

**CASE InsightsSM on Philanthropy in
International and Independent Schools
(Non-US Schools)**

Guidance Document (Australia)

October 2025

Introduction

CASE Insights on Philanthropy in International and Independent Schools

CASE Insights on Philanthropy in International and Independent Schools is designed to provide comprehensive data on fundraising and charitable giving to international and independent schools.

The survey:

- Raises the profile of international and independent school advancement and increases public understanding of the role of philanthropy in support of education;
- Provides data to help measure the impact of public policy and inform advocacy initiatives supporting educational advancement in independent schools and globally;
- Enables participating institutions to measure and benchmark fundraising progress year-over-year and among peer institutions; and
- Helps institutional leaders set goals, assess performance, build capacity, and make informed, strategic decisions regarding investments in advancement.

Data from this survey combined with data collected in the U.S. through a partnership with the National Association of Independent Schools (NAIS) will provide deeper insight into philanthropic activity for schools across the world.

Contact the CASE Insights team at insights@case.org if you have questions or suggestions regarding the survey or reporting guidelines.

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 with 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 include alumni relations, development services, communications, fundraising, government relations, and marketing. These professionals are at all stages of their career and may be working in universities,

schools, colleges, cultural institutions, or other not-for-profits. CASE uses the intellectual capital and professional talents of a community of international volunteers to advance its work, and its membership includes many educational partners who work closely with the educational sector.

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 its stakeholders, particularly its members, volunteers, and staff. For more information about CASE, please visit www.case.org.

Getting Started

Access to the Survey

The CASE Insights on Philanthropy in International and Independent Schools survey must be completed and submitted via the CASE Insights survey [website](#). **The site requires a user account that is separate from your general CASE website member account.** To request a new survey user account or make changes to your institution's existing survey contacts, email the CASE Insights staff at insights@case.org.

Activating the Survey for Data Entry

After logging into the CASE Insights survey [website](#), click on the CASE Insights on Philanthropy in International and Independent Schools survey under “Your Active Surveys” on the home page. (If you do not see the survey listed on your home page, please email the CASE Insights Staff at insights@case.org to ensure your account has the correct permissions.)

Clicking on the active survey will take you to the survey menu. **In the Survey Status section at the top, check the box that says, “My institution WILL complete this survey.”** This activates the survey for data entry. Your institution's survey contacts will receive reminders about the survey until it is submitted.

Survey Validation and Submission

As you are entering data, each section of the survey has error checks that run automatically when you save that section. Failed validations appear in the upper right corner. Note that you will see errors for any required questions that have not yet been answered, in addition to any errors on completed questions, so you may wish to wait until you are close to completion to review the errors in detail. Select the “Hide” button to minimize the notification as you complete entering data.

You can also manually check your survey for errors if you wish by going to the Completion Process section at the bottom of the survey menu and clicking, “Check your survey for common problems.” This view provides a summary of all validation errors in all sections of the survey.

There are three error levels:

- Fatal errors (skull icon) must be fixed before you can submit your survey.
- Serious errors (exclamation point icon) must be fixed or annotated before you can submit your survey. To annotate click, “Add Comment.”
- Warnings (question mark icon) require no specific action but indicate data may be out of the ordinary and deserve your review.

Error messages tell you which sections and specific questions have errors along with more details about the issue. Errors are listed for each section/question on the “Check your survey for common problems.” To review an error, click the link to return to the section/question with the error. You will see the failed validation within the section near the upper right.

In addition, the survey menu will show error-level icons next to sections that have errors.

After you fix your errors, you must return to the Completion Process section of the survey menu and re-run the error checker to clear them. Failed validation messages and error icons do not disappear until you do so. If you still have remaining errors and need assistance on how to resolve them, email the CASE Insights team at insights@case.org.

Submitting Your Survey

When you have finished your survey, check the Survey Status box that says, “My survey is complete and ready for review.” The built-in error checks will run automatically. If you receive any error messages, you must correct or annotate the errors. **Your survey is not submitted for review if it has errors.**

After you have made your corrections, re-check the box to indicate your survey is complete. If no errors remain, your survey will be submitted for review, and you will see a confirmation notice onscreen.

CASE will review all data submitted and attempt to identify any obvious errors or inconsistencies. CASE will contact participating institutions to clarify or correct apparent errors in submitted data.

Email the CASE Insights team at insights@case.org if you need assistance with errors.

Additional Resources

There are written instructions within the online survey instrument. In addition, you can hover over many of the row and column headers in the questions for additional help and definitions.

