

CASE InsightsSM on Global Philanthropy

2022 KEY FINDINGS



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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 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 those 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 universities, schools, colleges, cultural institutions, or other not-for-profit organizations.

Through CASE InsightsSM, 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.

Note from CASE's President and CEO

One of my proudest moments leading CASE was the 2018 announcement that CASE acquired the Voluntary Support of Education survey. That announcement led to a standing ovation from our CASE Summit for Advancement Leaders audience. It was momentous.

This report marks another proud moment --- the publication of our first CASE Insights on Global Philanthropy. This report stems from our work in championing the CASE Global Reporting Standards, which enable us to act as a connected profession around the world, defining educational philanthropy uniformly across the world's educational institutions. This enables our members - including over 98,000 advancement professionals, to speak the same language by using the same metrics about the power of philanthropy. They are also intrinsic to protecting institutional reputation, setting out explicit standards for our philanthropic engagement work, as we advance education to transform lives and society.

I am grateful to all CASE members and others who participate in our CASE Insights surveys that form the basis of this report; to our thoughtful volunteers who contributed to the publication of our CASE Global Reporting Standards; and to all the volunteers on our regional CASE Insights on Philanthropy survey committees. Your engagement has brought us to this auspicious moment. Thank you.

I would also like to express my gratitude to the CASE Insights team, and report authors Nick Campisi, Jenny Cooke Smith, and Cara Giacomini.

This year, CASE celebrates 50 years as your professional association, serving as a catalyst for advancing education worldwide, by inspiring, challenging, and equipping communities of professionals to act effectively and with integrity to champion the success of their institutions. CASE Insights is one of many ways CASE serves the profession; we look forward to what the next 50 years may bring.

Sue Cunningham
President and CEO
CASE

Table of Contents

Global Standards	3
Global Benchmarking	8
Key Findings	12
Funds Received	13
New Funds Committed	14
Staffing	15
Investment and Outcomes	16
Major Gift Support	18
Support from Individuals	19
Conclusions	21

“Using data to measure philanthropy allows CASE members to distribute their resources more effectively, examine what’s working and what’s not, and identify where they have opportunities to innovate.”

**—Cara Giacomini
Vice President, Data, Research, and Technology,
CASE**

Global Standards



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CASE Global Reporting Standards

The *CASE Global Reporting Standards* provide a common set of definitions for advancement professionals around the world.

- These worldwide standards in institutional fundraising include definitions for educational philanthropy and important guidance around gift counting, funds received, new funds committed, and donor control and influence.
- The CASE Standards set out to:
 - Reflect the increasingly global perspective of advancement;
 - Ensure transparency and consistency in reporting institutional progress in fundraising;
 - Provide a framework for expansion to alumni relations, as well as marketing and communications;
 - Enable benchmarking at regional and global levels; and
 - Provide a foundation for CASE InsightsSM data.



Key Terminology: CASE Global Reporting Standards

Donor Bill of Rights

This joint 10-point statement was developed by multiple associations (including CASE) to ensure donors and prospective donors have full confidence in the organizations and causes they are asked to support. The Donor Bill of Rights is included in the CASE Global Reporting Standards and available at www.case.org/resources/donor-bill-rights.

CASE Statement of Ethics

Institutional advancement professionals, by virtue of their responsibilities within the academic community, represent their colleges, universities, and schools to the larger society. They have, therefore, a special duty to exemplify the best qualities of their institutions and to observe the highest standards of personal and professional conduct.

Educational Philanthropy

Educational philanthropy is the voluntary act of providing private financial support to nonprofit educational institutions. To be categorized as philanthropy in keeping with CASE Standards, such financial support must be provided for the sole purpose of benefiting the institution's mission and social impact, without the expressed or implied expectation that the donor will receive anything more than recognition and stewardship as the result of such support.

Two Lenses on Fundraising

Funds Received

- A measure of money in the bank
- Monies and property received within the reporting year

Pledge Payments Received

Realized Bequests/Legacies

Newly Established Irrevocable Planned Gifts (at face value)

Outright Gifts (not associated with a pledge)

New Funds Committed

- A measure of the impact of fundraising efforts
- New monies and property committed in the reporting year

New Pledges or Recurring Gifts

New Bequest/Legacy Intentions (donors Ages 65+)

Newly Established Irrevocable Planned Gifts (at face value)

Outright Gifts (not associated with a pledge)

From Global Standards to Global Benchmarking

March 2021: Launch of
*CASE Global Reporting
Standards*

2021–2022: Education
phase for members and
educational partners;
testing global core metrics
based on CASE Standards

2022–2023: Collection of
data using *CASE Global
Reporting Standards* for
CASE benchmarking
surveys

Global Benchmarking



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Motives

What are we hearing from CASE members?

- Leadership and staff turnover
- More interest in data across advancement
- Increased focus on large gifts
- Focus on engagement outcomes
- Shortage of data resources/expertise
- Systems integrations and automation challenges
- Interest in understanding impacts of artificial intelligence
- Importance of the CASE Standards in a global crisis

What are we seeing in the data?

- Commitments slowed down during 2020, which meant a delay in funds received in some regions.
- New funds committed and revenue have bounced back in all regions.
- Staffing changes and budget cuts will likely be lagging indicators in the results, making typical measures of return on investment (ROI) more complex.
- Donor counts, particularly alumni, are not back to pre-pandemic levels.

**Are these concerns universal?
How do they vary by region or
institution type?**

Methodology

This report harmonizes data from CASE regional philanthropy surveys, which were measured in similar ways across all regions.

