

CASE InsightsSM **on Philanthropy** **(Australia and** **New Zealand)**

2022 KEY FINDINGS

**COUNCIL FOR ADVANCEMENT
AND SUPPORT OF EDUCATION**



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The Editorial Committee 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 promotion, data collection, data verification, analysis, report writing and dissemination.

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First and foremost, we would like to thank the university staff who gave their time to provide information about the philanthropic income of their institutions. We are also very grateful to the Australia and New Zealand Editorial Committee for their continued guidance and support and would like to extend our thanks to Joanna Watts who stepped down this year, after four years as the committee chair, and provided support in the early stages of this year's survey.

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ACCESSING ADDITIONAL ANALYSES:

Participants in CASE InsightsSM on Philanthropy (Australia and New Zealand), receive personalized summary benchmarking reports, which include interactive charts and data for key variables to prioritize next steps or inform further analysis. Respondents can also partner with CASE InsightsSM by purchasing additional services, such as strategic benchmarking reports or benchmarking cohorts. These additional services provide deeper interactive analysis for your institution and 10 self-selected peers, individualized review sessions, and an opportunity to learn the stories behind the data. Contact insightsolutions@case.org to learn more.



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FOREWORD FROM PRESIDENT AND CEO

Around the globe in 2022, advancement teams navigated new and ongoing challenges—from economic shifts to the transition back to in-person activities. They engaged alumni, donors, and communities with care, strategy, and mission-focus, securing support for groundbreaking research, essential student needs, and much more. In Australia and New Zealand, that resulted in more than \$1 billion in new funds committed, according to our 2022 CASE Insights on Philanthropy (Australia and New Zealand).

This survey provides valuable information on philanthropic support for higher education institutions in Australia and New Zealand. For many years, CASE has issued a report on philanthropy in this region and the progress detailed in this survey is remarkable. In 2021, we launched the *CASE Global Reporting Standards* which provide transparent and consistent professional standards, ethics, and benchmarks for the profession. These Standards are foundational to all our philanthropic surveys. With the data herein, institutions can benchmark progress and to showcase the value of their work in advancement.

Data also helps us understand and contextualize trends. This 2022 CASE Insights on Philanthropy Report (Australia and New Zealand) illustrates both resilience and change in the sector. Institutions raised a total of \$1 billion in new funds committed, and one transformational gift significantly impacted that. In August 2022, the University of Melbourne’s Peter Doherty Institute for Infection and Immunity secured a magnificent \$250 million gift from philanthropist, Mr Geoffrey Cumming, to create a global research centre with the core objective of providing greater resilience in dealing with future pandemics. It is a remarkable act of generosity—one of the largest gifts in Australian history—and a testament to the power of philanthropy and advancement to strengthen our world.

Throughout the report’s other trends and data points, we can see the lingering ripples of the pandemic. As our editorial committee notes in the pages ahead, recovery takes time. [CASE’s 2021 research on resilience in fundraising and endowments](#) showed that crises can have prolonged effects. Philanthropic engagement is a long-term endeavour that takes continued leadership, commitment, vision, and belief in the value of education for individuals and society, locally and globally. It’s heartening to see in this report renewed investment in fundraising and alumni relations staff.

Thank you to all survey participants for contributing to this and other CASE Insights surveys. Your continued involvement empowers the sector to understand our work and use data to drive success in supporting institutions and advancing education worldwide.

Sue Cunningham

President and CEO

Council for Advancement and Support of Education

August 2023

FOREWORD

Last year's foreword flagged the potential for an ongoing impact of COVID to be evident in the 2022 results. If taking the total for new funds committed in isolation, one might think this has not been the case. However, delving into the figures, there is some evidence in support of an ongoing COVID lag.

Total new funds committed exceeded \$1b (\$1.04b) for the first time in the survey's history. The sector is largely aware of a landmark \$250m gift secured by a Go8 institution. The gift to establish the Cumming Global Centre for Pandemic Therapeutics is the largest philanthropic gift to medical research, and one of the largest gifts in Australia's history. While very encouraging for the sector that such a transformational gift was secured, it is very much an outlier for the sector, skewing many of the figures within this report; therefore, you will see it differentiated in much of the narrative. When the outlier gift is removed, new funds committed only saw a marginal increase from 2021 of 3%. Coupled with a minimal increase in the number of \$1m+ gifts secured (107 in 2022 compared with 104 in 2021 and 120 in 2020¹), this could suggest the sector is still experiencing a COVID lag.

Furthermore, across the sector, there has continued to be a decrease in the number of donors. Donor numbers have decreased by 10% since 2021, following a slight increase of 2% between 2020 and 2021. It is possible that this decrease is reflective of several institutions reviewing their annual giving strategies, with an increased focus on retention of higher value donors (regular donors) over acquiring larger numbers of one-off donors (such as giving days, peer-to-peer fundraising, etc.).

In positive news for the sector, there has been a recovery in the investment in advancement staff, (\$126m in staff expenses and 920 FTE) following the decrease between 2020 and 2021. While the comparative figures have not returned to what they previously were, it is encouraging to see investment in the sector growing again.

It is interesting to note that the percentage of fundraising support staff compared to total fundraising FTE is higher for Go8s compared to Non-Go8s (46% versus 38%). This could be due to the increased complexity and maturity of the fundraising and alumni operations within Go8s, requiring a larger number of specialist roles. It is a factor worth noting as other institutions look to grow and mature their programmes. After many years of advancement services/operations being perceived as the back office and often experiencing reduced investment, it is encouraging to see the sector moving towards equal investment in both frontline resources as well as the strategic enablers.

Overall, this report is a timely reminder of both the fluctuating and long-term nature of advancement activity. The sector is resilient and showing positive signs of recovery; however, it is important for university leadership to be reminded that the recovery will not happen overnight.

In closing, the Editorial Committee would like to take the opportunity to thank Joanna Watts, who stepped down earlier this year after more than four years as the Chair of the Committee. Her investment, insights, and support have been invaluable, and we greatly appreciate her dedication to the sector.

With thanks,

CASE InsightsSM on Philanthropy (Australia and New Zealand) Editorial Committee

¹Unless otherwise stated, the year-on-year trends were calculated for a consistent cohort of 27 institutions that provided information for a key set of variables for all three years.

EXECUTIVE SUMMARY

MORE THAN ONE BILLION DOLLARS RAISED IN NEW FUNDS COMMITTED WITH ONE INSTITUTION BRINGING IN A SINGLE GIFT OF \$250M

- The 30 participating institutions raised a total of \$1.042b in new funds committed. This is the highest figure in the history of the survey and included a single gift of \$250m – the largest philanthropic gift to medical research, and one of the largest gifts in Australia’s history.
- For the 27 institutions that participated in each of the past three years, combined new funds committed increased by 36% from 2021 to 2022 and 38% from 2020 to 2022. Without the outlier gift, there was an increase of 3% this year and of 5% between 2020 and 2022².
- A total of 110 non-bequest gifts of \$1m or above were secured as new funds. The number of gifts of this size increased by 3% compared with 2021.
- The largest non-bequest pledge secured by an institution in 2022 was \$250m. The next largest was \$29m.
- Amongst institutions providing this data, while the majority of donors (80%) gave less than \$1k, only 0.4% of the total value of funds received came from donors in this category. With the inclusion of the \$250m outlier, 41% of new funds committed came from donors giving \$10m+.

FUNDS RECEIVED TOTALLED \$733M, OF WHICH \$153M CAME FROM BEQUESTS

- Funds received from all participating institutions came to a total of \$733m. Among institutions participating in each of the last three years, there was a 12% increase compared with 2021, (and a 2% decrease between 2020 and 2022). A total of 101 gifts of \$1m and above were given to participating institutions as funds received.

- Total funds received from bequests came to a total of \$153m, with one Non-Go8 institution bringing in 29% of this, from a single bequest.
- For those institutions providing this data, the majority of donors (81%) gave less than \$1k in funds received, but only 2.3% of funds received came from donors in this category. The \$1m-\$9.99m gift band brought in the largest percentage of funds received (35%).

FUNDS SECURED FROM ANNUAL FUND APPEALS VARIED CONSIDERABLY BETWEEN INSTITUTIONS: IN TOTAL THEY RAISED BOTH \$16M AS NEW FUNDS COMMITTED AND FUNDS RECEIVED

- Institutions raised a total of \$16m as new funds committed and \$16m as funds received via annual fund appeals.
- The median annual funds secured across all institutions was 2% of new funds committed and 3% of funds received.
- Funds secured via annual fund appeals varied considerably between institutions, with annual fund income making up a greater proportion of new funds committed and funds received for Non-Go8 than Go8 institutions.

DESPITE ACHIEVING HIGHER TOTALS FOR BOTH NEW FUNDS COMMITTED AND FUNDS RECEIVED THIS YEAR, BOTH DONOR NUMBERS AND ALUMNI DONOR NUMBERS HAVE FALLEN SUBSTANTIALLY

- Of the 6.9m alumni, 80% were contactable, and 22k of these made donations.
- This equates to a participation rate of 0.4% of contactable alumni.
- Institutions had a total of 48k donors, with alumni making up 46% of all donors.
- Total donor numbers have decreased by 10% since 2021, while alumni donor numbers decreased by 11%.

²Unless otherwise stated, the year-on-year trends were calculated for a consistent cohort of 27 institutions that provided information for a key set of variables for all three years

STAFF NUMBERS HAVE RISEN IN THE LAST YEAR FOR BOTH FUNDRAISING AND ALUMNI RELATIONS, WITH TOTAL ADVANCEMENT INVESTMENT ALSO INCREASING

- Institutions invested a total of \$107m in fundraising activities during 2022, with a median of 84% being invested in staff.
- The total investment by all institutions in alumni relations was \$51m, with a median of 76% being for staff costs.
- Overall, institutions spent a median of 18c on fundraising for each dollar of new funds committed and funds received, with Go8 institutions spending less than Non-Go8 institutions.
- Compared with 2021, total investment increased by 9% for fundraising and by 15% for alumni relations.
- Institutions employed a total of 623 full-time equivalent (FTE) fundraising staff and 297 FTE alumni relations staff. Compared with 2021 there were increases in FTE in both fundraising and alumni relations (6% and 14% respectively).

THE LARGEST PROPORTION OF GIFTS WAS MADE FOR 'RESEARCH PROGRAMMES AND PARTNERSHIPS', WITH VERY FEW 'UNRESTRICTED' GIFTS BEING MADE

- 'Research programmes and partnerships' was the most popular purpose for which gifts were made, accounting for 62% of mean new funds committed and 58% of mean funds received.
- For Non-Go8 institutions, 32% of all new funds committed were given for 'staff and student bursaries', while this was only the case for 8% of all new funds committed to Go8 institutions.
- For funds received, 'student and staff bursaries and scholarships' received the next highest percentage of donations: 18% across all institutions, and an even greater proportion among Non-Go8 institutions (29%).
- 'Unrestricted' gifts continued to make up a very small proportion of both new funds committed and funds received.

TRUSTS AND FOUNDATIONS REMAINS THE DOMINANT SOURCE OF FUNDING IN INSTITUTIONS

- In 2022, as a result of the substantial outlier gift, 'other individuals' was the biggest source of new funds committed, accounting for 37% of the total. For Non-Go8s 'trusts and foundations' made up 55% of all new funds, whereas for the Go8 institutions 'other individuals' made up the largest proportion of gifts, at 44%.
- However, the \$250m outlier gift, which came from 'other individuals', has skewed the overall result as well as that for Go8 institutions. Excluding this gift, 'trusts and foundations' was the largest source of gifts for both Go8 and Non-Go8 institutions.
- Across all institutions 'trusts and foundations' was the source of the largest non-bequest pledge for 67% of institutions (all but one Go8 institution received their largest non-bequest pledge from this source).
- 'Trusts and foundations' was also the main source of funds received, accounting for 43% of the total value. It was also the source of the largest gift given as funds received to 50% of institutions.

INTRODUCTION

About the survey and methodology

The CASE InsightsSM on Philanthropy (Australia and New Zealand), formerly known as the CASE Support of Education Survey, Australia and New Zealand, was first carried out in 2012. Conducted annually, the survey is now in its eleventh edition and has been offered on an online platform since 2017. It is based on the CASE InsightsSM CASE-Ross Support of Education Survey (United Kingdom and Ireland), and measures fundraising in two ways: new funds committed, and funds received^{3,4}.

The survey was updated in 2017 to include questions about: (i) the sources and purposes of philanthropic income and commitments; and (ii) the distribution of donors across different levels of giving. These questions are optional, resulting in smaller sample sizes compared to other reported variables.

This year, the survey was further updated as follows (i) to align terminology with other CASE surveys with “new funds secured” being changed to “new funds committed” and “cash income” being changed to “funds received”; (ii) extending the definition of contactable alumni to also include alumni for whom telephone numbers were held (previously only postal addresses or email addresses were allowed); and (iii) two additional optional questions were included to gather data on the dollar value of gifts across different levels of giving – one for new funds committed and one on funds received. While the change in definition for contactable alumni may impact on trend benchmarking for this question, it has been made to bring the survey in line with definitions in other CASE surveys.

CASE in Asia-Pacific undertakes the project management, oversees the communications and marketing efforts and, together with CASE in London, is responsible for the report writing, data collection and analysis. The survey is overseen by an Editorial Committee that, along with CASE staff, reviews the survey script, reporting rules and the question-by-question guide⁵ prior to launching the survey to eligible institutions in Australia and New Zealand. In addition, the Editorial Committee supports CASE in assisting with participants’ survey completion queries.