The remainder of this document includes:

- The text included within the hover text for each question.
- A copy of the survey with all the questions.

For further assistance, contact the CASE Insights team at insights@case.org

Survey question hover text

A. School Characteristics

End date of the most recent reporting year (A.1): The reporting year is an important time period for this survey, determining the period for which funds received and new funds committed are reported. Fiscal years vary from institution to institution and may not conform to calendar year, academic calendar, or government fiscal year.

School Type (A.3):

Independent Schools: Not-for-profit institutions overseen by boards of stakeholders and often have selective admissions processes for primary and/or secondary students. They serve students from the region or country in which they are located. Formats for these schools can include day, boarding, single-sex, and coeducational approaches.

International Schools: Provide an education with a global focus to students who are living outside of their home. Examples include embassy American or British schools established around the world where business, diplomatic, or military obligations take families overseas for several years at a time. These schools can be for or not-for-profit and are overseen by boards of stakeholders. Admissions can be selective or non-selective.

Total Enrolment (A.5): Total number of students inclusive of Day students, 5-Day Boarding students, 7-Day Boarding students

Day Programme (A.6): Programme for students who live at home.

Boarding Programme (A.6): 5-day or 7-day boarding programme is available.

How many individuals serve on your school's governing body? (A.10): Governing bodies include individuals or members of a board given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified. Some schools may refer to this governing body as the School Council, the Board, the Board of Governors, the Board of Directors, or the Board of Trustees.

B. Financial Operations

Does your school have an endowment? (B.1): Endowments are a fund or collection of funds established by gifts and bequests that were accepted subject to a requirement that the principal be maintained intact and invested to create a source of income.

Gross Tuition Funds (B.2): Total dollar value of tuition and fees collected within the stated reporting year.

Need-Based Financial Aid and Tuition Remission Total (B.2):

Combined total of tuition discounts which includes need-based financial aid and tuition remission.

Need-based financial aid is awarded to families who demonstrate a need based on household income and expenses.

Tuition remission is a reduction in tuition granted to school employees' children as a direct result of that person's employment at the school. No financial need is determined for these awards.

Do not include merit-based financial awards.

Net Tuition Funds (Calculated) (B.2): Gross tuition and fee revenue less the total value of tuition discounts such as need-based financial aid, or tuition remission.

Total operating expenses (B.3): Total value of the school's operating expenses. This could include staff salaries, benefits and payroll taxes, technology, auxiliary expenses, summer program, depreciation expense, interest expense for plant debt (bonds and notes payable), and other services and expenses.

C. Advancement Details

Alumni/ae (C.3): Graduates of the school and others with a prior academic relationship, including nongraduates, distance learners, residents, honorary degree recipients and honorary alumni. For individuals who attended the school but did not graduate, count those who completed at least one term or one grading period or at least one degree-credit course with passing grades.

Employees (C.3): Individuals who are current or former employees of the school.

If yes, were you in the quiet or public phase (C.5):

The quiet phase (also known as leadership, pre-public or planning phase) is a period during which pace-setting gifts are sought from individuals and entities closest to the school. This occurs before public announcement of the campaign or of its official goals.

The public phase (also known as the "active" phase) begins when the campaign is officially announced to the community and its stakeholders. This is also when the official public marketing and reporting happen.

D. Funds Received (Australia)

Total value of funds received (D.1): Include hard credits only when recording the total value of funds received

Total number of donors (D.2): Total number of unique hard credit donors. Only count the individual or organisation legally credited for the gift. Count each individual or organisation responsible only once.

Funds received (hard credit only) (D.4): Hard credit is legal credit. Enter the value of funds received that were legally credited to the individual or entity.

Alumni/ae (D.4): Graduates of the school and others with a prior academic relationship, including nongraduates, distance learners, residents, honorary degree recipients and honorary alumni. For individuals who attended the school but did not graduate, count those who completed at least one term or one grading period or at least one degree-credit course with passing grades.

Employees (D.4): Individuals who are current or former employees of the school.

Members of Governing Body (D.4): Governing bodies include individuals or members of a board given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified. Some schools may refer to this governing body as the School Council, the Board, the Board of Governors, the Board of Directors, or the Board of Trustees. Do not include donors or donations from trustees emeriti, honorary trustees, or any other person who did not serve actively on the governing body this fiscal year.

Other Individuals (D.4): Any individuals who do not fit into one of the other categories noted above.

