

CASE Support of Education Survey, Australia and New Zealand, 2019



Findings from data collected from 26 universities in Australia and New Zealand for 2016, 2017, and 2018



CASE Support of Education Survey, Australia and New Zealand Editorial Board

The Editorial Board members helped manage the project by contributing their time and expertise at each stage of the survey and report. They were involved with survey review, script creation, survey promotions, data collection, data verification, analysis, report writing, and dissemination. The 2019 committee consisted of

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CASE Staff

Ong Kai Yi, Head, Marketing and Communications, CASE Asia-Pacific

Yashraj Jain, Research Manager, CASE Europe

David Bass, Senior Director Research, CASE

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CONTENTS

President’s Note	4
Foreword	5
Executive summary	6
Findings	6
Key indicators	8
New funds secured 2018	9
Cash income received 2018	12
Annual funds 2018	14
Alumni and donors 2018	15
Fundraising investment 2018	17
Alumni relations investment 2018	19
Institutional expenditure and advancement staff 2018	21
Trends in key indicators 2016–2018	23
Philanthropic income trends	23
Alumni and donor trends	26
Fundraising and alumni relations staffing trends	27
Fundraising and alumni relations cost trends	28
Comparisons with institutions in the U.K.	30
Appendix	32
Methodology	32
Reporting conventions	32
Participating institutions	34
Glossary	35

ABOUT CASE

CASE believes in advancing education to transform lives and society. As a global nonprofit membership association of educational institutions, CASE helps develop the communities of professional practice that build institutional resilience and success in challenging times. The communities include staff engaged in alumni relations, fundraising, marketing, student recruitment, stakeholder engagement, crisis communications, and government relations. CASE is volunteer led and uses the intellectual capital of senior practitioners to build capacity and capability across the world.

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PRESIDENT'S NOTE

During my tenure at the University of Melbourne I was privileged to participate in the creation of The Charitable Giving to Universities in Australia and New Zealand Survey. Since that time, it has been exciting to see the continued growth of advancement programmes and the increasing philanthropic investment in education in the region. Data and metrics, including the insights provided by this study, have helped advancement leaders identify challenges and opportunities, make the case for investment, and document the growth in philanthropic support for universities and the impact of institutional advancement. As these programmes grow and evolve, reliable data and analytics will play an ever more critical role in planning, allocating resources, and validating strategies.

The change in the name of this survey to the CASE Support of Education Survey in Australia and New Zealand reflects both the globalisation of the advancement profession and CASE's commitment to serving a global membership under a unified governance structure. In keeping with our OneCASE vision, CASE has begun to align its diverse regional research initiatives as part of AMAtlas, CASE's resource for advancement metrics and analytics serving our members worldwide.

Since the launch of AMAtlas in July of 2018, CASE has conducted a new survey of higher education fundraising in Canada, which, together with this survey, the Ross-CASE Survey in the United Kingdom and Ireland, and the CASE Voluntary Support of Education Survey in the United States and Canada, provides a global overview of charitable giving to higher education. Comparative insights from these surveys have been compiled in a new research brief: *Voluntary Support of Education: A Global Snapshot*.

In the year ahead CASE will be rolling out two important new resources. CASE's Alumni Engagement Metrics will provide a framework to measure alumni engagement based on a common set of terms and definitions. The metrics will address volunteer, experiential, philanthropic, and communications engagement and allow institutions to measure alumni engagement from year to year and to benchmark engagement with peer institutions. In partnership with Marts & Lundy CASE will also be launching a global survey and database on educational fundraising campaigns. Members around the world will be able to access benchmarking data from these surveys using AMAtlas's online Data Miner tool.

I thank all of the institutions that participated in this important research and the members of the Editorial Board who provided invaluable guidance, support, and insights at every stage of this project.

Yours sincerely,

Sue Cunningham

President and CEO

CASE

FOREWORD

The survey once again shows growth in many areas and gives reason to feel positive about the success of fundraising in the sector. In 2018 participating institutions secured \$630 million in philanthropic support for students, faculty, research, facilities, and other critical purposes from more than 67,000 donors. As impressive as these numbers are, they indicate that growth in fundraising is not linear and that sustained investment in advancement is critical to the continued growth of the sector. After a 15% increase in funds secured from 2016 to 2017, funds secured decreased by 6% from 2017 to 2018. Year-over-year variations in fundraising are common, especially among institutions with relatively newly established advancement programmes. Large gifts or pledges, often secured in the early stages of a campaign, drive numbers up in one year, leading to a comparative decline in the subsequent year. Other data from the survey bode well for the future: The total number of donors increased by 3%, and the number of nonalumni donors increased by 9%.

During the survey year, 35% of participating institutions were in campaigns, and the Editorial Board is aware of a number of other universities that are planning to launch campaigns in the next year or two. As John Ross noted in *Times Higher Education* (October 3, 2019), such campaigns, pioneered by the University of Sydney and the University of Melbourne in 2013, represent a “coming of age for philanthropy in higher education in Australia.” The trend encompasses a broad range of institutions; only half of the universities in campaigns are members of the Group of Eight. The increasing interest and investment in campaigns as a vehicle for harnessing collective fundraising efforts is a sign of the growing maturity of advancement operations in Australia and New Zealand, and the growing number of donors reflects a recognition of the positive impacts of giving to and through higher education.

An analysis of longitudinal fundraising data from CASE surveys in the United States, United Kingdom, Canada, and Australia and New Zealand (*Voluntary Support of Post-Secondary Education: A Global Snapshot*) suggests that while contributions may rise or fall in any given year for a variety of reasons ranging from the timing of a handful of large gifts to the state of national economies, the overarching trend is one of upward growth in charitable support to higher education. Giving to Australian and New Zealand institutions that reported data grew by around 55% from 2013 to 2018.

There are signs, however, that giving in Australia, as in the United States and United Kingdom, is becoming more polarised, with an increasing proportion of funding coming from a decreasing proportion of donors. A report prepared for the Australian Financial Review looking at the top 50 donors found that the combined value of their donations in 2017–2018 had risen by 21% since the previous year. You now need to give \$3.6 million to make the list, up from \$3 million in 2017.

In its seventh year, the survey continues to play an important role in benchmarking, budgeting, and planning for advancement teams across Australia and New Zealand. As the financial contribution of philanthropy to university revenues grows, the importance of benchmarking and demonstrating the full impact of advancement and philanthropy will require the participation of all colleges and universities engaged in raising charitable support.

We hope you find this report helpful, invite your feedback and suggestions, and encourage your participation going forward.

Yours sincerely,

CASE Support of Education Survey, Australia and New Zealand, 2019, Editorial Board

EXECUTIVE SUMMARY

Findings

NEW FUNDS SECURED

The total amount of new funds secured by participating universities totalled \$630m in 2018, a 6% decrease since 2017. The decline follows a 15% increase from 2016 to 2017. There were 81 confirmed pledges of \$1m or more in 2018, a decrease of 19% from 2017 and a likely factor in the decrease in total new funds secured.

CASH INCOME RECEIVED

Total cash income received decreased by 7% since 2017 to \$491m in 2018. Institutions received 80 gifts of \$1m or more in 2018, an increase of 16% over 2017. Total cash income from bequests was \$78m in 2018, 40% higher than in 2017.

ANNUAL FUNDS

Total annual fund secured was \$19m in 2018 and annual fund income received was \$16m. While new funds secured by annual funds increased 4% since 2017, cash income received through annual funds decreased by 1%.

ALUMNI AND DONORS

Of the 5.6m alumni across participating institutions, 76% were contactable at the end of 2018. Of these, 30,962 donated during 2018, a 4% decrease from 2017.

Compared to 2017, the total number of donors increased slightly to 67,462 (3% increase over 2017), and the total number of nonalumni donors increased by 9%.

INVESTMENT IN FUNDRAISING AND ALUMNI RELATIONS

In 2018, the total investment in fundraising was \$97m, almost double the total investment of \$53m in alumni relations. Fundraising staff costs and nonstaff costs were \$75m and \$22m, respectively, and alumni relations staff costs and nonstaff costs were \$36m and \$17m, respectively. Alumni magazine production and distribution costs

(not included in alumni relations nonstaff costs) decreased by 17% to \$4m in 2018.

Overall, institutions were investing 29 cents on fundraising activities (including fundraising staff and nonstaff costs) per \$1 in new funds secured and 37 cents on fundraising activities per \$1 in cash income received.

Total fundraising investment increased by 7%, and alumni relations investment increased by 6% since 2017.

Fundraising staff counts increased by 11% from 525 FTE in 2017 to 581 FTE in 2018, exceeding 500 FTE staff for the second time in the survey's seven-year history. Alumni relations staff numbers increased by 6% from 281 FTE in 2017 to 299 FTE in 2018.

ABOUT THE SURVEY

The survey Supporting Document prescribes two methods for recording philanthropic support:

New funds secured reflects the success of current fundraising activity. It includes new cash gifts, the full value of confirmed pledges committed in the year, realised bequests, and the market value of gifts-in-kind. It does not include cash payments made against pledges.

Cash income received includes all cash received in the year, including new cash gifts, payments towards pledges made in the current and previous years, and realised bequests.

This report presents an overview of philanthropic giving to 26 higher education institutions in Australia and New Zealand. It benchmarks the fundraising performance of the sector with two subgroups:

1. Go8 (8 institutions)
2. Non-Go8 (18 institutions)

The Group of Eight (Go8) is a coalition of research-intensive Australian higher education institutions (refer to the Go8 website for further information: <https://go8.edu.au/>). Those universities that are not part of the Go8 make up the Non-Go8 group in this report.

Of the 26 participating institutions from the region, 24 are based in Australia, and two are based in New Zealand. All income figures are reported in Australian dollars (AUD). Eighteen institutions were engaged in clinical medicine, and four institutions reported having offices overseas with staff responsible for local fundraising.

Data were collected from participating institutions on a calendar-year basis (January to December) for 2016, 2017, and 2018. The year-on-year changes are based on data submitted by a core group of institutions that submitted data for 2016, 2017, and 2018. Unless otherwise specified, median figures are reported, and not the mean, for a group.

For further details about methodology, reporting rules, and question guidance, and a list of all participating institutions, please see the appendix to this report.

Some questions were optional, so not all tables and charts reflect data from 26 institutions. Sample numbers are noted in chart/table labels.

KEY INDICATORS

This chapter presents an in-depth analysis of the key indicators for 2018, including new funds secured, cash income received, contactable alumni, donor counts, and investment in fundraising and alumni relations activities. Among the important figures to note in the tables below are the sum totals of the different key indicators. They give a broad overview of the economic impact of fundraising across institutions in the region.

Twenty-four of the 43 universities in Australia and 2 of the 8 universities in New Zealand participated in this year's survey, bringing the participation rate to 51%. Data have not been reweighted to estimate figures for all 51 institutions. CASE believes that survey participants include a majority of the institutions raising significant levels of

philanthropic income, but the total figures in this report do not account for the fundraising activity of all universities in Australia and New Zealand.

The means reported below are often much larger than the associated medians due to a handful of large positive outliers. The sample consists of advancement programmes operating at different stages of maturity. Clinical research programmes also have a significant impact on institutions' fundraising capacity. Given that there are twice as many non-Go8 institutions as Go8 institutions in the sample, the overall median is more reflective of non-Go8 institutions. Institutions should take these factors into consideration when comparing their performance and determining benchmarking groups.