The CASE InsightsSM on Philanthropy (Australia and New Zealand) for 2022⁶ was open to participating institutions from February 2023 to March 2023. Invitations to participate were sent to 49 higher education and specialist institutions in Australia and New Zealand that are involved in some form of fundraising or alumni relations activity. Data was collected from participating institutions on a calendar-year basis (i.e., January to December) for the years 2020, 2021 and 2022.

CASE research staff, with the support of the Editorial Committee members, queried data submitted by participating institutions against an exhaustive set of logic, ratio, arithmetic, and substantive tests. Survey participants were asked to confirm or correct their responses. All data collected has been reported on a confidential basis, without naming institutions, with the exception of gifts which are in the public domain. Anonymised benchmarking data was made available to participating institutions after querying was completed.

This report presents an overview of philanthropic giving to 30 higher education institutions in Australia and New Zealand.

³Philanthropic income is defined in the Supporting Document and includes 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.

⁴New funds committed was previously referred to as new funds secured and funds received was previously referred to as cash income.

⁵The reporting rules and question-by-question guidance refers to documents providing guidance and definitions of funding that is eligible for inclusion in the survey, how that funding is recorded and general guidance on completing the survey.

⁶In previous years, the survey has been dated with the year of the data collection and report publication. This year’s report is dated based on the year of the most recent data included (the calendar year January-December 2022).

Interpreting the charts and tables

- Through most of this report, data presented has been broken down into two subgroups to benchmark the fundraising performance of the sector with:
 - Go8 (eight institutions)
 - Non-Go8 (22 institutions)
- The Group of Eight (Go8) is a coalition of research intensive Australian higher education institutions. Non-Go8 participants include institutions from both Australia and New Zealand.
- Unless otherwise stated, year-on-year trends detailed in the text and included in the trend graphs in each section, were calculated for a consistent cohort of 27 institutions that provided information for a key set of variables for all three years – 2020, 2021 and 2022. Since some institutions did not provide data for all key indicators for all the three years, sample sizes vary. Sum values were used to calculate the trends. Note that trend figures reported here cannot be compared with those in previous years' reports as the number of base institutions may differ and institutions can report or update data for the previous two years while completing the current year's survey.
- Trend graphs show the percentage change of the variables for the following time periods: 2020 to 2021; 2021 to 2022; and over the total period from 2020 to 2022.
- The number of institutions given as the base (n) for a chart or table indicates the number of institutions that provided data for a response to a question or for the given variables. Some questions were optional, so not all tables and charts reflect data from all participating institutions.
- Descriptive statistics, mainly using the measures of central tendencies, arithmetic mean/average and median, were used to analyse the data and report on key variables on a non-attributable basis.
- Mean figures provide a snapshot of the overall group's performance including outliers, while median figures highlight the exact midpoint in the range of figures reported.
- For variables that were calculated from the responses to more than one question in the survey, the variable was first calculated for each institution, then the mean/median was calculated for all institutions and reporting groups.
- All income figures are reported in Australian dollars (AUD) (represented by the \$ symbol) and cents (represented by ¢). Data reported in New Zealand dollars (NZD) was converted to AUD using an average of the conversion rate for the survey period (1 NZD = 0.91 AUD). Data from the CASE-Ross United Kingdom and Ireland survey that was reported in British Pounds (GBP or £) was converted to AUD using an average of the conversion rate for the survey period (1 GBP = 1.77 AUD).

KEY INDICATORS

Thirty institutions across the region participated in the CASE InsightsSM on Philanthropy (Australia and New Zealand) for the survey year 2022, yielding a response rate of 61%. Of these, 26 universities are based in Australia and four are based in New Zealand. Seventeen of the 30 participating institutions were engaged in clinical medicine. One institution reported having offices overseas with staff responsible for local fundraising.

Data reported here does not account for the fundraising activity of all institutions in Australia and New Zealand and has not been reweighted to estimate figures for all institutions. However, survey participants include a large share of the institutions raising significant levels of philanthropic support in the region.

The mean figures reported in the key indicators table 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 scales and stages of maturity. Clinical research programmes also have a significant impact on an institution's fundraising capacity. Given that there are almost three times 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.

Figure 1: Key indicators, 2022

	<i>n</i>	Sum	Mean	Median
Philanthropic income				
New funds committed	30	\$1,042,024,502	\$34,734,150	\$11,353,016
Funds received	30	\$732,881,294	\$24,429,376	\$11,731,799
Alumni				
Total alumni	30	6,885,858	229,529	199,968
Contactable alumni	30	5,526,501	184,217	148,360
Alumni donors	30	21,923	731	436
Donors				
Total donors	30	47,864	1,595	1,056
Total number of bequest intentions	26	392	15	12
Investment				
Total institutional expenditure	27	\$28,516,634,114	\$1,056,171,634	\$796,156,000
Fundraising costs	30	\$106,833,187	\$3,561,106	\$1,609,100
Alumni relations costs	30	\$51,186,548	\$1,706,218	\$924,130
Fundraising and alumni relations costs as a percentage of institutional expenditure	27	-	0.4%	0.4%
Staff				
Fundraising staff (FTE)	30	623	21	12
Alumni relations staff (FTE)	30	297	10	7

New funds committed 2022

OVERALL NEW FUNDS COMMITTED

New funds committed⁷ to an institution includes new donations/gifts received, new confirmed pledges not yet received, realised bequests⁸ and the market value of gifts-in-kind⁹ received in the reporting year. It excludes payments on pledges made in the current or previous years. Measuring new funds committed enables an institution to see the true impact of advancement efforts including future revenue expectations from multi-year gift commitments, reflecting the success of current fundraising activity.

The total value of new funds committed in 2022 exceeded one billion dollars (\$1.04b) for the first time in the history of the survey. The median value for new funds committed by all institutions in 2022 was \$11.4m. For those institutions participating in both 2021 and 2022 the median has increased from \$12.8m to \$13.2m.

Despite a smaller number of participating institutions, these figures reflect an increase in total

new funds committed compared to 2021. This increase, however, is primarily attributed to an exceptionally large gift, which accounts for nearly a quarter of the total new funds committed. Without the outlier gift, the increase in new funds committed this year is modest (3%).

This gift serves as a compelling demonstration of universities' ability to attract substantial donations. Moreover, this exceptional donation underscores the variability of advancement income and emphasizes the importance of analyzing data over an extended period rather than focusing solely on a single year. It highlights the need to consider long-term trends and patterns rather than making judgments based solely on immediate outcomes.

Among the 29 institutions that provided data for both 2020 and 2021, a higher number (16) reported an increase in new funds committed, while a smaller number (13) saw a decrease. Notably, half of the institutions with increased totals exhibited growth of more than 50%, whereas only three of the institutions with a decrease reported a decline of more than 50%.

Figure 2: New funds committed, 2022

	All	Go8	Non-Go8
New funds committed - Sum (n=30)	\$1,042,024,502	\$771,132,042	\$270,892,460
New funds committed - Mean	\$34,734,150	\$96,391,505	\$12,313,294
New funds committed - Median	\$11,353,016	\$59,862,372	\$6,973,158
New funds committed from bequests - Sum (n=23)	\$172,535,553	\$102,574,914	\$69,960,639
New funds committed from bequests - Mean	\$7,501,546	\$12,821,864	\$4,664,043
New funds committed from bequests - Median	\$1,956,470	\$6,522,899	\$1,195,789
Largest non-bequest pledge - Sum (n=30)	\$362,868,280	\$314,839,143	\$48,029,137
Largest non-bequest pledge - Mean	\$12,095,609	\$39,354,893	\$2,183,143
Largest non-bequest pledge - Median	\$1,497,618	\$6,858,144	\$911,072
Gifts-in-kind - Sum (n=19)	\$11,961,384	\$7,058,416	\$4,902,968
Gifts-in-kind - Mean	\$629,547	\$1,176,403	\$377,151
Gifts-in-kind - Median	\$162,941	\$454,502	\$94,460

⁷Previously new funds secured. Please note the definition of new funds committed in the CASE Support of Education Survey for Australia and New Zealand differs to that used in the CASE Global Reporting Standards. Bequest intentions are excluded from this Survey but realised bequests are included. CASE Global Reporting Standards count documented bequest intentions for donors aged 65 or older instead of realised bequests.

⁸A bequest is 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 committed or funds received (depending on the type of the gift) once they are received. See also footnote 7.

⁹Other types of goods donated that are not monetary contributions are referred to as gifts-in-kind.

The outlier gift was secured by a Go8 institution, with new funds committed from Go8 institutions making up almost three-quarters of the total new funds committed (74%). Whilst a higher percentage than in 2021 (66%), this is not unusual: in 2020

Go8 institutions secured 76% of the total value of new funds committed. Two institutions (both of whom were in the Go8) secured more than \$100m each.

Figure 3: Percentage change in new funds committed (overall and bequests), 2020–2022



Figure 3a: New funds committed, 2020 to 2022 (n=27)

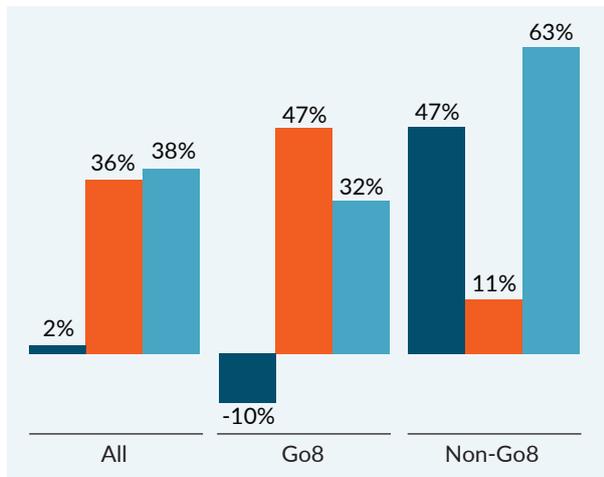


Figure 3b: Amount of new funds committed from bequests, 2020 to 2022 (n=24)

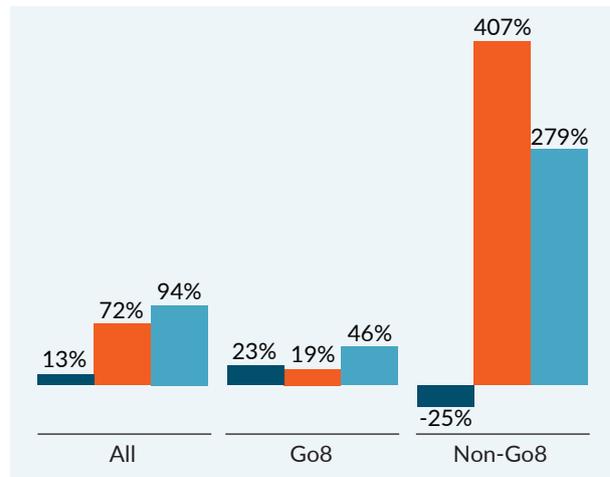


Figure 3c: Number of bequests that were a source of contribution to new funds committed, 2020 to 2022 (n=24)

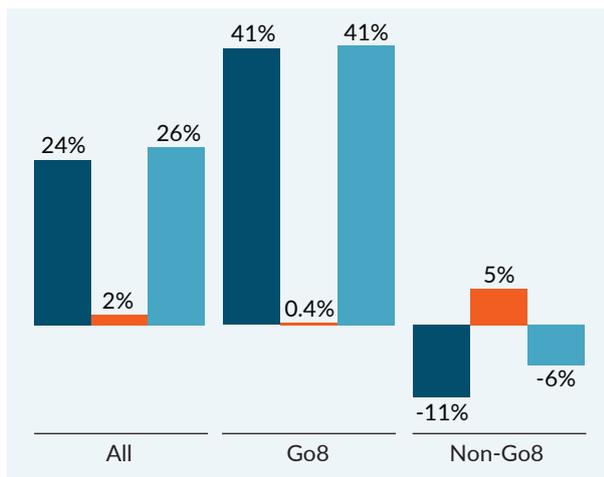
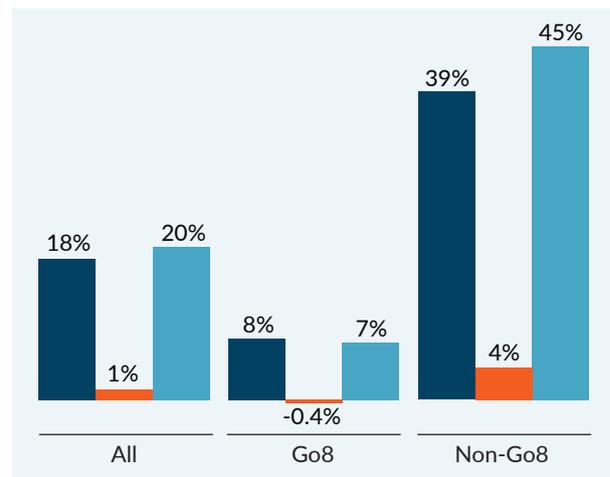


Figure 3d: New bequests confirmed, 2020 to 2022 (n=26)



BEQUEST INCOME AND INTENTIONS

For all institutions combined, 337 realised bequests raised \$173m. This accounts for 17% of the total new funds committed. The median was \$2m, exceeding one million dollars for the first time in the history of the survey.

Bequests made up a larger proportion of the total new funds committed to Non-Go8 institutions (26%) than they did for Go8 (13%) institutions. This is a reverse to 2021 – and largely attributable to outlier gifts: a Go8 institution receiving an extremely large non-bequest gift and a Non-Go8 institution receiving a very large bequest. If median values are considered, the pattern is rather different: median bequests made up 9% of new funds committed amongst Go8 institutions, compared with just 6% for Non-Go8 institutions.