Corporations (D.4): Corporations, businesses, partnerships, and cooperatives organised for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations, industry trade associations, and the corporate component of matching gifts.

Foundations and Trusts (D.4): Personal and family foundations, community foundations, and other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes. Company-sponsored foundations fall under Corporations and are excluded. For Australian schools, please include PAF giving in "Other Organisations" and not "Foundations and Trusts".

Other Organisations (D.4): Entities formed by a group of cooperating donors, such as individuals, institutions, or organisations, for facilitating their fundraising activities. Examples of fundraising consortia include the United Way, Rotary International, sororities and fraternities, and combined fund drives. For Australian schools, PAF giving should be included in this category.

Funds received (D.5): Hard credit is legal credit. Enter the value of funds received that were legally credited to the individual or entity.

Total (Calculated) (D.5): This calculated total must equal the total value of funds received provided in question D.1.

Value of all funds received allocated for endowment funds (D.6): Funds established at a school to support projects, programs, or activities over an extended period. Distributions may be donor designated for specific purposes or, less commonly, unrestricted as to designation but still intended to be invested and managed to provide long-term benefit to the institution.

E. New Funds Committed (Australia)

Number of donors (E.1): The number of individuals or entities that made the donation or pledge within each new funds committed category.

Number of bequest/legacy intentions (E.2): If your institution records bequest/legacy intentions please indicate the number of individuals/entities who made one in the current reporting year.

Value of bequest/legacy intentions (E.2): If your institution records bequest/legacy intentions please indicate the value of bequest/legacy intentions made in the current reporting year.

Number of donors (hard credit only) (E.3): Hard credit is legal credit. Enter the number of donors or entities who received legal credit for the new funds committed. For donor-advised funds, count the sponsoring organization (ex: Fidelity Charitable) as one donor, even if the distribution payments are for more than one household.

New funds committed (hard credit only) (E.3): Hard credit is legal credit. Enter the value of new funds committed that were legally credited to the individual or entity

Alumni/ae (E.3): Graduates of the school and others with a prior academic relationship, including nongraduates, distance learners, residents, honorary degree recipients and honorary alumni. For individuals who attended the school but did not graduate, count those who completed at least one term or one grading period or at least one degree-credit course with passing grades.

Employees (E.3): Individuals who are current or former employees of the school.

Members of Governing Body (E.3): Governing bodies include individuals or members of a board given control or powers of administration of property in trust with a legal obligation to administer it solely for the purposes specified. Some schools may refer to this governing body as the School Council, the Board, the Board of Governors, the Board of Directors, or the Board of Trustees. Do not include donors or donations from trustees emeriti, honorary trustees, or any other person who did not serve actively on the governing body this fiscal year.

Other Individuals (E.3): Any individuals who do not fit into one of the other categories noted above.

Corporations (E.3): Corporations, businesses, partnerships, and cooperatives organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This category also includes company-sponsored foundations, industry trade associations, and the corporate component of matching gifts.

Foundations and Trusts (E.3): Personal and family foundations, community foundations, and other foundations and trusts that are private, tax-exempt entities operated exclusively for charitable purposes. Company-sponsored foundations fall under Corporations and are excluded. The individual donor who encouraged the gift may receive money in soft credit for recognition purposes. For Australian schools, please include PAF giving in "Other Organisations" and not "Foundations and Trusts".

Other Organisations (E.3): Entities formed by a group of cooperating donors, such as individuals, institutions, or organisations, for facilitating their fundraising activities. Examples of fundraising consortia include the United Way, Rotary International, sororities and fraternities, and combined fund drives. For Australian schools, PAF giving should be included in this category.

Total (Calculated) (E.4): This calculated total must equal the total value of new funds committed provided in question E.1.

Value of all New Funds Committed allocated for endowments (E.5): Funds established at a school to support projects, programs, or activities over an extended period. Distributions may be donor designated for specific purposes or, less commonly, unrestricted as to designation but still intended to be invested and managed to provide long-term benefit to the institution.

F. Advancement Staff and Expenditures

Advancement Management (F.3): Chief advancement/development officers and their support staff who function as part of the advancement program and provide general support for all advancement functions. Do NOT include support staff who work exclusively for a functional area. Count them within each appropriate category instead of Advancement Management.

Advancement Services (F.3): Staff whose duties include database management, reporting and data insights, prospect research, gift processing, gift agreement templates, and recognition policies.