Key indicators, 2018

	Base	Sum	Mean	Median
Philanthropic income (AUD)				
New funds secured	26	\$629,750,172	\$24,221,160	\$14,799,598
Cash income received	26	\$491,137,894	\$18,889,919	\$8,156,054
Alumni				
Total alumni	26	5,645,402	217,131	194,431
Contactable alumni	26	4,302,809	165,493	154,344
Alumni donors	26	30,962	1,191	621
Donors				
Total donors	26	67,462	2,595	1,335
Total number of bequest intentions	25	257	10	5
Investment (AUD)				
Total institutional expenditure	26	\$27,411,734,825	\$1,054,297,493	\$926,204,500
Fundraising costs	26	\$97,314,729	\$3,742,874	\$2,370,313
Alumni relations costs	26	\$52,793,011	\$2,030,500	\$1,560,649
Fundraising and alumni relations cost as a percentage of institutional expenditure*	26		0.5%	0.5%
Staff				
Fundraising staff (FTE)	26	581	22	15
Alumni relations staff (FTE)	26	299	12	10

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

New funds secured 2018

Measuring new funds secured enables an institution to see the true impact of advancement efforts including future revenue expectations from multi-year gift commitments.

The median value for new funds secured in 2018 was \$15m. The Go8 institutions make up a significant part of the new funds secured, accounting for almost two thirds of the total. When looking at these two groups separately the difference is clear; the median value for new funds secured for Go8 institutions in 2018 was \$46m, while the median value for non-Go8 institutions was \$7m.

The value of new funds secured varies widely among survey participants. Of the 26 participants, the top 10 institutions secured 80% of all new funds – one institution alone secured \$115m or 18% of all new funds secured.

Realised bequests account for more than 13% of all new funds secured. The Go8 was more successful in securing large bequests, which accounted for 15% (median) of new funds compared to 4% (median) among non-Go8 institutions. It should be noted that planned gifts are typically the result of long-term relationship building and yield benefits to the institution years in the future. Among mature

fundraising programmes with long-established planned giving programmes, realised bequests can have a significant impact on annual income received.

Seventeen participating institutions confirmed 81 pledges of \$1m or more, although more than half of these were received by just four institutions, the largest of which was a pledge of \$30m.

Both Go8 and non-Go8 institutions are similarly dependent on their institutions' largest nonbequest pledge, which accounted for medians of 18% and 20% of their total new funds secured. Five pledges accounted for 58% the total value of all largest nonbequest pledges reported. Non-Go8s performed more strongly in this area compared to other areas of the survey. Half of the 10 largest nonbequest pledges were secured by non-Go8 institutions. Trusts and foundations accounted for 57% of the total funds secured from largest nonbequest pledges, and individuals in lifetime accounted for 20% of the total funds secured from the largest nonbequest pledges.

The value of gifts-in-kind ranges widely among institutions and may reflect differences in the way institutions identify and record gifts-in-kind secured directly by faculty or administrators in fundraising accounts and totals. Seventeen of the

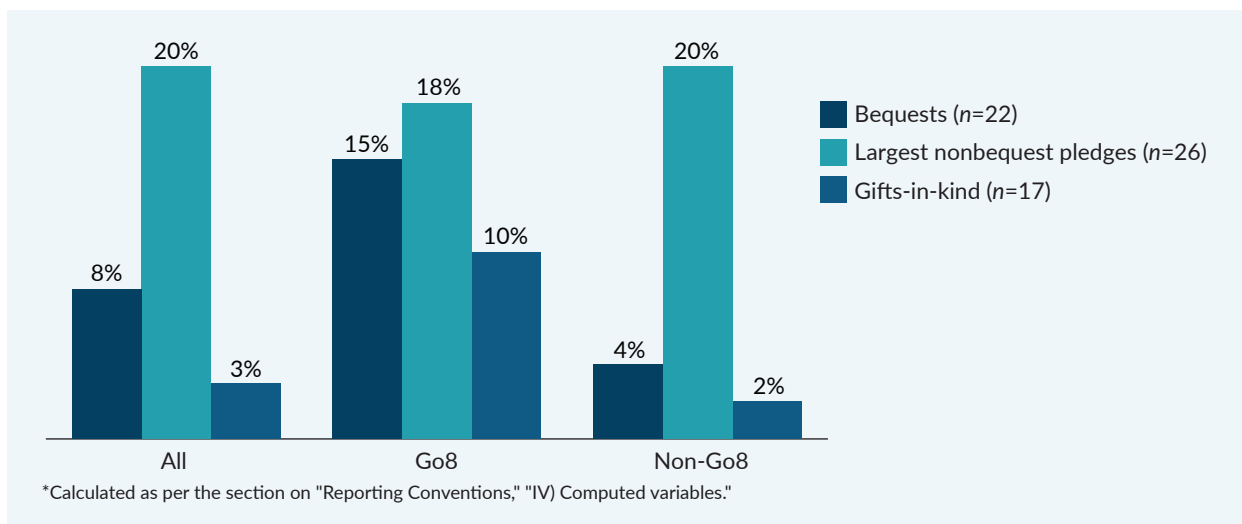
New funds secured, 2018 (AUD)

	All	Go8	Non-Go8
New funds secured – Sum (n=26)	\$629,750,172	\$410,493,335	\$219,256,837
New funds secured – Mean	\$24,221,160	\$51,311,667	\$12,180,935
New funds secured – Median	\$14,799,598	\$45,664,818	\$7,188,208
New funds secured from bequests – Sum (n=22)	\$84,557,915	\$70,497,726	\$14,060,189
New funds secured from bequests – Mean	\$3,843,542	\$8,812,216	\$1,004,299
New funds secured from bequests – Median	\$982,777	\$6,304,566	\$199,067
Largest nonbequest pledge – Sum (n=26)	\$158,593,375	\$85,499,162	\$73,094,213
Largest nonbequest pledge – Mean	\$6,099,745	\$10,687,395	\$4,060,790
Largest nonbequest pledge – Median	\$2,875,000	\$9,674,581	\$1,052,500
Gifts-in-Kind – Sum (n=17)	\$51,866,884	\$31,375,666	\$20,491,218
Gifts-in-Kind – Mean	\$3,050,993	\$6,275,133	\$1,707,601
Gifts-in-Kind – Median	\$406,999	\$7,236,889	\$122,967

26 participating institutions reported securing at least one gift-in-kind in 2018. The value of all gifts-in-kind secured by individual institutions ranged

from the tens of thousands to millions of dollars. Thirteen institutions secured gifts-in-kind in each of the past three years, 2016, 2017, and 2018.

Median bequests, largest nonbequest pledges, and gifts-in-kind as a percentage of new funds secured, 2018*



Number of confirmed pledges of \$1 million or more, 2018

	All	Go8	Non-Go8
Sum (n=17)	81	51	30
Mean	5	7	3
Median	3	8	2

The survey was updated in 2017 to include new optional questions about the sources and purposes of philanthropic income and commitments and the distribution of donors across different levels of giving. As some institutions chose not to answer these questions, lower sample sizes are reported in the charts below.

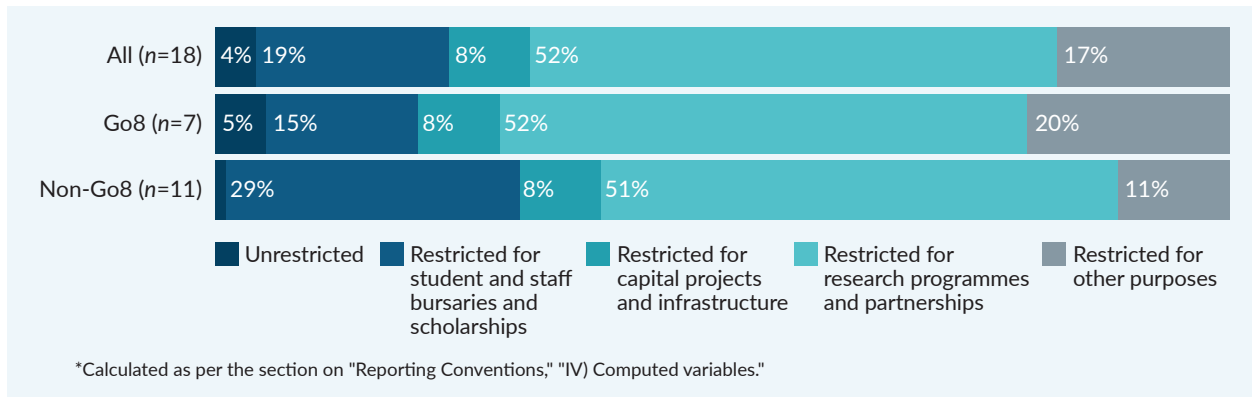
At those universities that answered these questions, more than half the total new funds secured was for research programmes and partnerships (52%). This figure was similar for Go8 and non-Go8 institutions. Twenty-nine percent of new funds secured by non-Go8 institutions was designated for scholarships and bursaries, almost twice the 15%

secured for these purposes by Go8 institutions. When a high outlier non-Go8 institution is taken out, the percentage restricted for scholarships and bursaries at non-Go8 institutions drops to 19%.

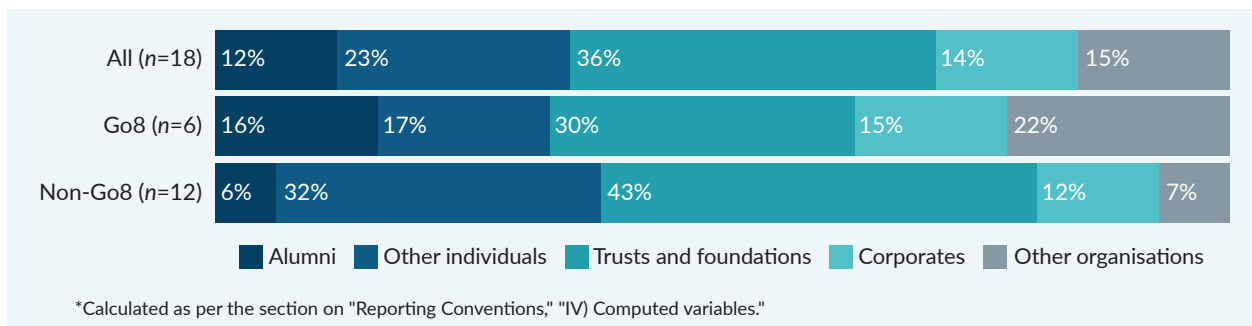
The very small proportion of unrestricted giving is consistent with the general trend of donors' moving away from blank cheque gifts and instead being more targeted and intentional with their giving.

While new funds secured restricted for capital purposes were less than 10% across all groups, two outlier participating institutions reported 48% and 22% of new funds secured that were restricted for capital purposes.

New funds secured by purpose, 2018*



New funds secured by source, 2018*



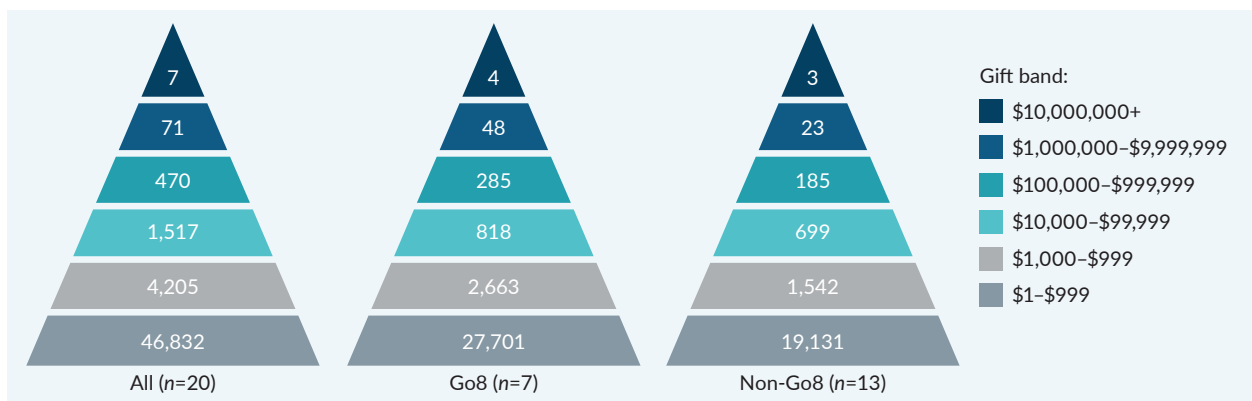
Go8 institutions secured 30% of their new funds from trusts and foundations and 16% from alumni. Non-Go8 institutions secured 43% of their new funds from trusts and foundations, 32% from nonalumni individuals, and 6% from alumni. Overall, 14% of new funds secured came from corporates; two institutions, however, reported securing close to 40% of their new funds from corporates, and one institution alone accounted for 35% of the total new funds secured from corporates.