Across all institutions, four institutions raised \$132m of the total \$173m new funds committed from bequests. Two of these institutions were also responsible for 181 of the 337 realised bequests. This illustrates that bequest fundraising, like other areas can be very variable, and six institutions did not receive any income from bequests in 2022.

Actual bequest income has an important impact on new funds committed. However, as a number of years typically pass between someone making a bequest intention and the income being realised upon their death, bequest income might primarily be viewed as a reflection of past fundraising efforts. It is therefore important to also consider new bequest intentions as an indicator of current fundraising activity and potential future income. In total, 392 new bequests intentions were secured in 2022. Of these, 234 were by Go8 and 158 by Non-Go8 institutions. Amongst those that reported at least one bequest intention, this was a median of 20 new bequest intentions for Go8 and six for Non-Go8 institutions. As in 2021, bequests were more common amongst Go8 alumni (approximately one per 11,000) compared with Non-Go8 alumni (approximately one per 28,000).

Based on those 27 institutions that participated in each of the past three years, it is encouraging to see that, following a drop in 2020, the number of new bequest intentions has remained stable for the past two years.

Figure 4: Median bequests, largest non-bequest pledge and gifts-in-kind as a percentage of new funds committed, 2022

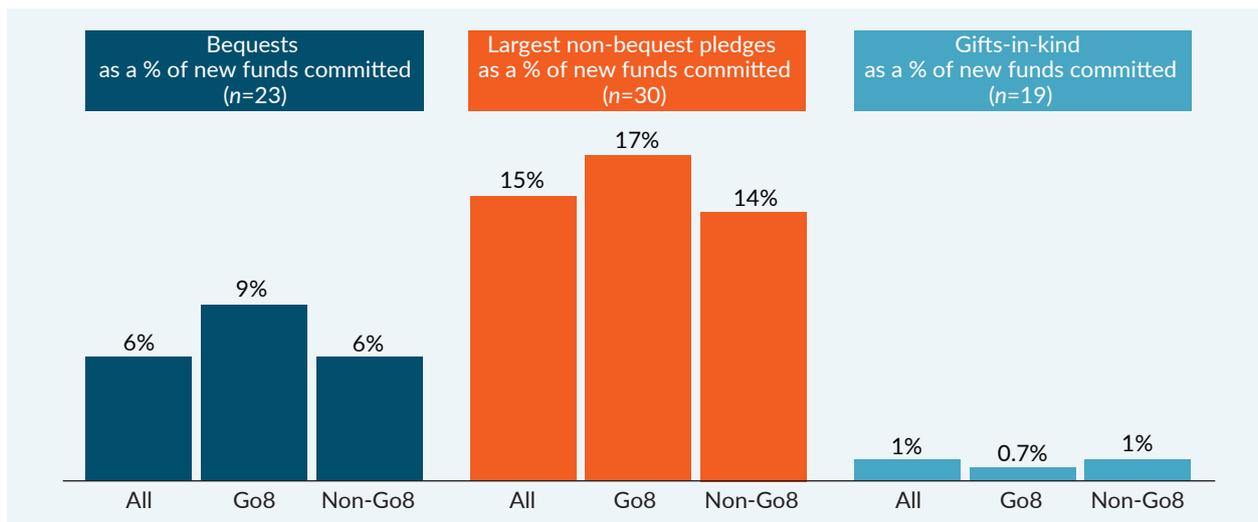


Figure 5: New bequest intentions confirmed, 2022
(n=26)

	All	Go8	Non-Go8
New bequest intentions confirmed - Sum	392	234	158
New bequest intentions confirmed - Mean	15	29	9
New bequest intentions confirmed - Median	12	20	6

LARGEST PLEDGES

The total value of the largest new non-bequest pledges across all institutions in 2022 was \$363m. As with overall new funds committed, this figure has been lifted considerably by the large outlier gift reported by a Go8 institution.

In 2021 a notable increase was found in the value of the largest new non-bequest pledges for Non-Go8s. While this fell again in 2022, it still remained well above the figure for 2020: for those participating in all three years the values were \$26m in 2020, \$56m in 2021 and \$45m in 2022.

In 2022, four institutions received mega-gifts (\$10m+) as their largest non-bequest confirmed gift: three of these were Go8 institutions. This compares with five in 2021 (four of which were Go8 institutions) and six in 2020 (all of which were Go8 institutions). In 2022, the four mega-gifts accounted for 85% of the total value of reported largest non-bequest confirmed gifts. The largest non-bequest gift in 2022 was \$250m, compared with \$25m in 2021.

For nine institutions, their largest non-bequest pledge accounted for 25% or more of their new funds committed. For one Go8 institution it accounted for 75% of their total and for one Non-Go8 institution, it accounted for 59%.

GIFTS OF \$1M+ AS NEW FUNDS COMMITTED

It has been suggested that the number of major/principal gifts can be considered to be a measure of fundraising success, as it is not skewed by mega and outlier gifts. Twenty institutions secured 110 new confirmed pledges of \$1m or more. Five institutions brought in 10 or more \$1m+ gifts each (four Go8 and one Non-Go8 institutions). In total, these five institutions brought in 62% of all the \$1m+ gifts – these institutions also being amongst the top seven for total new funds committed.

In 2021 there was a fall in the number of \$1m+ pledges from 2020. In 2022 this had risen again very slightly: the totals for the institutions participating in all three years being 120, 104 and 107 respectively.

Figure 6: Percentage change in new funds committed (large pledges), 2020–2022



Figure 6a: Largest non-bequest pledge, 2020 to 2022
(n=27)

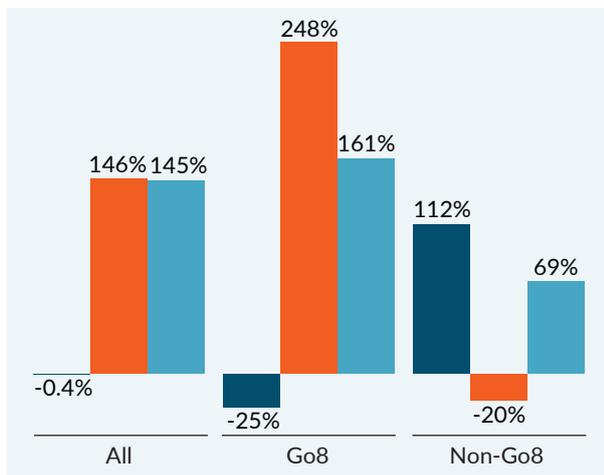


Figure 6b: Number of confirmed pledges higher than \$1m, 2020 to 2022
(n=26)

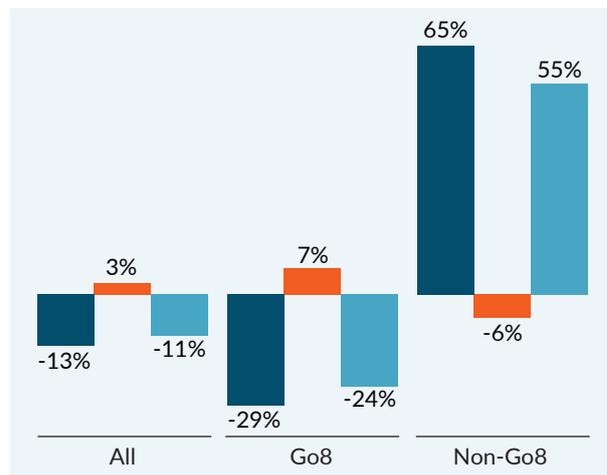


Figure 7: Number of gifts received as new funds (except bequests) of \$1 million and above, 2022

	All	Go8	Non-Go8
Sum (n=27)	110	76	34
Mean	6	10	3
Median	4	9	2

GIFTS-IN-KIND

Nineteen institutions reported having received at least one gift-in-kind in 2022. The total value of these came to \$12m and made up 1.1% of all new funds committed. The median value was \$163k. The value of gifts-in-kind ranges widely among institutions and may reflect differences in the way institutions identify and record gifts-in-kind. The highest value reported by any institution in 2022 was \$5m and the lowest was \$16,435.

Of those institutions participating in each of the last three years, there has been a decline in the proportion receiving gifts-in-kind (from 78% in 2020 to 67% in 2022), and 13 institutions received at least one gift-in-kind each year. Over this period, for the 27 institutions participating each year, the value of gifts-in-kind fell from \$24m in 2020 to \$16m in 2021 to \$12m in 2022. However, individual institutional values can have a substantial impact on the total. For this same group of institutions, one institution’s gifts-in-kind made up 48% of the 2020 total; another institution’s made up 52% of the 2021 total; and another’s accounted for 43% of the 2022 total.

NEW FUNDS COMMITTED BY PURPOSE

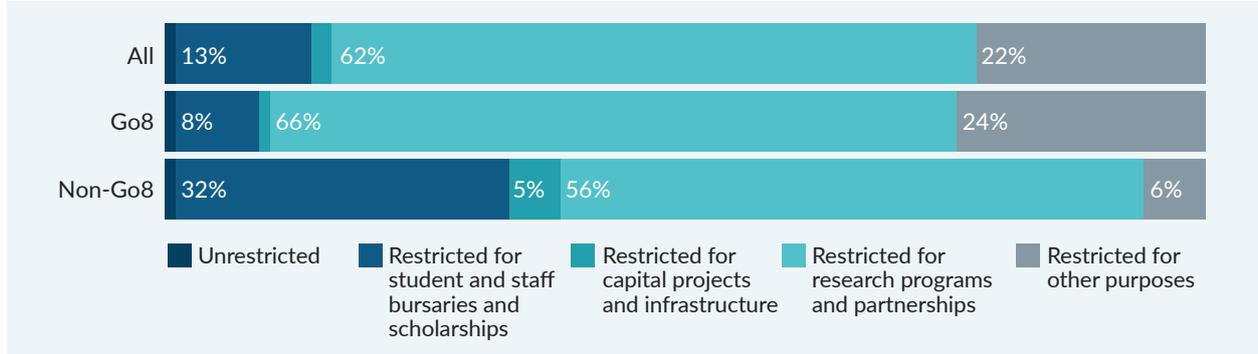
Sixty-two percent of the mean new funds committed were restricted for ‘research programmes and partnerships’ (27 institutions provided a response): the percentages for Go8 and Non-Go8 institutions were 66% and 56% respectively. The figure for the Go8 institutions was inflated by the very large outlier gift being nominated for this purpose (which also results in percentages for other purposes being lower amongst Go8 institutions).

Non-Go8 institutions had a notably higher proportion of mean new funds committed designated for ‘student and staff scholarships and bursaries’ (32%) than did Go8 institutions (8%).

A very small proportion of new funds committed was designated as unrestricted giving (1%). In total, \$5.4m was secured across all institutions for this purpose, with a very high proportion of this coming from one institution (\$3.1m of this total).

In 2021, one exceptionally large gift brought up the value of new funds committed for capital projects and infrastructure. This year saw a reduction in the percentage of gifts for this purpose (just 2% of the total). Of the \$14.2m brought in for this purpose, 39% came from one Go8 institution.

Figure 8: Mean new funds committed by purpose, 2022
(n=27)



NEW FUNDS COMMITTED BY SOURCE

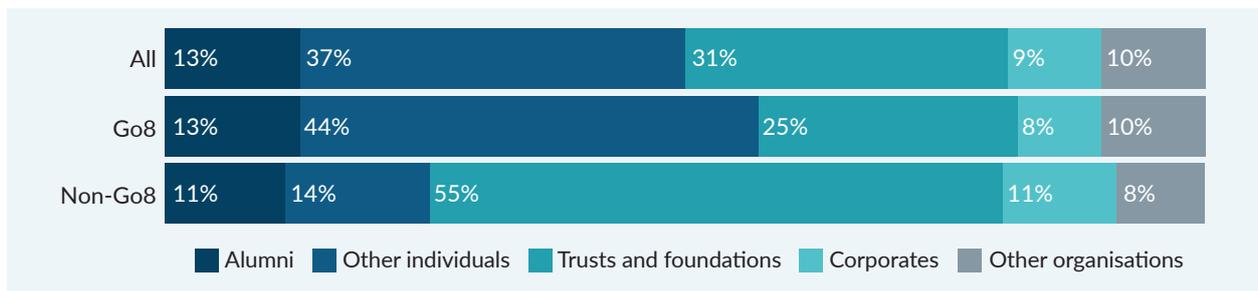
As has been observed in previous years, there is a high degree of variance among institutions, and outlier gifts can have considerable impact. The \$250m outlier gift came from ‘other individuals’, leading to this being the highest value source, accounting for 37% of the total (44% of the total for Go8 institutions). If this gift is removed, the percentage of gifts to Go8 institutions coming from ‘other individuals’ is in line with those from Non-Go8 institutions.

This outlier gift also explains a lower proportion of new funds committed from ‘Trusts and foundations’¹⁰, which accounted for 31% of the total in 2022. If this outlier gift is removed, ‘Trusts and

foundations’ is the largest source of gifts for both Go8 and Non-Go8 institutions. It should be noted that gifts from such trusts or foundations can include private/family foundations. While gifts from such trusts or foundations are legally credited to the organisations, they often reflect the philanthropy of individual donors who may be “soft credited” by the institution.

For Non-Go8 institutions, gifts from ‘alumni’ and ‘corporates’ made up an equal proportion of the total: each contributing 11% to new funds committed. For Go8 institutions ‘alumni’ gifts made up a higher percentage (13%), compared with ‘corporates’ (8%).