Alumni Relations (F.3): Include staff whose primary purpose is building long-term relationships with alumni to develop champions of the school's mission, enhance

participation in the school's activities, and enhance alumni financial support. Duties may include organizing, promoting/maintaining alumni clubs, events such as class reunions, homecoming, alumni boards/committees, and other special programs.

Communications and Marketing (F.3): Include marketing and communications staff who work in direct support of fundraising/development and alumni relations. Staff duties may include informing external audiences of activities, achievements, and priorities; promoting alumni programs and events; direct marketing; public relations; and preparing/producing/distributing print and digital literature (websites, brochures, proposals).

Fundraising (F.3): Include staff whose primary purpose is to secure philanthropic gifts in support of the school. Include staff whose duties include annual giving, major/principal gifts, planned giving, corporate and foundation relations, campaign management, or donor stewardship.

Admissions/Enrolment (F.3): (This refers to admissions/enrolment staff who are considered members of the advancement/development team.) Include staff whose primary purpose is in the realm of admissions/enrolment; duties include activities related to the recruitment, stewardship, and enrolment of new students such as lead generation, application review, prospective student interviews, attending recruiting fairs/events, enrolling new students.

Total Advancement Staff (calculated) (F.3): This calculated total must equal the total number of FTE advancement staff provided in question F.1

Advancement Expenditures (F.5): Include expenditures related to advancement management, advancement services, alumni relations, and fundraising.

Communications and Marketing (F.5): Include expenditures related to communications and marketing work for advancement.

Admissions/Enrolment (F.5): Include expenditures related to admissions and enrolment work within the advancement department.

CASE Test Organization 1

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Data Use Agreement

All participating institutions will be expected to agree to the CASE Data Use Agreement (below). You will not be able to take part if you opt-out of this data use agreement.

	Check here to indicate agreement (REQUIRED)
Have you read and agreed to the data use agreement?	<input type="radio"/> Yes <input type="radio"/> No

Please add the name and title of the individual who has read and agreed to the Data Use Agreement below.

First Name	
Last Name	
Position Title	

Data Use Agreement: CASE Insights on International and Independent Schools Survey

There is no charge for institutions to submit data using CASE's survey tool. All CASE members, as a benefit of membership, will have complimentary access to survey results using CASE's online reporting tool, the CASE Insights data portal. For CASE members, this reporting tool will allow you to see your own institution's data, to see any other submitting institution's data, and to select and save a group of peers and/or aspirational peers to see your data aligned with others'.

All participating institutions, thereby, are agreeing to share their data with other institutions. The data will not be anonymised when shared with CASE members within the CASE Insights data portal. Participating institutions agree not to share any other institution's data with third parties or in the public domain. CASE will only share aggregate anonymised information in the public domain and will only share de-identified results with survey partners to aid in verification of results and producing survey findings.

CASE Test Organization 1

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A. School Details

In this section, please provide information about your school characteristics. Hover over underlined row and column headings for additional help and definitions.

A.1 Please provide the end month and year of your most recently completed reporting year.

	End Month	End Year (yyyy)
End date of most recent reporting year.		

A.2 Choose the currency used to report on this survey.

Currency	
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A.3 Which of the following best describes your school?

School Type	<input type="radio"/> Independent School <input type="radio"/> International School
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A.4 Where is your school campus located?

Country	
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A.5 What was your school's total enrolment as of the most recent reporting year?

- Count all students who were enrolled at the beginning of the academic year in the reporting period.
- Do not provide a rolling headcount for the whole year or just the number of new students registering.

Total Enrolment:	
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A.6 Which of the following residential statuses does your school offer?

Day Programme	<input type="radio"/> Yes <input type="radio"/> No
Boarding Programme	<input type="radio"/> Yes <input type="radio"/> No
5-day Boarding Programme	<input type="radio"/> Yes <input type="radio"/> No
7-day Boarding Programme	<input type="radio"/> Yes <input type="radio"/> No

A.7 Is your school single-sex or coeducational?

Please select your school's designation	<input type="radio"/> Girls only <input type="radio"/> Boys only <input type="radio"/> Coeducational
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A.8 Which age groups does your school cover?

- There are schools in different regions that cover Middle Years differently. Please pick the grouping(s) that most closely describes your students' age groups.
- Please note these groupings refer to the age of the children and not the school year.

	Select Yes for all that apply.
2 years old or younger	<input type="radio"/> Yes <input type="radio"/> No
3-10 years old	<input type="radio"/> Yes <input type="radio"/> No
11-14 years old	<input type="radio"/> Yes <input type="radio"/> No
15 years old and up	<input type="radio"/> Yes <input type="radio"/> No

A.9 In what year was your school founded?