When observing the distribution of donors, it is notable that 88% of donors gave less than \$1,000 in value.

Overall, there is a strong positive correlation between new funds secured from trusts and foundations and new funds secured for research.

Six of the participating institutions recorded donors of \$10m+. Of the six, three were in the top five for total new funds secured, and for the other three the \$10m+ new gifts/pledges accounted for at least 40% of their total new funds secured.

Number of donors by gift bands, 2018



Cash income received 2018

Cash income received in a year includes all cash that is received during the year, including new single cash gifts, pledge payments, and cash realised from bequests. Cash income typically corresponds to and trails new funds secured. This year's cash income equalled 78% of last year's new funds secured; for the prior year the figure was 79%.

The median value of cash income received in 2018 was \$8m. The median value of cash income received by Go8 institutions in 2018 was \$36m, while the median value of cash income received by non-Go8 institutions was \$5m.

The number of confirmed cash gifts of \$1m or more was 80 in 2018, 60 of which were made to

Go8 institutions. Cash income from bequests constituted 17% of total cash income received for Go8 institutions and 7% for non-Go8 institutions.

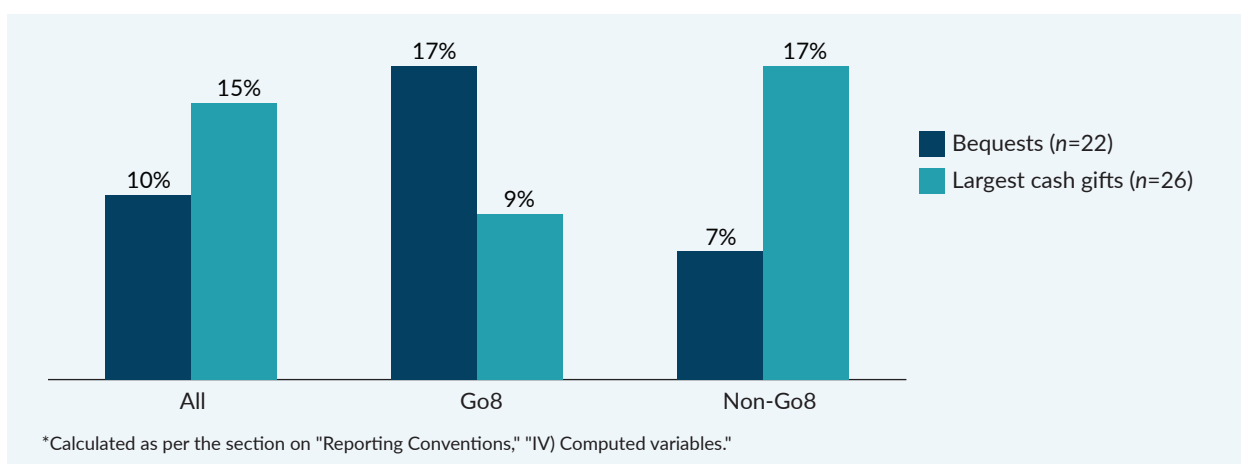
For non-Go8 institutions, the largest cash gift accounted for a median of 17% of total cash income received; for Go8 institutions the largest cash gift contributed 9% of total cash income. The median value of the largest gift for Go8 institutions is \$3m and \$612,500 for non-Go8 institutions.

Twenty percent of institutions received their largest cash gift from an individual in lifetime, and half of institutions received their largest cash gift from trusts and foundations.

Cash income received, 2018 (AUD)

	All	Go8	Non-Go8
Cash income received – Sum (n=26)	\$491,137,894	\$339,524,422	\$151,613,472
Cash income received – Mean	\$18,889,919	\$42,440,553	\$8,422,971
Cash income received – Median	\$8,156,054	\$36,456,279	\$5,462,040
Cash income received from bequests – Sum (n=22)	\$77,821,581	\$63,761,392	\$14,060,189
Cash income received from bequests – Mean	\$3,537,345	\$7,970,174	\$1,004,299
Cash income received from bequests – Median	\$748,350	\$6,304,566	\$199,067
Largest cash gift – Sum (n=26)	\$87,207,744	\$57,802,150	\$29,405,594
Largest cash gift – Mean	\$3,354,144	\$7,225,269	\$1,633,644
Largest cash gift – Median	\$1,291,026	\$3,187,500	\$612,500

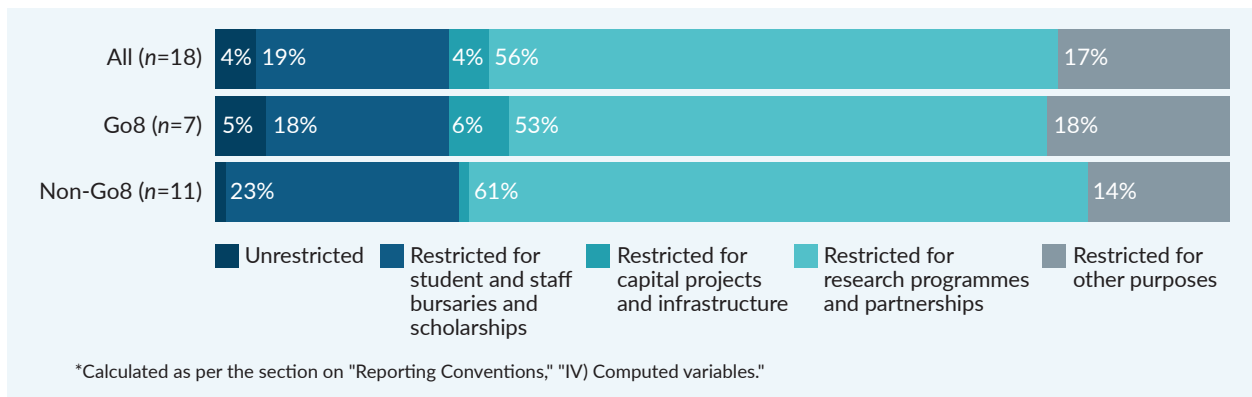
Median bequests and largest cash gifts as a percentage of cash income, 2018*



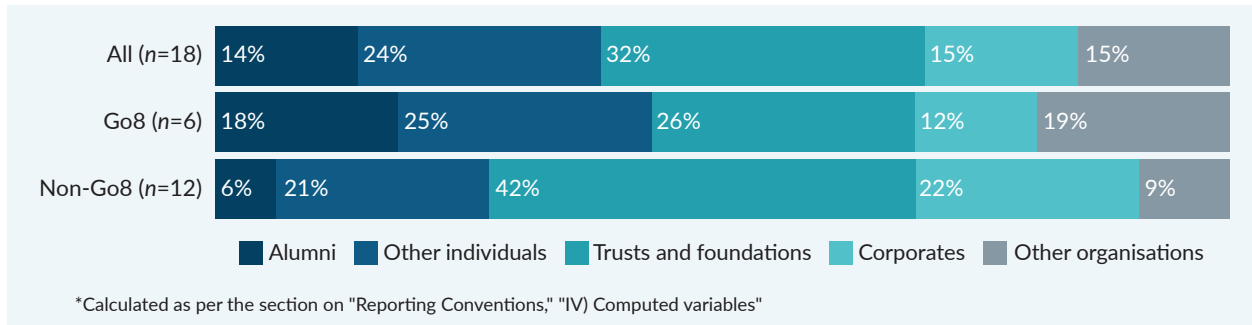
Number of cash gifts of \$1 million or more, 2018

	All	Go8	Non-Go8
Sum (n=15)	80	60	20
Mean	5	9	3
Median	3	8	2

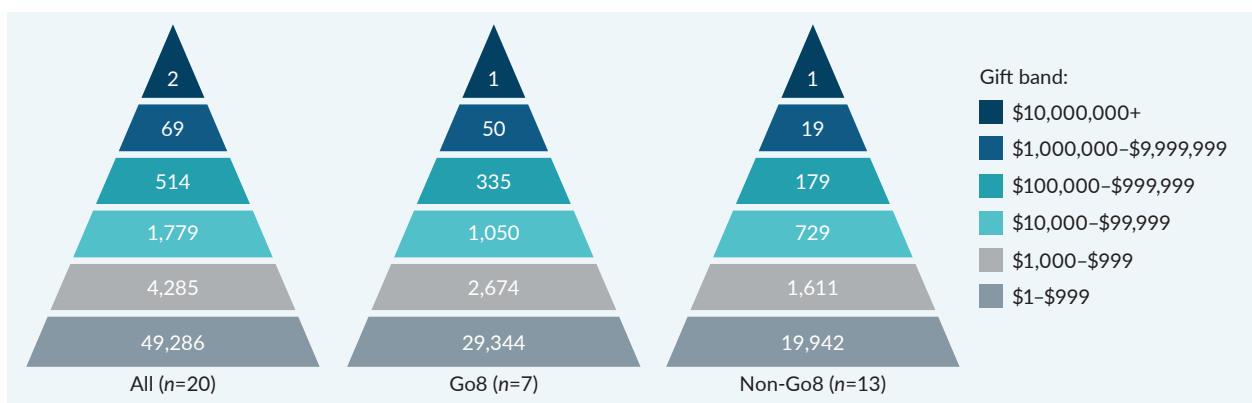
Cash income received by purpose, 2018*



Cash income received by source, 2018*



Number of donors by gift bands, 2018



NOTE: We address this in the About the Survey section and in the prior section on new funds secured.

The purposes of cash received were in keeping with the breakdown of purposes of new funds secured. At the universities that answered these questions, more than half the total cash income received was for research programmes and partnerships (56%). Among Go8 institutions research funds accounted for 53% of new cash received. Excluding one outlier, research funds made up 47% of new cash income for non-Go8 institutions.

Annual funds 2018

Annual fund income is the term used to describe gifts that are typically smaller in value and raised through cyclical digital, postal, telephone appeals. Generally, these appeals are targeted to alumni, although increasingly universities are exploring how they may engage the wider community through peer-peer fundraising or other initiatives.

Non-Go8 institutions received a larger proportion of new cash income designated for scholarships and bursaries (23%) compared to Go8 institutions (18%).