Figure 9: Mean new funds committed by source, 2022
(n=26)



‘Trusts and foundations’ was the source of the single largest non-bequest pledge for 67% of all institutions and all but one Go8 institution (for which ‘other individuals’ were the source). For

Non-Go8 institutions, ‘alumni’ and ‘corporates’ were each the source of the single largest non-bequest pledge for 18% of institutions.

¹⁰Trusts and foundations include personal and family foundations and other foundations and trusts that are private tax-exempt entities operated exclusively for charitable purposes; they also include Australian philanthropic foundations and private ancillary funds. Gifts to these types of trusts or foundations would typically see a “soft credit” flow to individuals.

Figure 10: Percentage of institutions receiving their single largest non-bequest pledge from various sources, 2022 (n=30)

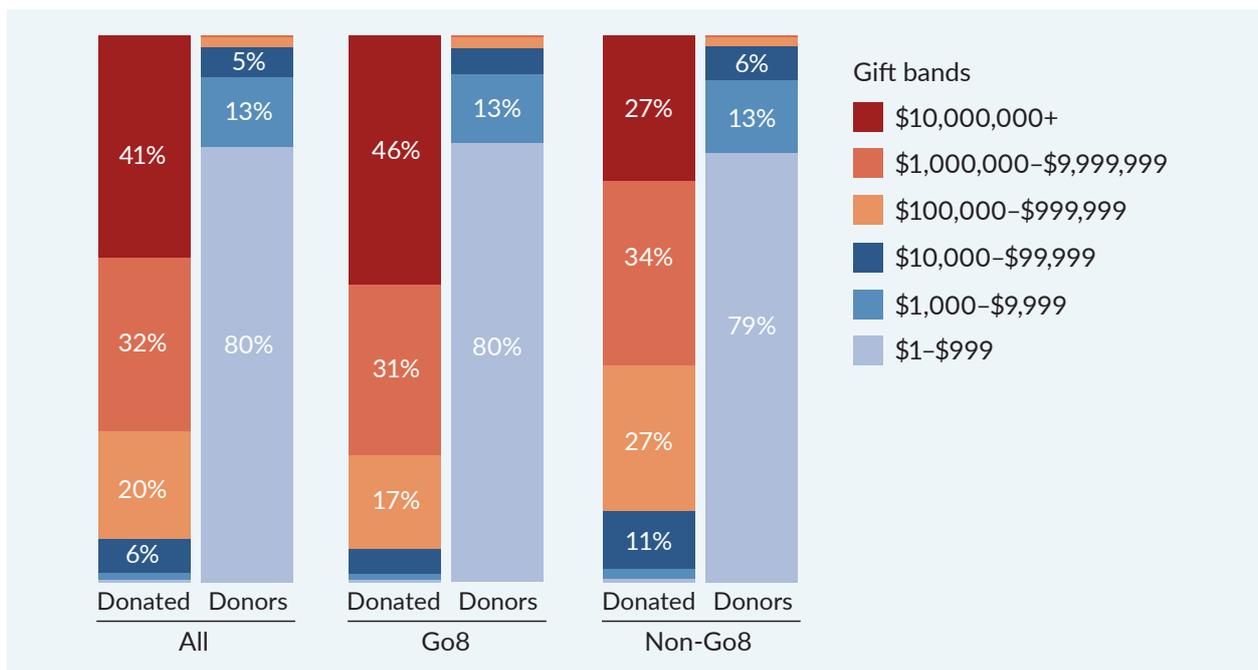


NEW FUNDS COMMITTED BY GIFT BANDS

As in 2021, for those institutions providing details of donors by gift bands, 80% of donors gave gifts of less than \$1,000. At the other end of the spectrum,

seven institutions (five Go8 and two Non-Go8 institutions) reported a total of nine donors who gave \$10m+ (representing 0.02% of donors).

Figure 11: Total donated and donors by gift bands, 2022 (n=22 for total donated as a % of new funds committed; n=27 for total donors as a % of new funds committed)



As might be expected, by dollars raised, a reversal of this trend is seen, with 41% of all new funds committed coming from gifts of \$10m+ and only 0.4% coming from gifts of \$1-\$999. However, the

\$250m outlier gift does skew this and, if this is removed, the largest percentage of new funds committed comes from gifts of between \$1m and \$10m.

Funds received 2022

OVERALL FUNDS RECEIVED

Funds received by an institution include all the cash that is received during the year, including new single cash gifts, pledge payments for current and prior years commitments, cash received towards recurring gifts, and cash realised from bequests.

In 2022, a total of \$733m was received across all participating institutions, with a median value of

\$11.7m. For those 29 institutions that participated in both 2021 and 2022, the median increased from \$10.8m to \$11.8m. Of these, 18 institutions reported an increase from 2021 and 11 reported a decrease. Two institutions saw particularly notable increases largely due to outlier gifts.

Of those institutions participating in each of the past three years, funds received dipped from \$7.3m in 2020 to \$6.4m in 2021 and recovered much of that decrease in 2022 to bring the total to \$7.2m.

Figure 12: Funds received, 2022

	All	Go8	Non-Go8
Funds received - Sum (n=30)	\$732,881,294	\$484,912,602	\$247,968,692
Funds received - Mean	\$24,429,376	\$60,614,075	\$11,271,304
Funds received - Median	\$11,731,799	\$52,750,058	\$5,761,161
Funds received from bequests - Sum (n=23)	\$153,240,941	\$90,850,905	\$62,390,036
Funds received from bequests - Mean	\$6,662,650	\$11,356,363	\$4,159,336
Funds received from bequests - Median	\$1,277,985	\$6,454,089	\$1,192,249
Largest gift as funds received - Sum (n=30)	\$135,040,516	\$62,386,636	\$72,653,880
Largest gift as funds received - Mean	\$4,501,351	\$7,798,330	\$3,302,449
Largest gift as funds received - Median	\$1,569,000	\$5,196,198	\$1,046,536

FUNDS RECEIVED COMPARED WITH NEW FUNDS COMMITTED

Funds received typically follows the new funds committed from previous years, reflecting both the success of the current and past years' fundraising activity. However, because new funds committed includes the value of multi-year pledges, it is generally higher than funds received.

In 2022 new funds committed was higher than funds received for 16 institutions, and the overall value of funds received was \$309m higher. However, \$250m of this came from a single gift. For those 29 institutions completing the survey in 2021 and 2022, funds received during 2022 was equal to 94% of new funds committed in 2021.

Figure 13: Percentage change in funds received, 2020–2022



Figure 13a: Funds received, 2020 to 2022
(n=27)

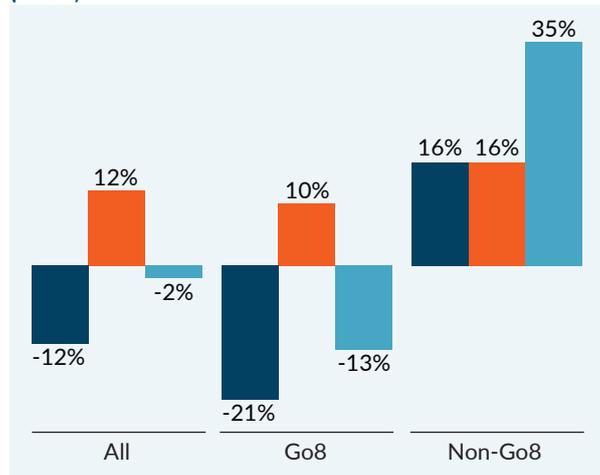


Figure 13b: Amount of funds received from bequests, 2020 to 2022
(n=24)

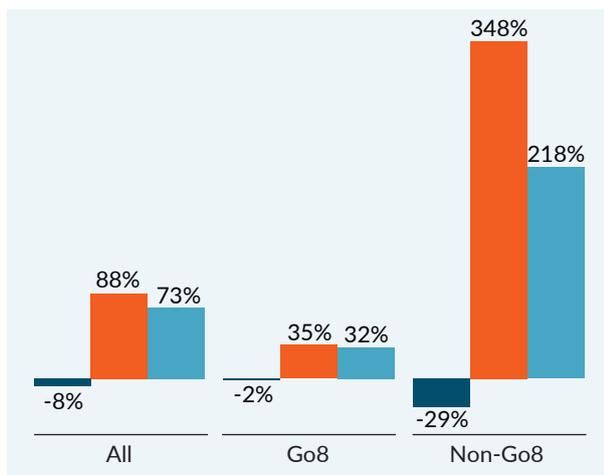


Figure 13c: Number of bequests that were a source of contribution to funds received, 2020 to 2022
(n=24)

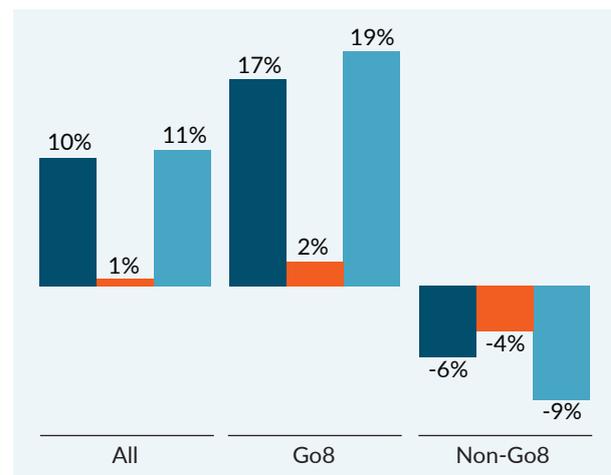


Figure 13d: Largest gift as funds received, 2020 to 2022
(n=27)

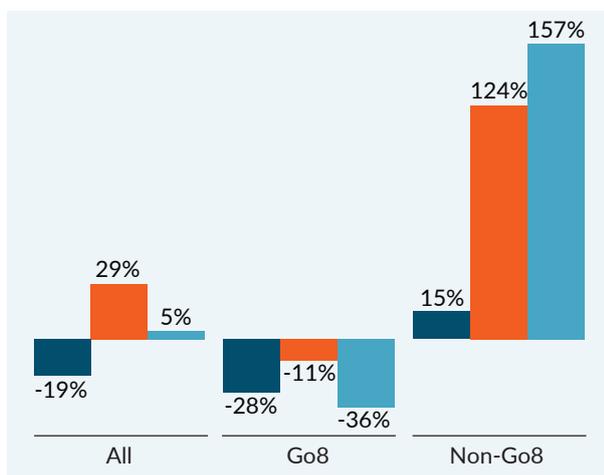
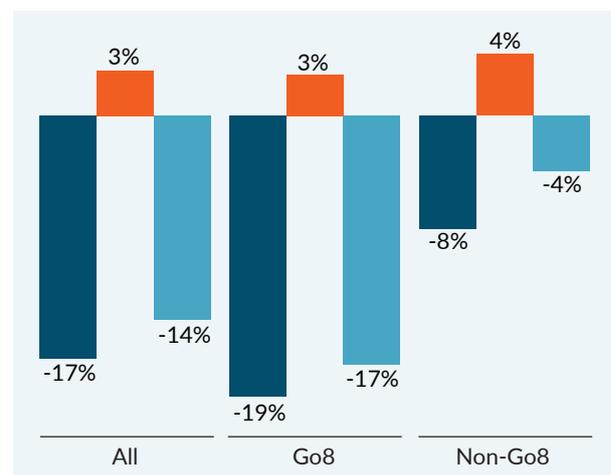


Figure 13e: Number of gifts higher than \$1m as funds received, 2020 to 2022
(n=23)



INSTITUTIONAL DIFFERENCES IN SIZE AND TYPE OF GIFTS RECEIVED

The value of funds received varied widely among reporting institutions, ranging from \$788k to \$129m. There was a notable difference between Go8 and Non-Go8 institutions: the median values of funds received being \$53m and \$6m respectively and, as in 2021, Go8 institutions brought in 66% of all funds received. For both Go8 and Non-Go8s a handful of institutions dominated the totals raised. One Go8 institution brought in 27% of funds received by all Go8 institutions. The Non-Go8 figure is also heavily inflated by two institutions that collectively brought in 41% of funds received by all Non-Go8 institutions. Overall, eight institutions (27% of institutions) brought in 75% of all funds received.

Total funds received from bequests accounted for 19% and 25% of the total funds received by all

Go8 and Non-Go8 institutions respectively. For Non-Go8 institutions, this was notably higher than in 2021. This is driven by one very large bequest being received in 2022, which made up 70% of the total bequest funds received by Non-Go8 institutions. The median values show a different pattern. Median bequests accounted for 9% of funds received by Non-Go8 institutions and 16% for Go8 institutions.

The single biggest gifts made to institutions in a year typically makes up a high proportion of overall funds received. In 2022, two institutions received more than \$10m as their largest gift as funds received, and their largest gifts accounted for 10% (\$74m) of the total funds received by all institutions.

Twenty institutions collectively confirmed 101 gifts of \$1m and above as funds received, with Go8 institutions receiving 74 of these.