	Enter Year (yyyy)
Year school was founded	

A.10 Please provide information on your school's governing body.

- For the first question, please count individuals who served at any point during the reporting year, even if it was a partial year.

How many individuals serve on your school's governing body?	
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Is this governing body elected, nominated, or a mix?	<input type="radio"/> Elected <input type="radio"/> Nominated <input type="radio"/> Mix
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A.11 Does your school have a parent organisation?

- Parent organisations vary. Some examples include Parent Teacher Association, Boosters, Parents for the School Groups, and Parents and Citizens Associations. If your community has any of these types of parent volunteer groups that support the school, please answer yes.

Parent Organisation	<input type="radio"/> Yes <input type="radio"/> No
If yes, does your parent organisation participate in fundraising for the school?	<input type="radio"/> Yes <input type="radio"/> No

A.12 INTERNATIONAL SCHOOLS ONLY: please provide information on your guaranteed placement programme below.

- Guaranteed Placement Programmes, Debenture, or Corporate Seat Programmes exist at some schools to allow companies to secure openings at international schools to accommodate their international employees' children as needed.
- This question will prohibit data entry unless you select "International School" in question A.3.

Does your school have a debenture or guaranteed placement programme?	<input type="radio"/> Yes <input type="radio"/> No
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	Total Count
If yes, how many seats are part of the programme annually?	

CASE Test Organization 1

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B. Financial Operations

In this section, please provide requested financial data for the reporting year below. Hover over underlined row and column headings for additional help and definitions.

B.1 School Endowment

Does your school have an endowment?	<input type="radio"/> Yes <input type="radio"/> No
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If yes, provide the total value of your endowment at the end of the reporting period.	
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B.2 Tuition Funds

- Please enter the values of gross tuition fees and need-based financial aid tuition remission in the boxes below. The net tuition funds will auto-calculate based on this information.

Gross Tuition Funds	
Need-Based Financial Aid and Tuition Remission Total	
Net Tuition Funds (Calculated)	

B.3 What are your school's total operating expenses?

Total operating expenses	
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B.4 INTERNATIONAL SCHOOLS ONLY: please provide the total tuition and fees paid by companies of current parents.

- Your school type as recorded in section A is displayed below. If you selected "International School" please complete this question. If you selected "Independent School", you will not be able to complete this question.

	Selected Response
School type from question A.3.	

Total tuition and fees paid by companies of current parents	
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C. Advancement Details

In this section, please provide information about your advancement programme. Hover over underlined row and column headings for additional help and definitions.

C.1 In what year did your school begin fundraising?

- This is the year in which your school first invested in a professional fundraising programme.
- Some institutions have historically had separately constituted "alumni associations" with associated dues before investing in a professional office. These do not count.

	Enter Year (yyyy)
Year school started fundraising	

C.2 For how many consecutive years has your school been fundraising?

- Beginning with the financial year reported in this survey, count back the number of consecutive years the school has been fundraising.
- Some schools may have gaps in their fundraising history. Looking at the most recent number of consecutive years allows for more comparable benchmarking.

Number of Consecutive Years Fundraising	
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C3. How many legally contactable members of each of the following groups does your school have?

- Please count individuals and not households.
- Please count those who are legally contactable only. To be considered legally contactable, an individual should be one who is not marked as deceased, for whom you have at least one means of contact (phone, postal address, or email address), and who does not have a total "no contact" status. For example, if the individual only opted out of communications specifically about fundraising, that person is still counted as legally contactable. Do not count individuals who you can contact only via social media, such as Twitter, Facebook, Instagram, etc. and for whom you do not have a current phone number, email address, or postal address.

	Count of legally contactable members
Parents/Guardians of Current Students	
Alumni/ae	
Grandparents of Current Students	
Parents and Grandparents of Alumni/ae	
Employees	

C.4 Does your school have a charitable foundation to receive gifts for the school in your host country or in other countries?

Foundation in Host Country	<input type="radio"/> Yes <input type="radio"/> No
Foundation in Other Countries	<input type="radio"/> Yes <input type="radio"/> No

If you selected other countries, please type those countries into the text box below.

- If the charitable foundations are in more than one country outside of your host country, enter country names separated by commas.

