

# CASE Insights<sup>SM</sup> on Advancement Metrics that Matter (United States)

*in partnership with*

**GIVECAMPUS**

**SEPTEMBER 2023**

COUNCIL FOR ADVANCEMENT  
AND SUPPORT OF EDUCATION



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## ACKNOWLEDGMENTS

We would like to thank all professionals who answered this survey, giving their time to provide information about the advancement metrics that matter most to them.

A special thanks to our partners at GiveCampus, whose support made this survey possible.

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### ABOUT CASE

CASE—the Council for Advancement and Support of Education—is a global, not-for-profit membership association with a vision to advance education to transform lives and society.

CASE is the professional home for advancement professionals, inspiring, challenging, and equipping them to act effectively and with integrity to champion the success of their institutions. CASE defines the competencies and standards for the profession of advancement, leading and championing their dissemination and application for more than 97,000 advancement professionals at 3,100 member institutions in 80 countries. Broad and growing communities of professionals gather under the global CASE umbrella. Currently, these professionals include individuals working in alumni relations, development and advancement services, communications, fundraising, government relations, and marketing. These professionals are at all stages of their careers and may be working at schools, colleges, universities, cultural institutions, or other not-for-profit organizations.

Through CASE Insights<sup>SM</sup>, CASE is the world leader in providing data, standards, and research to help institutions and advancement professionals make data-informed decisions and achieve their goals.

Headquartered in Washington, D.C., CASE works across all continents from its regional offices in London, Singapore, and Mexico City to achieve a seamless experience for all of its stakeholders, particularly its members, volunteers, and staff.



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### ABOUT GIVECAMPUS

GiveCampus is the world's premier fundraising platform for nonprofit educational institutions. Trusted by more than 1,300 colleges, universities, and K–12 schools, our mission is to advance the quality, the affordability, and the accessibility of education. We provide software, services, and expertise that help schools raise more money, from more people, at a fraction of the cost of other fundraising methods. For more information, please visit [go.givecampus.com](https://go.givecampus.com).

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## FOREWORD

At GiveCampus, our mission is to advance the quality, the affordability, and the accessibility of education. One of the many ways we do this is by supporting the important work of advancement professionals.

We recently partnered with CASE Insights<sup>SM</sup> on a pulse survey asking advancement leaders in the United States about which metrics matter most to them and how they measure success at their school, college, or university. CASE members were generous with their time and thoughtful with their responses. We are pleased to share their observations, along with detailed findings and important takeaways, in the pages that follow.

As a fundraising platform provider, we know that data-informed strategies yield the best outcomes. So we were encouraged to learn that nearly two-thirds (64.4%) of advancement professionals said they were “regularly asked for data to show their work.” On the flip side, however, only 45.8% said they had easy access to that data.

Despite the value placed on data-driven work, less than half of advancement professionals have the information they need to make informed decisions about what is working at their institution and what is not.

At GiveCampus, not only do we make it our goal to use data to continuously optimize the results that our platform drives for educational fundraisers, but we also believe it is critical to provide easy access to these insights, from tracking and forecasting giving activity to offering schools fundraising benchmarks from peer institutions.

We found it encouraging to see that schools are once again embracing both in-person and digital channels to engage alumni, potential donors, and other community members. Both in-person event attendance and online giving made it into the top five engagement metrics. From our experience with the institutions we serve, a multichannel approach can have a meaningful impact on both donors engaged and dollars raised.

Thank you to all those who participated in this survey. Your input helps the entire industry gain a deeper understanding of the challenges faced by advancement professionals and presents organizations like ours with the unique opportunity to explore innovative solutions to address their needs.

We look forward to continuing our close partnership with CASE to address the thoughts, questions, and ideas that are top of mind for you and your teams. Our shared belief in the power of data, our mission-driven focus, and our dedication to supporting the critical initiatives you develop will continue to be a driving force behind our collaboration.