Figure 14: Median bequests and largest gifts as a percentage of funds received, 2022

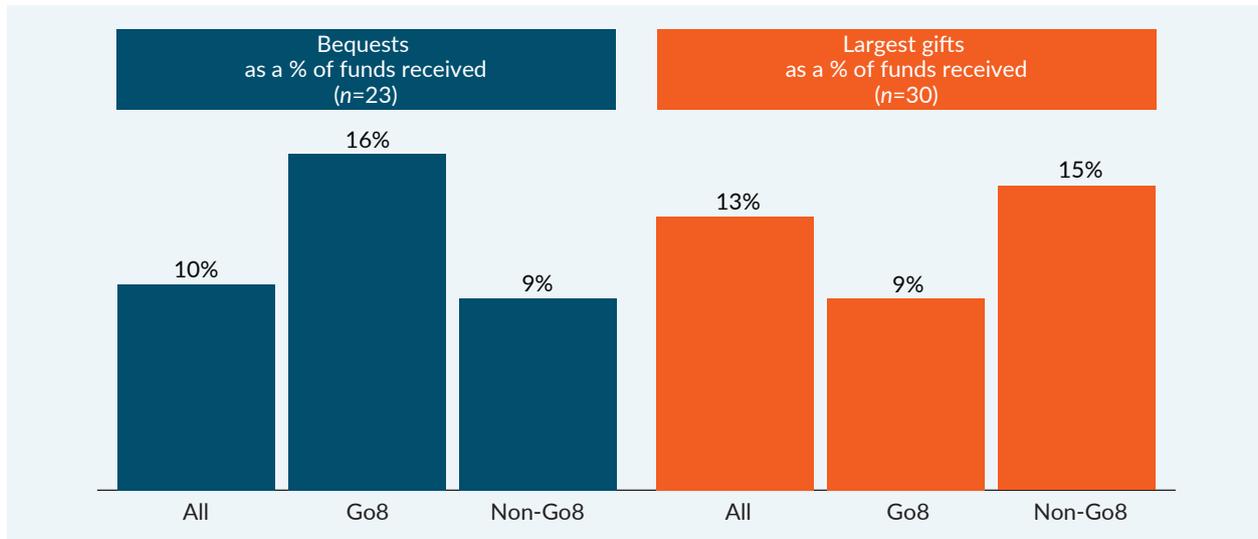


Figure 15: Number of gifts of \$1m or more as funds received, 2022

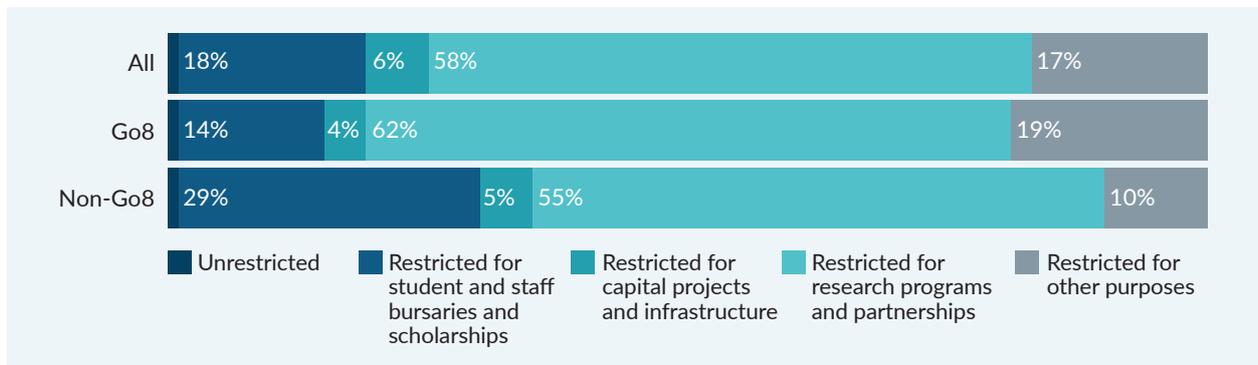
	All	Go8	Non-Go8
Sum (n=20)	101	74	27
Mean	5	9	2
Median	2	12	2

FUNDS RECEIVED BY PURPOSE

Fifty-eight percent of the mean funds received were restricted for ‘research programmes and partnerships’; the percentages for Go8 and Non-Go8 institutions were 62% and 55% respectively. One institution’s total funds received for ‘research programmes and partnerships’ made up almost 29% of the total funds received for this purpose.

As in 2021, Non-Go8 institutions received a larger proportion of mean funds received for ‘student and staff bursaries and scholarships’ (29%) compared with Go8 institutions (14%). For both Go8 and Non-Go8 institutions, as was the case with new funds committed, a very small proportion of funds received were designated for ‘unrestricted’ giving (1%). Of the total designated for this purpose, 66% was raised by two institutions.

Figure 16: Mean funds received by purpose, 2022 (n=27)

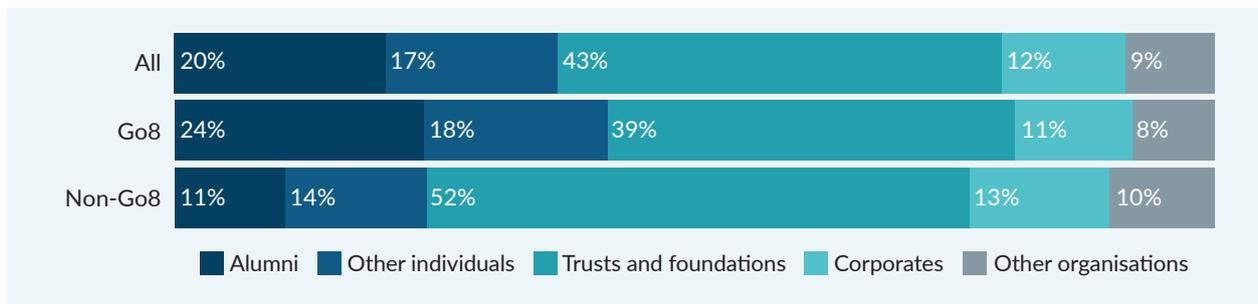


FUNDS RECEIVED BY SOURCE

Both Go8 and Non-Go8 institutions secured their highest percentage of funds received from ‘trusts and foundations’ (39% and 52% respectively). This will include some gifts given through private/family foundations. One Go8 institution brought in 27% of all funds raised from this source.

For Go8 institutions, ‘alumni’ was the second highest source of mean funds received, accounting for 24% of the total. This was more than double that of Non-Go8 institutions (11%), with one Go8 institution bringing in 27% received from this source.

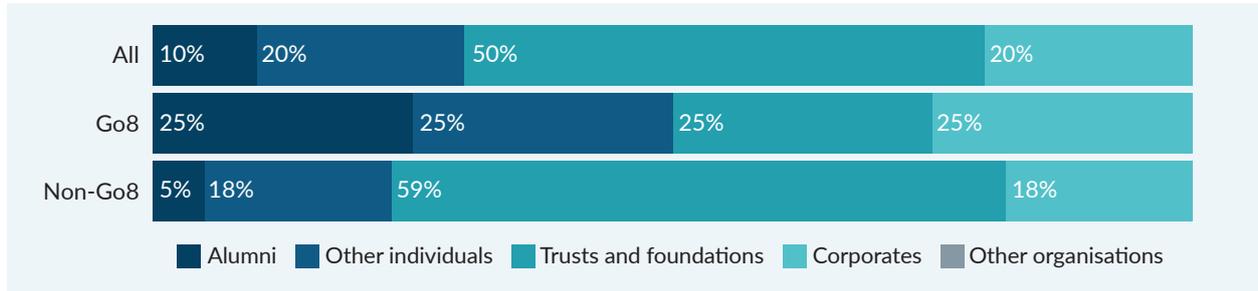
Figure 17: Mean funds received by source, 2022 (n=26)



‘Trusts and foundations’ was the source of the single largest gift as funds received for half of all institutions. For Go8 institutions, the source of the largest gift was evenly spread, whereas for Non-Go8s

there was variability with ‘trusts and foundations’ being the source of the largest gift for 59% of institutions compared with just 5% coming from alumni.

Figure 18: Percentage of institutions receiving their single largest gift as funds received from various sources, 2022 (n=30)

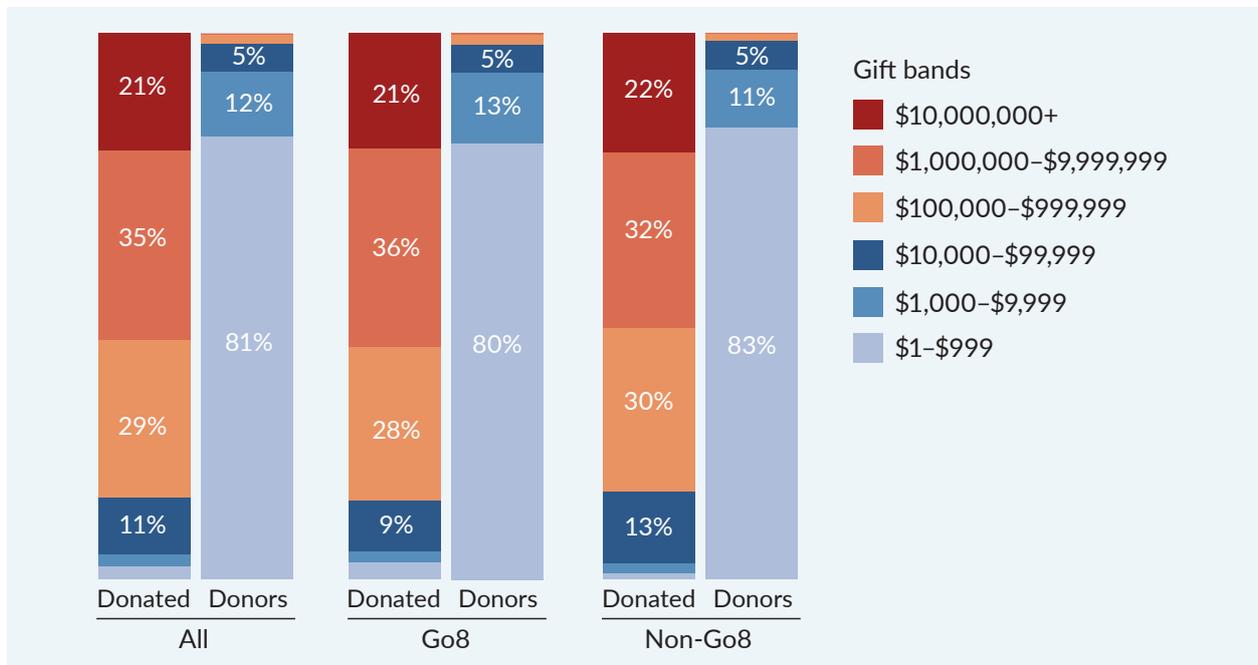


FUNDS RECEIVED BY GIFT BANDS

The distribution of donors by gift bands shows that 81% of donors across participating institutions gave less than \$1k as funds received. This is in line with the findings from previous years. At the other end of the spectrum, only 0.03% of donors gave \$10m+ (seven institutions reported having a total of 13 donors that gave more than \$10m).

Looking at the dollar value, as with new funds committed, the majority of funds received came from higher value gifts. The \$1m–\$9.99m gift band accounted for 35% of the funds received and the \$10m+ band accounted for another 21% of the funds received. With the lower bands, the \$1–\$999 and \$1,000–\$9,999 bands made up very similar percentages of funds received (2.3% and 2.2% respectively).

Figure 19: Total donated and donors by gift bands as a percentage of funds received, 2022 (n=22 for total donated as a % of new funds committed; n=27 for total donors as a % of new funds committed)



Annual funds 2022

Annual fund income is the term used to describe gifts that are typically smaller in value and raised through cyclical digital, postal, or telephone appeals. Generally, these are focused on alumni, although some institutions engage in activities with the wider community.

In 2022, across all institutions, new funds committed from annual appeals totalled \$16.2m and funds received totalled \$16.4m. These figures are usually very similar because annual fund gifts are typically smaller and realised immediately, rather than being multi-year pledges. However, it should be noted that, while for most institutions the two values were similar, 10 had at least a 20% difference between their new funds committed and funds received, an indication of larger pledges being secured or paid under the annual fund activity. Overall, funds received from annual giving were slightly higher than new funds committed in 2022, which may suggest a decline in annual fund giving.

Annual fund income is more sensitive to short term events than major gift income. In 2020, there was a spike in annual fund income, which was

largely as a result of research and hardship appeals linked to the COVID pandemic. This was followed by a big decline from 2020 to 2021 (43% for new funds committed), as giving returned to levels similar to those observed prior to the pandemic. From 2021 to 2022, new funds committed from the annual fund fell again by a small amount (4%); however, this drop was not across the board and amongst Non-Go8 institutions there was a 6% increase, albeit largely due to one institution.

At an individual institution level, the importance of the annual fund varies; one institution reported no annual fund activity at all, while for another (a Non-Go8), annual fund income made up 32% of their new funds committed, and 64% of funds received. Annual funds are proportionately more significant to Non-Go8 institutions than Go8 institutions, with median annual funds representing 3% of new funds committed for Non-Go8 institutions compared with 1% for Go8 institutions. However, the dollar amounts for new funds committed per alumnus are higher for Go8 institutions (a mean of \$3.40 per alumnus) compared with Non-Go8 institutions (a mean of \$1.75 per alumnus).