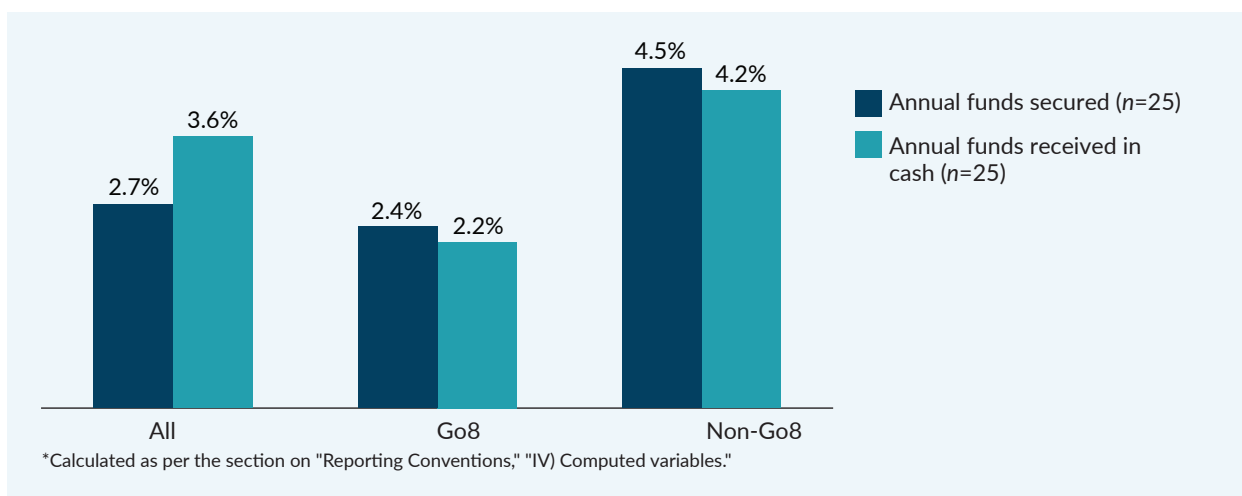
Go8 institutions received 26% of their cash income from trusts and foundations, 25% from nonalumni individuals, and 18% from alumni, while non-Go8 institutions received a larger proportion of cash income from trusts and foundations (42%) and smaller proportions from nonalumni individuals (21%), and alumni (6%).

Participating institutions secured \$19m and received \$16m in cash income from annual fund giving. Go8 institutions secured a median of \$748,326 in annual funds and a median of \$669,895 of cash income. Non-Go8 institutions secured \$267,716 in new funds and \$236,000 in cash income from annual giving.

Overall, annual fund giving accounted for a median of 2.7% of total new funds secured and 3.6% of total cash income.

Annual fund income, 2018 (AUD)

	All	Go8	Non-Go8
Annual funds secured – Sum (n=25)	\$18,893,739	\$10,299,964	\$8,593,775
Annual funds secured – Mean	\$755,750	\$1,287,496	\$505,516
Annual funds secured – Median	\$339,168	\$748,326	\$267,716
Annual fund income received in cash – Sum (n=25)	\$16,088,841	\$8,031,704	\$8,057,137
Annual fund income received in cash – Mean	\$643,554	\$1,003,963	\$473,949
Annual fund income received in cash – Median	\$341,375	\$669,895	\$236,000

Median annual funds secured and received in cash as a percentage of cash income*, 2018**Alumni and donors 2018**

Participating institutions reported 5.6m total alumni, of whom 76% were contactable. Contactable alumni include all former students for whom the institution has a postal or email address. The median number of total alumni was 299,574 for Go8 institutions and 190,984 for non-Go8 institutions. Median contactable alumni as a percentage of total alumni was 79% for all institutions, 79% for Go8 institutions, and 80% for non-Go8 institutions. Two institutions reported less than 50% contactable alumni, while another two reported more than 90% contactable alumni.

Go8 institutions reported 1.6m contactable alumni and 22,392 alumni donors while non-Go8 institutions reported 2.7m contactable alumni and 8,570 alumni donors.

Of the 4.3m contactable alumni, 30,962 alumni donated, for an overall alumni participation rate of 0.7%. Go8 institutions had a significantly higher alumni participation rate (median 1.2%) than non-Go8 institutions (0.2%). Two institutions reported an alumni participation rate of more than 1.5%; both were members of the Go8.

The median number of donors for Go8 institutions was 4,115 and the median number of alumni donors was 2,273; non-Go8 institutions reported a median of 963 donors and a median of 275 alumni donors. Almost 72% of all alumni donors contributed to Go8 institutions, while 51% of all non-alumni donors contributed to non-Go8 institutions.

Institutions secured a median of \$6,041 in new funds per donor and received \$6,854 in cash income per donor. Five institutions secured more than \$20k in new funds per donor; only one of these was a Go8 institution. The four non-Go8 institutions that reported more than \$20k in new funds per donor reported a comparatively smaller donor base than the Go8 institution, and three of them secured 43% of their new funds from their largest gift.

In 2018, 257 new bequest intentions were confirmed by the 25 reporting institutions. Go8 institutions confirmed a median of 19 new bequest intentions and non-Go8 institutions confirmed a median of 4 new bequest intentions.

Alumni, 2018

	All	Go8	Non-Go8
Total alumni – Sum (n=26)	5,645,402	2,130,374	3,515,028
Total alumni – Mean	217,131	266,297	195,279
Total alumni – Median	194,431	299,574	190,984
Contactable alumni – Sum (n=26)	4,302,809	1,627,743	2,675,066
Contactable alumni – Mean	165,493	203,468	148,615
Contactable alumni – Median	154,344	235,353	132,883
Median contactable alumni as a percentage of total alumni* (n=26)	79%	79%	80%

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

Donors, 2018

	All	Go8	Non-Go8
All donors – Sum (n=26)	67,462	40,203	27,259
All donors – Mean	2,595	5,025	1,514
All donors – Median	1,335	4,115	963
Alumni donors – Sum (n=26)	30,962	22,392	8,570
Alumni donors – Mean	1,191	2,799	476
Alumni donors – Median	621	2,273	275
Median alumni donors as a percentage of all donors* (n=26)	51%	56%	35%
Median alumni donors as a percentage of contactable alumni* (n=26)	0.5%	1.2%	0.2%
Nonalumni donors – Sum (n=26)	36,500	17,811	18,689
Nonalumni donors – Mean	1,404	2,226	1,038
Nonalumni donors – Median	789	1,533	616
Median nonalumni donors as a percentage of all donors* (n=26)	49%	44%	65%

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

New bequest intentions confirmed, 2018

	All	Go8	Non-Go8
New bequest intentions confirmed – Sum (n=25)	257	168	89
New bequest intentions confirmed – Mean	10	21	5
New bequest intentions confirmed – Median	5	19	4

New funds secured and cash income received per donor amount (AUD), 2018

	All	Go8	Non-Go8
Median new funds secured per donor* (n=26)	\$6,041	\$8,717	\$5,911
Median cash income received per donor* (n=26)	\$6,854	\$7,418	\$6,567

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

Fundraising investment 2018

Participating institutions invested a total of \$97m in fundraising activities in 2018, of which around 77% of was spent on staff costs. Go8 institutions invested a median of \$8.1m in fundraising activities compared to a median of \$2m invested by non-Go8 institutions.

Many factors contribute to an institution's ability to secure charitable contributions, making it problematic to attribute fundraising outcomes solely to investments in advancement. For example, effective engagement of academic leaders, volunteers, and other nonadvancement staff in the identification of philanthropic opportunities and the cultivation and stewardship of donors is among the hallmarks of high-performing advancement programmes but is not reflected in fundraising budgets or staff counts. Nonetheless, there is clear correlation over time

between sustained investments in advancement and fundraising success, and looking at year-over-year return on investment calculations can provide valuable strategic insights for advancement leaders and other institution administrators.

Go8 institutions reported a median investment of 19 cents both for every \$1 in new funds secured and every \$1 in cash income. Non-Go8 institutions reported median investment of 25 cents per \$1 in new funds secured and 34 cents per \$1 in cash income.

Go8 and non-Go8 institutions reported similar investment costs per donor (\$1,646 and \$1,596, respectively). As noted above, Go8 institutions secured a median of \$8,717 new funds per donor, and non-Go8 institutions secured \$5,911 new funds per donor.

Fundraising costs, 2018

	All	Go8	Non-Go8
Fundraising costs – Sum (n=26)	\$97,314,729	\$60,631,032	\$36,683,697
Fundraising costs – Mean	\$3,742,874	\$7,578,879	\$2,037,983
Fundraising costs – Median	\$2,370,313	\$8,117,639	\$1,928,230
Staff fundraising costs – Sum (n=26)	\$75,363,540	\$46,919,919	\$28,443,622
Staff fundraising costs – Mean	\$2,898,598	\$5,864,990	\$1,580,201
Staff fundraising costs – Median	\$1,930,160	\$5,950,789	\$1,597,988
Median staff fundraising costs as a percentage of fundraising costs* (n=26)	80%	78%	80%
Nonstaff fundraising costs – Sum (n=26)	\$21,951,189	\$13,711,114	\$8,240,075
Nonstaff fundraising costs – Mean	\$844,276	\$1,713,889	\$457,782
Nonstaff fundraising costs – Median	\$497,341	\$2,029,842	\$338,677
Median nonstaff fundraising costs as a percentage of fundraising costs* (n=26)	20%	22%	20%

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

Investment per dollars raised and donor, 2018

	All	Go8	Non-Go8
Median fundraising investment per dollar of new funds secured* (n=26)	\$0.24	\$0.19	\$0.25
Median fundraising investment per dollar of cash income received* (n=26)	\$0.26	\$0.19	\$0.34
Median fundraising cost per donor* (n=26)	\$1,596	\$1,646	\$1,596

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

Alumni relations investment 2018

Participating institutions invested \$53m in alumni relations activities, with median alumni relations costs of \$1.6m. This investment excludes costs to produce and distribute alumni magazines. Staff costs accounted for about two thirds of total investments in alumni relations.

Go8 institutions invested a median of \$18.30 in alumni relations cost per contactable alumnus and \$2,201 per alumni donor. Non-Go8 institutions invested a median of \$7.40 in alumni relations cost per contactable alumnus and \$2,994 per alumni donor. Investment in alumni relations per contactable alumnus ranged from \$3 to \$31, with six non-Go8 institutions reporting less than \$10 of investment in alumni relations cost per contactable alumnus. Nine (three Go8 and six non-Go8) institutions reported investing less than \$1,500 in alumni relations costs per alumni donor.

Participating institutions spent a total of \$4m to produce and distribute alumni magazines, with a median cost of \$125,067. Median magazine costs at Go8 institutions were five times the median among non-Go8 institutions. Go8 institutions invested \$1.60 in alumni magazine costs per contactable alumnus and \$144 in alumni magazine costs per alumni donor. Non-Go8 institutions invested \$0.90 in alumni magazine costs per contactable alumnus and \$198 in alumni magazine costs per alumni donor. One outlier non-Go8 institution reported more than \$3k in alumni magazine costs per alumni donor, inflating the overall and cohort medians.

The ratio of total investment in fundraising to total investment in alumni relations excluding magazines is 2:1 for both Go8 institutions and non-Go8 institutions.

Alumni relations costs (AUD), 2018

	All	Go8	Non-Go8
Alumni relations costs – Sum (n=26)	\$52,793,011	\$31,990,374	\$20,802,637
Alumni relations costs – Mean	\$2,030,500	\$3,998,797	\$1,155,702
Alumni relations costs – Median	\$1,560,649	\$3,632,549	\$1,020,423
Staff alumni relations costs – Sum (n=26)	\$35,785,414	\$21,528,782	\$14,256,632
Staff alumni relations costs – Mean	\$1,376,362	\$2,691,098	\$792,035
Staff alumni relations costs – Median	\$1,006,086	\$2,630,567	\$704,036
Median staff alumni costs as a percentage of alumni relations costs* (n=26)	71%	66%	73%
Nonstaff alumni relations costs – Sum (n=26)	\$17,007,597	\$10,461,592	\$6,546,004
Nonstaff alumni relations costs – Mean	\$654,138	\$1,307,699	\$363,667
Nonstaff alumni relations costs – Median	\$400,553	\$1,036,454	\$333,943
Median nonstaff alumni relations costs as a percentage of alumni relations costs* (n=26)	29%	34%	27%

*Calculated as per the section on "Reporting Conventions," (IV) Computed variables."