**Jennifer Agustin**

Vice President of Marketing  
GiveCampus

## INTRODUCTION

What metrics matter the most to advancement professionals? Are we regularly collecting the most strategic data, or are there new metrics we should consider? To answer these questions, the Council for Advancement and Support of Education (CASE) and GiveCampus partnered on a pulse survey on this topic for advancement professionals at educational nonprofit organizations, K–12 schools, colleges, and universities in the United States. This is the first survey in a new series that will gather insights on topical and timely issues from individuals working in advancement, with the aim of supplementing data collected in our annual benchmarking surveys. The pulse survey was open to participants from June 7 through June 21, 2023, with the aim of understanding which metrics matter most to advancement professionals.

The survey gathered general information about each respondent, including the primary focus of the respondent's role, level in role, number of years working in advancement, type of institution, total philanthropic support at institution, and size of advancement program. The survey asked respondents to rank metrics in the areas of philanthropy, engagement, and marketing and communications. Some of the options provided in each area were well-established metrics, and others represented areas of emerging interest in the profession. There were additional questions around common data challenges and the importance of various metrics.

Invitations to participate were sent to individuals from all CASE member institutions in the United States and broadly shared by GiveCampus, including through social media and its *Class Notes* newsletter. Based on these invitations, 342 individuals participated in the survey.

This report provides a summary of the findings compiled from those responses and presents key takeaways designed to help today's advancement professionals evaluate and optimize their approaches to measuring the impact of their work.

### INTERPRETING THE CHARTS AND TABLES

- This pulse survey was designed with skip logic that created a custom path through the survey that varied based on a respondent's answers. As such, not all of the 342 individuals who participated in the survey answered every question. The number of respondents to a particular question is indicated below each chart in the report.
- Results of the ranking questions were analyzed using two methods. The first method counts the frequency of a metric appearing in the top five. This method provides insights into the general usefulness of a metric. The second method calculates the weighted average to show the popularity of a metric. A higher score (weighted rank) indicates that the metric appeared more frequently as a top choice. Assessing the weighted average given to a metric shows its importance to survey respondents.

## KEY FINDINGS

### WHO RESPONDED?

- Out of the 342 individuals who responded to the survey, 43.9% indicated that they held management-level positions, 36.5% were staff members, and 19.6% held executive leadership roles (not shown).

### WHAT DATA MATTER?

- Metrics on philanthropy, engagement, and marketing and communications were all important to respondents, especially those in leadership roles.
- Among the 342 participants, participants from 313 institutions responded to the question regarding the importance of data categories. Of these respondents, 50.5% considered philanthropy, engagement, and marketing and communications all to be important data categories. An additional 37.0% noted that two of the three categories of advancement activities were significant to their work.
- Of the 50.5% of respondents (158 individuals) who highlighted the importance of all three data categories in their advancement activities, 67.1% were in leadership and management positions, and 32.9% were staff members (not shown).

### WHAT ARE THE DATA CHALLENGES?

- Out of the 249 respondents who identified the most challenging fundraising stage for their organization, 28.5% highlighted difficulties in obtaining complete data to accurately identify, segment, and prioritize constituents. About one-quarter (25.7%) said it is challenging to convert donors' capacity and intent to give into actual gifts.

### HOW TO MEASURE PHILANTHROPY

- Respondents most frequently identified funds received (the value of gifts and payments received during the year) and new funds committed (a measure of fundraising activity that includes pledges secured during the year) as useful metrics to assess philanthropy levels. Funds received and new funds committed were among the top five metrics for 235 and 185 respondents, respectively.
- The results indicate that these two metrics are not only widely considered useful (i.e., within the top five) but also perceived as the most important metrics (i.e., ranked first and second).
- CASE has been tracking new funds committed in the CASE Insights<sup>SM</sup> philanthropy surveys in the United Kingdom and Ireland, Australia and New Zealand, and Canada consistently, but it only introduced the measure in the CASE Insights<sup>SM</sup> on Voluntary Support of Education (United States) survey in 2022.
- Used together, funds received and new funds committed are useful measures for highlighting the impact of fundraising during the year and the future potential results of fundraising activity.

