dollar of Annual Operating Expenses on Fundraising/Development (D1/B5)

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$6.40	\$7.97	\$4.27	\$9.95	\$1.58	\$56.46	57
Private	\$6.36	\$7.99	\$4.39	\$10.49	\$1.08	\$25.08	63
BA	\$6.59	\$10.44	\$5.45	\$12.17	\$3.00	\$56.46	38
MA	\$4.87	\$5.47	\$3.70	\$6.85	\$1.58	\$11.83	45
PhD	\$8.85	\$8.81	\$5.88	\$11.93	\$1.08	\$15.41	28
Start-up	\$5.94	\$9.44	\$3.54	\$7.60	\$1.58	\$56.46	18
Emerging	\$5.97	\$6.44	\$4.29	\$7.69	\$1.66	\$14.12	42
Mature	\$7.41	\$8.63	\$4.93	\$11.61	\$1.08	\$25.08	60
In a Campaign	\$6.49	\$8.55	\$4.39	\$10.45	\$1.08	\$56.46	71
Not in a Campaign	\$6.33	\$7.17	\$4.27	\$8.88	\$1.66	\$17.09	49
All	\$6.38	\$7.98	\$4.34	\$10.11	\$1.08	\$56.46	120

Table 4.6 answers the question most often asked: “What is the return to the institution for the monies invested in fundraising?” The basic calculation looks at operating expenses invested for fundraising/development and advancement services relative to total funds raised.

However, the survey asked participants to report expenses and staffing in alumni relations, communications and marketing and advancement management/leadership to allow for benchmarking within those advancement disciplines and to allow CASE and institutions to look at overall investments in advancement in multiple ways. The overall median return on investment for the 120 respondents in FY 2010 was \$4.86. The return on investment for the middle 50 percent was \$3.28 and \$7.46 per dollar invested (for the 25th percentile and 50th percentile, respectively). Wherever an institution falls on this range, college and university fundraising provides an impressive return on investment.

TABLE 4.6

Return on Investment: Fundraising/Development Operating Expenses and Advancement Services Operating Expenses per Dollar of Voluntary Support Raised (D1/(B5+B11))

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$4.35	\$5.53	\$3.06	\$6.71	\$1.03	\$31.39	57
Private	\$5.49	\$6.41	\$3.52	\$8.56	\$1.03	\$19.46	63
BA	\$5.79	\$7.98	\$4.53	\$9.52	\$2.75	\$31.39	38
MA	\$3.34	\$3.87	\$2.79	\$4.94	\$1.03	\$9.36	45
PhD	\$6.23	\$6.54	\$4.38	\$9.16	\$1.03	\$13.08	28
Start-up	\$4.52	\$7.11	\$3.15	\$7.46	\$1.03	\$31.39	18
Emerging	\$3.93	\$4.77	\$2.99	\$5.43	\$1.26	\$14.12	42
Mature	\$5.70	\$6.52	\$4.26	\$8.87	\$1.03	\$18.62	60
In a Campaign	\$4.94	\$6.39	\$3.35	\$8.20	\$1.03	\$31.39	71
Not in a Campaign	\$4.62	\$5.41	\$2.97	\$6.01	\$1.26	\$15.33	49
All	\$4.86	\$5.99	\$3.28	\$7.46	\$1.03	\$31.39	120

Table 4.7 presents total voluntary support raised per dollar of total advancement operating expenses (the five areas collectively).

TABLE 4.7

Total Voluntary Support Raised per Dollar of Total Advancement Operating Expenses (D1/(B5+B7+B9+B11+B13))

Category	Median	Mean	Middle 50%		Range		Count
			25th %ile	75th %ile	Minimum	Maximum	
Public	\$2.48	\$3.20	\$1.73	\$4.05	\$0.40	\$11.39	57
Private	\$2.64	\$3.45	\$1.99	\$4.51	\$0.45	\$10.73	63
BA	\$3.34	\$4.19	\$2.37	\$5.15	\$1.29	\$11.39	38
MA	\$1.94	\$2.14	\$1.46	\$2.60	\$0.40	\$5.03	45
PhD	\$4.31	\$4.27	\$2.54	\$6.19	\$0.45	\$7.96	28
Start-up	\$2.18	\$3.44	\$1.64	\$3.81	\$0.40	\$11.39	18
Emerging	\$2.12	\$2.48	\$1.59	\$3.10	\$0.66	\$7.88	42
Mature	\$3.56	\$3.89	\$2.35	\$5.13	\$0.45	\$9.91	60
In a Campaign	\$3.06	\$3.51	\$1.92	\$4.59	\$0.40	\$11.39	71
Not in a Campaign	\$2.48	\$3.08	\$1.67	\$3.84	\$0.66	\$8.89	49
All	\$2.60	\$3.33	\$1.83	\$4.49	\$0.40	\$11.39	120

APPENDIX A. INTERPRETING THE STATISTICS IN THE REPORT

Commonly used statistics in this report include the following.

Median

When all values for a given question are rank-ordered from lowest to highest (or the reverse), the value in the middle position is the median. Half the values are above this point and half are below. If there is an even number of values, the median is derived by taking the values just below and just above the midpoint and averaging the two.

The median is often preferred over the mean as a more representative measure because median values are not added and then divided by the number of respondents (as the mean is) but rather are chosen from the position of the value at the midpoint of the values. Thus, the median is less vulnerable to being skewed by very high or very low individual values. However, when both the mean and the median measures are provided, readers can get a sense of the range of responses to a question if there is a big difference between the two measures.

Mean (or Average)

The mean is calculated by summing all responses to a question and dividing by the number of respondents to that question. Unless there are clear outliers that need to be excluded from the calculation (i.e., a few responses that are far outside the range of values for a given question), the mean includes each value reported. A mean is significantly affected by extremely high or low values, which can skew results.

