CASE-CCAE Survey of Charitable Giving to Higher Education in Canada

Frequently Asked Questions

1. Who conducts the CASE-CCAE survey?

The CASE-CCAE survey is conducted in partnership by CASE and the Canadian Council for the Advancement of Education (CCAE). The survey is closely aligned with the Ross-CASE Survey, the CASE survey of Charitable Giving to Universities in Australia and New Zealand, and CASE Europe Fundraising Survey. CASE and CCAE plan to conduct the survey on an annual basis to enable institutions to benchmark year-over-year progress in fundraising and document changes in charitable giving to Canadian higher education over time.

2. What information does the survey collect and why is it important?

The survey collects data on philanthropic funds secured by institutions in their most recently completed fiscal year, including information on the sources, purposes, and sizes of gifts. The survey also collects data on bequest commitments and campaign status and goals. The survey will provide a valuable resource for advancement professionals, enabling them to benchmark fundraising year over year and against peer institutions. Findings will also help to demonstrate the important role of advancement and the impact philanthropy has on Canadian colleges and universities.

3. How is data collected and made available to participants?

Data is collected in CASE's online Benchmarking Toolkit. The Toolkit allows institutions to submit and update data during the period that the survey is open. CASE has also developed a "smart" Excel "Data Collection Form" allowing survey participants to assemble and review data prior to submitting it via the Benchmarking Toolkit. Institutions participating in the survey should designate one individual to complete the online survey.

The Toolkit also serves as a reporting and benchmarking tool, providing downloadable reports and charts and allowing survey participants to review year-over data and benchmark their institution against

customized peer/comparison groups. Learn more about the CASE Benchmarking Toolkit here. A CASE website login is required to access the CASE Benchmarking Toolkit.

In addition to the reporting and benchmarking options provided by the Toolkit, CASE will publish a report and analysis of findings and conduct complimentary webinars to share and discuss findings with survey participants.

4. Who can access institutional data?

Data will be reported anonymously in published reports and in the Benchmarking Toolkit. Only CASE and CCAE will have access to non-anonymized data. Toolkit users can create comparison groups based on submitted data regarding institution type, enrollment, and other variables in the survey. Any staff member from institutions that have participated in the survey is eligible for access to the toolkit. The primary survey contact at the institution should email Research@case.org to request or revoke toolkit access for additional colleagues.

5. Are institutions required to submit data for all questions?

Institutions are required to submit data for a set of core questions. Other questions are optional but institutions are encouraged to complete as many questions as possible. This will provide the most comprehensive picture of charitable giving to higher education in Canada and greatly enhance the value of the survey and associated benchmarking resources for all participating institutions.

CASE will review all survey responses and contact institutions to resolve apparent errors or inconsistencies in submitted data.

6. Can institutions save responses and complete the survey in parts?

Yes, responses can be saved to allow the survey to be completed in parts. Answers for each section must be saved before proceeding to another section, before leaving the survey or before closing the webpage. See the how-to guide for more details. Survey participants can update their responses at any time during the data collection period. Using the Data Collection Form may obviate the need to complete the Toolkit survey in parts.

7. What resources are available to aid in completion of the survey?

To aid institutions in assembling data for the survey CASE has developed an Excel Data Collection Form, a Question-by-Question Guidance document, and Reporting Rules that provide more detailed guidance and examples. These documents can be found on the survey webpage.

Institutions can also contact CASE if they require any assistance throughout the survey process. Simply email Research@case.org.