### HOW TO MEASURE ENGAGEMENT

- The CASE Insights<sup>SM</sup> on Alumni Engagement survey tracks four main types of engagement: experiential, volunteerism, philanthropic, and communication. The pulse survey included options in all of these categories and more.
- For metrics of engagement, in-person event attendance and volunteering metrics were most frequently included among the top five, by 240 and 232 respondents, respectively. These metrics were also given the most weight, with respondents tending to rank these metrics first and second in importance.

- Online giving was included in the top five (edging out online event attendance and reunions), indicating that the channel of giving is important to respondents.

## **HOW TO MEASURE MARKETING AND COMMUNICATIONS**

- Measuring marketing and communications is a growing area of focus for CASE members. As with engagement, the effectiveness of marketing and communications is often felt and measured across the advancement disciplines.
- For marketing and communications metrics, respondents most frequently placed alumni engagement and email engagement among the top five metrics (143 and 134 respondents, respectively). These metrics also typically appeared as the first and second most important when ranked.

## DETAILED FINDINGS

### THE ROLE OF DATA IN ADVANCEMENT

Survey participants recognize the growing importance of data in advancement. When asked to comment on the role of data in tracking and assessing the impact of their work, 64.4% of the respondents to this question reported that they are regularly asked for data for this purpose; however, less than half of respondents (45.8%) have easy access to the data they need. This finding indicates that there is an opportunity for improvement in how to collect and organize advancement data.

All data categories in advancement—philanthropy, alumni engagement, and marketing and communications—were important to survey respondents. When asked which categories of data are most important in their role, more than half of

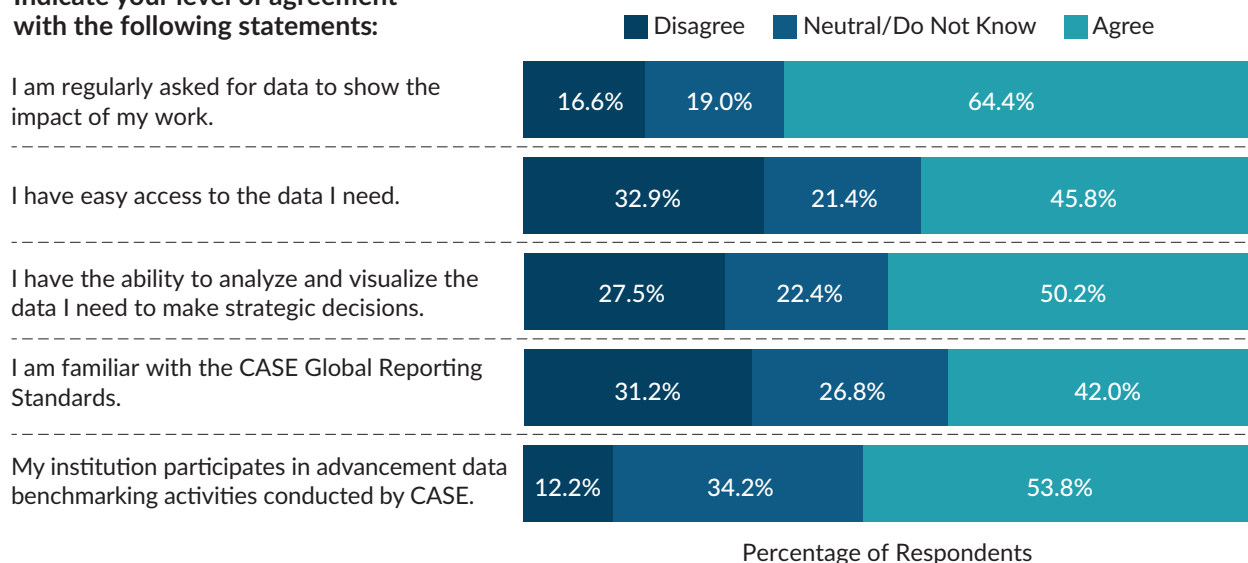
respondents (50.5%) indicated that data on all three categories of advancement activities are important to their work. An additional 37.0% of respondents noted that data on two categories of advancement activities are significant to their work. This finding was most common among respondents in leadership roles, indicating the importance of an integrated view of advancement.