- All group values are shown as medians.
- All monetary values are displayed in U.S. dollars and are not adjusted for inflation.
- Time series charts use regional samples of consistent cohorts. The institutions in these samples responded to their respective regional philanthropy surveys across all eligible years. Separately, some charts utilize all survey respondents for a specific year. Sample sizes are noted where relevant.
- We also highlight results for certain sub-regional interest groups, including research-intensive universities:
 - Group of Eight (Australia/New Zealand)
 - Medical/Doctoral (Canada)
 - Russell Group (United Kingdom/Ireland)
 - Research Doctoral (United States)

CASE Insights on ...

Philanthropy
(Australia and
New Zealand)

- History: 11 years
- Reporting period: January to December

Philanthropy
(Canada)
with CCAE

- History: 5 years
- Reporting period: April to March

Philanthropy
(United Kingdom
and Ireland)

- History: 20 years
- Reporting period: August to July

Voluntary Support
of Education
(United States)

- History: 60 years
- Reporting period: July to June

Note: Some participants' fiscal years vary slightly.

Regional Contexts Impacting Philanthropy



ECONOMIC DIFFERENCES such as the general state of economies or investment markets, the impact of the COVID-19 pandemic, or the power of a dollar can influence if and how much donors philanthropically support institutions.



A CULTURE OF PHILANTHROPY is based on varying approaches to giving that can impact financial support for education, as donors may look to support institutions in other ways.



FUNDING MODELS of governments can impact the amount and for what purposes institutions seek private support.

Key Findings

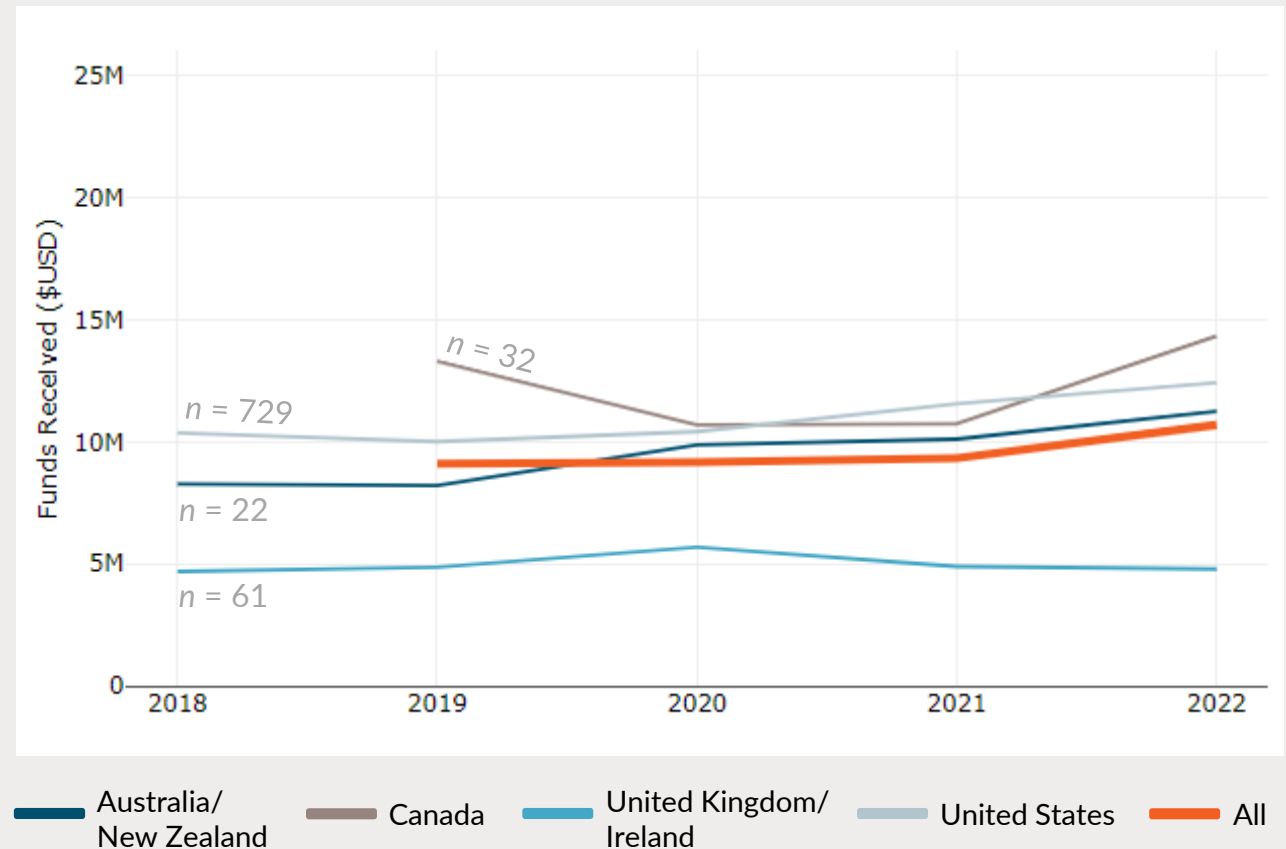


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Funds Received

Funds received remained relatively stable over the last five years.

- Despite the COVID-19 pandemic's evident impacts on funds received (FR), the medians were higher in 2022 than they were in 2018 across all regions. We found the largest increase (almost US\$3 million) in Australia/ New Zealand.
- While some turbulence during the period is evident, the relative consistency of funds received over the last five years was notable considering global changes. This consistency may be attributed, in part, to the strong performance of regional economies and markets during the period (Voluntary Support of Education key findings, 2020-21).