Outlier

An outlier is a data point that is far outside the rest of the distribution for a given measure. Some outlier values were removed from means in the aggregate report in order to provide the most reliable data for benchmarking.

Percentiles and Minimum/Maximum Values

Because the range of responses to given questions can be wide, the report also provides percentile values for several of the figures in the report. These measures help readers understand where the variations in the range occur.

The 50th percentile is the midpoint (or median) of all values provided: half the values are above and half are below this value. Likewise, the 25th percentile is the point in the ordered range of values at which 75 percent of the values are above and 25 percent are below this value. The inverse is true of the 75th percentile: 25 percent of the values are above this point and 75 percent are below it.

The minimum and maximum values are the lowest and highest values, respectively, of the responses to a given question.

APPENDIX B. CASE ADVANCEMENT INVESTMENT METRICS STUDY (AIMS) SURVEY QUESTIONS

First, tell us about your institution . . .

- A1. What is the full legal name of your educational institution?
- A2. Is your institution public (i.e., taxpayer-funded) or private?
- A3. What is the total annual operating budget of your educational institution for the most recently completed fiscal year?
- A4. How many “alumni of record” does your institution have?
- A5. What is the total student enrollment of your institution at the beginning of the most recently completed fiscal year? (Please report beginning fall enrollment, headcount.)
- A6. Was your institution in a fundraising campaign at any time during the most recently completed fiscal year?
- A7. What was the value of your institution’s endowment at the end of the most recently completed fiscal year?
- A8. For approximately how long have you had two or more full-time staff dedicated specifically to direct fundraising?
- A9. If you have a dues-paying alumni members program, what was the gross revenue from both annual and lifetime dues collected for the most recently completed fiscal year? Please check the N/A checkbox if you do not have a membership dues program.

Next, tell us about your advancement expenditures . . .

- B1. Does your institution have an INDEPENDENT ALUMNI ASSOCIATION (defined as a separately incorporated entity from the institution and having its own governing board), and will its expenditures be included in your responses to questions on this survey?
- B2. Does your institution have an INSTITUTIONALLY RELATED FOUNDATION, and will its expenditures be included in your responses to the questions on this survey? (By “foundation” we mean an entity whose only or main mission is to support the institution.)
- B3. Does the advancement program at your institution have information technology staff who are fully dedicated to supporting advancement operations and are not part of a centralized campus IT office? (Please note that expenditures associated with these staff should be included in the ADVANCEMENT SERVICES sections of this survey.)
- B4. Does the advancement program at your institution have human resources staff who are fully dedicated to supporting advancement operations and are not part of a centralized campus HR office? (Please note that expenditures associated with these staff should be

included in the ADVANCEMENT LEADERSHIP/ADVANCEMENT MANAGEMENT sections of this survey.)

- B5. What were total annual OPERATING expenditures, including salaries and benefits, of all your FUNDRAISING/DEVELOPMENT offices (including foundation, if applicable and available) for the most recently completed fiscal year?
- B6. What are the total annual CAPITAL expenditures of all your FUNDRAISING/DEVELOPMENT offices (including foundation, if applicable and available) for the most recently completed fiscal year?
- B7. What are the total annual OPERATING expenditures, including salaries and benefits, of all your ALUMNI RELATIONS/AFFAIRS offices and INDEPENDENT ALUMNI ASSOCIATION (if applicable and available) for the most recently completed fiscal year?
- B8. What are the total annual CAPITAL expenditures of all your ALUMNI RELATIONS/AFFAIRS offices and INDEPENDENT ALUMNI ASSOCIATION (if applicable and available) for the most recently completed fiscal year?
- B9. What are the total annual OPERATING expenditures, including salaries and benefits, of all your COMMUNICATIONS AND MARKETING offices for the most recently completed fiscal year?
- B10. What are the total annual CAPITAL expenditures of your COMMUNICATIONS AND MARKETING offices for the most recently completed fiscal year?
- B11. What are the total annual OPERATING expenditures, including salaries and benefits, of your ADVANCEMENT SERVICES offices for the most recently completed fiscal year? (Include expenses associated with information technology staff for advancement here if those staff are fully dedicated to serving advancement units and are not based in a centralized campus IT unit. If your institution does not have a separate Advancement Services office do not leave this blank but check the N/A check box in the adjacent response area.)
- B12. What are the total annual CAPITAL expenditures of your ADVANCEMENT SERVICES office for the most recently completed fiscal year? (If your institution does not have a separate Advancement Services office do not leave this blank but check the N/A checkbox.)
- B13. What are the total annual OPERATING expenditures, including salaries and benefits, of your ADVANCEMENT LEADERSHIP/ADVANCEMENT MANAGEMENT office for the most recently completed fiscal year?
- B14. What are the total annual CAPITAL expenditures of your ADVANCEMENT LEADERSHIP/ADVANCEMENT MANAGEMENT office for the most recently completed fiscal year?

- B15. Are there OTHER operating expenditures that you have NOT reported here because they are covered in an overhead/indirect base or formula?

About your staffing . . .

- C1. How many full-time equivalent paid staff are there in all your FUNDRAISING/ DEVELOPMENT offices (including foundation, if available) for the most recently completed fiscal year?
- C2. How many full-time equivalent paid staff are there in your ALUMNI RELATIONS/ AFFAIRS office and INDEPENDENT ALUMNI ASSOCIATION (if applicable and available) for the most recently completed fiscal year?
- C3. How many full-time equivalent paid staff are in your COMMUNICATIONS AND MARKETING office for the most recently completed fiscal year?
- C4. How many full-time equivalent paid staff are there in your ADVANCEMENT SERVICES office for the most recently completed fiscal year?
- C5. How many full-time equivalent paid staff are there in your ADVANCEMENT LEADERSHIP/ADVANCEMENT MANAGEMENT office for the most recently completed fiscal year?