Figure 20: Annual fund income, 2022

	All	Go8	Non-Go8
Annual funds as new funds committed - Sum (n=28)	\$16,214,659	\$8,564,280	\$7,650,379
Annual funds as new funds committed - Mean	\$579,095	\$1,070,535	\$382,519
Annual funds as new funds committed - Median	\$286,158	\$794,730	\$198,400
Annual fund income as funds received - Sum (n=29)	\$16,395,605	\$9,212,075	\$7,183,530
Annual fund income as funds received - Mean	\$565,366	\$1,151,509	\$342,073
Annual fund income as funds received - Median	\$338,808	\$885,294	\$199,822

Figure 21: Median annual funds committed as a percentage of new funds committed and annual funds received as a percentage of funds received, 2022

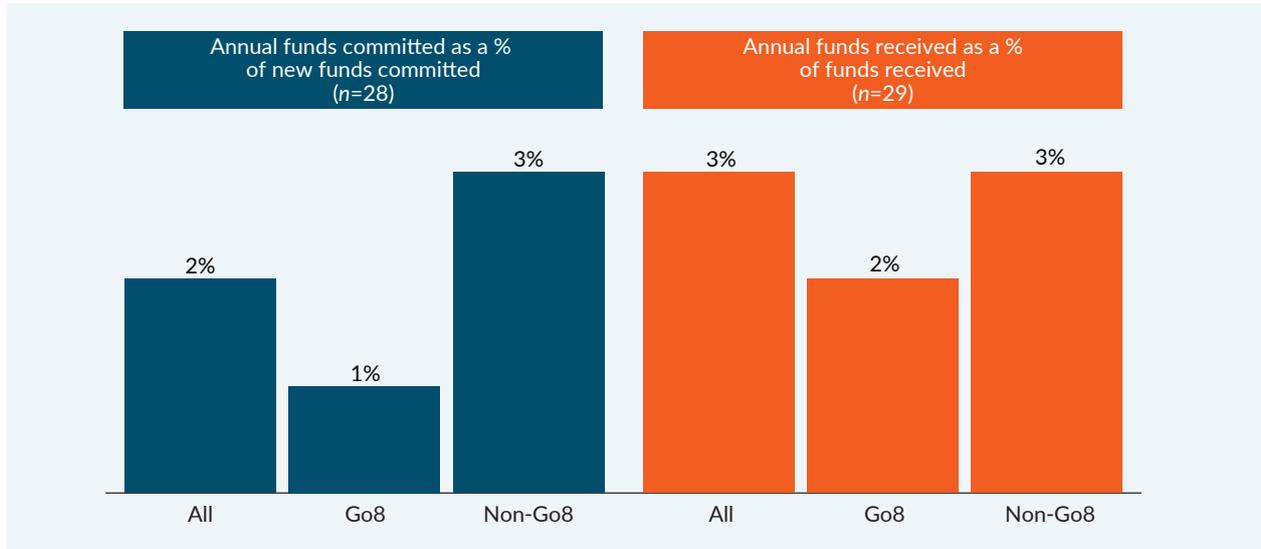


Figure 22: Percentage change in annual funds, 2020–2022



Figure 22a: Annual fund income as new funds committed, 2020 to 2022 (n=26)

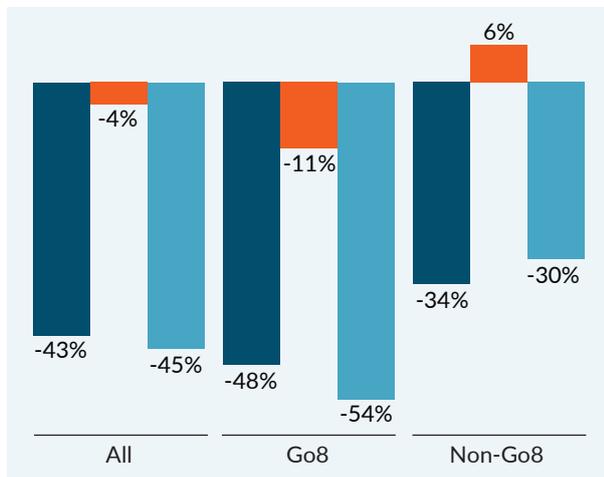
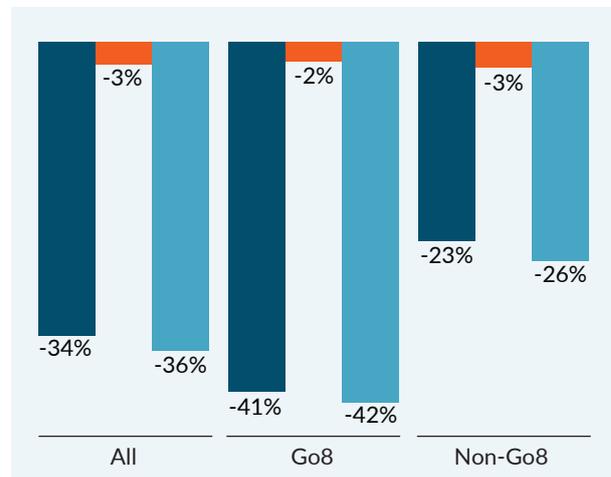


Figure 22b: Annual fund income as funds received, 2020 to 2022 (n=26)



Alumni and donors 2022

The total number of alumni for all participating institutions was 6.9m, 80% of whom were contactable. Included in the number of contactable alumni are all former students of an institution who are living, for whom the institution has a reliable postal or email address or telephone number anywhere in the world and who have not opted out of all available means of contacting them. This differs slightly to the definition from previous years, with the addition of a telephone number as a valid method of communication. Of those institutions participating in each of the past three years, there appears to have been an increase in the number of contactable alumni from 4.7m in 2020 to 4.9m in 2021 to 5.2m in 2022. However, this may be due in part to the change in definition, so any year-on-year comparisons should be made with caution.

Of the 5.5m contactable alumni, 22k made donations resulting in an overall alumni participation rate of 0.4%. The median participation rate was 0.3%, with a higher rate in Go8 institutions than Non-Go8 institutions (0.6% and 0.2% respectively).

As in 2021, alumni donors made up 46% of donors (52% for Go8 and 38% for Non-Go8s). A similar pattern is seen looking at median values. In total, institutions had 47,864 donors (alumni and non-alumni combined). For Go8 institutions, the median number of donors was 4,018 and the median number of alumni donors was 1,775; Non-Go8 institutions reported a median number

of 648 donors and a median number of 309 alumni donors.

For those institutions participating in each of the past three years, there was a slight increase (2%) in donor numbers between 2020 and 2021. However, between 2021 and 2022 there was a drop of almost 10% and, across this whole 2020-2022 period, there was a drop of 8%. Looking specifically at alumni donors, the fall appears to be even greater with an 11% drop in the last year and a 16% drop from 2020 to 2022.

Participation rates of contactable alumni donors had been declining between 2019 and 2021 and continued to do so into 2022. However, with the changed definition of contactable alumni in 2022, this trend of lower participation rates must be regarded with caution and analysis of data over future years will be needed to confirm any trend. Furthermore, with an increasing pool of young alumni (many of whom do not give to their institutions), participation rates would be expected to decline, regardless of other factors, and looking at actual numbers of donors may be more meaningful.

In 2022, institutions secured a median of \$13.3k in new funds committed per donor and \$12.2k in funds received per donor. Institutions that participated in each of the last three years experienced a rise in median funds received per donor this year. This seems to be predominantly driven by Non-Go8 institutions, which experienced a rise from \$8.3k in 2021 to \$12k in 2022. Among Go8 institutions there was a more modest increase from \$17.3k in 2021 to \$18k in 2022.

Figure 23: Alumni, 2022
(n=30)

	All	Go8	Non-Go8
Total alumni - Sum	6,885,858	2,516,752	4,369,106
Total alumni - Mean	229,529	314,594	198,596
Total alumni - Median	199,968	346,274	179,781
Contactable alumni - Sum	5,526,501	2,084,156	3,442,345
Contactable alumni - Mean	184,217	260,520	156,470
Contactable alumni - Median	148,361	270,807	135,173
Median contactable alumni as a percentage of total alumni	81%	84%	80%

Figure 24: Donors, 2022
(n=30)

	All	Go8	Non-Go8
Total donors - Sum	47,864	26,389	21,475
Total donors - Mean	1,595	3,299	976
Total donors - Median	1,056	4,018	648
Alumni donors - Sum	21,923	13,769	8,154
Alumni donors - Mean	731	1,721	371
Alumni donors - Median	436	1,775	309
Median alumni donors as a percentage of total donors	48%	55%	40%
Median alumni donors as a percentage of contactable alumni	0.3%	0.6%	0.2%
Non-alumni donors - Sum	25,941	12,620	13,321
Non-alumni donors - Mean	865	1,578	606
Non-alumni donors - Median	542	1,321	309
Median non-alumni donors as a percentage of total donors	52%	45%	60%

Figure 25: New funds committed per donor and funds received per donor, 2022
(n=30)

	All	Go8	Non-Go8
Median new funds committed per donor	\$13,330	\$19,154	\$10,801
Median funds income received per donor	\$12,150	\$17,980	\$11,502

Figure 26: Percentage change in alumni and donor numbers, 2020–2022



Figure 26a: Contactable alumni, 2020 to 2022 (n=27)

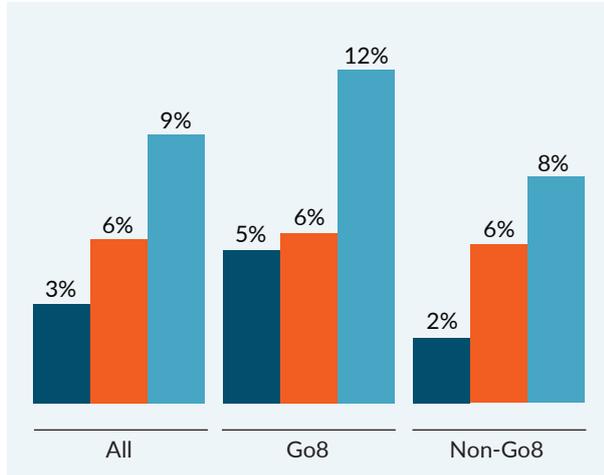


Figure 26b: Total donors, 2020 to 2022 (n=27)

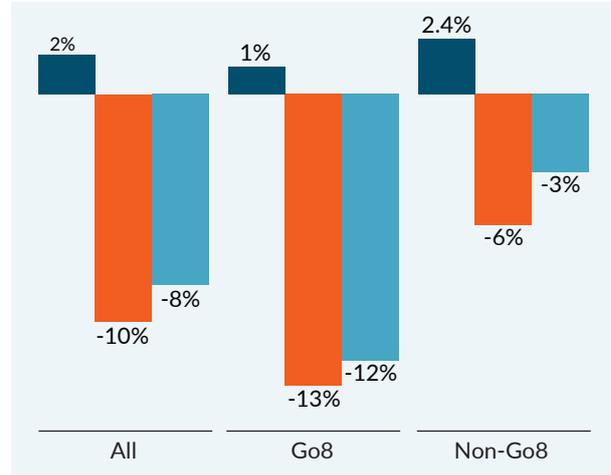


Figure 26c: Alumni donors, 2020 to 2022 (n=27)

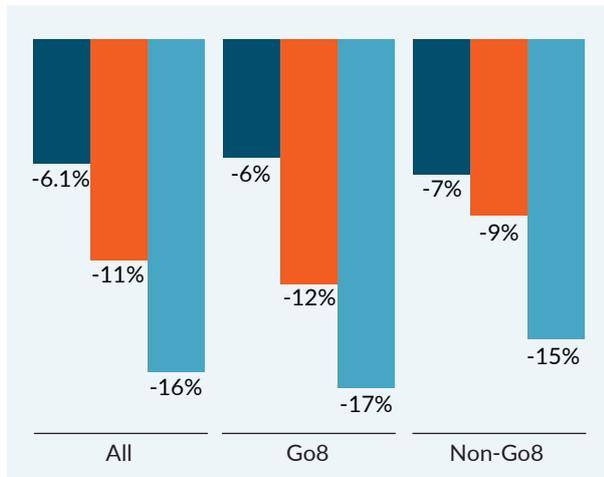
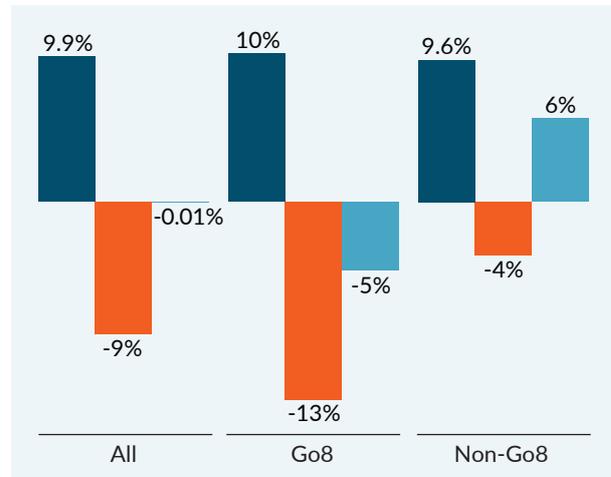


Figure 26d: Non-alumni donors, 2020 to 2022 (n=27)



Overall institutional investment 2022

Participating institutions collectively reported total institutional expenditure of \$28.5b in 2022. Median fundraising costs as a percentage of institutional expenditure were 0.3%, and median alumni relations costs as a percentage of institutional expenditure were 0.1%.

Figure 27: Advancement investments as a percentage of total institutional expenditure, 2022 (n=27)

	All	Go8	Non-Go8
Institutional expenditure - Sum	\$28,516,634,114	\$14,694,871,407	\$13,821,762,707
Institutional expenditure - Mean	\$1,056,171,634	\$2,099,267,344	\$691,088,135
Institutional expenditure - Median	\$796,156,000	\$2,195,102,000	\$712,081,858
Median fundraising costs as a percentage of institutional expenditure	0.3%	0.3%	0.2%
Median alumni relations costs as a percentage of institutional expenditure	0.1%	0.2%	0.1%

Fundraising investment and staffing 2022

OVERALL FUNDRAISING INVESTMENT

Investment in fundraising includes the costs of the staff undertaking fundraising and other non-staff costs involved with the running and maintenance of fundraising operations.