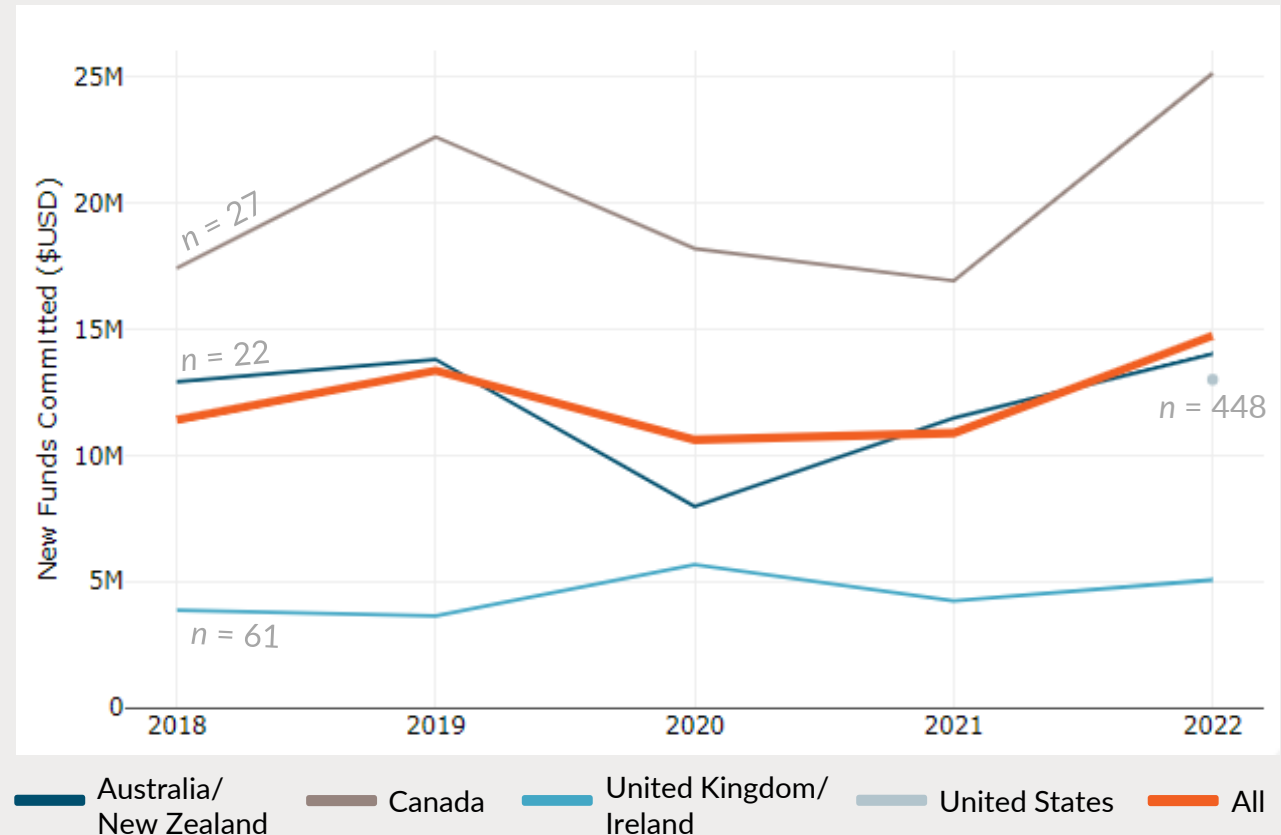


Notes: The chart displays data from participants who submitted their regional surveys for all eligible years. The Canadian survey did not collect information on funds received in 2018.

New Funds Committed

Despite mid-period turbulence, new funds committed increased in every region between 2018 and 2022.

- New funds committed (NFC), a measure that is more reactive to tempo distortion than funds received, experienced more variation than its cash counterpart during the period.
- We found that early growth in new funds committed was reversed in every region during the middle of the period, although the timing of this reversal varied by region, stemming from varying levels of economic health, COVID-19 pandemic impact, and regional reporting time frames.
- Despite mid-period turbulence, new funds committed remained relatively stable between 2018 and 2022. By the 2022 reporting cycle, new funds committed was above 2018 levels in each of the three regions with available longitudinal data.
- The largest changes over time were found in Australia/New Zealand, which recovered by 2022 after a 42% decrease between 2019 and 2020.