About your fundraising . . .

- D1. What was the TOTAL VOLUNTARY SUPPORT raised by your institution for the period in the most recently completed fiscal year, from all sources?
- D2. Of that total amount, how much came from ALUMNI? (This number can be the same as your organization gave to the Council for Aid to Education's "Voluntary Support of Education" survey and reported in the column headed "Sources of Support-Individuals-Alumni.")
- D3. Of that total amount, how much came from PARENTS? (This number can be the same as your organization gave to the Council for Aid to Education's "Voluntary Support of Education" survey and reported in the column headed "Sources of Support-Individuals-Parents.")
- D4. Of that total amount, how much came from OTHER INDIVIDUALS? (This number can be the same as your organization gave to the Council for Aid to Education's "Voluntary Support of Education" survey and reported in the column headed "Sources of Support-Individuals-Others.")
- D5. Of that total amount, how much came from FOUNDATIONS? (This number can be the same one your organization gave to the Council for Aid to Education's "Voluntary

- Support of Education” survey and reported in the column headed “Sources of Support - Organizations - Foundations.”)
- D6. Of that total amount, how much came from CORPORATIONS? (This number can be the same as your organization gave to the Council for Aid to Education’s “Voluntary Support of Education” survey and reported in the column headed “Sources of Support - Organizations - Corporations.”)
- D7. Of that total amount, how much came from RELIGIOUS ORGANIZATIONS? (This number can be the same one your organization gave to the Council for Aid to Education’s “Voluntary Support of Education” survey and reported in the column headed “Sources of Support - Organizations - Religious Orgs.”)
- D8. Of that total amount, how much came from “OTHER ORGANIZATIONS,” such as fundraising consortia? (This number can be the same as your organization gave to the Council for Aid to Education’s “Voluntary Support of Education” survey and reported in the column headed “Sources of Support - Organizations - Fundraising Consortia and Other Orgs.”)

Finally, your contact info

- E1. Please give us your name. (This will be used only to contact you about the survey; it will not be shown in reports or given out to third parties.)
- E2. Please give us your email address. (This will be used only to contact you about the survey; it will not be shown in reports or given out to third parties.)
- E3. Please give us your job title. (This will only be used to keep track of what types of staff complete the survey; it will not be given out to third parties or appear in reports.)
- E4. Please give us your phone number. (This will be used only to contact you about the survey; it will not be shown in reports or given out to third parties.)

APPENDIX C. RATIO NAMES AND FORMULAS

Ratio Name	Ratio Formula	Variables
Total Operating Expenses for Alumni Relations per Alumnus	B7/A4	B7. Total operating expenses for alumni relations
		A4. Alumni of record at institution
Total Advancement Operating Expenses	B5+B7+B9+B11+B13	B5. Total operating expenses for fundraising/development
		B7. Total operating expenses for alumni relations
		B9. Total operating expenses for communications and marketing
		B11. Total operating expenses for advancement services
		B13. Total operating expenses for advancement management/leadership
Total Advancement Operating Expenses Per Student	(B5+B7+B9+B11+B13)/A5	B5. Total operating expenses for fundraising/development
		B7. Total operating expenses for alumni relations
		B9. Total operating expenses for communications and marketing
		B11. Total operating expenses for advancement services
		B13. Total operating expenses for advancement leadership/management
		A5. Total student enrollment for institution at beginning of fall semester
Total Advancement Expenses, Operating and Capital	B5+B6+B7+B8+B9+B10+B11+B12+B13+B14	B5. Total operating expenses for fundraising/development
		B6. Total capital expenses for fundraising/development
		B7. Total operating expenses for alumni relations
		B8. Total capital expenses for alumni relations
		B9. Total operating expenses for communications and marketing
		B10. Total capital expenses for communications and marketing
		B11. Total operating expenses for advancement services
		B12. Total capital expenses for advancement services
		B13. Total operating expenses for advancement leadership/management
B14. Total capital expenses for advancement management/leadership		

Total Advancement Operating Expenses as a Percentage of Total Institutional Operating Expenses	$(B5+B7+B9+B11+B13)/A3$	B5. Total operating expenses for fundraising/development
		B7. Total operating expenses for alumni relations
		B9. Total operating expenses for communications and marketing
		B11. Total operating expenses for advancement services
		B13. Total operating expenses for advancement management/leadership
		A3. Total institutional operating expenditures
Total Voluntary Support Raised as a Percentage of Total Institutional Operating Expenditures	D1/A3	D1. Total voluntary support raised by the institution from all sources
		A3. Total institutional operating expenditures
Total Voluntary Support Raised per Dollar of Total Advancement Operating Expenditures	$D1/(B5+B7+B9+B11+B13)$	D1. Total voluntary support raised by the institution from all sources
		B5. Total operating expenses for fundraising/development
		B7. Total operating expenses for alumni relations
		B9. Total operating expenses for communications and marketing
		B11. Total operating expenses for advancement services
		B13. Total operating expenses for advancement management/leadership
Total Voluntary Support Raised per Dollar of Annual Operating Expenditures on Fundraising/Development	D1/B5	D1. Total voluntary support raised by the institution from all sources
		B5. Total operating expenses for fundraising/development
Total Advancement Staff FTEs	$C1+C2+C3+C4+C5$	C1. FTE paid staff in fundraising/development
		C2. FTE paid staff in alumni relations
		C3. FTE paid staff in communications and marketing
		C4. FTE paid staff in advancement services
		C5. FTE paid staff in advancement management/leadership
Total Voluntary Support Raised per Total Advancement Staff FTE	$D1/(C1+C2+C3+C4+C5)$	D1. Total voluntary support raised by the institution from all sources
		C1. FTE paid staff in fundraising/development
		C2. FTE paid staff in alumni relations
		C3. FTE paid staff in communications and marketing
		C4. FTE paid staff in advancement services
		C5. FTE paid staff in advancement management/leadership