It is also noteworthy that respondents struggled most with getting complete and accurate constituent data in their advancement activities. They struggled with that data issue more than they did with converting donor intent into donations and engaging with donors.

**Figure 1**

### What role do advancement data play in the evaluation of your activities?

Indicate your level of agreement with the following statements:



Note: Number of participants reporting: 295. Percentages may not add up to precisely 100% due to rounding.

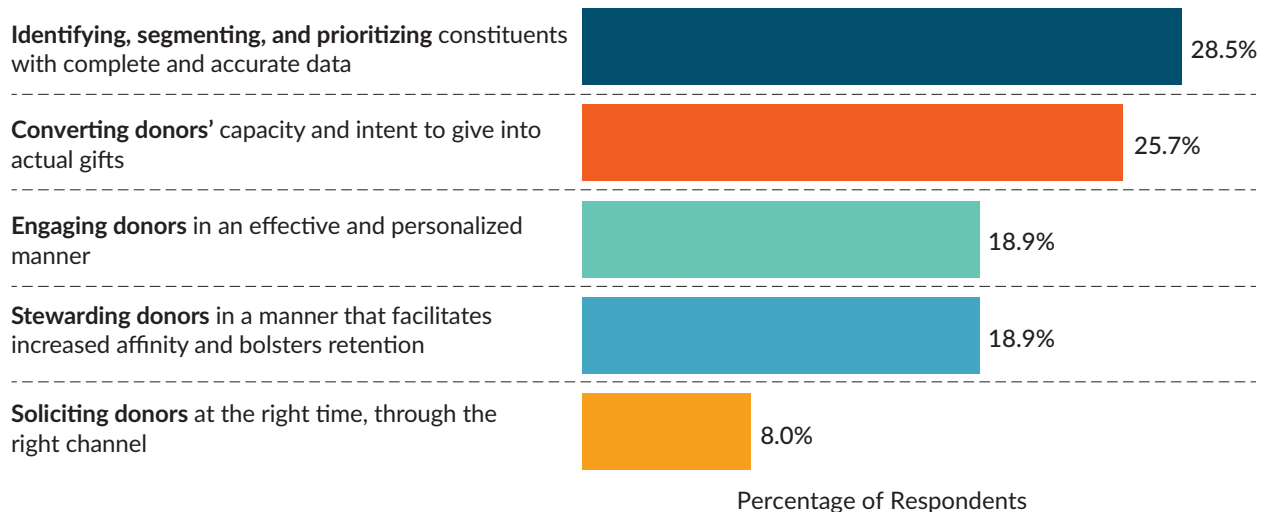


**Figure 2**  
**What categories of data are important in your role?**



Note: Number of participants reporting: 313

**Figure 3**  
**Which stage of the fundraising process does your organization struggle with the most?**



Note: Number of participants reporting: 249

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## **Comments from participants on the data they wish they could track**

*“Qualitative data tracking: Difficulties in tracking qualitative data, such as sentiment toward the institution, attitudes, motivations to give or engage, and personal preferences.”*

*“Lack of integration: Systems such as social media, web, and email are not seamlessly integrated with the Customer Relationship Management, making it difficult to track and store engagement data.”*

*“Lack of staff and time: Limited staffing, lack of time, and competing priorities impede data compilation, analysis, and reporting.”*

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## PHILANTHROPY METRICS

Advancement departments can evaluate the success of fundraising efforts using a number of philanthropy metrics. Survey participants were asked to rank which metrics are most important to them. The survey results show that the top metric was the amount of funds received, with new funds committed also appearing as a key metric.

It is possible to look at the results of respondents' rankings from two different perspectives. Considering how often respondents placed a metric in the top five provides insights about the general usefulness of a metric, and assessing the weighted average given to a metric shows its importance to survey respondents. While these tended to coincide in the results, it is possible, in principle, for a metric to be widely considered useful but not necessarily the most important.