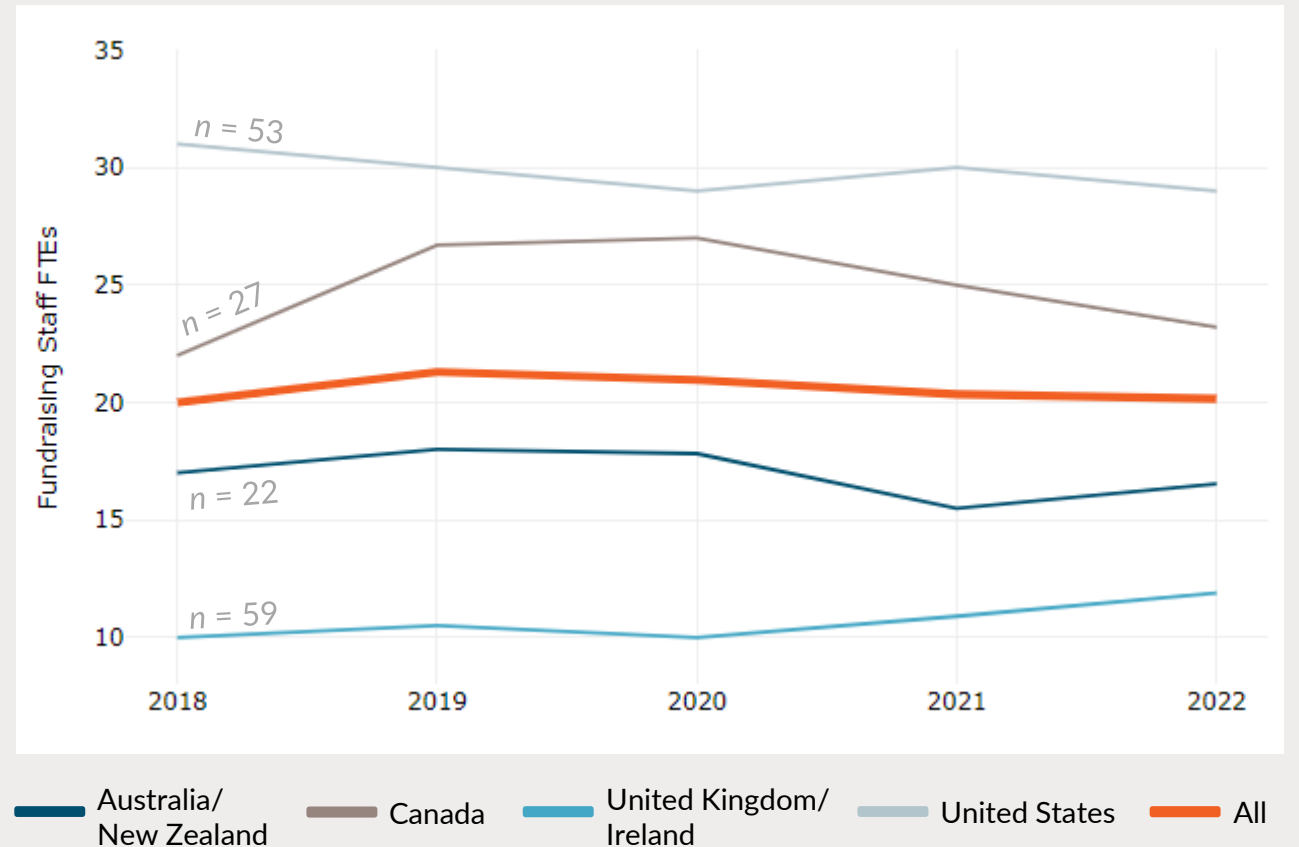


Notes: The chart displays data from participants who submitted their regional surveys for all eligible years. Data on new funds committed were collected in the United States for the first time in 2022. U.S. data for 2022 are not included in the “All” calculations.

Staffing

Fundraising staff FTEs have remained stable around the world despite unprecedented factors.

- Trends in fundraising staff full-time equivalents (FTEs) between 2018 and 2022 revealed gentle changes in staffing despite the “Great Resignation” during the 2021 and 2022 reporting periods.
- While most regions experienced a gentle changes in fundraising staff levels during the period, differences in regional budget changes, shortages of expertise, and difficulty filling permanent positions all contributed to unique variation in staff turnover.
- Although the absolute change in fundraising staff FTEs may not be large, such as a decrease of 2 FTEs in the United States between 2018 and 2022, the domino effect of transferred work and lost knowledge can have strong impacts on how fundraising professionals work.
- Contrary to regional decreases in staffing, research-intensive institutions increased their staffing during the period, most notably for U.S. Research Doctoral (21%) and Group of Eight (16%) institutions.