Total Voluntary Support Raised per Fundraising/ Development Staff FTE	D1/C1	D1. Total voluntary support raised by the institution from all sources
		C1. FTE paid staff in fundraising/development
Fundraising/Development Staff FTE as a Percentage of Total Advancement Staff FTE	C1/(C1+C2+C3+C4+C5)	C1. FTE paid staff in fundraising/development
		C2. FTE paid staff in alumni relations
		C3. FTE paid staff in communications and marketing
		C4. FTE paid staff in advancement services
		C5. FTE paid staff in advancement management/ leadership
"Return on Investment" (Fundraising/Development Operating Expenses and Adv. Services Operating Expenses per Dollar of Voluntary Support Raised)	D1/(B5+B11)	D1. Total voluntary support raised by the institution from all sources
		B5. Total operating expenses for fundraising/ development
		B11. Total operating expenses for advancement services

APPENDIX D. CASE ADVANCEMENT INVESTMENT METRICS STUDY (AIMS): SURVEY GUIDELINES AND DEFINITIONS¹

Purpose of This Document

This document contains guidelines and definitions to help CASE members respond to the CASE Advancement Investment Metrics Study (AIMS) survey. Potential respondents should read the guidelines and definitions before answering the survey questions. Additional guidance will also be provided within the survey itself.

The question numbers on the survey relating to the guideline statements below are listed in italics against each sub-heading for easy cross-reference. If you have any questions after reading this document, please contact the CASE research staff at research@case.org or call Judith Kroll, CASE senior director of research, at 202-478-5557.

About the Survey

The AIMS survey seeks to record, analyze and report “advancement investments” in such a way that members can benchmark their own levels with those of their peers and relate those investments to their fundraising success.

The approach described below does not provide a definitive, or the only, method for capturing expenditures that can be attributed to advancement, or the only way of measuring the “cost to raise a dollar” or doing a return on investment analysis of fundraising. It is an attempt designed by experienced fundraising practitioners to make practical judgments about expenditures to be considered and included and to use those judgments as a basis for obtaining comparable data across institutions that may then be used to evaluate similar investments and outcomes.

There are five major advancement functions for which expenditures are requested in the AIMS survey:

- Fundraising/Development
- Alumni Relations/Affairs
- Communications and Marketing
- Advancement Services
- Advancement Leadership/Advancement Management.

These advancement functions, and the expenditures made to fulfill them, may occur within organizational frameworks, legal entities, program structures, and office names that vary greatly from institution to institution. As a result, completing this survey may require the collection of data from beyond a centralized advancement unit at your institution. (Note: While multiple

1. Original author: Lori Redfearn, *California State University, Office of the Chancellor*, Long Beach, CA. Additional material: Chris Thompson and Rae Goldsmith, CASE, with input from an advisory group of fundraising practitioners.

people at your institution may need to contribute data to respond to the survey, a single individual should be identified to actually collect and submit the data.)

You will also need to collect functional expenses data from wherever they reside, including central university or college offices, decentralized colleges and other sub-units within a larger institution, other decentralized development and fundraising offices, and (if applicable) institutionally related foundations and independent alumni associations. Full reporting of all advancement expenditures, including those for institutionally related foundations and independent alumni associations, will create the most comprehensive and comparable data for benchmarking. We urge institutions to collaborate with these foundations and associations in the completion of this survey.

The guidelines and definitions below show you what expenditures to include and exclude, and under which label the information is entered, regardless of the name of unit within which the expenditure occurs at your institution.

We recommend that you keep notes for yourself as to how you allocated expenditures and staffing among the advancement functions (in essence, how you came up with your institution's numbers). These notes will be of assistance to you or another colleague when your institution completes the survey in subsequent years.

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 - 3.1.1 Salaries and wages
 - 3.1.2 Employment benefits
- 3.2 Services, supplies, and other current expenses
 - 3.2.1 Expenditures to be included:
- 3.3 Capital expenditures: equipment and software
 - 3.3.1 Expenditures to be included
 - 3.3.2 Expenditures to be excluded

4. Other definitions

- 4.1 Total Educational & General Expenditures of the institution
 - 4.1.1 Expenditures to be included
 - 4.1.2 Expenditures to be excluded
- 4.2 Alumni of Record
- 4.3 Total student enrollment
- 4.4 Campaigns
- 4.5 Voluntary support raised
 - 4.5.1 Revenues to be included
 - 4.5.2 Revenues to be excluded

1. TOTAL PROGRAMS

1.1 General expenditures to be **included**:

- all those expenditures that generally fall under the rubric of “advancement” where:
 - advancement is defined as a systematic, integrated method of managing relationships in order to increase an educational institution’s support from its key outside constituents, including alumni and friends, members of the community, and philanthropic entities of all types
 - the management of these activities has been assigned to someone as part of his or her job responsibility and resources have been allocated to support them
 - advancement may be part of a centralized or decentralized organizational structure.

1.2 General expenditures to be **excluded**:

- the salaries of the president and heads of academic units (provosts, deans, department chairs) EVEN IF fundraising, alumni relations, and communications and marketing are responsibilities included in their job descriptions and they spend significant portions of their work time on such activities
- overhead costs, such as office space, utilities, insurance, janitorial services, accounting services, payroll services, audit services, and general institution information technology support EVEN IF these costs are related to an off-site location (see discussion of information technology support provided and paid for within advancement in section 2 on next page).