Alumni relations investment per alumnus and alumni donor, 2018

	All	Go8	Non-Go8
Median alumni relations cost per contactable alumnus* (n=26)	\$10.2	\$18.3	\$7.4
Median alumni relations cost per alumni donor* (n=26)	\$2,201	\$1,599	\$2,994

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

Alumni magazine costs, 2018

	All	Go8	Non-Go8
Production and distribution alumni magazine costs – Sum (n=19)	\$4,059,587	\$2,650,919	\$1,408,668
Production and distribution alumni magazine costs – Mean	\$213,662	\$441,820	\$108,359
Production and distribution alumni magazine costs – Median	\$125,067	\$424,964	\$87,821

Institutional expenditure and advancement staff 2018

Participating institutions collectively reported total institutional expenditure of \$27bn in 2018. Median fundraising costs as a percentage of institutional expenditure were 0.3%, and median alumni relations costs as a percentage of institutional expenditure were 0.2%.

Participating institutions employed a total of 581 FTE fundraising staff. Go8 institutions employed 60% of this workforce, with 350 FTE fundraising staff compared to 231 FTE fundraising staff at non-Go8 institutions. The size of fundraising teams varies widely: 5 Go8 institutions employ more than 40 FTE fundraising staff, while 6 non-Go8 institutions have fewer than 5 FTE fundraising staff. Two hundred ninety-nine FTE staff members worked in alumni relations at partici-

pating institutions (179 at Go8 institutions and 120 at non-Go8 institutions).

Institutions invested a median of \$122,668 per fundraising staff member, resulting in a sevenfold return in new funds secured per FTE and a fivefold return on cash income received per FTE fundraising staff member. Go8 institutions invested a median of \$134,867 per fundraising staff member, resulting in a sevenfold return on investment in new funds secured and cash income received per FTE fundraising staff member. Non-Go8 institutions invested a median of \$117,999 per fundraising staff member, resulting in a sevenfold return on investment in new funds secured and fivefold in cash income received. Institutions invested a median of \$117,205 per alumni relations staff member. Go8 and non-Go8 institutions invested a median of \$119,085 and \$113,391 per alumni relations staff member, respectively.

Advancement investments as a percentage of total institutional expenditures, 2018

	All	Go8	Non-Go8
Sum institutional expenditure – Sum (n=26)	\$19,333,517,825	\$9,093,748,858	\$10,239,768,967
Sum institutional expenditure – Mean	\$966,675,891	\$1,515,624,810	\$731,412,069
Sum institutional expenditure – Median	\$914,041,500	\$1,507,282,500	\$716,041,220
Median fundraising costs as a percentage of institutional expenditure* (n=26)	0.27%	0.43%	0.25%
Median alumni relations costs as a percentage of institutional expenditure* (n=26)	0.16%	0.22%	0.16%

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

Advancement staff counts, costs per staff, fundraising returns, 2018

	All	Go8	Non-Go8
Fundraising staff – Sum (n=26)	581	350	231
Fundraising staff – Mean	22	44	13
Fundraising staff – Median	15	45	14
Median fundraising staff cost per FTE fundraising staff member* (n=26)	\$122,668	\$134,867	\$117,999
Median new funds secured per FTE fundraising staff member* (n=26)	\$800,871	\$1,001,244	\$800,871
Median cash income received per FTE fundraising staff member* (n=26)	\$620,665	\$917,553	\$576,995
Alumni relations staff – Sum (n=26)	299	179	120
Alumni relations staff – Mean	12	22	7
Alumni relations staff – Median	10	22	7
Median alumni relations staff cost per FTE alumni relations staff member* (n=26)	\$117,205	\$119,085	\$113,391

*Calculated as per the section on "Reporting Conventions," "IV) Computed variables."

TRENDS IN KEY INDICATORS 2016–2018

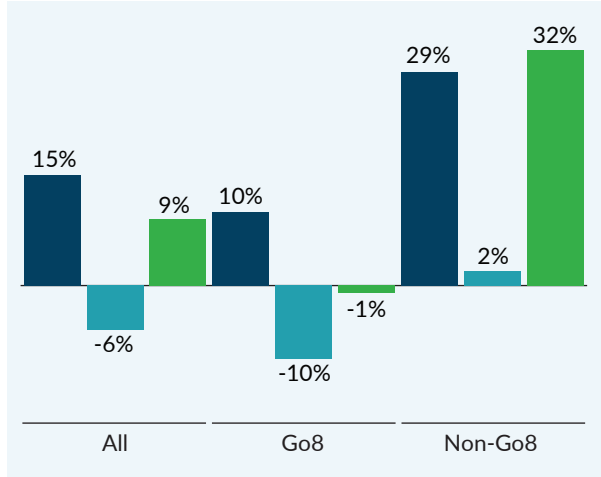
Trends are calculated using sum values on a like-for-like basis for institutions that submitted data for a variable for each of the three survey years (2016, 2017, and 2018).

Philanthropic income trends

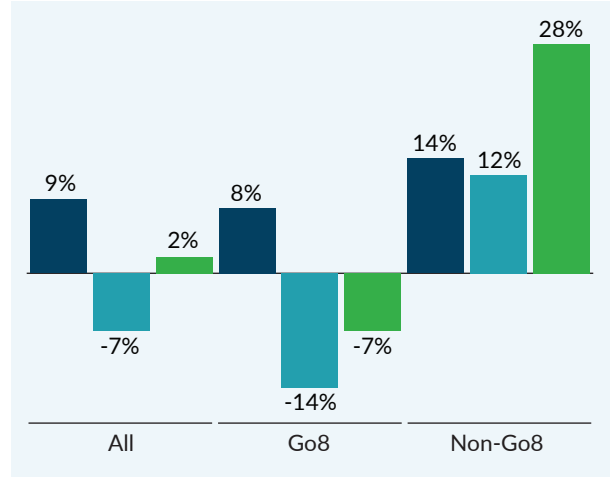
- Despite a dip in new funds secured compared to the previous year, the overall trend when considered across multiple years is upward (2018 shows a 6% decrease since 2017 but an increase of 9% over 2016). The positive trend is more evident if one institution that accounted for 14% of total funds secured in 2017 and reported a significant decrease in 2018 in the wake of a campaign is removed from the analysis. When this institution is excluded, total funds secured grew 7% from 2017 to 2018 and 12% from 2016 to 2018.
- Twelve institutions reported an increase in new funds secured from 2017 to 2018, and 14 institutions reported a decrease for the same period.
- The trend in cash income received is slightly less pronounced but similar to that of new funds secured. It is down 7% from 2017 to 2018 but up 2% from 2016. Excluding the outlier noted above yields static cash income from 2017 to 2018 and 4% growth over 2016.
- Annual fund income secured increased by 14% at non-Go8 institutions from 2017 to 2018, while Go8 institutions saw a decrease of 3% in annual fund income secured during the same time period.
- The value of largest gifts received varies widely from year to year. The value of the largest cash gifts to Go8 institutions dropped by 41% from 2017 to 2018 after increasing 57% from 2016 to 2017. For non-Go8 institutions the value of largest cash gifts increased by 53% from 2017 to 2018 after a decrease of 20% from 2016 to 2017.
- After a 9% increase from 2016 to 2017, the number of bequest intentions dropped by 20% from 2017 to 2018 (Go8 down 26% and non-Go8 down 6%). Cash realised from bequests increased 40% in 2017 and 35% from 2016 to 2018.
- Overall, the number of gifts of \$1m or more received as new funds secured decreased 16% from 2017 to 2018. The number of gifts of \$1m or more secured by non-Go8 institutions decreased by 4%, while the number of gifts of \$1m or more secured by Go8 institutions decreased by 21% from 2017 to 2018.
- The number of cash gifts of \$1m or more increased by 10% for non-Go8 institutions and by 18% for Go8 institutions from 2017 to 2018.

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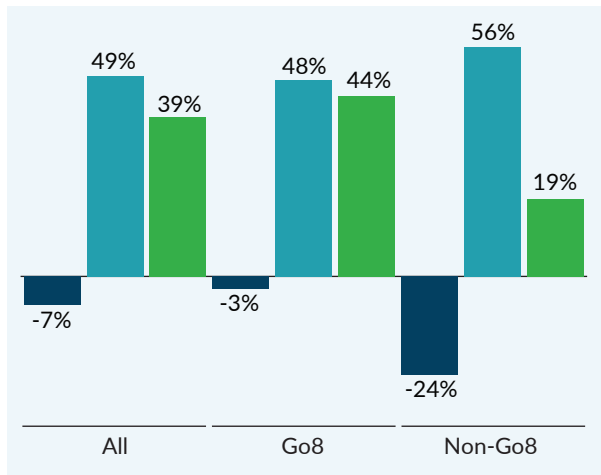
Philanthropic income trends, new funds secured, 2016 to 2018



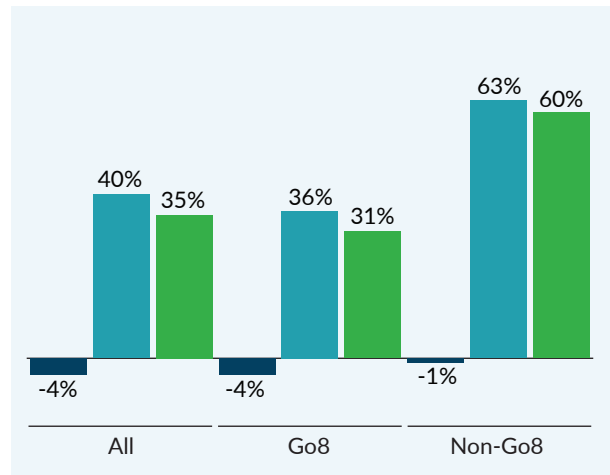
Philanthropic income trends, cash income received, 2016 to 2018



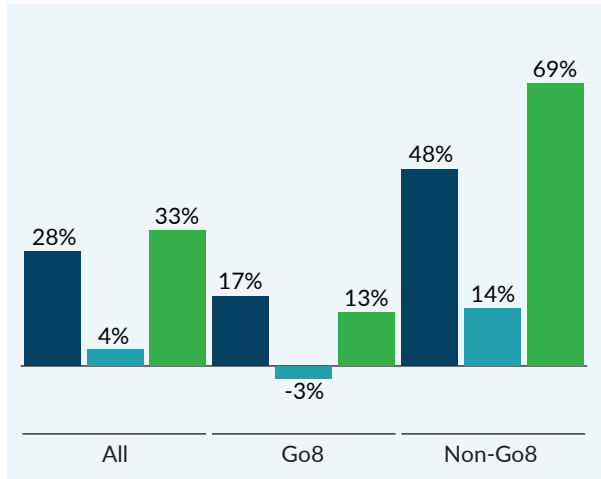
Philanthropic income trends, new funds secured from bequests, 2016 to 2018



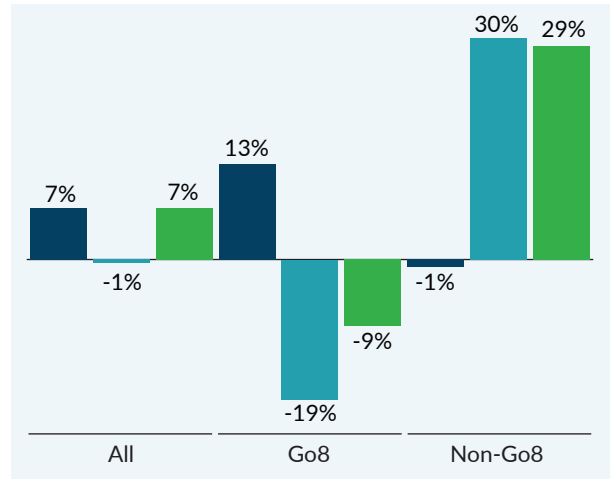
Philanthropic income trends, cash income received from bequests, 2016 to 2018