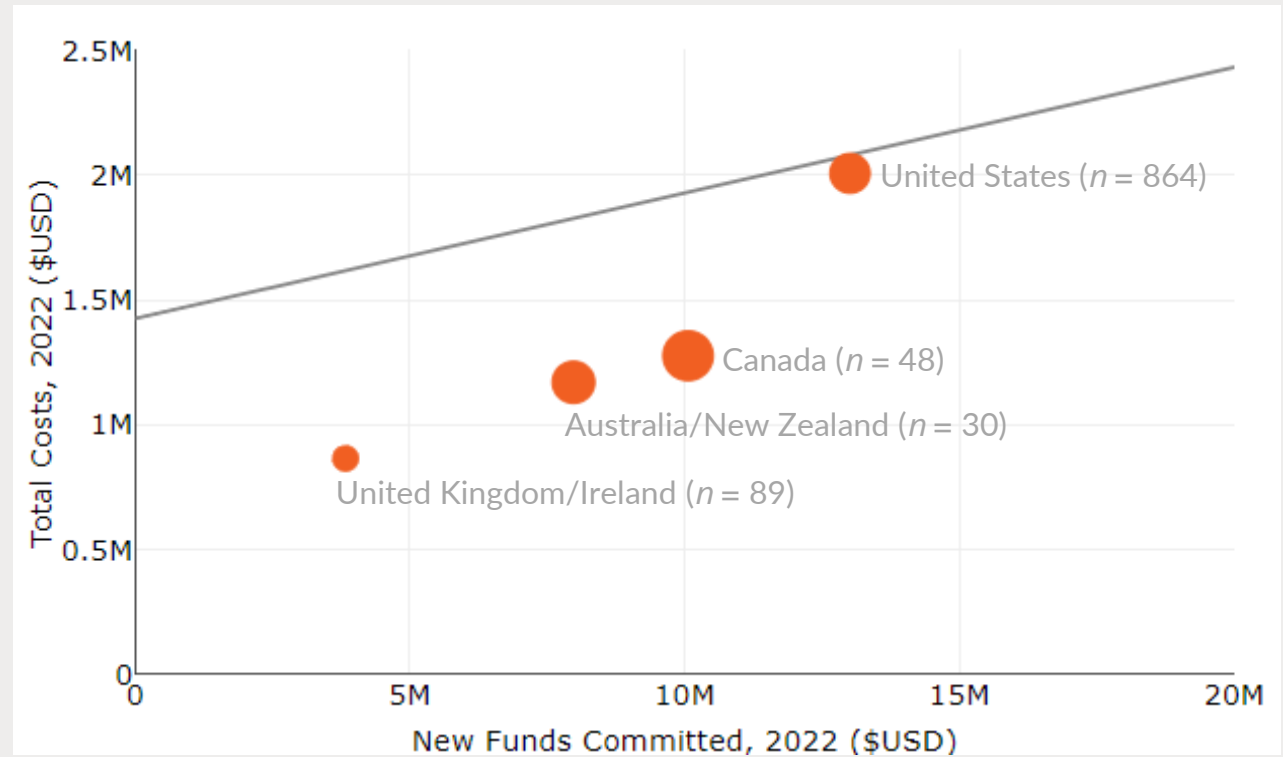


Note: The chart displays data from participants who submitted their regional surveys for all eligible years.

Investment and Outcomes

Higher spending was related to larger amounts of new funds committed.

- Across all institutions, we observed a linear trend between investment and new funds committed across all survey respondents during the 2022 reporting cycle (gray line in figure), in which higher total costs are related to higher levels of new funds committed.
- While regional medians did not directly adhere to the linear relationship on the institutional level, a clear positive trend is still evident across the regions.
- Distinct regional differences persisted, however, and the linear relationship was not absolute. For example, Australia/New Zealand and Canada reported similar total costs in 2022, but institutions in Canada received more than US\$2 million more in new funds committed than institutions in Australia/New Zealand.

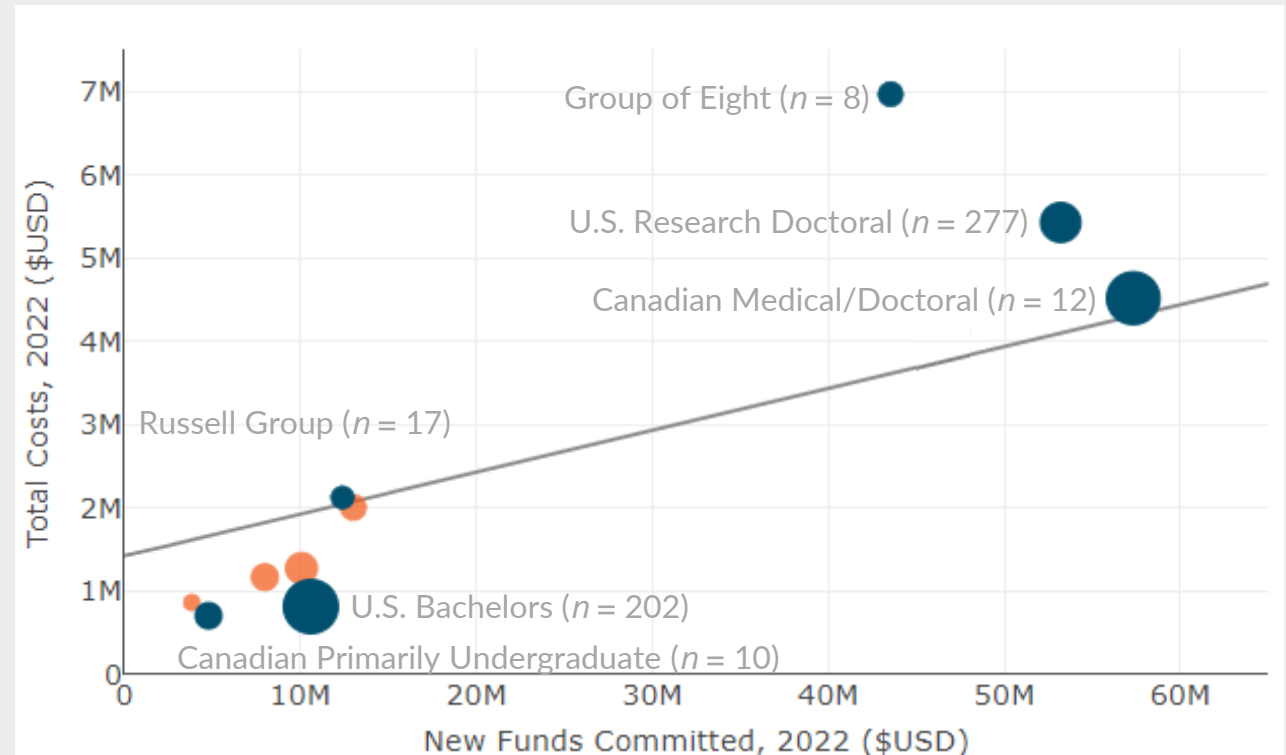


Notes: Sizing of dots corresponds to amount of Return on Investment (ROI). ROI is measured as dollar NFC returned per Investment dollar. ROI is calculated as $\frac{\text{NFC} - \text{Investment}}{\text{Investment}}$

Investment and Outcomes

Those that raised the most did not always have the largest return on investment.