2. DEFINITIONS OF EXPENDITURES BY MAJOR PURPOSE

Reporting by primary purpose

Several purposes may be served simultaneously by activities in each of the broad advancement disciplines of Fundraising/Development, Alumni Relations/Affairs, Communications and Marketing, Advancement Services and Advancement Leadership/Advancement Management. For the purposes of this report you should assume that all activities are undertaken for a *primary purpose*. Secondary benefits from these activities may also occur, but the allocation of expenditure to a category should generally be based on the *primary* purpose. For the purposes of this survey, report expenditures and staffing numbers by primary purposes served.

Advancement activities and the staff who undertake them may or may not be under an office with the same name: for example, if your Fundraising/Development office has its own communications staff person, then report that employee’s employment and salary under “Communications

and Marketing” on the survey. This may mean you will have to segment out some of your own existing budget category figures and report parts of them in different categories, but we believe it will yield a picture that is more useful to respondents because it will show the budget truly spent on each advancement *function*, and not just a total that merely reflects an organizational office structure and labels that may vary between institutions.

Institutionally related foundations and independent alumni associations

Include advancement expenditures of any independent alumni association or institutionally related foundation, if applicable and available, under the appropriate advancement function also. (Questions B1 and B2 give you the opportunity to let us know if those entities exist at your institution and whether their expenditures will be included in your numbers.)

Information technology and human resources within advancement

If your advancement operation includes information technology staff members who are fully dedicated to serving advancement and are not part of a centralized campus IT unit, include expenditures associated with these staff in Advancement Services. If your advancement operation includes human resources staff that are fully dedicated serving advancement and are not part of a centralized campus HR unit, include expenditures associated with these staff in Advancement Leadership/Advancement Management. Questions B3 and B4 give you the opportunity to let us know if you have these functions within advancement at your institution.

Gross expenditures

Please report GROSS expenditures only, even if these may in practice be offset by program (non-gift) revenues, such as income from ticket sales, per-plate dinners, event admission fees, affinity program royalties, and so on.

Inclusions and exclusions

The following sections (2.1 to 2.4) define each activity by primary purpose and provide examples of the “included” and “excluded” expenditures for the reporting to the AIMS survey. In some institutions, “included” expenditures may be covered in an automatically added overhead/indirect base, or formula, or percentage calculation. Do NOT report the dollar value of that base, but instead please try and estimate expenditures on the “included” items as if they had been purchased as direct costs. (Question B15 gives you the opportunity to let us know about this.)

2.1 Fundraising / Development [Questions B5 and B6]

The primary purpose of this activity is to secure philanthropic gifts in support of the institution.

Advancement units included under this section should include (where present at an institution) the annual fund, major/principal gifts, planned giving, corporate and foundation relations, central development, college-based development, and educational fundraising campaign management. The fundraising costs to be reported include those incurred by central development, campaigns, institutionally related foundations, academic units, athletic associations and their affiliate organizations, and fundraising consortia.

2.1.1 Expenditures to be **included**:

- cultivating and soliciting actual and prospective donors, including reimbursed expenditures incurred by the president, faculty, non-advancement staff, or volunteers
- preparing, producing, distributing and evaluating fundraising print and electronic literature, such as websites, newsletters, brochures, case statements, and proposals
- enlisting and servicing fundraising volunteers and volunteer groups, including the costs of meetings, travel, communication mechanisms, service recognition, and other supplies
- volunteer expenses in connection with fundraising/development functions, but only if billed as a direct cost
- fundraising events, such as luncheons, dinners, golf tournaments, benefit concerts, auctions, and the like
- evaluating philanthropic capacity, including advancement counsel, feasibility studies, organizational assessments, and data screening
- acceptance of gift instruments, including professional advisors such as legal counsel, appraisers, or special asset experts.

2.1.2 Expenditures to be **excluded**:

- database management, reporting, prospect research, and gift processing (these should be reported under “Advancement Services” below)
- administering gift revenue after it has been received and acknowledged, including costs incurred for accounting and treasurer functions and the use of external services such as realtors and attorneys to liquidate gifts of real and personal property **after** they have been accepted
- securing revenue other than private gifts, such as contract revenue, government support, auxiliary enterprise income, tuition and fees
- conducting activities that are not primarily for the purpose of fundraising.

2.2 Alumni Relations/Affairs [Question B7 and B8]

The primary purpose of this activity is to build long-term relationships with alumni to develop champions of the institution’s mission, enhance participation in the institution’s activities, and

enhance alumni financial support. The alumni relations expenditures include those incurred in institution administered programs, independent alumni associations, and programs administered by academic units. Expenditures by alumni relations on fundraising/ development, communications and marketing, advancement services and advancement leadership/advancement management functions within alumni relations, should be reported under those other disciplines. Include expenditures of independent alumni associations if applicable and available.

2.2.1 Expenditures to be **included**:

- publishing, producing and distributing alumni newsletters and alumni-specific magazines (newsletters and magazines that are produced for general/multiple external audiences should be counted under Communications and Marketing)
- creating and maintaining websites, social networking sites and other electronic media targeting alumni
- organizing, promoting and maintaining memberships in clubs and chapters, including their communications, activities, and special events
- organizing and holding alumni events, such as class reunions, homecoming, and meetings of alumni boards and committees
- volunteer expenses in connection with alumni relations functions, but only if billed as a direct cost
- organizing, promoting, and conducting noncredit instructional programs for alumni
- providing special programs such as alumni travel programs, career counseling, and health and fitness programs
- recognizing the achievements and service of alumni.

2.2.2 Expenditures to be **excluded**:

- providing career counseling for students
- recruiting students, including scholarship programs supporting student recruitment
- operating and maintaining alumni facilities
- developing affinity business relationships
- soliciting gifts or conducting alumni donor events (fundraising efforts managed by alumni relations; i.e., annual fund should be reported under Development)
- advocating the interests of the institution to government agencies and elected and appointed officials; and
- conducting activities that are not primarily for the purpose of alumni relations.