Annual fund income trends, secured in new funds, 2016 to 2018

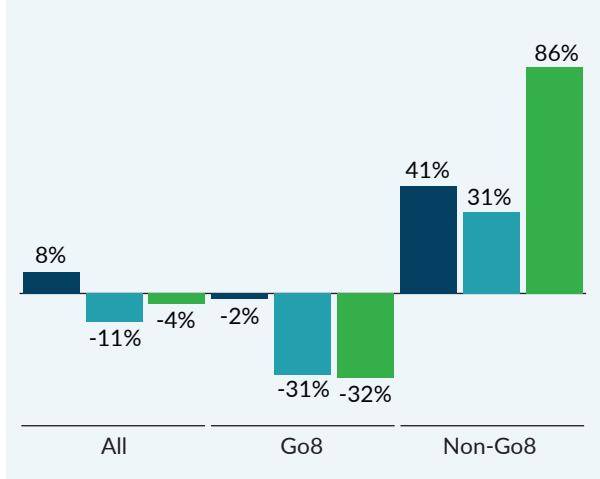


Annual fund income trends, received in cash, 2016 to 2018

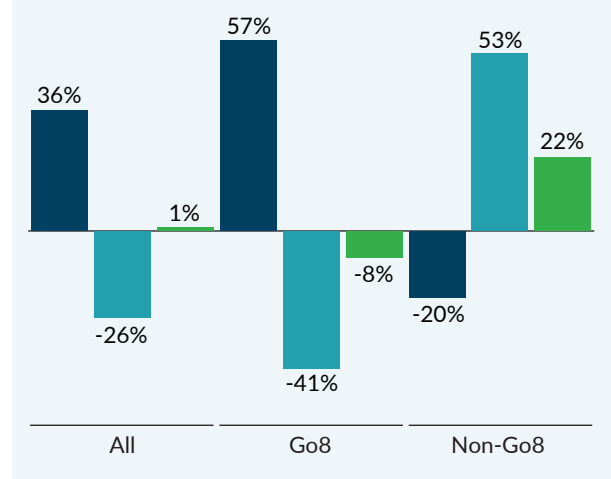


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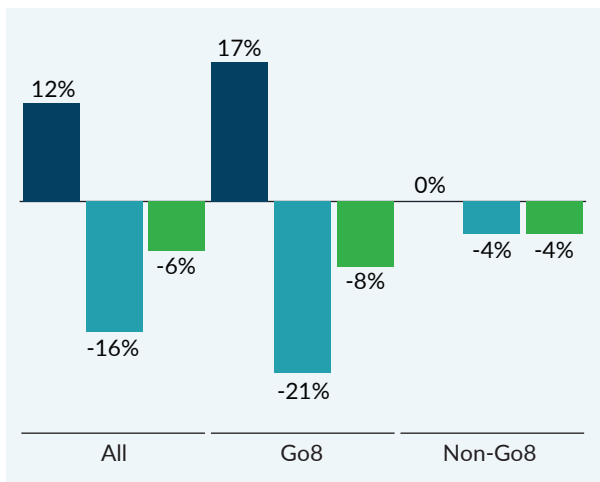
Largest nonbequest pledge trends, 2016 to 2018



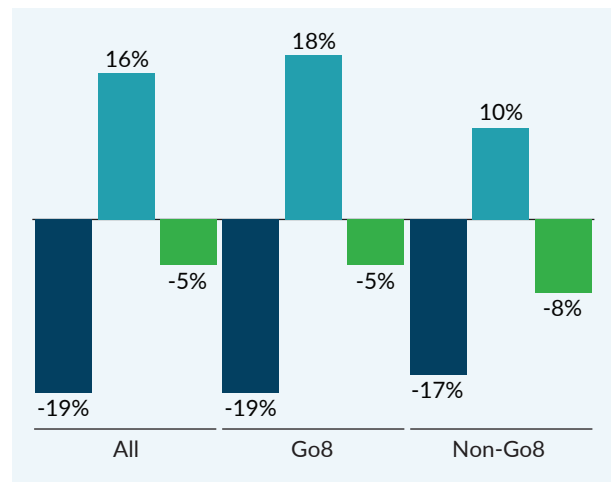
Largest cash gift trends, 2016 to 2018



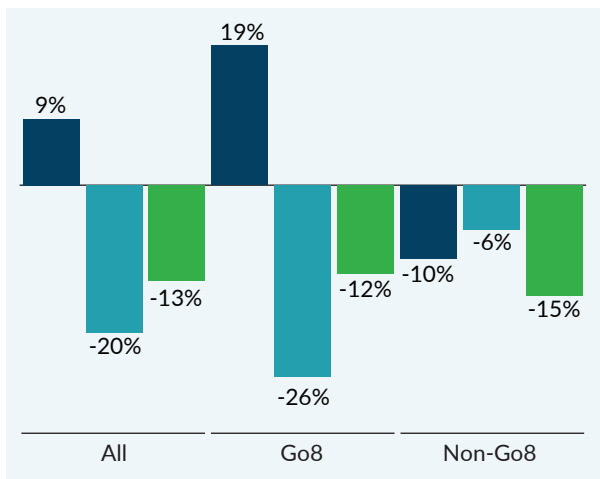
Number of confirmed pledges more than \$1m trends, 2016 to 2018



Number of cash gifts more than \$1m trends, 2016 to 2018



New bequests confirmed trends, 2016 to 2018



Alumni and donor trends

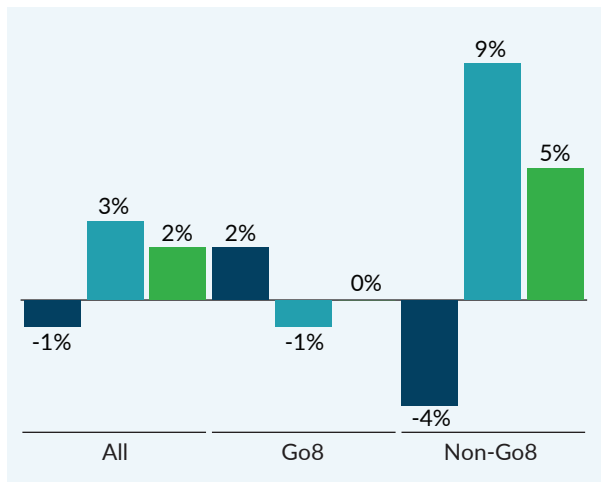
- Contactable alumni numbers grew by 6% for both Go8 and non-Go8 institutions from 2017 to 2018.
- The total number of donors increased by 3% from 2017 to 2018.
- The total number of donors increased by 9% for non-Go8 institutions from 2017 to 2018 and

decreased by 1% for Go8 institutions during the same time period.

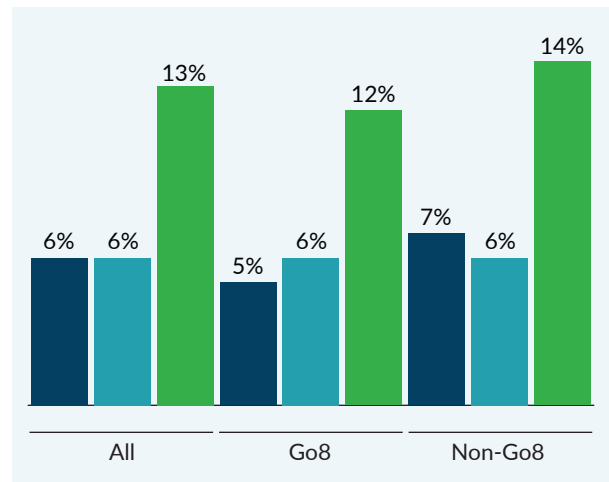
- The number of alumni donors increased by 7% at non-Go8 institutions from 2017 to 2018 and decreased by 8% at Go8 institutions.
- The number of nonalumni donors increased by 10% for non-Go8 institutions from 2017 to 2018 and increased by 8% for Go8 institutions.

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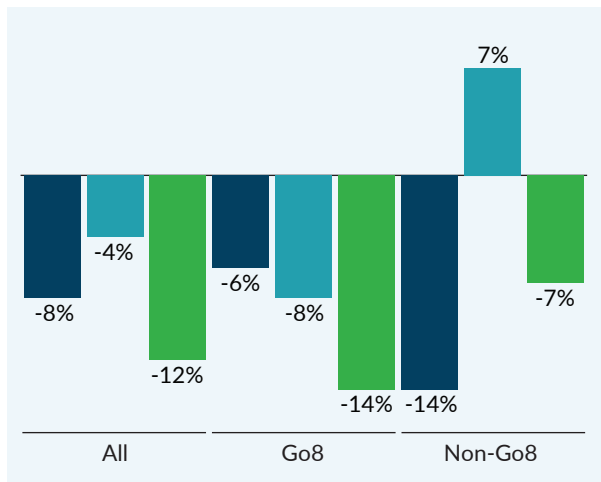
Alumni and donor trends, all donors, 2016 to 2018



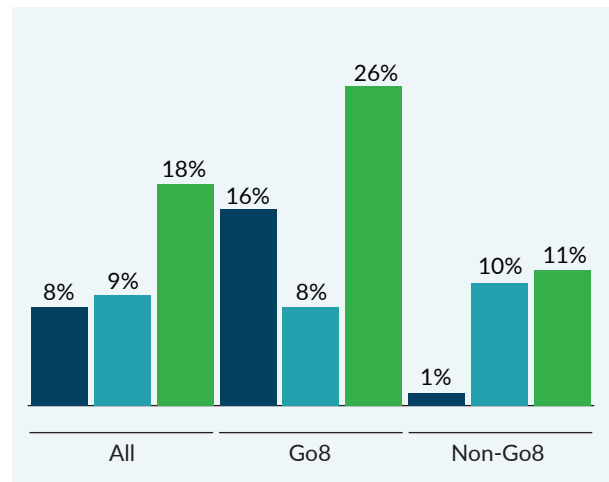
Alumni and donor trends, contactable alumni, 2016 to 2018



Alumni and donor trends, alumni donors, 2016 to 2018



Alumni and donor trends, nonalumni donors, 2016 to 2018



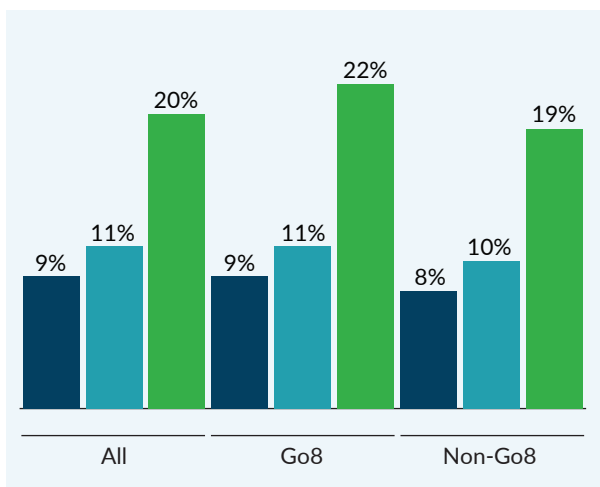
Fundraising and alumni relations staffing trends

- Fundraising staff numbers grew year-on-year since 2016, but the increase was at a higher rate of 11% between 2017 and 2018, compared to a 9% increase from 2016 to 2017.