Countries	
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C.5 Campaigns

- A "campaign" is a concentrated effort to raise a specified sum of money to meet a specified goal or goals, normally within a specified period of time.
- Campaigns can be for a specific purpose (e.g., \$15 million for a new building), or can be institution wide, with several specific purposes under a campaign "umbrella." Some campaigns include annual fund returns against their campaign target; others do not. Both approaches are acceptable.
- Campaigns are normally divided into a "quiet phase" (where funds are sought, mostly from major gifts, but the campaign is not publicly announced); and a "public phase" (the period between public announcement of the campaign, and its conclusion).

CASE Insights on Campaigns in partnership with Marts&Lundy is a global survey on educational fundraising campaigns. Learn more about the survey and how you can participate here.

	Were you in a campaign at the end of the reporting year?	If yes, were you in the quiet or public phase?	If public, provide published financial goal of campaign
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Select:	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Quiet phase <input type="radio"/> Public phase	
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D. Funds Received (Australia)

Please use the following definition of Educational Philanthropy from the CASE Global Reporting Standards as you determine what types and sources of gifts to include in this section:

- 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 its 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.

In addition, questions in this section are based on the Funds Received counting method:

- Funds Received is defined as monies and property received within the reporting year from any individual or qualified organisation.
- Include outright gifts, payments received to fulfill pledges made in the current or previous years, irrevocable planned gifts at face value, and funds received from realised bequests/legacies.
- Include all gifts types (cash, checks, credit cards, virtual currency, stocks, gifts-in kind at the fair market value) both restricted and unrestricted.
- Funds Received that meet the definition of educational philanthropy should be included regardless of tax deductibility status to the donor.

D.1 What was the total value raised as Funds Received by your school in the most recent reporting year?

Total value of funds received	
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D.2 What was the total number of individual or entities contributing to your Funds Received in the most recent reporting year?

Total number of donors	
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D.3 Provide the total value of funds received and the count of individuals (decedents) of realised bequests/legacies.

- Both questions below are subsets of total funds received and total donors provided above.
- If multiple payments were received from a single bequest/legacy in the reporting year, only count the estate once in the donor count.

Total value of realised bequests as funds received	
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Total number of realised bequests (decedents)	
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D.4 Funds Received by Constituent Type

- Enter the value of funds received and number of unique donors by constituent type in the tables below.
- For individual constituents there are columns for hard (required) and soft credit (optional).
- For organisational constituents only hard credits are to be included.
- Hard credit funds received and donor counts refer to the last entity (individual or organisation) that had legal control of and transmitted the gift. If a household includes multiple potential donors (e.g., parents and alumni), count only the individual who transmitted the gift.
- Soft credit refers to recognition credit given to individuals who did not make the gift directly, but may be connected to the gift (e.g. spouse of donor or individual connected to a foundation).

INDIVIDUAL CONSTITUENTS

- If an individual falls into more than one category (e.g. alumni, parent, and employee), count the donor and their giving in all applicable categories.
- Do not double count an individual or their giving as both a hard and a soft credit within the same constituency.

	Number of donors (hard credit only)	Number of donors (soft credit only) OPTIONAL	Total donors (hard + soft credit)	Funds received (hard credit only)	Funds received (soft credit only) OPTIONAL	Total funds received (hard + soft credit)
Parents/Guardians of Current Students						
Alumni/ae						
Grandparents of Current Students						
Parents and Grandparents of Alumni/ae						
Employees						
Members of Governing Body						
Other Individuals						

ORGANISATIONAL CONSTITUENTS

	Number of donors (hard credit only)	Funds received (hard credit only)
Corporations		
Foundations and Trusts		
Other Organisations		

D.5 Value of Funds Received by Purpose

- Enter the value of funds received as hard credit in the reporting year by the designated purpose or use of the gift.

	Funds received
Bursaries/Scholarships	
Libraries	
Buildings	
Other restricted donations	
Unrestricted donations	
Total (calculated)	

D6. Of the total funds received in D.1, how much went into an endowment fund?

- This question is only available to schools who selected "Yes" that they had an endowment fund in question B.1.

	Selected Response
Does your school have an endowment?	

Value of all funds received allocated for endowment funds	
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E. New Funds Committed (Australia)

Please use the following definition of Educational Philanthropy from the CASE Global Reporting Standards as you determine what types and sources of gifts to include in this section:

- 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 its 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.