2.3 Communications and Marketing [Questions B9 and B10]

The primary purpose of this activity is to keep the institution's *external* audiences informed of activities, achievements and priorities to build public support. Expenditures specifically dedicated instead to Alumni Relations or Development should be counted under those categories.

2.3.1 Expenditures to be **included**:

- maintaining news or press bureaus that respond to media requests and issue news releases
- maintaining a publication unit that prepares print and electronic brochures, magazines, pamphlets, leaflets, newsletters, posters, certificates, reports and other promotional materials
- developing and maintaining sections of the website that are focused primarily on external audiences (excluding prospective students); include, for example, the home page, pages devoted to development and alumni relations, and pages developed to feature campus news and events; include expenses associated with ensuring brand consistency throughout the site
- maintaining a marketing unit that researches, develops and promotes the institution's identity, brand, image, awareness, academic reputation and strategic positioning
- providing writing, editorial, graphic, photographic, and other technical services for public relations purposes
- maintaining records, files and archives on persons of influence, press contacts, newsworthy individuals, institutional data, photographs, printed material, and other items of use in public relations
- organizing and conducting events that serve to cultivate the interest of external constituencies
- providing visitor and guest services, including informational material, tours, and entertainment;
- volunteer expenses in connection with communications and marketing functions, but only if billed as a direct cost
- conducting or commissioning research and evaluations that support the public relations program, including attitude surveys, opinion polls, readership surveys, content analysis, focus groups, and the like
- developing, producing or buying media such as print, radio, television and internet advertisements or features.

2.3.2 Expenditures to be **excluded**:

- operating television and radio stations, printing plants, and copy, duplicating, or word-processing centers that serve more than the communications and marketing function
- carrying out public service functions, such as extension service, continuing education, or community service learning
- conducting communications with federal, state, and local government officials and agencies;

- providing technological equipment, networking or programming that supports the foundational architecture or utility of data services used broadly across the institution;
- providing emergency communications services such as reverse calling systems, blast texting, and audible alarms
- providing audio-visual services to the instructional, research, and public service programs of the institution
- maintaining programs for the enhancement of student life on campus, such as student organizations, counseling, visiting lecturers and cultural events, job placement services, and the like
- holding events at which regular institution business is conducted, such as commencement, opening convocations of students and faculty, and faculty meetings
- supporting the requirements of the governing board, including the costs of its travel, lodging, meals, and meetings
- providing services or publications for the recruitment of prospective students
- producing publications “of record,” including catalogs, staff directories, and faculty and staff handbooks and manuals
- producing sections of the website focused on academic units and student recruitment as well as sections that are not focused primarily on external audiences
- marketing merchandise
- conducting sports information programs
- conducting institutional research, where the primary function is to provide data that supports management functions or reporting requirements
- conducting activities that are not primarily for the purpose of public relations.

2.4 Advancement Services [Questions B11 and B12]

The primary purpose of this activity is to provide multi-discipline advancement support for technology, research and data functions, including database management, reporting, prospect research, and gift processing.

2.4.1 Expenditures to be included:

- accountability, financial and donor reporting in advancement
- database management in advancement
- maintaining records and lists of actual and prospective donors (alumni, parents, other friends, corporations, foundations, and other organizations)
- identifying prospective donors, including prospect research; peer evaluations; and the acquisition of services, information, and materials that assist in this process;

- gift processing and receipting;
- supporting advancement information technology needs if those needs are staffed within the advancement office and are not served through a central campus IT office

2.4.2 Expenditures to be **excluded**:

- overhead and general operational support provided by the institution for all functions
- functions that may be uniquely assigned to Advancement at the reporting institution but are not generally considered advancement functions, such as ticket administration.

2.5 Advancement Leadership/Advancement Management [Questions B13 and B14]

By “Advancement Leadership/Advancement Management” we mean the expenditures and executive staff who oversee ALL OR MULTIPLE advancement disciplines rather than one discipline exclusively; often these executive-level staff will have a title of vice president and report directly to the institution’s president, chancellor or head. We also mean expenditures associated with staff who directly support these executives as well as staff who are dedicated specifically to human resources for advancement and who are not part of the institution’s central human resources department. All other advancement staff are to be counted in the staff numbers for the advancement discipline in which they spend the majority of their time.

Individual advancement staff at smaller institutions who may be in small or one-person shops, and who are therefore both the multi-function manager and the primary implementer of a function should pro-rate their expenditures and staff position across the advancement functions and leadership/management accordingly.

2.5.1 Expenditures to be **included**:

- strategic leadership, management, and goal-setting in advancement;
- policy development and oversight;
- recruitment and retention of advancement personnel;
- volunteer expenses incurred by advancement leadership and billed as a direct cost;
- budgeting and resource administration in advancement;
- human resources activities if they are based in advancement and are not part of a central campus HR office

2.5.2 Expenditures to be **excluded**:

- expenditures intended to benefit only one advancement function.
- functions that may be uniquely assigned to Advancement at the reporting institution but are not generally considered advancement functions, such as commencement or athletics administration.

3. DEFINITIONS: OBJECTS OF EXPENDITURE [QUESTIONS IN SECTION B]

3.1 Personnel compensation

3.1.1 Salaries and wages:

Report both professional staff salaries and support staff salaries and wages as described below.

Report the salary costs of full-time, part-time, and temporary *exempt* employees. As noted previously, EXCLUDE salaries of presidents and heads of academic units. Report the salaries and wages of all *non-exempt* full-time, part-time, and temporary support staff and student personnel. Support staff should be reported under the primary purpose served; i.e. Fundraising/Development, Alumni Relations, Communications and Marketing, Advancement Services and Advancement Leadership/Advancement Management. Do NOT report all support staff under Advancement Leadership/Advancement Management.

