

CASE InsightsSM on Advancement at Historically Black Colleges and Universities

Leveraging Data and
Promoting Engagement

Sponsored by

 **TIAA** Institute

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COUNCIL FOR ADVANCEMENT
AND SUPPORT OF EDUCATION



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CASE thanks Spelman College for hosting a gathering of HBCU advancement professionals that informed this report.

Finally, this report is based on the information and insights that HBCU advancement professionals shared through polling and at two extended focus groups. We are grateful to them for generously giving their time and for candidly sharing their experience and expertise. This report reflects the excellent work that they do on behalf of their institutions, students, alumni, and broader communities. See the Appendix for a complete list of the institutions whose staff participated in this project.

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ABOUT CASE

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

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

Through CASE InsightsSM, CASE is the world leader in providing data, standards, and research to help institutions and advancement professionals make data-informed decisions and achieve their goals.

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



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CONTENTS

Foreword	4
Introduction	6
Context: Advancement Challenges and Opportunities Nationally and at HBCUs	7
National Advancement Trends	7
HBCU Advancement Indicators	8
Focus Group Discussion on Context	9
Leveraging Data	11
Advancement Management	11
Fundraising	11
Communication	12
Promoting Engagement	14
Cultivation of Alumni Relationships	14
Volunteer and Giving Opportunities for All Alumni	15
Events that Build Engagement and Promote Giving	15
Planned Giving	16
Next Steps: CASE and HBCUs	17
Appendix: Participating Institutions	18
Notes	19
What is Case InsightsSM?	20
Data. Standards. Research.	21

FOREWORD

I am honored to introduce the inaugural ‘CASE InsightsSM on Advancement at Historically Black Colleges and Universities’, an extension of our commitment to support every institution within our advancement community. HBCUs have shaped higher education in profound ways – creating cultural pride, fostering leaders who uplift their communities, and demonstrating how a strong sense of inclusion and belonging can fuel lifelong relationships.

“As a three-time HBCU graduate, raised by HBCU-educated parents, and now the mother and grandmother of HBCU alumni, I know firsthand that HBCUs deliver exceptional education. Since the 19th century, these institutions have educated generations of elite doctors, lawyers, teachers, scientists, and countless other professionals. When you support an HBCU, you support an educated populace.”

Dr. Vita T. Pickrum, Founder,
HBCU Philanthropy Symposium;
former CASE Board member.

This publication, the first of its kind, reflects the immense value of HBCU voices and the critical role they play not only in the U.S., but as beacons for colleagues around the world. As Rob Henry, Vice President, People, Culture & Talent at CASE, states, “HBCUs are the heartbeat of education and the foundation of resilience. CASE’s work is to acknowledge the excellent advancement work that occurs at these institutions.”

In our analysis, philanthropic support per full-time student ranged from about \$270 to over \$51,000, revealing differences in institutional resources and, simultaneously, the HBCUs’ exceptional capacity for growth. Even more remarkable, every participating HBCU posted robust year-over-year gains – evidence of a focused and strategic commitment to engagement that echoes their long history of perseverance and achievement.

While alumni donor participation has declined across higher education, HBCUs have experienced less reductions – and those who remain philanthropically engaged demonstrate a strong commitment across every dimension – from giving and volunteering to mentorship and advocacy. That profound sense of connection, rooted in shared tradition and collective triumphs, energizes alumni to provide their time, expertise, and voice, strengthening their alma maters and enriching higher education as a whole.

Beyond their own campuses, HBCUs exemplify how cultural pride can be harnessed for transformational advancement. Advancement teams from across the world can draw inspiration from these institutions who so successfully build on a strong sense of heritage which can create a deep engagement with their communities. It is that same intrinsic bond—far more than a transactional exchange—that underpins advancement programs at HBCUs, transforming institutions by fueling student success, fostering innovation, and elevating their missions on the global stage.

From the survey, there is also a clear imperative to invest strategically in staffing. Dedicated teams are essential both for weaving advancement into the fabric of campus life and for leveraging data to tell HBCUs’ stories. With strong staffing, institutions can sustain survey participation – gathering data, analyzing results, and showcasing accomplishments. When advancement professionals work shoulder-to-shoulder with

institutional leadership; and with academic, student affairs, and administrative colleagues, every breakthrough, act of service, and story is captured and celebrated.