The results varied among individuals based on the size of their institutions. Those from larger

Survey participants were asked to rank the following philanthropy metrics:

- Funds received (gifts and payments received)
- New funds committed (gifts and pledges secured)
- New donors acquired
- Donor retention rates
- Donor counts (hard credit)
- Donor counts (soft credit)
- Gift bands (totals by giving levels)
- Gifts by alumni cohort (years since graduation)
- Gifts by purpose
- Gifts by channel
- Proportion of giving represented by largest gifts
- Return on fundraising investment

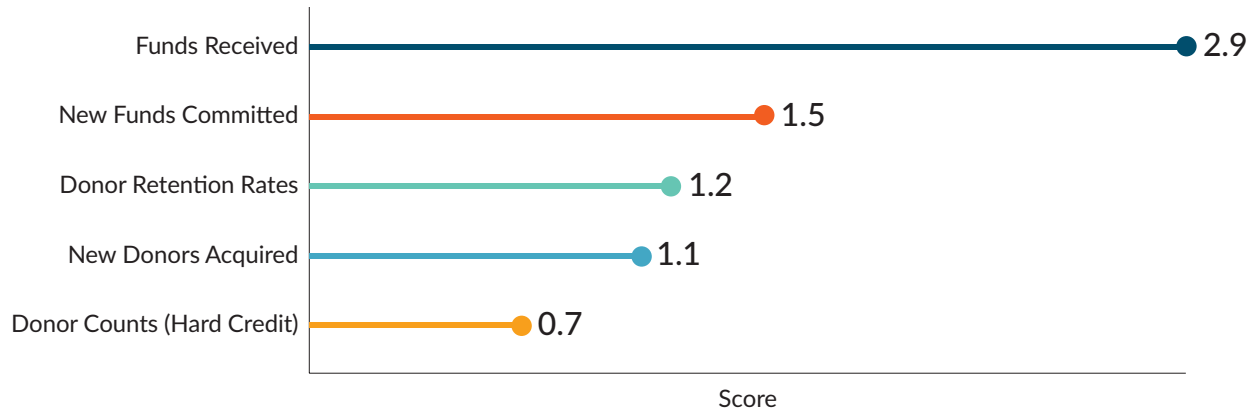
institutions considered the number of new donors acquired to be more important than the amount of new funds committed. Those from smaller institutions prioritized new funds committed.

**Figure 4**  
How often was a given philanthropy metric ranked in the top five?



Note: Number of participants reporting: 249. The frequency of a metric being ranked in the top five is determined by the number of respondents who selected it as one of their top five choices among philanthropy metrics. Each icon represents 10 respondents.

**Figure 5**  
How popular were the top options?



Note: Number of participants reporting: 249. The popularity of an option is calculated by finding the weighted average.

**Figure 6**  
What were the most popular philanthropy metrics for respondents from each type of institution?

		Type of Institution			
		Two-year college	Four-year college or university	College or university foundation	Independent school
Ranking of Philanthropy Metrics	1	Funds Received	Funds Received	Funds Received	Funds Received
	2	New Donors Acquired	New Donors Acquired	New Funds Committed	Donor Retention Rates
	3	Donor Retention Rates	New Funds Committed	New Donors Acquired	New Funds Committed
	4	New Funds Committed	Donor Retention Rates	Donor Retention Rates	New Donors Acquired
	5	Gifts by Purpose	Gifts by Purpose	Donor Counts (Hard Credit)	Donor Counts (Hard Credit)

Note: Number of participants reporting: 240

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## **Comments from participants on the importance of their preferred philanthropy metrics**

*“**Donor retention is vital** to the organization because of the money spent on recruitment of donors and the data [showing] that people who give consistently to your organization, when asked, will give more, providing they’re being properly cultivated and invited to continuously engage with the organization.”*

*“**Leadership annual giving** is becoming more important as U.S. News & World Report has dropped [donor] participation from its ranking calculations.”*