3.1.2 Employment benefits:

Report the share of benefits paid by the institution for the salaries and wages reported. These benefits usually include social security; medical, disability, and life insurance; and retirement plan contributions. Professional staff benefits may also include car allowances, housing subsidies, memberships, and other perquisites. Report these benefits even if they are not included in advancement budgets. If you do not know the value of these benefits, contact your human resources office and ask for either the specific amount or the percentage of benefits as a part of salary paid by your institution. If you still do not know the value of the benefits, calculate them at 28 percent of salary for all advancement employees in each category.

3.2 Services, supplies, and other current expenses

3.2.1 Expenditures to be **included**:

- postage and delivery services;
- telephone and personal communication devices (Blackberries, Trios, etc.);
- printing and duplicating, both in-house and contracted;
- travel including transportation, tolls, mileage, parking fees, lodging, meals, conference fees and incidentals;
- meeting and entertainment costs;
- professional fees and honoraria for fund-raising counsel, commercial fundraisers, consultants, wealth screening, attorneys, realtors, escrow agencies, writers, designers, advertising and public relations agencies, and the like;
- general office supplies, equipment and software valued at under \$5,000;
- subscriptions and memberships; and
- training

3.3 Capital expenditures: equipment and software (valued at \$5,000 or more) [Questions B6, B8, B10, B12, B14]

These expenditures may be amortized over a three-year period.

3.3.1 Expenditures to be **included**:

- specialized equipment and software supporting the functional activities of Advancement; i.e., calling systems, donor management software (such as BSR, Raisers Edge, Donor Perfect), planned giving software (such as Crescendo Gift Legacy), public relations software (such as Blackbaud, RSS), including licensing and technical support for implementation and upgrades.

3.3.2 Expenditures to be **excluded**:

- renovations, alterations or improvements to office space
- standard office equipment found in any well-furnished administrative office – tables, desks, chairs, lamps, and the like.

4. OTHER DEFINITIONS

4.1 Total educational & general expenditures of the institution [Question A3]

The number you give here should be the same number reported for your institution in the Council for Aid to Education's Voluntary Support of Education survey² (if your institution responded to that survey), and commonly referred to as "Educational and General Expenditures," or "E&G expenditures." Public institutions should report the combined expenditures for the foundation and the institution.

Expenditures to be **included**:

- instruction
- research
- public service
- academic support
- student services
- institutional support
- scholarships and fellowships
- operation and maintenance of the physical plant.

Expenditures to be **excluded**:

- auxiliary enterprises such as bookstores and food services
- hospital services
- independent operations.

4.2 Alumni of record [Question A4]

The number you give here should be the same number reported for your institution in the Council for Aid to Education's *Voluntary Support of Education* survey³ (if your institution responded to that survey). By "alumni of record" we mean the total number of living alumni, as defined above, for whom you feel reasonably confident you have a correct contactable address (mail or email) in your database, i.e. they are "solicitable."⁴

An "alumnus/alumna" is anyone who obtained a degree or certificate (undergraduate or associates or graduate, full-time or part time) from your institution, OR who completed courses for credit

2. Voluntary Support of Education, Council for Aid to Education, NY; Ann Kaplan, Director, www.cae.org.

3. Voluntary Support of Education, Council for Aid to Education, NY; Ann Kaplan, Director, www.cae.org.

4. See *CASE Reporting Standards and Management Guidelines for Educational Fundraising*, 4th edition, 2009, p. 54.

towards a degree or certificate but moved on before graduating. The person does NOT have to be a dues-paying or registered member of an alumni association to be counted as an alumnus or alumna.

4.3 Total student enrollment [Question A5]

The number you give here should be the same number reported for your institution in the Council for Aid to Education's *Voluntary Support of Education* survey (if your institution responded to that survey). In the 2007 print edition of the VSE that number is found in column 29 for "Beginning Fall Enrollment (headcount)." This number is the sum of full and part-time students, NOT "full-time equivalent" students. For example, if you have 1,000 full-time students and 500 half-time students, you would enter "1500," and not "1250."

4.4 Campaigns [Question A6]

A "campaign" is a focused fundraising initiative that has a defined length of usually more than a year and goals separate from those of on-going annual fund-type operations, even though those annual fund operations may sometimes be referred to as "annual fund campaigns."

4.5 Voluntary support raised [Question D1]

The number you give here should be the same number reported for your institution in the Council for Aid to Education's *Voluntary Support of Education* survey (if your institution responded to that survey). In the 2007 print edition of the VSE that number is found in column 1 for "Total Support." "Total support" includes "outright" and "deferred" gifts combined, with deferred gifts included at discounted present value. If your institution has not reported to the VSE and you have to collect data from scratch, follow the lists below.⁵

4.5.1 Revenues to **include**:

- Gifts and non-governmental grants to the institution, for both current operations and capital purposes, regardless of form (cash, products, properties, securities, etc).
- Gifts and non-governmental grants to institutionally-related foundations and organizations created to raise philanthropic funds for the institution.
- Securities, real estate, equipment, property, or other non-cash gifts, reported at fair market value established by an independent appraiser, but not any cash income therefrom.

5. Adapted from the *Voluntary Support of Education*, Council for Aid to Education, NY; Ann Kaplan, Director, www.cae.org, and from the *CASE Reporting Standards and Management Guidelines for Educational Fundraising*, 4th edition, 2009,

- Deferred gifts reported at discounted present value.
- Cash value of life insurance contracts.
- Cash payments returned as contributions from salaried staff.
- Insurance premiums paid by donors.