This timely report marks the beginning of a partnership founded on listening, learning, and growing together. As Reshunda Mahone, Associate Vice Chancellor for Alumni Engagement and Annual Giving at North Carolina State University and CASE Insights Volunteer, notes, “CASE has long been a trusted partner, champion, and advocate for advancement teams at Historically Black Colleges and Universities. This research not only provides valuable context, outlines current need and opportunities, but also serves as a catalyst for continued learning, achievement, and future research.”

As CASE refines our surveys and tools, we invite every HBCU to lend your voice, share your data, and shape our collective insights. By participating in future surveys, you ensure that CASE can craft resources and analyses that honor the scale and ambition of the HBCU community. Thank you to everyone who contributed to this first edition – and to all who will join the journey ahead. Together, we will honor HBCU legacies and forge new pathways for advancement, here in the United States and across our global CASE community.

Sue Cunningham

President and CEO, CASE

INTRODUCTION

This report summarizes the lessons learned from a CASE project that focused on an important and longstanding sector of American higher education, Historically Black Colleges and Universities (HBCUs). These 101 institutions were established, often under sanctioned segregation and “separate but equal” policies, with the mission of educating African Americans. These colleges and universities have played – and continue to play – a critical role in American society and are credited with creating the African American middle-class,¹ and with producing many prominent graduates.²

CASE undertook this project for several reasons:

1. To take stock of the current state of advancement at HBCUs;
2. To learn how CASE can best support advancement professionals at HBCUs;
3. To gain insights from HBCUs that will help CASE members and other advancement professionals create stronger connections to their alumni and other key supporters.

With support from the TIAA Institute, CASE collected information from HBCU advancement professionals through a survey and two extended focus groups: an in-person meeting at Spelman College in March 2025 and a virtual gathering in April 2025. Sixty-seven advancement professionals attended these meetings, representing 12 public and 8 private HBCUs (see Appendix for a list of participating institutions). To supplement this information and provide additional context, CASE conducted special analyses of HBCU responses to its Voluntary Support of Education (VSE) and Alumni Engagement surveys.

Through these activities, CASE sought to understand the challenges confronting these institutions, the contours of HBCU advancement programs, and the high-impact strategies HBCUs employ that are instructive to peers within that sector and to the larger advancement community.

As described by Dr. Brandy Jackson, Assistant Dean of the Howard University College of Education, this project is important because:

HBCUs continue to face significant challenges in building endowments, increasing annual giving and securing major financial gifts.³ A study by Chabotar found that 90% of private HBCUs rely almost entirely on student tuition and fees as their primary source of operating revenue, highlighting their financial vulnerability.⁴ Additionally, state legislatures have historically allocated less funding to HBCUs compared to predominantly White institutions, further compounding disparities in financial resources.⁵ In addition, existing philanthropic scholarship has largely centered on the giving behaviors of White donors, often overlooking the diverse motivations and practices within communities of color.⁶ This lack of inclusive research limits a comprehensive understanding of fundraising potential among underrepresented groups. Further, in philanthropic research, African Americans are often depicted primarily as recipients of charitable giving, rather than as active participants, leaders, or influencers within the philanthropic landscape.⁷ This narrow framing overlooks the agency and contributions of Black individuals in shaping and sustaining philanthropic efforts. There remains a critical need for both qualitative and quantitative research that explores the specific roles, responsibilities, and lived experiences of fundraisers at Historically Black Colleges and Universities (HBCUs). As Tindall emphasizes, such studies are essential to understanding ‘the roles that constitute the duties and experience of fundraisers at historically Black colleges.’⁸

CONTEXT:

Advancement Challenges and Opportunities Nationally and at HBCUs

To provide context for the focus groups, CASE staff analyzed and presented information on trends in advancement at U.S. higher education institutions generally, and at HBCUs. During the focus groups, participants described their own contexts. This section summarizes this information.

National Advancement Trends

The CASE team presented a number of national trends, drawn from CASE reports and other sources, that often resonated with the experience of advancement staff at HBCUs.

- Advancement is an engine for institutional revenue, with growth in fundraising (58% increase from 2010 to 2021) outpacing growth in tuition revenue (23% increase during the same period).⁹
- At the same time, there is a downward trend in public attitudes toward higher education,¹⁰ and as a gift destination, education has dropped to number three in total philanthropic giving in the U.S.¹¹, behind religious and human services organizations, as the number of public charities grows.¹²
- These shifts appear to have negatively impacted both giving and engagement, as seen in falling contributions and declining voluntarism.
 - There was an 11% decrease in alumni giving from 2022 to 2023, and total charitable giving to higher education declined by \$1.5 billion from FY2022 to FY2023. Furthermore, the number of donors who gave \$50,000 or more fell by 7.4% over the same period.¹³
 - There was a 7% decline in the number of Americans who volunteered from 2020 to 2021; 23% of Americans volunteered, the