*“Just let institutions know that **planned giving is important** for a healthy, well-rounded development program.”*

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## ENGAGEMENT METRICS

This section considers four main types of engagement: experiential, volunteerism, philanthropic, and communication. Many advancement departments seek to evaluate their success in actively engaging alumni, potential donors, and other community members. Survey participants assessed which engagement metrics they consider to be most important to their work. In-person event attendance and volunteering engagement metrics were overall the most popular to evaluate engagement. The strong ranking of in-person event attendance and the lower ranking of online event attendance may indicate a focus on the prioritization of in-person engagement following the COVID-19 pandemic.

Donor participation—the percentage of a constituent group (e.g., alumni, parents) who donated in a financial year—also appeared in the top five engagement metrics. Historically, this metric has received a lot of attention because of its use in college rankings. CASE has spoken against the use of this metric in rankings because it represents only one facet of alumni engagement. In May 2023, *U.S. News & World Report* dropped this metric from its rankings. It is too soon to tell how these changes in the ranking process will impact the use of donor participation as a metric over time.

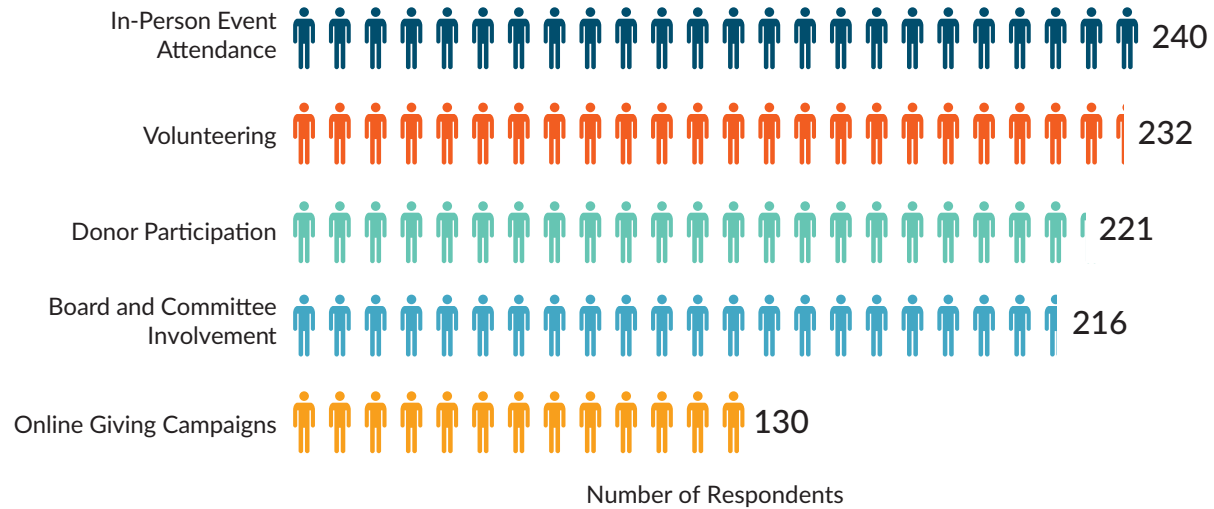
Although respondents considered online giving important, it was perceived as less important than the top metrics. This finding might be due to the

Survey participants were asked to rank the following engagement metrics:

- Board and committee involvement
- Volunteering
- In-person event attendance
- Online event attendance
- Event type (e.g., athletics, art)
- Donor participation
- Advocacy
- Alumni association membership
- Campus visit
- Reunions
- Online giving campaigns (e.g., giving day, crowdfunding)