4.5.2 Revenues to **exclude**:

- Advertising revenue.
- Alumni membership dues.
- Affinity program royalties.
- Contract-governed revenues, and contract sponsored-research, even if they are labeled a “gift.”
- Contributed services.
- Contributions from governments of all levels, and whether U.S. or foreign, including the government portion of state matching or incentive funding schemes.
- Discounts on purchases.
- Earned income, including transfer payments from medical or analogous practice plans.
- Transfers from institutionally-related foundations and other organizations, as these should already have been counted on first receipt above, not when they are transferred.
- Investment earnings.
- Monies received as a result of exclusive vendor relationships, such as “pouring rights”
- Pledges.
- Revenue from special education programs.
- Aid to named students.
- Surplus income transfers from ticket-based operations, except for the amount equal to that portion permitted as a deduction by the IRS.
- Testamentary commitments (bequest intentions).
- Tuition payments, even if gifted to an individual student by a third party.
- Value of deferred-giving contracts terminated due to the death of the income beneficiary during the year.

APPENDIX E. PARTICIPATING INSTITUTIONS

Albany College of Pharmacy and Health Sciences (NY) Davenport University (MI)
 Albany Law School (NY) DePaul University (IL)
 Amherst College (MA) Dickinson College (PA)
 Arizona State University Dominican Campus (TN)
 Austin College (TX) Drew University (NJ)
 Benedictine College (KS) Drexel University (PA)
 Berry College (GA) Edison State College Foundation, Inc. (FL)
 Bowdoin College (ME) Emporia State University (KS)
 Bridgewater College (VA) Freed-Hardeman University (TN)
 Brown University (RI) Frostburg State University (MD)
 Butler University (IN) Gordon College (MA)
 California Maritime Academy Hampshire College (MA)
 California Polytechnic State University Haverford College (PA)
 California State Polytechnic University, Pomona Heidelberg University (OH)
 California State University, Bakersfield Hillsborough Community College (FL)
 California State University, Channel Islands Houston Baptist University (TX)
 California State University, Chico Humboldt State University (CA)
 California State University, Dominguez Hills Iowa State University Foundation
 California State University, East Bay Ithaca College (NY)
 California State University, Fresno John Paul the Great Catholic University (CA)
 California State University, Fullerton Johnson Bible College (TN)
 California State University, Long Beach Keene State College (NH)
 California State University, Los Angeles Kenyon College (OH)
 California State University, Monterey Bay Lawrence University (WI)
 California State University, Northridge Lebanon Valley College (PA)
 California State University, Sacramento Lewis University (IL)
 California State University, San Bernardino Linfield College (OR)
 California State University, San Marcos Loyola Marymount University (CA)
 California State University, Stanislaus Foundation Loyola University New Orleans (LA)
 Canisius College (NY) Manhattanville College (NY)
 Central Washington University Massachusetts Institute of Technology
 Chapman University (CA) Medical University of South Carolina
 Christendom College (VA) Mercer County Community College (NJ)
 Colby-Sawyer College (NH) Mercyhurst College (PA)
 College of Saint Benedict (MN) Michigan Technological University
 College of the Holy Cross (MA) Middle Tennessee State University
 College of William & Mary (VA) Mills College (CA)
 College of Wooster (OH) Missouri Western State University Foundation
 Colorado College Monroe Community College (NY)
 Colorado State University New Mexico State University
 Connecticut College Northwest Nazarene University (ID)
 Creighton University (NE) Norwich University (VT)
 Dallas County Community College District (TX) Nova Southeastern University (FL)

Park University (MO)
Pepperdine University (CA)
Portland State University (OR)
Ripon College (WI)
Saint Joseph College (CT)
Saint Mary's College of California
San Diego State University (CA)
San Francisco State University (CA)
San Jose State University (CA)
Santa Clara University (CA)
Scripps College (CA)
Simmons College (MA)
Skidmore College (NY)
Smith College (MA)
Sonoma State University (CA)
Southwestern University (TX)
St. Edward's University (TX)
St. John Fisher College (NY)
St. Louis College of Pharmacy (MO)
St. Norbert College (WI)
St. Olaf College (MN)
Stetson University (FL)
SUNY at New Platz Foundation (NY)
SUNY Potsdam (NY)
Susquehanna University (PA)
Temple University (PA)
Texas A&M University (Corpus Christi)
Texas Christian University
Thomas More College of Liberal Arts (NH)
Thomas University (GA)
Trevecca Nazarene University (TN)
Unity College (ME)
University of Alabama (Tuscaloosa)
University of Arkansas
University of California, Davis
University of Central Florida
University of Cincinnati (OH)
University of Connecticut Foundation, Inc
University of Dallas (TX)
University of Florida
University of Idaho
University of Louisville (KY)
University of Maryland University College
University of Miami (FL)
University of North Florida
University of North Texas
University of Northern Iowa
University of South Alabama
University of Texas at Austin
University of Washington
Utah State University
Vassar College (NY)
Virginia Tech
Wesleyan University (CT)
West Virginia University Foundation, Inc.
Widener University (PA)
William Jewell College (MO)
William Penn University (IA)

ABOUT CASE

The Council for Advancement and Support of Education (CASE) is the professional organization for advancement professionals at all levels who work in alumni relations, communications and marketing, development and advancement services.

CASE's membership includes more than 3,400 colleges, universities and independent and secondary schools in 61 countries. This makes CASE one of the largest nonprofit education associations in the world in terms of institutional membership. CASE also serves more than 60,000 advancement professionals on staffs of member institutions and has more than 22,500 individual "premier-level members" and more than 230 Educational Partner corporate members.

CASE has offices in Washington, D.C., London, Singapore and Mexico City. The association produces high-quality and timely content, publications, conferences, institutes and workshops that assist advancement professionals perform more effectively and serve their institutions.

For information, visit www.case.org or call +1-202-328-2273.