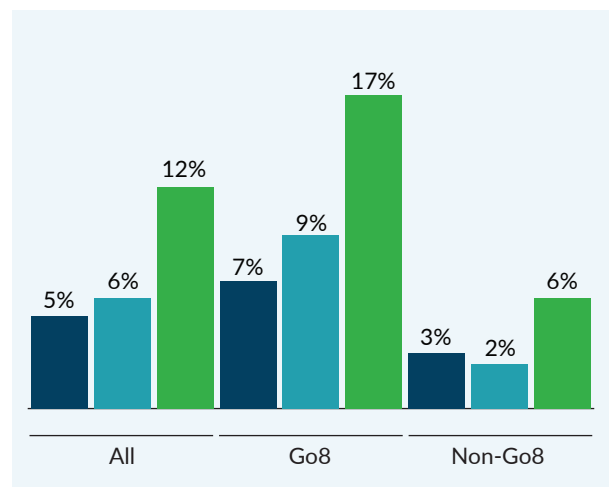
- Non-Go8 fundraising staff numbers grew 8% between 2016 and 2017 and 10% from 2017 to 2018. Go8 fundraising staff numbers increased by 9% from 2016 to 2017 and 11% between 2017 and 2018.
- Alumni relations staff numbers grew by 9% at Go8 institutions and 2% at non-Go8 institutions from 2017 to 2018.

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Fundraising staff trends, 2016 to 2018



Alumni relations staff trends, 2016 to 2018



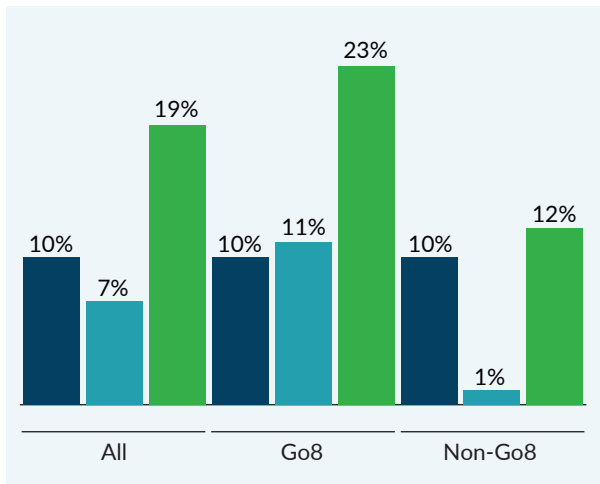
Fundraising and alumni relations cost trends

- Staff fundraising costs increased by 13% from 2017 to 2018, and nonstaff fundraising costs decreased by 7% after increasing by 12% from 2016 to 2017.

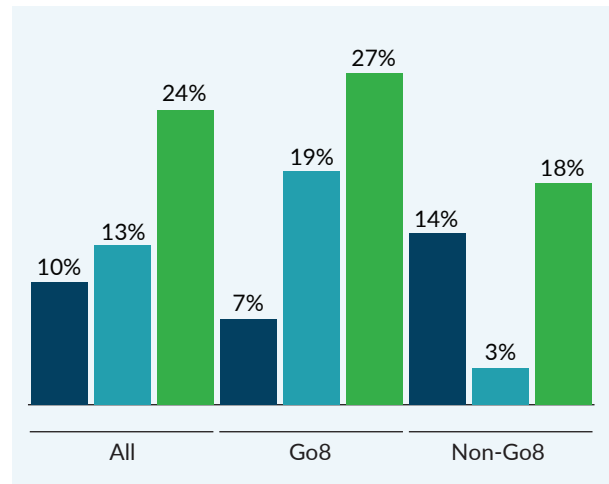
- Staff alumni relations costs increased by 5% from 2017 to 2018, and nonstaff alumni relations costs decreased by 7%.
- Alumni magazine production and distribution costs decreased by 15% for non-Go8 institutions and 18% for Go8 institutions from 2017 to 2018.

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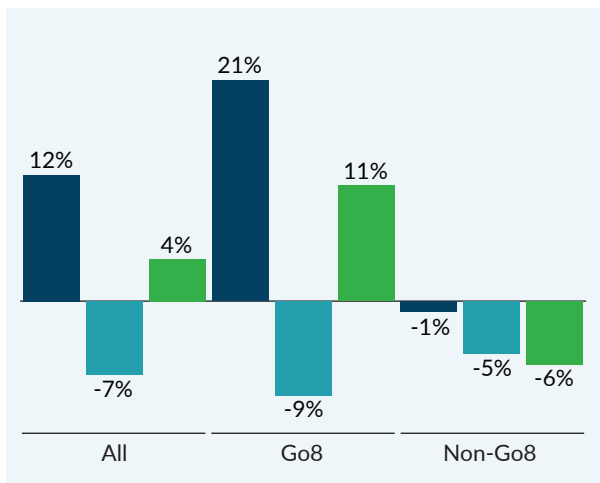
Fundraising cost trends, 2016 to 2018



Staff fundraising cost trends, 2016 to 2018

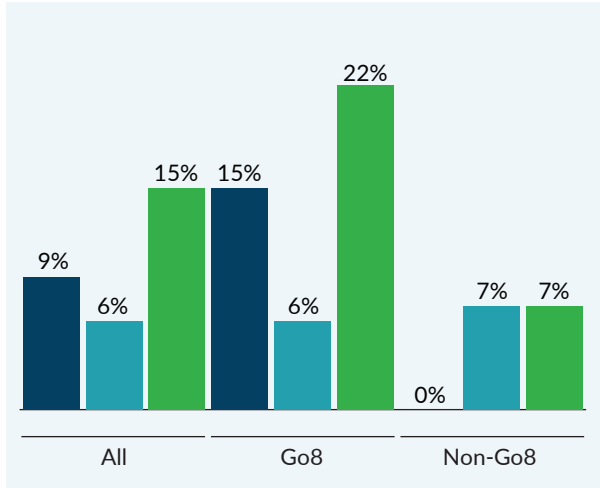


Nonstaff fundraising cost trends, 2016 to 2018

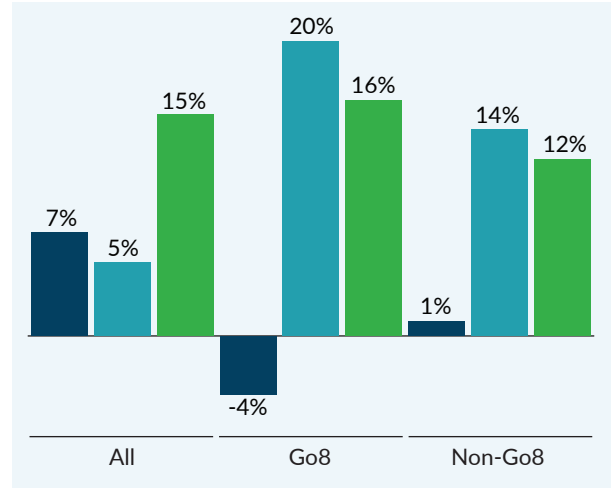


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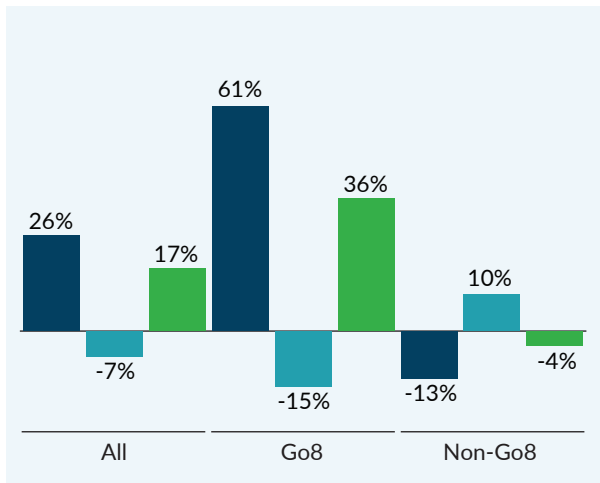
Alumni relations cost trends, 2016 to 2018



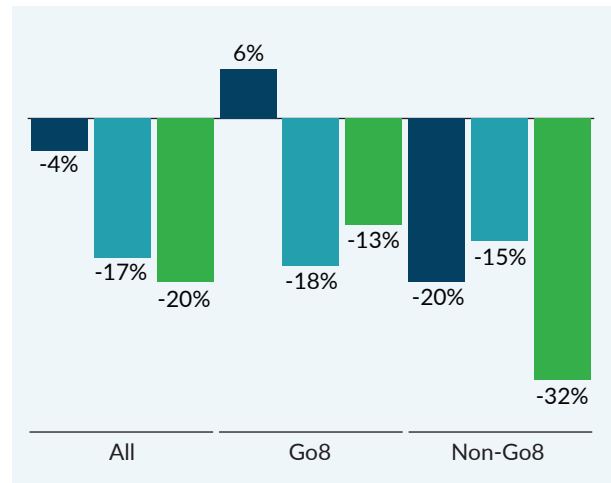
Staff alumni relations cost trends, 2016 to 2018



Nonstaff alumni relations cost trends, 2016 to 2018



Production and distribution alumni magazine cost trends, 2016 to 2018



COMPARISONS WITH INSTITUTIONS IN THE U.K.

U.K. institutions participating in the long-running Ross-CASE Survey of charitable giving provide a valuable point of comparison for universities in Australia and New Zealand. The following section draws on data from the current survey and from the Ross-CASE Survey 2017–2018 to compare trends in fundraising outcomes, investments in fundraising, and fundraising staff counts.

Plotting median new funds secured against median FTE fundraising staff demonstrates a clear correlation between fundraising staff counts and new funds secured. Go8 institutions are positioned at the top-right of this trend, with the highest median new funds secured and highest staff counts, followed by institutions in the Established¹ cluster in the U.K. and then the Russell Group of institutions. Non-Go8 institutions in this survey appear between the median for institutions in Australia and New Zealand and the median for U.K. institutions.

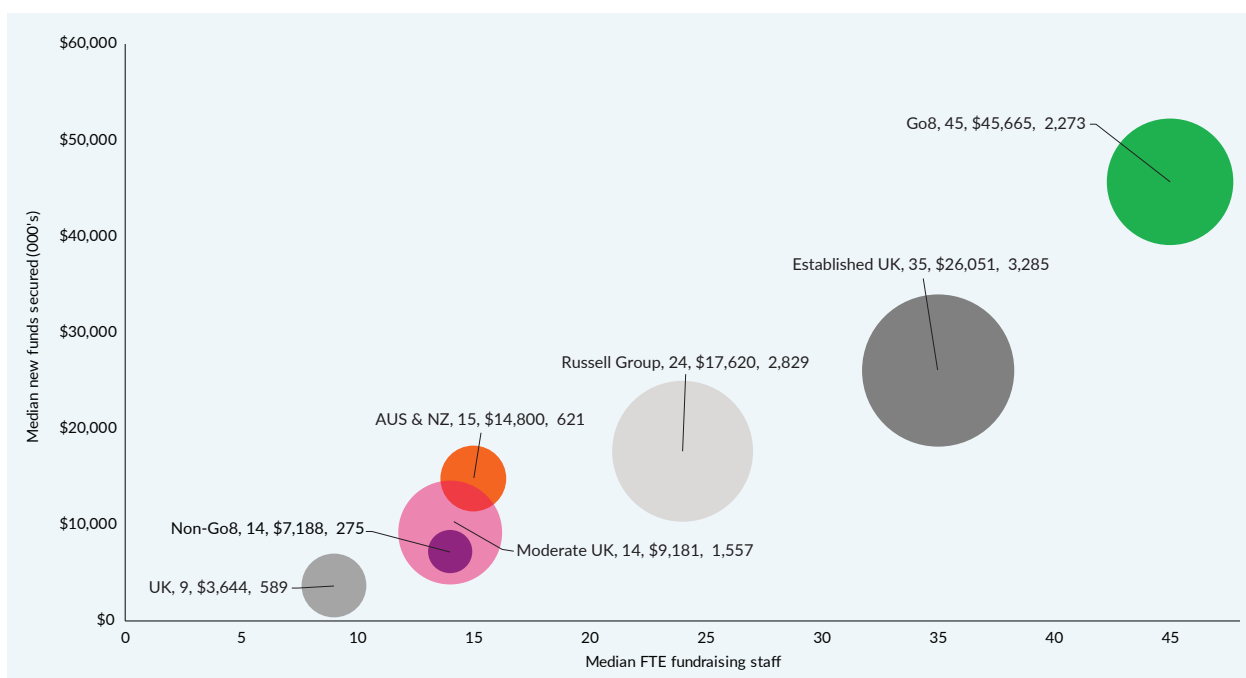
Non-Go8 institutions share some characteristics of institutions in the Moderate cluster in the

U.K. Non-Go8 institutions and U.K. institutions in the Moderate cluster both have median FTE fundraising staffs of 14. The median fundraising staffs of all U.K. institutions is 9. The median number of alumni donors across these three groups varies widely. Non-Go8 institutions reported \$3.5m more in median new funds secured compared to the median for all U.K. institutions, but non-Go8 institutions secured a median of \$2m less than U.K. institutions in the Moderate cluster.

