

# CASE Insights on College and University Foundations 2022

# 2022 College and University Foundations Survey

- 2 versions of the survey –  
Research/Doctoral (long version) and  
Non-Research/Doctoral (short version)
- 46 foundations completed the survey
  - 42 long version, 4 short version
- 63% of institutions were independent  
of the institution / 37% were  
interdependent

| Institution Type  | 2022 |
|-------------------|------|
| Community College | 4%   |
| Bachelor's        | 7%   |
| Master's          | 2%   |
| Research/Doctoral | 85%  |
| System/District   | 2%   |

# 2022 Fundraising

Does your institution lead/manage the fundraising function at your institution?

- Median number of FTE development officers: 42
  - Max FTE : 165
  - Min FTE: 0

| Institution Type  | Yes        | No         |
|-------------------|------------|------------|
| Community College | 100%       | 0%         |
| Bachelor's        | 67%        | 33%        |
| Master's          | 100%       | 0%         |
| Research/Doctoral | 82%        | 18%        |
| System/District   | 0%         | 100%       |
| <b>Total</b>      | <b>80%</b> | <b>20%</b> |

# 2022 Endowment

| Endowment Value          |     |
|--------------------------|-----|
| < \$10 million           | 0%  |
| \$10.1 to \$50 million   | 9%  |
| \$50.1 to \$100 million  | 2%  |
| \$100.1 to \$250 million | 15% |
| \$250.1 to \$500 million | 15% |
| > \$500 million          | 59% |

-7.5%

Median annual return  
on LTIP

+7.2%

Median 3-year return  
on LTIP

+7.8%

Median 10-year  
return on LTIP

# Campaigns 2021 and 2022

Median Timeline: 8 years

| Campaign Status | 2021 | 2022 |
|-----------------|------|------|
| Planning        | 34%  | 35%  |
| In Progress     | 38%  | 28%  |
| Just Completed  | 16%  | 20%  |
| No Plans        | 11%  | 13%  |
| Other           | 2%   | 4%   |

| Goal (median)     | 2021                 | 2022                 |
|-------------------|----------------------|----------------------|
| Community College | \$12 million         | \$2 million          |
| Bachelor's        | \$125 million        | \$2 billion          |
| Master's          | \$25 million         | \$25 million         |
| Research/Doctoral | \$500 million        | \$875 million        |
| System/District   | NA                   | NA                   |
| <b>Total</b>      | <b>\$275 million</b> | <b>\$625 million</b> |

# Funding Sources 2022

| Funding Source (All Respondents) | % Using Source | % of Foundation Funding (mean) |
|----------------------------------|----------------|--------------------------------|
| Institutional Support            | 78%            | 28%                            |
| Unrestricted Gift Funds          | 74%            | 8%                             |
| Gift Funds Restricted Operations | 59%            | 12%                            |
| Investment Income Unrestricted   | 57%            | 9%                             |
| Cash Float                       | 63%            | 13%                            |
| Endowment Mgmt Fee               | 100%           | 45%                            |
| Gift Fees                        | 65%            | 16%                            |
| Real Estate                      | 59%            | 5%                             |

# Endowment Mgmt. Fee 2021 and 2022

| Endowment Mgmt Fee categories | 2021          | 2022          |
|-------------------------------|---------------|---------------|
| No Fee                        | 8%            | 2%            |
| < 1 %                         | 8%            | 11%           |
| 1%                            | 20%           | 20%           |
| Between 1% to 2%              | 59%           | 59%           |
| 2%                            | 3%            | 4%            |
| > 2 %                         | 2%            | 4%            |
| Median endowment fee          | 1.28%         | 1.25%         |
| Median endowment              | \$473,571,612 | \$604,309,998 |

# Gift Fees 2021 and 2022

| Gift Fees   | 2021 | 2022 |
|---|------|------|
| Assess Fees on Both Endowed and Non-endowed Gifts | 31%  | 26%  |
| Assess Fees on Non-endowed Only                   | 17%  | 20%  |
| Assess Fees on Endowed Only                       | 3%   | 2%   |
| No Gift Fees Assessed                             | 48%  | 52%  |



# Gift Fees 2022

## Non-endowed Gifts:

- 46% of foundations assessed fees on non-endowed gifts in 2022. Most common fee was 5% charged by 65% of foundations assessing the fee. The minimum fee was 3%, maximum fee was 6.5%.

## Endowed Gifts:

- 28% of foundations assessed fees on endowed gifts in 2022. Most common fee was 5% charged by 56% of foundations assessing the fee. The minimum fee was 1.8%, maximum fee was 6.5%.

| Gift Fees (mean) | 2022 |
|------------------|------|
| Non-endowed Gift | 4.6% |
| Endowed Gift     | 4.0% |

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