In addition, questions in this section are based on the New Funds Committed counting method. New Funds Committed are new monies and property committed in the reporting year from any individual or qualified organisation. This includes:

- New Pledges - pledges that were secured in the reporting year at their total value.
- Outright Gifts (not associated with a pledge) - A gift to the institution in the current reporting year. Outright gifts can be made by any type of asset including cash, securities (stocks, bonds, and mutual funds), real estate, tangible personal property, and/or retirement plan assets. Gifts in kind are included in this category.
- New bequest/legacy intentions are reported in a separate question. Include bequests/legacies received only if they were not recorded in the survey as an intention in a previous year.
- New Funds Committed that meet the definition of educational philanthropy should be included regardless of tax deductibility status to the donor.
- Do NOT include pledge payments received during the reporting year as New Funds Committed.

To provide global benchmarks and enhance data transparency globally, the number and value of new legacy intentions are collected and reported on separately.

E.1 Total New Funds Committed exclusive of bequests/legacy intentions

	Number of donors	New funds committed exclusive of bequest/legacy intentions
New funds committed exclusive of bequest/legacy intentions		

E.2 New Revocable Bequest/Legacy Intentions

- This is the only section where new revocable bequest intentions are included. Count qualified and documented bequests if the donor is age 65 or older during the reporting year.

	Number of bequest/legacy intentions	Value of bequest/legacy intentions
New revocable bequest/legacy intentions		

E.3 New Funds Committed by Constituent Type

- Enter the value of new funds committed and number of unique donors by constituent type in the tables below.
- Bequest/Legacy intentions should not be included in this question.
- For individual constituents there are columns for hard (required) and soft credit (optional).
- For organisational constituents only hard credits are to be included.
- Hard credit new funds committed and donor counts refer to the last entity (individual or organisation) that had legal control of and transmitted the gift. If a household includes multiple potential donors (e.g., parents and alumni), count only the individual who transmitted the gift.
- Soft credit refers to recognition credit given to individuals who did not make the gift directly, but may be connected to the gift (e.g. spouse of donor or individual connected to a foundation).

INDIVIDUAL CONSTITUENTS

- If an individual falls into more than one category (e.g. alumni, parent, and employee), count the donor and their giving in all applicable categories.
- Do not double count an individual or their giving as both a hard and a soft credit within the same constituency.

	Number of donors (hard credit only)	Number of donors (soft credit only) OPTIONAL	Total donors (hard + soft credit)	New funds committed (hard credit only)	New funds committed (soft credit only) OPTIONAL	Total new funds committed (hard + soft credit)
Parents/Guardians of Current Students						
Alumni/ae						
Grandparents of Current Students						

Parents and Grandparents of Alumni/ae						
Employees						
Members of Governing Body						
Other Individuals						

ORGANISATIONAL CONSTITUENTS

	Number of donors (hard credit only)	New funds committed (hard credit only)
Corporations		
Foundations and Trusts		
Other Organisations		

E.4 New Funds Committed by Purpose (Value Only)

- o Enter the value of new funds committed in the reporting year by the designated purpose or use of the commitment.
- o Bequest/Legacy intentions should not be included in this question.

	Amount committed
Bursaries/Scholarships	
Libraries	
Buildings	
Other restricted donations	
Unrestricted donations	
Total (calculated)	

E.5 Of the total New Funds Committed in E1, how much went into an endowment fund?

- o This question is only available to schools who selected "Yes" in question B.1.

	Selected Response
Does your school have an endowment?	

Value of all New Funds Committed allocated for endowments	
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CASE Test Organization 1

2024-25 CASE Insights on Philanthropy in International and Independent Schools

F. Advancement Staff and Expenditures

The objective of this section is to account for the totality of staffing and expenditures dedicated to all functional areas of advancement including alumni relations, development/fundraising, marketing and communications supporting those areas, and admissions/enrolment if they are part of the advancement team

F.1 Does your school consider admissions/enrolment staff as part of your advancement/development team?

- o If you answer yes, you will be asked to provide additional information in the questions below.

Select	<input type="radio"/> Yes <input type="radio"/> No
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F.2 Provide the total number of full-time-equivalent (FTE) employees working in advancement/development in the survey year, regardless of where they report in the school.

- o If you answered yes in question F.1, include the admissions/enrolment FTE in your answer.
- o Only include paid staff.
- o Exclude non-advancement executives (e.g. heads of school) who may contribute to fundraising efforts.

Total number of FTE advancement staff	
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F.3 Provide the number of FTE employees working in advancement/development in the survey year broken down into six functional categories.