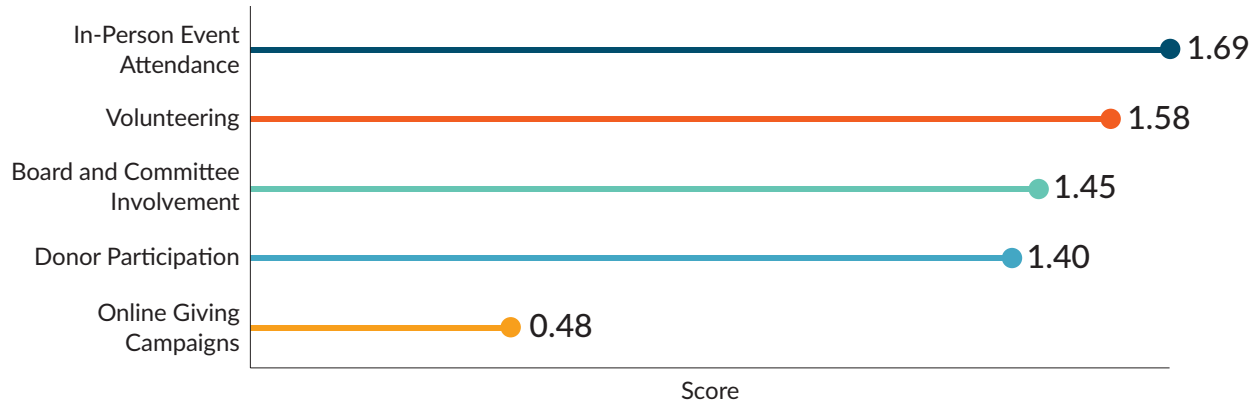
fact that online giving is a more targeted metric relative to the other measures, but its placement in the top five indicates that online giving is an area of focus for advancement professionals. Respondents noted the importance of online giving more than they did for other similarly targeted metrics, such as online event attendance and reunions. The importance of volunteering as a metric varied significantly among respondents from institutions receiving different total levels of donor support. Volunteering was less important for those from institutions receiving less support, but it had more significance for those from institutions getting the greatest levels of donor support.

**Figure 7**  
How often was a given engagement metric ranked in the top five?



Note: Number of participants reporting: 286. Each icon represents 10 respondents.

**Figure 8**  
How popular was each engagement metric?



Note: Number of participants reporting: 286

**Figure 9**  
 What were the most popular engagement metrics for respondents from institutions receiving a given level of total donor support?

		Total Support			
		Greater than \$10,000,000	\$3,000,001–\$10,000,000	\$1,500,001–\$3,000,000	Less than \$1,500,000
Ranking of Engagement Metrics	1	Volunteering	In-Person Event Attendance	Donor Participation	In-Person Event Attendance
	2	Board and Committee Involvement	Volunteering	In-Person Event Attendance	Board and Committee Involvement
	3	In-Person Event Attendance	Donor Participation	Volunteering	Donor Participation
	4	Donor Participation	Board and Committee Involvement	Board and Committee Involvement	Volunteering
	5	Online Giving Campaigns	Online Giving Campaigns	Online Giving Campaigns	Event Type

Note: Number of participants reporting: 256

### Comments from participants on the importance of their preferred engagement metrics

*“Understanding the **correlation between parent engagement and donations.**”*

*“**Fundraising productivity**—We spend a lot of money on trips and donor visits that do not appear to yield any substantial major gifts or even really establish any significant stewarding of a future gift.”*



## MARKETING AND COMMUNICATIONS METRICS

A key part of the work of advancement departments is outreach to prospective students, alumni, potential donors, and other community members. As with engagement, the effectiveness of marketing and communications is often felt and measured across the advancement disciplines. Survey respondents were asked what metrics are most important to use to evaluate the success of such marketing and communications activities. Overall, they considered alumni engagement and email engagement to be the most important.

However, respondents in different advancement roles did not prioritize the same metrics. While executive leadership and management prioritized email engagement and alumni engagement, respectively, advancement staff members instead put the most weight on enrollment.