- Examining the high-performing groups, we observed further heterogeneity in the positive investment-NFC relationship. In this way, those groups that spend the most are not always those that realize the most returns.
- Those groups that secured the most funds were not always those with the highest ROI. Canadian Medical/Doctoral institutions, which raised the most in NFC, had the same average ROI as U.S. Bachelors institutions (US\$12 NFC per dollar of costs), which raised more than US\$45 million less.
- Similarly, groups that spent the most did not always see the most return on investment. The Group of Eight was by far the highest-spending interest group, at around US\$7 million in 2022. However, the Group of Eight reported an average ROI around US\$5, far less than other groups with similar NFC levels and around the same level as the Russell Group.

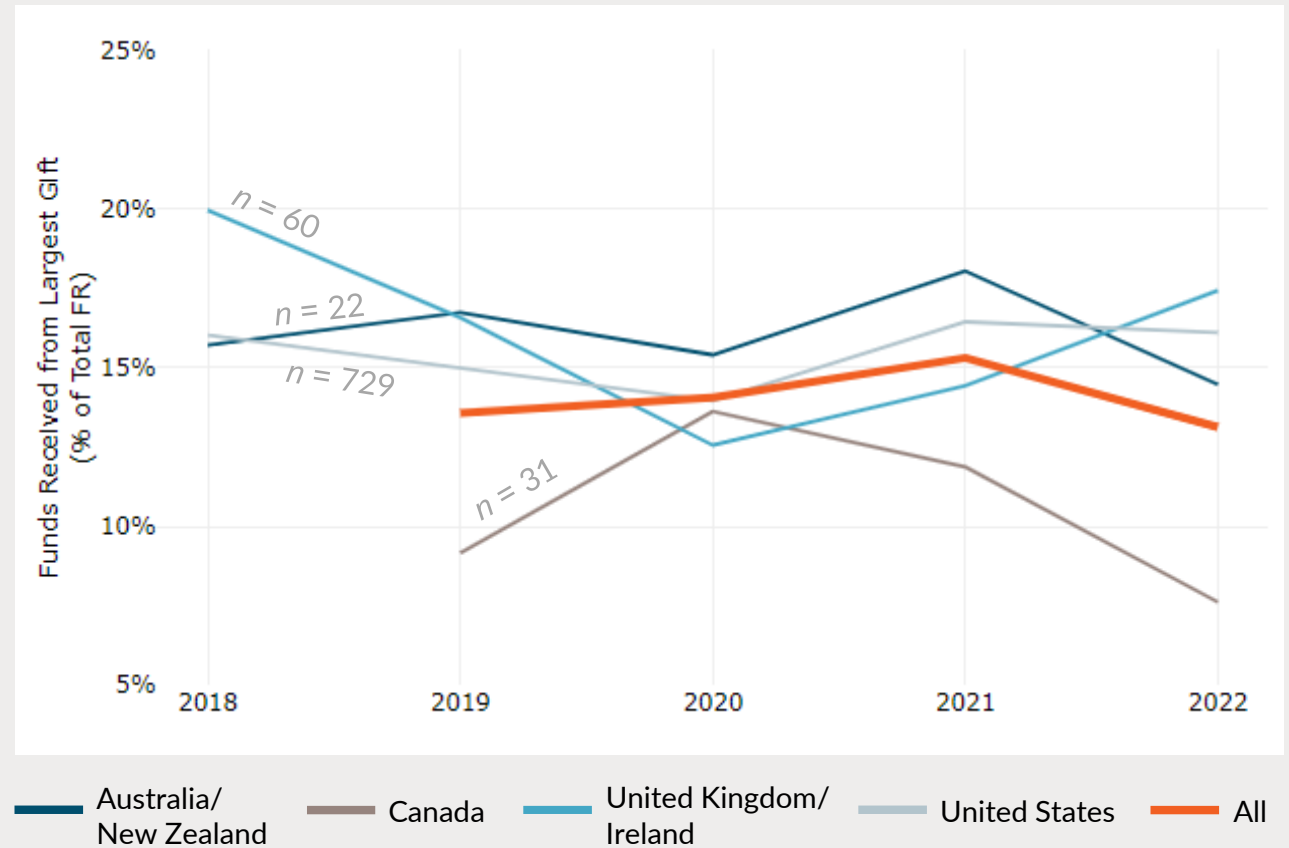


Notes: Sizing of dots corresponds to amount of Return on Investment (ROI). ROI is measured as dollar NFC returned per Investment dollar. ROI is calculated as $\frac{\text{NFC} - \text{Investment}}{\text{Investment}}$

Major Gift Support

The share of total support from the largest gift decreased between 2018 and 2022.

- The median proportion of total support stemming from the singular largest gift decreased between 2018 and 2022 in most regions. The exception to this trend is the United States, although increases were negligible as the major gift support was the same at the beginning and end of the period.
- Mid-period turbulence was culminated by large changes between the 2021 and 2022 reporting cycles for non-U.S. regions, with large decreases found in Australia/New Zealand and Canada. Despite turbulence in the proportion of total funds received from the largest gift, variation within all regions was within $\pm 6\%$ over time.
- Notably, the share of total support that comprised the largest gift increased for two straight years in the United Kingdom/ Ireland at the end of the period, resulting in this region displaying the highest ratio by 2022. At 17% in 2022, this region's reliance on a singular gift is quite high, even though the median of total funds received in this region was among the highest of these regions.