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revenue

lowest rate since these data were first collected in the early 2000s.¹⁴

- Likewise, the percentage of higher-income individuals (\$100,000 or more) who volunteer dropped from 76% in 2017 to 68% in 2021.¹⁵
- Forty-seven percent of nonprofit CEOs report that recruiting sufficient volunteers is a big problem.¹⁶
- Despite these challenges, institution boards and presidents see advancement as a solution to help close revenue gaps.¹⁷ However, many leaders also expect advancement to do “more with less” and have cut advancement budgets as part of general belt-tightening in higher education.¹⁸
- A piece of good news is that the donor base is becoming more diverse. Today, people of color are one in six millionaires, with that proportion set to grow as the population continues to change.¹⁹ Further, \$30 trillion in U.S. wealth is expected to be transferred to younger women by 2030.²⁰

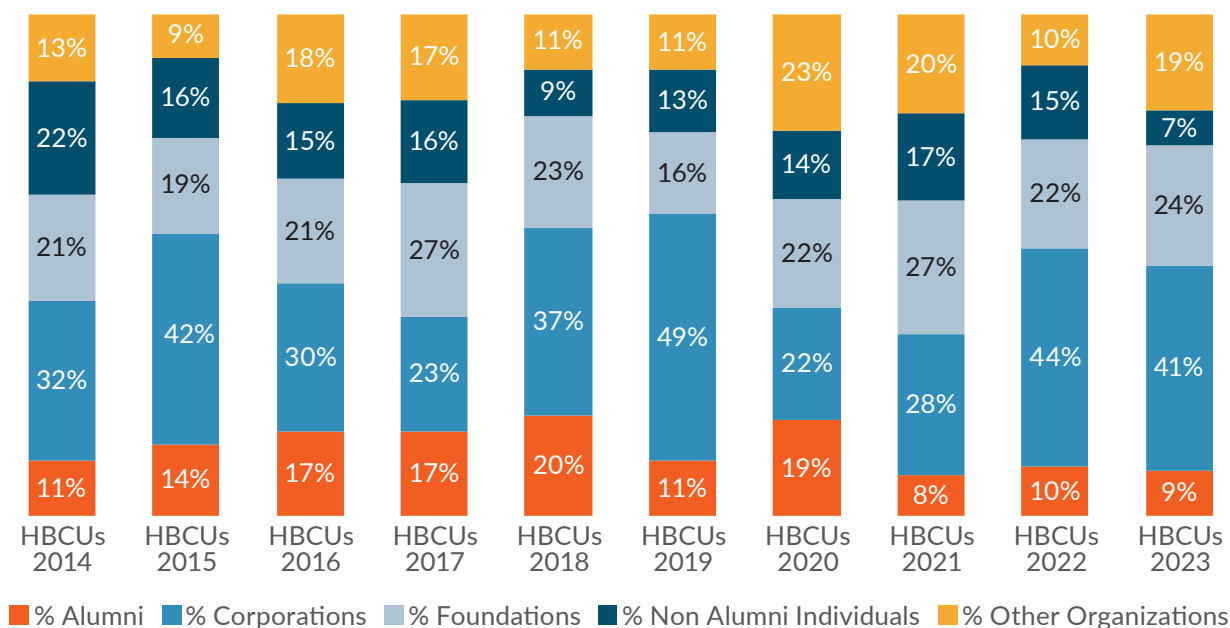
HBCU Advancement Indicators

During the virtual and in-person focus groups, the CASE team also presented information on advancement at HBCUs as reported through CASE surveys. The data shared represented 22 HBCUs that participated in the most recent CASE Voluntary Support of Education (VSE) survey, or that had participated for the prior three years but not in the most recent cycle. These institutions include 15 public four-year universities and seven private four-year colleges and universities. None of the 12 two-year HBCUs participated in CASE surveys during this period.

PHILANTHROPIC GIVING TO HBCUs

- As one might expect among respondents that range from small regional institutions to national research universities, giving to HBCUs varied widely, from \$270 in total philanthropic funds received per full-time equivalent student to \$51,700.

- Likewise, funds received from philanthropy varied considerably as a percentage of total institutional expenditures but averaged 10.4%, which is consistent with the average for all VSE respondents and reinforces the concern expressed by participants that philanthropy cannot close the revenue gaps that exist at most HBCUs.
- For philanthropic funds received, the compound annual growth rate (CAGR), which is a measure of average growth over time, was robust at 10% (5% or more is considered ideal). Every survey participant had a positive CAGR.
- HBCUs appear to be somewhat more reliant on large gifts, primarily from corporations and foundations, than VSE respondents generally. At the median, 33% of funds received came from 12 large gifts. Among all VSE respondents, the median was 29%. Less than 20% reliance on the largest gifts is considered ideal.