Survey participants were asked to rank the following marketing and communications metrics:

- Enrollment
- Yield rate from applicant pool
- Quality of students enrolling
- Fundraising productivity
- Alumni engagement
- Media placements
- Social media engagement
- Email engagement
- Web analytics
- Brand health
- Institutional rankings

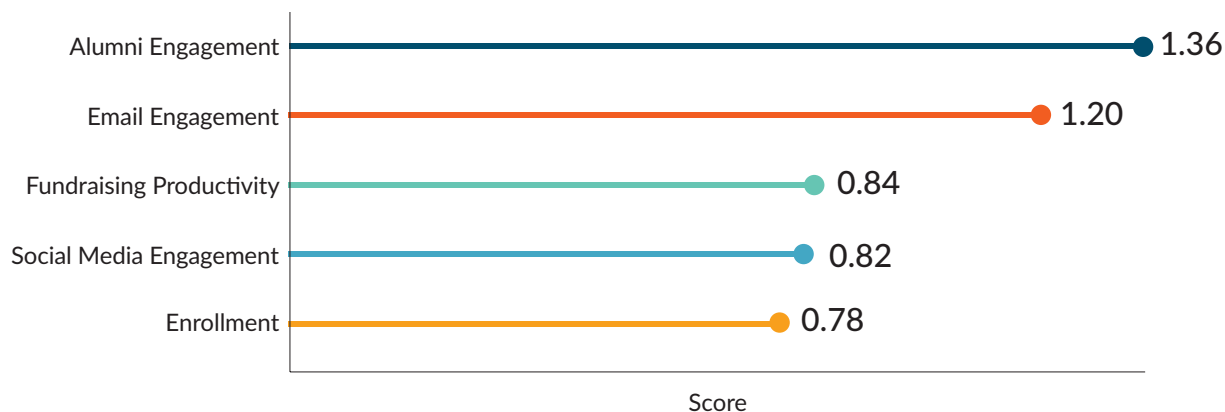
**Figure 10**

How often was a given marketing and communications metric ranked in the top five?



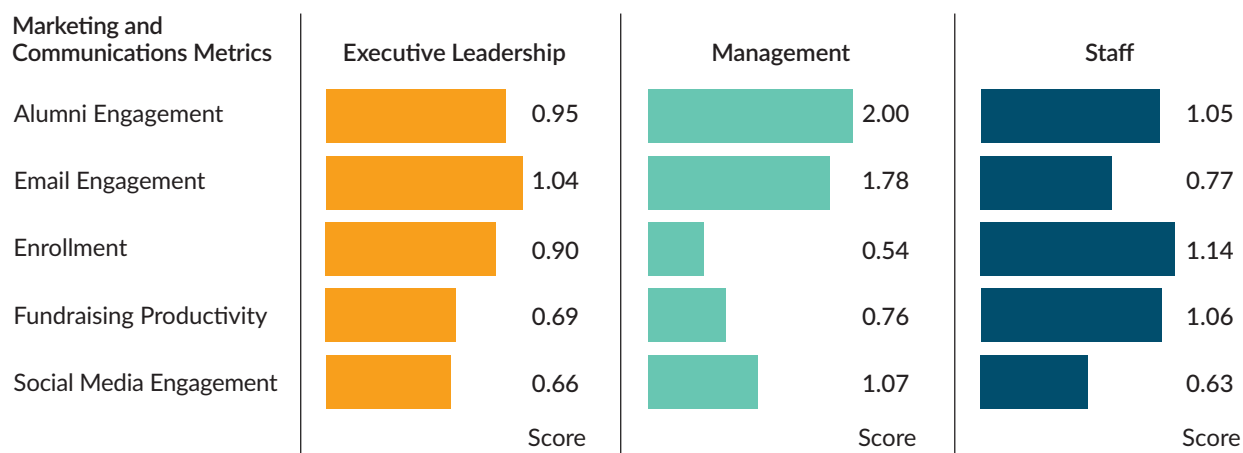
Note: Number of participants reporting: 187. Each icon represents 10 respondents.

**Figure 11**  
How popular was each marketing and communications metric?



Note: Number of participants reporting: 187

**Figure 12**  
What were the most popular marketing and communications metric for each type of role in an advancement department?



Note: Number of participants reporting: Executive Leadership = 39, Management = 85, Staff = 63

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