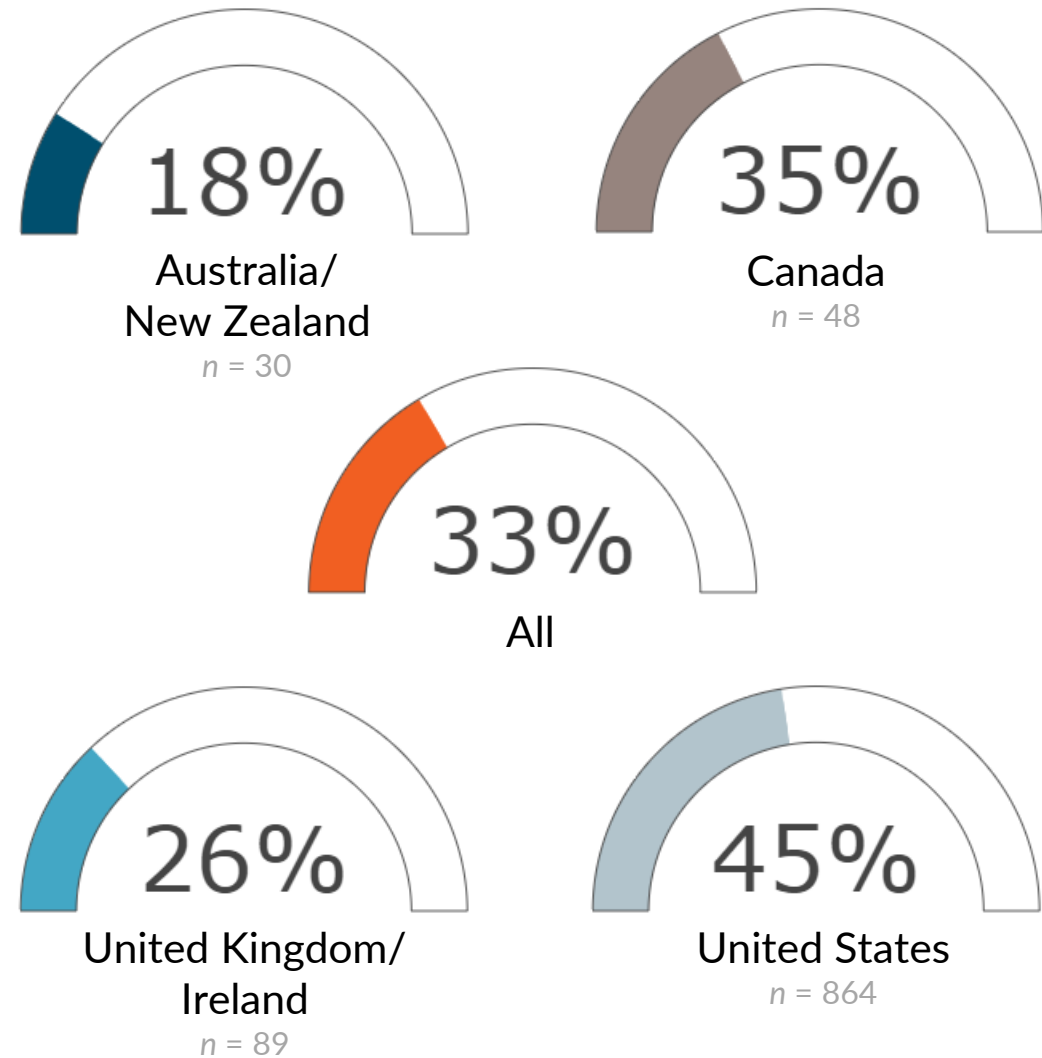


Notes: The chart displays data from participants who submitted their regional surveys for all eligible years. The Canadian survey did not collect information on funds received in 2018.

Support from Individuals

The United States had the largest reliance on support from individuals in 2022.

- The share of funds received from individuals—alumni and non-alumni—varied substantially between regions. The highest share was found in the United States, driven by larger participation of alumni compared with other regions. In this way, institutions in the United States received an average of 45% of their funds from individuals and 55% of funds from organizations.
- The lowest share was found in Australia/New Zealand, a region with generally high reliance on major gifts over the last five years. Large reliance on organizational support, rather than individual support, in this region was largely driven by high participation from trusts and foundations, with this group among the highest givers proportionally in Australia/New Zealand.
- Over time, the share of support from individuals was similar to or higher than pre-pandemic levels in all regions.