- o Use up to two decimal places to report personnel distribution.
- o The time of a single employee may be distributed over more than one functional area based on time spent in that function.
 - o Example 1: If you have one individual who is responsible for both alumni relations and fundraising, you would enter 0.50 in alumni relations and 0.50 in fundraising.
 - o Example 2: If you have 4 full-time and 3 half-time staff working in a functional area, you would enter 5.50.

	FTE Staff Count
Advancement Management	
Advancement Services	
Alumni Relations	
Communications and Marketing	
Fundraising	
Admissions/Enrolment	
Total Advancement Staff (calculated)	

F.4 To whom does the senior-most advancement professional report?

- o The senior most advancement professional is the leader of the advancement team and programme.
- o Examples of titles include but are not limited to Chief Advancement Officer, Director of Advancement or Development, Assistant Head of School for External Relations.

Select	<input type="radio"/> President <input type="radio"/> Head of School <input type="radio"/> Principal or equivalent position (senior most executive officer of the institution) <input type="radio"/> Vice President <input type="radio"/> Assistant Head of School <input type="radio"/> Vice Principal or equivalent position <input type="radio"/> Other (please specify)
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If you chose "Other," above, please specify here:	
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F.5 Provide total advancement department expenditures in the following three areas: Advancement, including advancement management, advancement services, alumni relations, and fundraising; Communications and Marketing; and Admissions/Enrolment.

- o Expenditures include:
 - o Salaries/Wages: Include the salaries/wages paid for all staff included in the FTE advancement staff counts in question F.1.
 - o Staff Benefits: Staff benefits may include pension, employment insurance, disability insurance, private health insurance, and retirement savings plans. Professional staff benefits may also include car allowances, housing subsidies, memberships, and other perquisites.
 - o All Other Advancement Expenditures: Include all other advancement expenditures that can be attributed to the five functional advancement categories including staff training/professional development, staff travel, volunteer and guest expenses, external contractors, alumni and fundraising events and

programmes, communications (mailing, phones, advertising), printing, IT (hardware, software, leases, subscriptions and maintenance).

- o Only include Senior Staff in the Advancement line item as part of Advancement Management.

Advancement Expenditures	
Communications and Marketing	
Admissions/Enrolment	
Total Expenditures	

CASE Test Organization 1

2024-25 CASE Insights on Philanthropy in International and Independent Schools

G. Feedback

Thank you for your participation in the CASE Insights on Philanthropy in International and Independent Schools Survey. Please take a few minutes to share your perspective on the survey and guidance. We greatly appreciate your feedback.

G.1 Usability

	Select
How would you rate the overall usability of the data-collection tool?	<input type="radio"/> Very difficult <input type="radio"/> Somewhat difficult <input type="radio"/> Neither easy nor difficult <input type="radio"/> Somewhat easy <input type="radio"/> Very easy

G.2 Technical Issues

	Select
Did you encounter any technical issues while using the tool?	<input type="radio"/> Yes <input type="radio"/> No

	Type Here
If you encountered any technical issues, please describe them.	

G.3 Clarity of Instructions

	Select
How clear were the instructions provided within the tool?	<input type="radio"/> Very unclear <input type="radio"/> Somewhat unclear <input type="radio"/> Neither clear nor unclear <input type="radio"/> Somewhat clear <input type="radio"/> Very clear

G.4 Relevance

	Select
Were the questions in the tool relevant to your educational context?	<input type="radio"/> Not at all relevant <input type="radio"/> Somewhat irrelevant <input type="radio"/> Neither relevant nor irrelevant <input type="radio"/> Somewhat relevant <input type="radio"/> Very relevant

G.5 Question Difficulty

	Select
Were there any questions you found difficult to understand or answer?	<input type="radio"/> Yes <input type="radio"/> No

	Type here
Please specify which questions and why.	

G.6 Time Spent

	Select
How long did it take you to complete the survey?	<input type="radio"/> Far less time than expected <input type="radio"/> A little less time than expected <input type="radio"/> About as much time as expected <input type="radio"/> A little more time than expected <input type="radio"/> Far more time than expected

Check all that apply

<p>What section of the survey took the longest?</p>	<ul style="list-style-type: none"> o A. School Characteristics o B. Financial Operations o C. Advancement Details o D. Funds Received o E. New Funds Committed o F. Advancement Staff and Expenditures
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G.7 What features or questions would you like to see added to the survey in future updates?

<p>Suggestions</p>	<p style="text-align: center;">Type here</p>
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G.8 Any additional comments or suggestions?

<p>Additional Comments or Suggestions</p>	<p style="text-align: center;">Type here</p>
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