Many factors contribute to an institution's ability to secure philanthropic contributions, making it problematic to attribute fundraising outcomes solely to investments in advancement. For example, effective engagement of academic leaders, volunteers and other non-advancement staff in the identification of philanthropic opportunities and the cultivation and stewardship of donors are among the hallmarks of high performing advancement programmes; however, these are not reflected in fundraising budgets or staff counts. Nonetheless, there is a clear correlation over time between sustained investments in advancement and fundraising success. Looking at year-on-year return on investment can provide valuable strategic

insights for advancement leaders and other institution administrators.

Participating institutions invested a total of \$107m in fundraising activities during 2022. Go8 institutions invested a median value of \$9.6m compared to \$1.4m for Non-Go8 institutions.

In 2021, there had been a dip in fundraising investment compared to 2020, which had been anticipated as a possible impact of COVID. Looking at those institutions participating in each of the past three years, investment levels have picked up again: the values being \$104m in 2020, \$88m in 2021 and \$104m in 2022. While this rebound in fundraising investment is encouraging, this seems to have been experienced to a greater degree in Non-Go8 institutions. At an individual institutional level five saw a decrease in fundraising spending in 2022 (three of which were Go8 institutions). Many institutions are still to return to pre COVID levels and it may be that the impact of the pandemic will continue to be felt over the coming years.

Both Go8 and Non-Go8 institutions reported median fundraising costs per donor of \$2.2k.

Figure 28: Fundraising costs, 2022
(n=30)

	All	Go8	Non-Go8
Fundraising costs - Sum	\$106,833,187	\$70,521,902	\$36,311,285
Fundraising costs - Mean	\$3,561,106	\$8,815,238	\$1,650,513
Fundraising costs - Median	\$1,609,100	\$9,584,319	\$1,396,448
Staff fundraising costs - Sum	\$88,672,749	\$59,499,363	\$29,173,386
Staff fundraising costs - Mean	\$2,955,758	\$7,437,420	\$1,326,063
Staff fundraising costs - Median	\$1,305,802	\$8,000,868	\$1,062,706
Median fundraising staff costs as a percentage of fundraising costs	84%	87%	83%
Non-staff fundraising costs - Sum	\$18,160,435	\$11,022,536	\$7,137,899
Non-staff fundraising costs - Mean	\$605,348	\$1,377,817	\$324,450
Non-staff fundraising costs - Median	\$277,566	\$1,316,317	\$247,894
Median fundraising non-staff costs as a percentage of fundraising costs	16%	13%	17%

Figure 29: Investment per dollars raised and per donor, 2022
(n=30)

	All	Go8	Non-Go8
Median fundraising investment per dollar of new funds committed	\$0.18	\$0.11	\$0.21
Median fundraising investment per dollar of funds received	\$0.18	\$0.14	\$0.21
Median fundraising cost per donor	\$2,229	\$2,223	\$2,229

FUNDRAISING STAFF INVESTMENT

The split between fundraising staff costs and fundraising non-staff costs is similar to previous years with a median of 84% being invested in staff in 2022. Given expenditure has increased and the percentage spent on staff remained the same, it follows that the dollar spend on staffing has also increased for most institutions. Looking across the last three years, 81% of institutions spent more on staffing in 2022 than in 2021 and 63% reported an increase from 2020 to 2022. Just four institutions reported a reduction in staff spending this year.

Participating institutions employed a total of 623 FTE fundraising staff. Go8 institutions employed 64% of this workforce (396 FTE staff), despite representing just over a quarter of the number of participating institutions and having only 37% of the total alumni. Four Go8 institutions employed more than 50 FTE fundraising staff, while five Non-Go8 institutions had fewer than five FTE fundraising staff. Across all institutions

participating in each of the last three years, FTE staff fell quite substantially between 2020 and 2021 (from 623 to 568), which had been expected due to the impact of COVID. It is encouraging to see numbers climb back up in 2022 to 604, though not yet to pre-pandemic levels. Continued monitoring will be important to determine if the recovery continues, as the region faces further economic pressures.

Across all institutions, 57% of the fundraising FTEs work directly in fundraising while 43% work in support roles. Amongst Go8 institutions the proportion of FTEs employed in direct fundraising roles is slightly lower than this (54%) and higher for support roles (46%).

Looking across all three years, the drop in fundraising staffing in 2021 was greater amongst the support roles than the front-line fundraisers, and it is in the support roles where the greatest recovery is observed, with this being most apparent in the Go8 institutions.

Figure 30: Fundraising staff counts, costs per staff, 2022
(n=30)

	All	Go8	Non-Go8
Fundraising staff - Sum	623	396	228
Fundraising staff - Mean	21	49	10
Fundraising staff - Median	12	52	9
Median fundraising staff cost per FTE fundraising staff member	\$134,475	\$150,958	\$129,728
Median new funds committed per FTE fundraising staff member	\$1,020,045	\$1,748,470	\$830,059
Median funds received per FTE fundraising staff member	\$835,644	\$1,448,077	\$800,412
Fundraising frontline staff - Sum	352	212	141
Fundraising frontline staff - Mean	12	26	6
Fundraising frontline staff - Median	8	26	6
Fundraising support staff - Sum	271	184	87
Fundraising support staff - Mean	9	23	4
Fundraising support staff - Median	5	20	4

FUNDRAISING NON-STAFF INVESTMENT

Non-staff fundraising investment came to \$18.2m in total, with the median investment for Go8 institutions being \$1.3m compared to \$248k for Non-Go8 institutions. By individual institution, 16 institutions increased non-staff investment between 2021 and 2022, and across the last three years 85% reported an increase in non-staff costs between 2020 and 2022.

RETURN ON FUNDRAISING INVESTMENT

Go8 institutions reported a median fundraising investment of 11¢ per dollar for new funds committed and 14¢ per dollar for funds received. Non-Go8 institutions reported a median fundraising investment of 21¢ per dollar for new funds committed and 21¢ per dollar for funds received.

Overall, institutions invested a median value of \$134k per FTE fundraising staff member, resulting

in an eight-fold return on new funds committed per FTE fundraising staff member.

Investment by Go8 institutions was higher (a median value of almost \$151k per FTE fundraising staff member) and delivered an even greater return on investment: a twelve-fold return on new funds committed per FTE fundraising staff member and ten-fold return on funds received per FTE fundraising staff member.

Non-Go8 institutions invested a median value of \$130k per FTE fundraising staff member, resulting in a six-fold return on investment in both new funds committed per FTE fundraising staff member and funds received per FTE fundraising staff member. This is still an impressive return on investment in fundraising staff for Non-Go8 institutions, despite these institutions having lower returns than their Go8 counterparts.

Figure 31: Percentage change in fundraising staffing and investment, 2020–2022

■ % change 2020 to 2021 ■ % change 2021 to 2022 ■ % change 2020 to 2022

Figure 31a: Fundraising staff (FTEs), 2020 to 2022 (n=27)

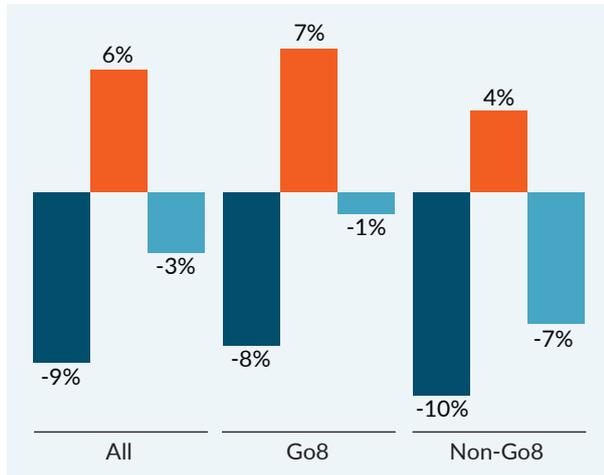


Figure 31b: Total fundraising costs, 2020 to 2022 (n=27)

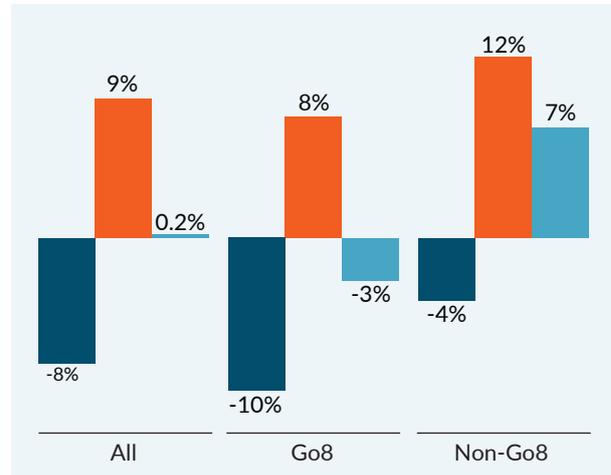


Figure 31c: Fundraising staff costs, 2020 to 2022 (n=27)

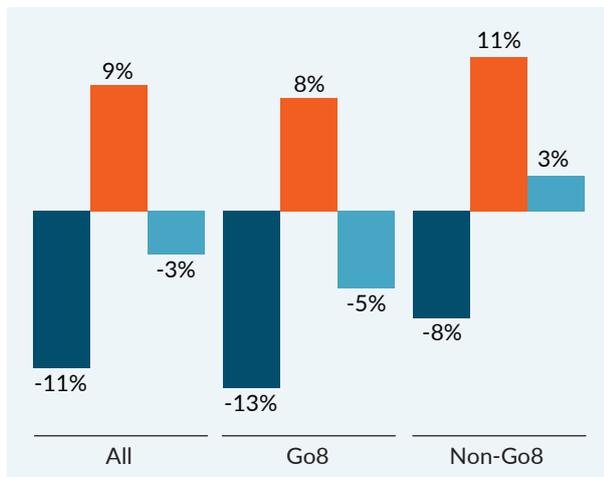
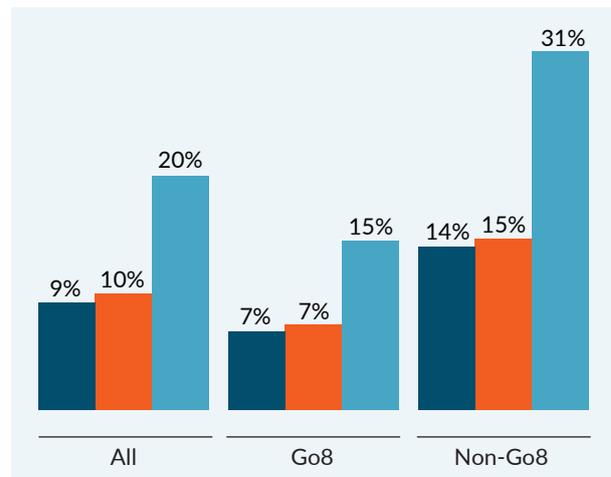


Figure 31d: Fundraising non-staff costs, 2020 to 2022 (n=27)



Alumni relations investment and staffing 2022

OVERALL ALUMNI RELATIONS INVESTMENT

Investment in alumni relations includes the costs associated with the activities conducted to engage alumni and the community; they include both staff and non-staff costs.

Participating institutions invested a total of \$51m in alumni relations activities, with a median alumni relations cost of \$0.9m. This investment excludes the costs involved in the production and distribution of alumni magazines. Overall, institutions invested a median of \$8 per contactable alumnus (\$16 for Go8 and \$6 for Non-Go8 institutions), and a median of \$2,626 per alumni donor (\$2,614 and \$2,678 for Go8 and Non-Go8 institutions respectively).

Amongst institutions participating in each of the past three years, alumni expenditure has increased this year following drops in the previous two years, (there was an 11% decrease between 2020 and 2021 followed by a 15% increase between 2021 and 2022). When broken down between staff and non-staff costs, it can be seen that the patterns of expenditure differ. Non-staff costs have increased progressively across the three years by 19% between 2020 and 2021 and by 23%

between 2021 and 2022. Staff costs, however, fell by 18% between 2020 and 2021 and then rose by 13% between 2021 and 2022.

The overall growth is encouraging and, in terms of the increase in non-staff costs, this may be in part due to the resumption of in-person engagement with alumni, which is likely to require more investment than the online programmes, that dominated during the pandemic. While COVID may have encouraged digital engagement at a more global level, which is desirable to maintain, a shift back to in-person contact is important in enabling institutions to develop deeper relationships with their alumni and donor communities.

As with fundraising expenditure, however, there is variability between institutions, with five decreasing their expenditure in the last year. There are also differences between Go8 and Non-Go8 institutions: while non-staff costs increased amongst both groups, this was particularly marked amongst Non-Go8 institutions where the spending between 2020 and 2022 increased by 65%, compared with a 39% increase for Go8 institutions.

The ratio of total investment in fundraising to total investment in alumni relations (excluding investment in alumni magazines) is approximately 2.2:1 for Go8 institutions and 1.9:1 for Non-Go8 institutions.