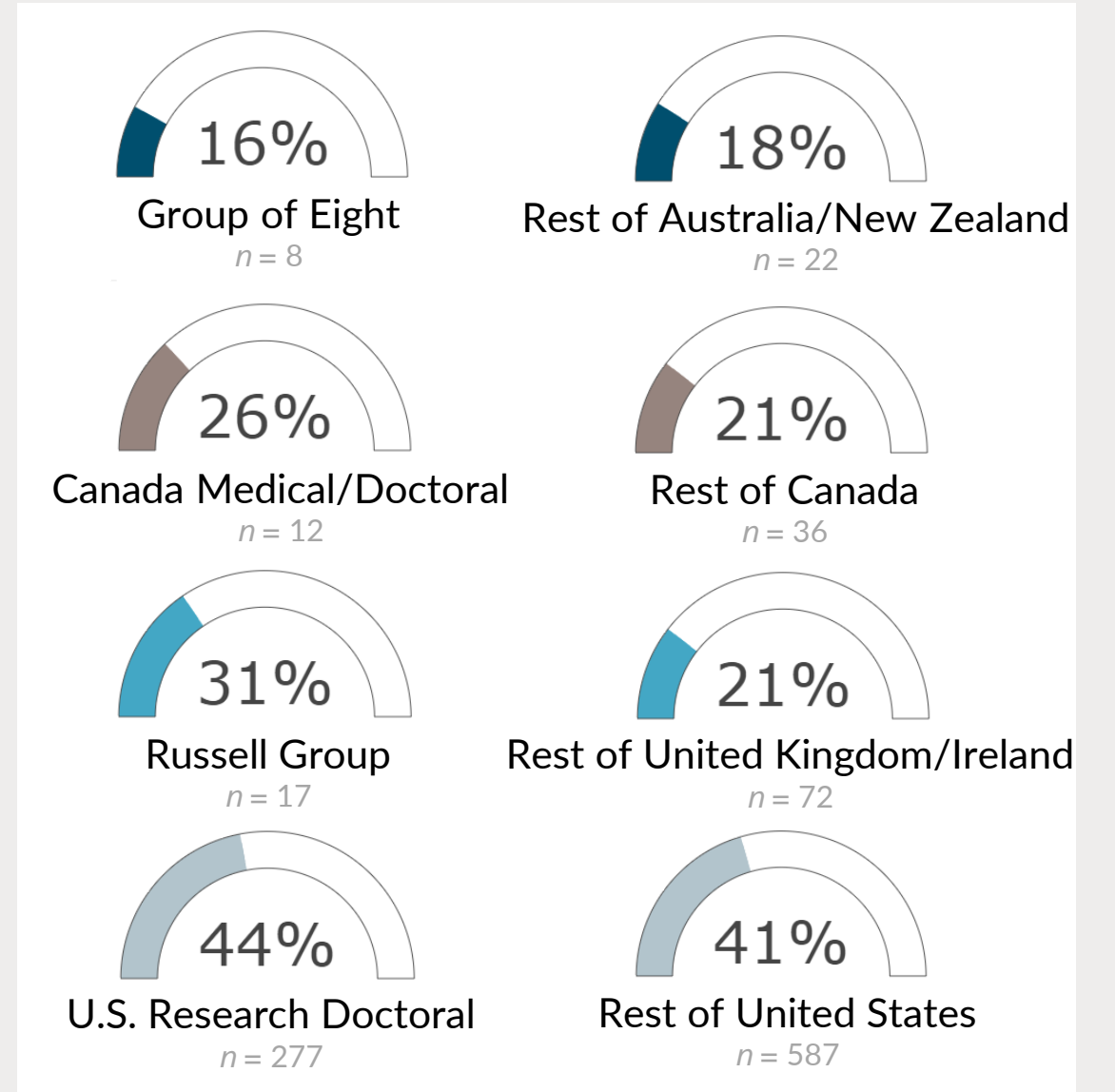


Notes: 2021–22 survey data. Percentages are the share of total funds received.

Support from Individuals

The share of support from individuals tended to be higher at research-intensive institutions than at other institutions in the same region.

- In this way, we can assume that non-research-intensive institutions tended to rely more on funding support from organizations.
- Australia/New Zealand continued to be an outlier from other regions internally as well, as research-intensive institutions in this region tended to rely *less* on individual support than other regional peers.
- The most substantial difference between research-intensive institutions and other regional institutions was in the United Kingdom/Ireland, where Russell Group institutions received 10% more of their funds received from individuals compared with other regional institutions. The magnitude of this difference was driven by three Russell Group institutions with more than 50% of funds received coming from individuals, a share only six other non-U.S. institutions also displayed.



Conclusions



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Conclusions

This is the first report of its kind combining data from all four of CASE's foundational surveys on philanthropy. Regular reporting and expansion of coverage will shed further light on philanthropy trends around the world and provide context for both global and regional changes in the future.

- CASE's regional foundational surveys on philanthropy are conducted each year and provide informative updates on philanthropy trends within the relevant region. However, these reports often omit the global aspects that can be useful for fundraisers as they conduct work in an increasingly global environment.
- Significant increases in philanthropic support were observed in 2022 for most regions, and support in all regions was above 2018 levels. For some regions, however, this increase was a return to pre-pandemic levels. It is still unclear if increases will continue in the future.
- Despite monetary increases over the last five years, half of the regions experienced decreases in fundraising staff, although the absolute change in fundraising staff was low (the United States experienced the largest decrease by two FTEs across five years). Nonetheless, decreasing staff and increasing philanthropic support muddy our ability to analyze traditional metrics of performance, such as income per staff FTE.
- Those institutions that raised the most money were not always the most efficient in terms of return on investment. We observed groups with similar ROIs but different levels of new funds committed. While the distribution of ROI among our interest groups was mixed, groups with higher ROIs tended to receive more revenue, likely driven by efficiencies of large development shops and diminishing impediments of scale (e.g., the cost of hosting a database does not proportionally grow with increases in data).
- Dependence on support from one major gift decreased substantially for most regions in 2022, demonstrating more sustainable income as sources of funds received became more diverse. Large changes between the 2021 and 2022 reporting cycles in all regions suggested that the relative stability observed between 2018 and 2021 is likely to change.
- While research-intensive institutions tended to receive more support from individuals, this was not the case in Australia/New Zealand. On average, Australia/New Zealand was also the region that received the lowest amount of total funds from individuals, instead receiving more than 80% of cash income from non-individual sources. The emphasis on individual giving for most research-intensive groups stood out from the rest of the regional institutions and suggested distinct differences in fundraising among these institutions compared with others in their region.
- The implementation of the *CASE Global Reporting Standards* allowed the consistent data collection that facilitated this analysis. Continued utilization of the CASE Standards will allow further exploration of philanthropy trends around the world as those observed here unfold in the future. CASE's planned expansion of foundational surveys to new regions, such as Latin America, and to new constituents, such as independent schools, will provide a more comprehensive perspective of truly global trends in philanthropy.

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