DONORS

- The alumni donor participation rate has declined at HBCUs from 6.3% in 2014 to 5% in 2023. In that same time period, the decline for all VSE respondents was steeper, falling from 7.7% to 5.1%. It is important to note that this rate is calculated by dividing the number of donors by the number of legally contactable alumni, so if the alumni base has grown, the rate can decline even if the absolute number of alumni donors has increased.
- Corporations and foundations donated the largest shares of funds received by HCBUs, at 41% and 24%, respectively. These donors have consistently provided the largest shares of funds received since 2014. The share of funds donated by alumni appears to have declined, but there has been an increase in the share of funds received from “other organizations,” including donor-advised funds. It is likely that some alumni giving is now made through these vehicles.

Only two HBCUs participated in the CASE InsightsSM survey. Both institutions excelled, with one having the highest percentage of alumni engaged experientially and philanthropically among selective private colleges and universities and the other having the highest count of engaged alumni per advancement staff. These institutions are clearly meeting the leadership expectation to “do more, with less,” which was a common theme expressed by participants.

In addition to analyzing existing survey data, CASE administered a short poll to focus group attendees that provides additional context about the attendees and their institutions.

- Attendees were varied in their experience level, with most having 10 years of experience in advancement or less, but a few have worked in

the field for more than 15 years. Likewise, most held staff or director-level positions, and several were in senior leadership.

- To get a sense of the scope of philanthropic giving at the participant institutions, the poll asked for the level of giving that qualified as a major gift. Most attendees reported that gifts exceeding \$25,000 or \$50,000 were considered major at their institutions.

Focus Group Discussion on Context

During the in-person focus group held at Spelman College the discussion began with attendees identifying political, economic, and institutional challenges that affect their work.

POLITICAL CHALLENGES

- The rapidly evolving federal political landscape has made it challenging to determine long-term plans. There was significant concern expressed about loss of federal funding through Title III of the Higher Education Act and the impact that would have on staffing and other operational needs. Subsequent to these discussions, Congress has begun to debate sharp cuts to student loans programs, which would have significant adverse effects on HBCUs.
- Attendees stressed that the advancement team needs to keep donors and alumni informed and to galvanize them to step in if federal funds are lost.
- Attendees also expressed concerns that attacks on diversity, equity, and inclusion (DEI) policies could negatively impact HBCUs.
- The current climate of increased scrutiny of higher education has led some donors to question the importance and value of giving to colleges and universities.

ECONOMIC CHALLENGES

- Inflation has affected all of higher education, raising institutional costs and increasing reliance on philanthropic giving.
- An economic downturn may lead to decreased giving as donors have less to spend and may conclude that colleges and universities do not have the greatest need for their philanthropy.

INSTITUTIONAL CHALLENGES

- A vicious cycle could develop in which reduced giving leads to less institutional support for advancement, which would in turn lead to reduced donations. Already, participants noted that they have difficulty hiring for specialized roles such as prospect research because they cannot pay a competitive salary, and not having the right personnel can impede their fundraising efforts.
- Participants agreed that the active engagement and support of institutional leaders, including board members, is essential, both to understand and support the role of advancement and to act as the institution's fundraisers, networkers, spokespersons, and advocates. Some participants praised their presidents for being active on social media and for serving as high-profile champions for their institutions.

LEVERAGING DATA

Focus group participants recognized the value of using data for multiple purposes. A key element of successful advancement work is telling the institution's story. One survey respondent said:

“Better data can help [our institution] tell its story by showcasing student success, alumni achievements, and community impact. It strengthens fundraising, recruitment, and strategic planning while ensuring transparency and compliance. With clear, evidence-based insights, [our institution] can highlight its legacy, growth, and commitment to excellence.”

Advancement Management

Within advancement, participants discussed using data to demonstrate impact, provide transparency, inform strategic plans, and make the case for resources. Specific uses included:

- Identify areas of focus and success across the entire advancement organization (alumni relations and communication as well as philanthropy)
- Benchmark against peer institutions
- Communicate regularly with senior leadership
- Demonstrate return on investment
- Make the case for resources

Fundraising

Having the right data can help institutions develop narratives that highlight the impact of donations. Participants agreed that HBCUs have a great story to tell regarding how philanthropy directly supports students. According to the FY2023 VSE, 95% of funds donated to endowments at HBCUs are directly designated to students, compared with 40% generally.