Go8 institutions reported a median of 556 fewer alumni donors than the Russell Group (medians of 2,273 and 2,829, respectively), but median new funds secured by Go8 institutions are \$28m more than those secured by Russell Group institutions.

Advancement matrix 2018: median FTE fundraising staff by median new funds secured

Bubble size: median number of alumni donors

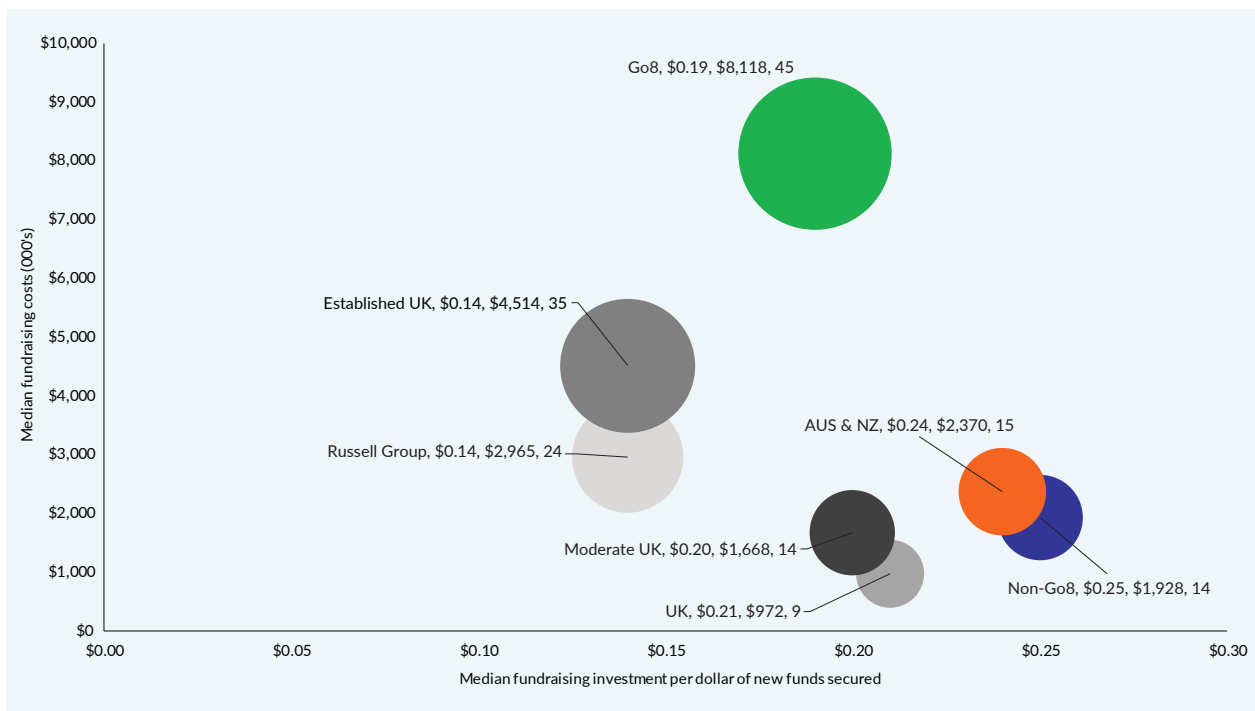


1. U.K. institutions participating in the Ross-CASE Survey are grouped using Latent Class Analysis into six clusters—Fragile, Emerging, Developing, Moderate, Established, and Elite. This is based on seven key variables from the *Ross-CASE Survey 2017–2018*.

When looking at U.K. institutions in the Established cluster, institutions report 10 fewer FTE fundraising staff members at Established institutions than the Go8 and secure \$20m less in new funds secured. With more median alumni donors, Russell Group institutions, Established institutions, and Go8 institutions report the lowest

median investment per \$1 in new funds secured of 14 cents, 14 cents, and 19 cents, respectively. For Go8 institutions, the median fundraising cost is \$5m more than that of institutions in the Russell Group, and the median FTE fundraising staff at Go8 institutions is 21 more than FTE fundraising staff at Russell Group institutions.

Advancement matrix 2018: median cost per dollar secured by median fundraising costs
Bubble size: median number FTE fundraising staff



APPENDIX

Methodology

This report presents findings from the CASE Support of Education Survey, Australia and New Zealand, 2019. CASE Asia-Pacific undertakes the project management, overseeing the communications and marketing, with CASE Europe managing the data collection, analysis, and report writing. The survey is based on the U.K. Ross-CASE Survey and has been carried out since 2012. The survey was offered online for the first time in 2017, and the online platform was used again in 2018 to collect data for 2018.

The survey is overseen by an editorial board that, along with CASE research staff, reviews the survey script, reporting rules and the question-by-question guide before launching the survey to eligible institutions in Australia and New Zealand.

The 2016, 2017, and 2018 survey was launched online via the CASE Benchmarking Toolkit in February 2019 and closed in April 2019. Members of the board and CASE research staff queried the data submitted by the institutions against an exhaustive set of logic, ratio, arithmetic, and substantive tests (a full list can be obtained on request). The queries were emailed to the participating institutions, which had the option of rectifying the errors by amending their data or leaving the questions unanswered. Best possible efforts were made to remove any unreliable data that were submitted. Descriptive statistics, mainly using the measures of central tendencies (mean and median), were used to analyse the data, and key indicators were reported on this basis.

All data collected have been reported on a confidential and aggregated basis in this report. Survey participants also have access to anonymised data via CASE's online Benchmarking Toolkit. All income figures in this report are in Australian dollars. As with previous reports, this year's data are intended for benchmarking purposes, and as such, does not provide sector or organisational context, nor does it speculate as to reasons why differences may have occurred between years.

Reporting conventions

I) TREND DATA

Trend data are presented on a like-for-like basis. Returning participating institutions were requested to submit data for 2018 and update any data from 2016 and 2017. New participating institutions were requested to submit data for three years – 2016, 2017, and 2018.

II) BASE SIZE

The number of institutions given as the base in tables and figures refers to the number of institutions answering a particular question or set of questions rather than the total number participating in the survey.

III) MEASURES OF CENTRAL TENDENCIES

Mean figures provide a snapshot of the overall group's performance, while median figures highlight the middle point of the distribution in fundraising figures across the participating institutions. Where the mean and median are close together, the group is normally distributed, and where the mean is significantly different from the median, the group is much more skewed. Differences in mean and median figures in this sample are likely due to the presence of outliers in a sample. The sample includes a diverse range of institutions, and mean values tend to be inflated by a few high-performing institutions. This variation is reduced when mission groups are analysed. This is because mission group institutions are generally very similar to each other in terms of their operations.

IV) COMPUTED VARIABLES

Some variables are calculated on the basis of two variables from the survey. For example, largest cash gift as a percentage of total cash income received was calculated using unweighted statistics. This was done by first computing the percentage of largest cash gift to total cash income received for

each institution, and then we calculated the median from these figures rather than computing it by using the total of the largest cash gift and dividing that by total cash income received.

V) PERCENTAGE VARIABLES

Apart from percentages that may be presented as computed variables above, there are percentages that are calculated based on the weighted statistics. For example, new funds by purpose were calculated by dividing total new funds secured for each purpose by the total new funds secured.

Response rate

Response rates 2013–2019

	2013	2014	2015	2016	2017	2018	2019
Higher education institutions in Australia							
Invited to participate	43	43	43	43	43	43	43
Number participating	8	10	14	23	24	24	24
Response rate	19%	23%	32%	53%	56%	56%	56%
Higher education institutions in New Zealand							
Invited to participate	8	8	8	8	8	8	8
Number participating	0	1	5	1	1	1	2
Response rate	0%	12%	62%	12%	12%	12%	25%
Higher education institutions in Australia and New Zealand							
Invited to participate	51	51	51	51	51	51	51
Number participating	8	11	19	24	25	25	26
Response rate	16%	21%	37%	47%	49%	49%	51%

Participating institutions

AUSTRALIA - GO8 INSTITUTIONS

1. Monash University
2. The Australian National University
3. The University of Adelaide
4. The University of Melbourne
5. The University of Queensland
6. The University of Sydney
7. The University of Western Australia
8. UNSW Sydney

AUSTRALIA - NON-GO8 INSTITUTIONS

1. CQ University Australia
2. Deakin University
3. Griffith University
4. La Trobe University
5. Macquarie University
6. Murdoch University
7. Queensland University of Technology
8. RMIT University
9. Swinburne University of Technology
10. The University of Newcastle
11. University of New England
12. University of Tasmania
13. University of Technology Sydney
14. University of Wollongong
15. Victoria University
16. Western Sydney University

NEW ZEALAND

1. The University of Auckland
2. Victoria University of Wellington

Glossary

Annual funds: Gifts obtained through mass participation, often directed to general operations and/or designated university priorities.

Bequest: A commitment (pledge) that a transfer of wealth will occur upon a donor's death. Within the survey bequest, gifts are counted only in either new funds secured or cash income received (depending on the type of gift) when they are received. Committed bequests (whether received in year or not) are included in the committed bequests question within the survey.

Cash income received: Income received by the institution, including payments received towards pledges made in previous years, excluding new pledges where payment has not been received.

Contactable alumni: Addressable alumni (former students of the institution)—those for whom you have reliable postal or email addresses anywhere in the world.

Gifts-in-kind: Other goods donated that are not monetary contributions.

Group of Eight: A coalition of research-intensive Australian higher education institutions (refer to the Go8 website for further information: <https://go8.edu.au/>).

Investment in alumni relations: The costs associated with engagement activity with alumni and community, including staff and nonstaff expenditure.

Investment in fundraising: The costs associated with the efforts to gather new funds secured and cash income received. It includes the cost of the staff (staff expenditure) undertaking the fundraising and the other costs (nonstaff expenditure) of running and maintaining the fundraising operations. When the costs of staff expenditure and nonstaff expenditure are combined this equals the total fundraising expenditure.

Mean: A measure of central tendency that is the average value, i.e., the sum of the sampled values divided by the number of items in the sample. In this report *mean* denotes the arithmetic mean.

Median: A measure of central tendency separating the higher half of a data sample, a population, or a probability distribution from the lower half.

New funds secured: New funding secured by the institution, including new donations received and new confirmed pledges not yet received but excluding payments of pledges made in previous years. This does not include bequest pledges but includes bequests received.

Organisations: Trusts, foundations, companies, and other organisations.

Philanthropic income: Defined in the Supporting Document and including gifts/donations or grants that meet two criteria; source of funds should be eligible, and the nature of funds should meet the survey's definition of philanthropic intent. The survey reports philanthropic income in two ways—new funds secured and cash income received.

Reporting Rules and Question-by-Question Guide: Documents providing guidance and definitions on funding that is eligible for inclusion in the survey and how that funding is recorded. They also contain general guidance on completing the survey.

Russell Group Universities: An association of 24 research-intensive institutions in the U.K.

Sum: The result of summation, which is the operation of adding a sequence of numbers.

For further information about this report contact research@case.org.



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