Figure 32: Alumni relations costs, 2022
(n=30)

	All	Go8	Non-Go8
Alumni relations costs - Sum	\$51,186,548	\$31,940,196	\$19,246,352
Alumni relations costs - Mean	\$1,706,218	\$3,992,525	\$874,834
Alumni relations costs - Median	\$924,131	\$3,725,408	\$772,220
Staff alumni relations costs - Sum	\$37,278,487	\$23,130,834	\$14,147,653
Staff alumni relations costs - Mean	\$1,242,616	\$2,891,354	\$643,075
Staff alumni relations costs - Median	\$710,388	\$2,796,036	\$637,717
Median alumni staff costs as a percentage of alumni relations costs	76%	73%	77%
Non-staff alumni relations costs - Sum	\$13,908,279	\$8,809,363	\$5,098,916
Non-staff alumni relations costs - Mean	\$463,609	\$1,101,170	\$231,769
Non-staff alumni relations costs - Median	\$265,224	\$1,076,780	\$147,152
Median alumni non-staff costs as a percentage of alumni relations costs	24%	27%	23%

Figure 33: Alumni relations investment per alumnus and per alumni donor, 2022
(n=30)

	All	Go8	Non-Go8
Median alumni relations costs per contactable alumnus	\$8	\$16	\$6
Median alumni relations costs per alumni donor	\$2,626	\$2,614	\$2,678

ALUMNI RELATIONS STAFF INVESTMENT AND FTES

Institutions invested a total of \$37.3m in alumni relations staff costs in 2022, with median alumni relations staff costs accounting for 76% of the total investment in alumni relations. The median amount invested in staff was \$0.7m (\$2.8m amongst Go8 and \$0.6m amongst Non-Go8 institutions).

Across all institutions, 297 FTE staff were employed in alumni relations. Go8 institutions employed a high proportion of these (57%) in comparison with the percentage of total alumni from Go8 institutions (37%).

Looking at those institutions that participated in each of the past three years, there was a notable drop in alumni staffing from 344 in 2020 to 246 in 2021. This picked up again in 2022 to 280 but still not to previous levels, particularly within the Go8 institutions.

Institutions invested a median value of \$120k per alumni relations staff member; Go8 and Non-Go8 institutions invested a median value of \$138k and \$115k respectively per alumni relations staff member.

Figure 34: Alumni relations staff counts, costs per staff, 2022
(n=30)

	All	Go8	Non-Go8
Alumni relations staff - Sum	297	168	129
Alumni relations staff - Mean	10	21	6
Alumni relations staff - Median	7	22	5
Median alumni relations staff cost per FTE alumni relations staff member	\$120,286	\$137,742	\$115,260
Alumni relations frontline staff - Sum	167	89	78
Alumni relations frontline staff - Mean	6	11	4
Alumni relations frontline staff - Median	4	10	3
Alumni relations support staff - Sum	130	79	51
Alumni relations support staff - Mean	4	10	2
Alumni relations support staff - Median	3	11	2

Figure 35: Percentage change in alumni relations staffing and investment, 2020–2022

■ % change 2020 to 2021 ■ % change 2021 to 2022 ■ % change 2020 to 2022

Figure 35a: Alumni relations staff (FTEs), 2020 to 2022 (n=27)

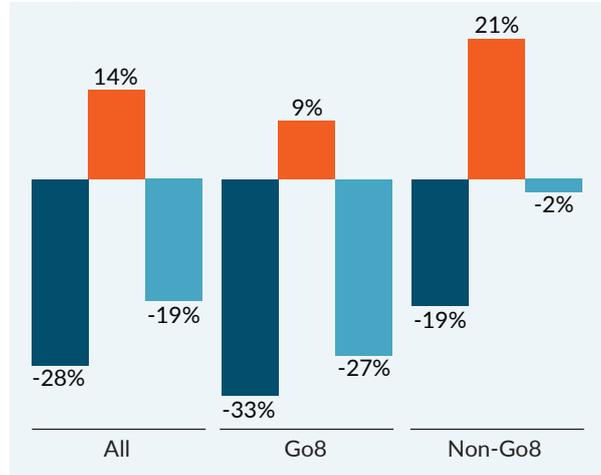


Figure 35b: Total alumni relations costs, 2020 to 2022 (n=27)

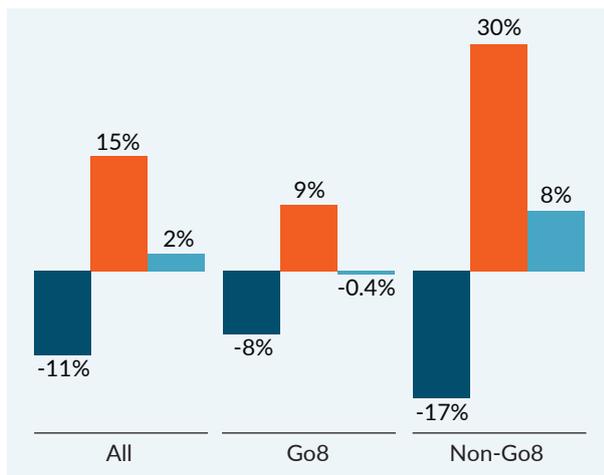


Figure 35c: Alumni relations staff costs, 2020 to 2022 (n=27)

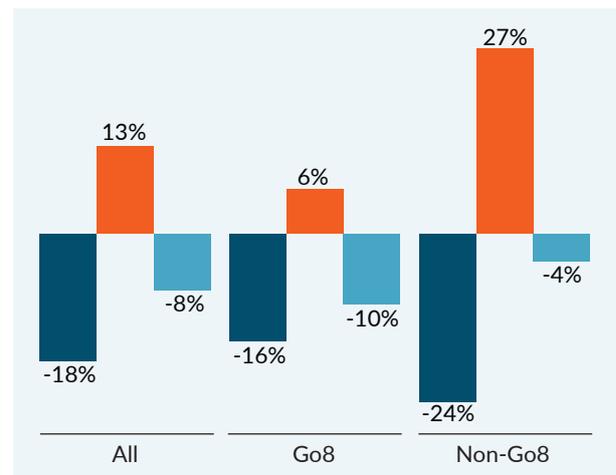


Figure 35d: Alumni relations non-staff costs, 2020 to 2022 (n=27)

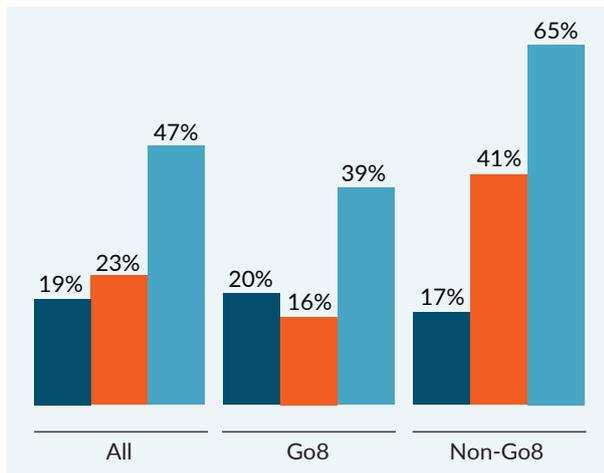
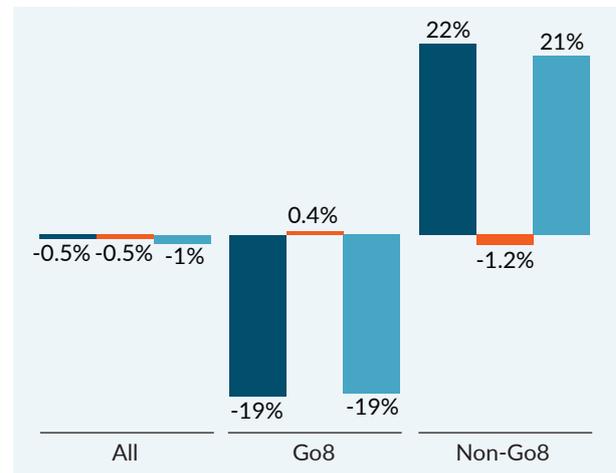


Figure 35e: Costs for production and distribution of alumni magazine, 2020 to 2022 (n=13)



ALUMNI RELATIONS MAGAZINE INVESTMENT

Fifteen participating institutions spent a total of \$2.3m to produce and distribute alumni magazines, with a median cost of \$55k. For those institutions that supplied this information in each of the last three years, total costs have remained stable following a big drop prior to this.

Figure 36: Alumni magazine costs, 2022
(n=15)

	All	Go8	Non-Go8
Production and distribution costs of alumni magazine - Sum	\$2,347,500	\$1,068,074	\$1,279,426
Production and distribution costs of alumni magazine - Mean	\$156,500	\$213,615	\$127,943
Production and distribution costs of alumni magazine - Median	\$55,000	\$105,000	\$47,500

COMPARISONS WITH INSTITUTIONS IN UNITED KINGDOM AND IRELAND

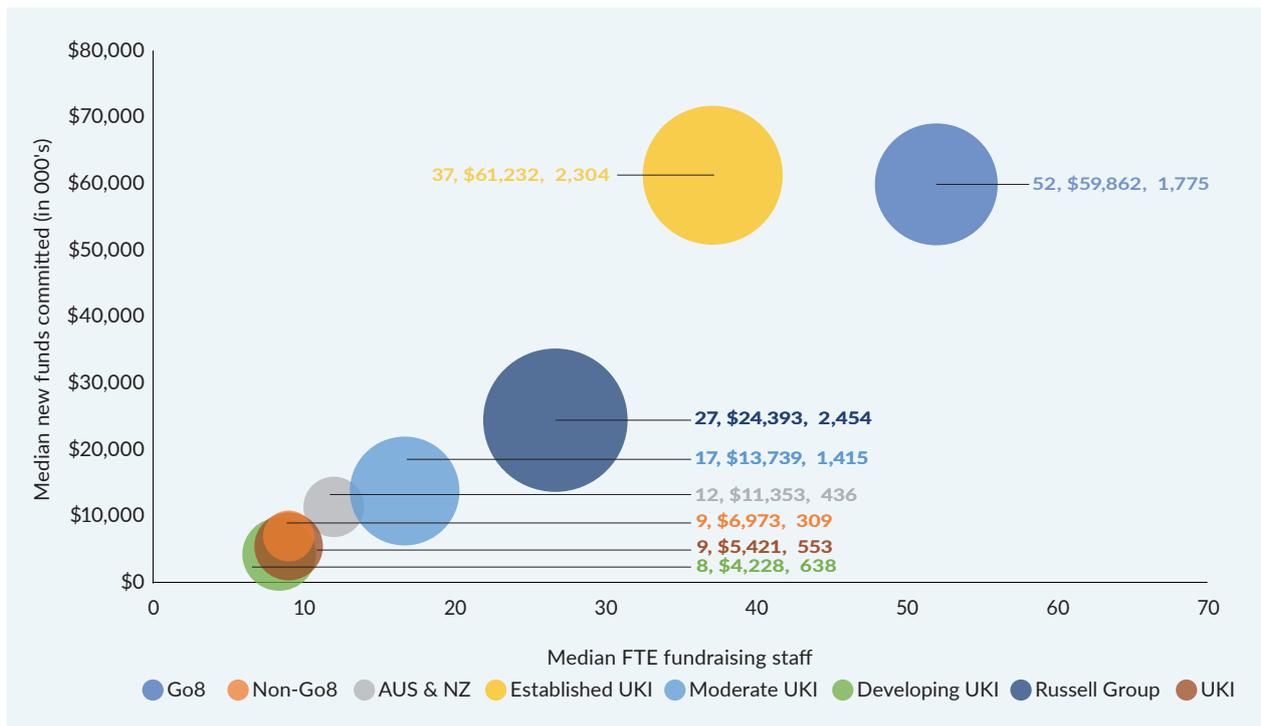
Institutions from the United Kingdom and Ireland, participating in the long-running CASE Insights on Philanthropy (United Kingdom and Ireland), formerly the CASE-Ross Survey, provide a valuable point of comparison for institutions in Australia and New Zealand.

A comparison of the 2021–22 United Kingdom and Ireland data and the current survey demonstrates that in both regions there is a positive relationship between median FTE fundraising staff and new funds committed. There are, however, some exceptions. For example, Established UKI institutions

have a lower median number of staff than Go8 institutions (37 compared with 52) but have a higher median for their new funds committed. At the other end of the scale, the Developing UKI and Non-Go8 institutions have eight and nine median staff but Developing UKI institutions have a lower median new funds committed than do Non-Go8s.

In general, institutions with higher median FTE fundraising staff and higher median new funds committed also report a higher median value for the number of alumni donors.

Figure 37: Advancement matrix, 2022: Median FTE fundraising staff by median new funds committed
Bubble size: Median number of alumni donors



APPENDIX

Figure 38: Response rate 2013–2023¹¹

Year of report release	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Survey year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Higher education institutions in Australia											
Invited to participate	43	43	43	43	43	43	43	39	42	41	41
Number participating	8	10	14	23	24	24	24	27	29	30	26
Response rate	19%	23%	33%	53%	56%	56%	56%	69%	69%	73%	63%
Higher education institutions in New Zealand											
Invited to participate	8	8	8	8	8	8	8	8	8	8	8
Number participating	0	1	5	1	1	1	2	6	5	4	4
Response rate	0%	13%	63%	13%	13%	13%	25%	75%	63%	50%	50%
Higher education institutions in Australia and New Zealand											
Invited to participate	51	51	51	51	51	51	51	47	50	49	49
Number participating	8	11	19	24	25	25	26	33	34	34	30
Response rate	16%	22%	37%	47%	49%	49%	51%	70%	68%	69%	61%

¹¹These correspond to the year in which the report was published.

Figure 39: Participating institutions

GO8 INSTITUTIONS

From Australia

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

NON-GO8 INSTITUTIONS

From Australia

1. Australian Catholic University
2. Bond University
3. Charles Sturt University
4. Deakin University
5. Flinders University
6. Griffith University
7. La Trobe University
8. Murdoch University
9. Queensland University of Technology
10. RMIT University
11. The University of Newcastle
12. University of Canberra
13. University of South Australia
14. University of Southern Queensland
15. University of Tasmania
16. University of Wollongong
17. Victoria University
18. Western Sydney University

From New Zealand

1. The University of Auckland
2. University of Otago
3. University of Waikato
4. Victoria University of Wellington

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