That said, no amount of data can take the place of a story that illustrates the value and impact of a gift.



Focus on
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that do not ask
for a donation

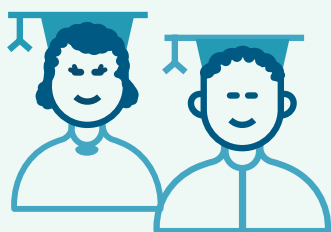
To tell that story – and build a personal connection between donors and students – attendees suggested the student beneficiaries share personal updates with donors.

A participant described using the concept of gap funding – the amount of funds that students need to complete their degrees – to make the case for philanthropic support. This approach marries data with a personal story to great effect.

“The thing that we added this year was gap funding to let people know that students needed additional funds to be able to graduate. It went over tremendously.”

Another important use of data is identifying individuals to target for fundraising appeals. Participants discussed using wealth screening tools and prospect research to identify and assess alumni and other prospective donors. They also used these

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tools to help the institution identify prospective board members who could make a significant donation themselves or who could help the institution connect with other potential supporters.

“So, as people are rolling off the board, how are we strategically recruiting those to come on? And when we’re doing board of trustee recruitment, let’s pull [data on] who we’re thinking about, so we can see who is in their network. Because your net worth is your network.”

An attendee also mentioned reaching out to parents of new students to identify individuals who may be willing to contribute. Simply surveying incoming parents about their interest in providing support yielded a significant gift to this attendee’s institution.

Participants also talked about using the CASE InsightSM on Alumni Engagement Survey to identify alumni who interact with the institution through experiences, volunteering, or communications but who are not yet donors. By further parsing that data to identify highly engaged alumni, advancement

staff can use their time wisely and concentrate on converting active supporters into donors.

Communication

A major use of data is to understand alumni interests and preferences and to customize communication so that it is most effective. Attendees discussed surveying alumni and using the results to customize and personalize communications, aided by specialized communication software. These tools enable HBCUs to provide regular, meaningful touchpoints with alumni that reflect their interests. Not only does this approach forge a closer tie between the institution and alumni, but it also aligns with the sort of “user experience” that many of us are accustomed to in other aspects of our lives.

“We had a good survey that went out my first year to really help people to spell out their interests. And similar to Netflix, we now have a curated model where if you’re only interested in learning about athletics or the College of Business, that’s the only information we’re going to send you regularly. I’ve seen some of these giving trends improve for us because we are offering the customizable experience a lot of the younger generations, including millennials, are anticipating and expect.”

A recurring theme in the discussions was the importance of creating meaningful, regular touchpoints with alumni that do not involve asking for a donation. Communications can include activities and events that align with expressed interests as well as updates on the impact of prior gifts. Establishing a schedule of communication is important so that alumni know that they can expect to hear regularly from their alma mater.

“We’re seeing a lot of success because of the quality of our content and the touch points. Alumni feel like there’s really a relationship that is forged versus just a transaction.”

In addition to collecting and using data to customize the content of communications, it is important to pay attention to preferred modes of communication, and not to make assumptions based on age or other factors. A busy young professional may not have time to read emails and may prefer an occasional phone call and a retiree who regularly FaceTimes with family members may prefer a video message to a piece of direct mail.

“I’m learning there’s no bright line. It’s really not age. I have older people who love the video messages and younger people who want the mailers.”

While numerous attendees praised the use of software systems to help generate and manage customized communication, they also emphasized the importance of personal outreach. If an alumnus is willing to be called, a personal phone call to check in or express thanks for a gift can be deeply appreciated.

Finally, data can play an important role in getting details right that make a big impression. A small but significant gesture is ensuring that names are used and pronounced properly. An attendee talked about collecting short audio files from alumni in which they say their name. By attaching these files to alumni records, advancement staff can avoid embarrassing mistakes and demonstrate care, concern, and respect.

“It’s the intentionality of it. It makes the donor walk away feeling empowered.”

PROMOTING ENGAGEMENT

Alumni engagement is much more than an avenue for fundraising. It is a good unto itself, and it benefits the institution in many ways that extend well beyond fundraising. Cultivating long-term alumni engagement was a major topic of discussion at both focus groups, and it yielded a wide variety of practices that HBCUs have employed successfully to build vibrant alumni networks.

Cultivation of Alumni Relationships

STUDENTS

Participants emphasized that alumni relationships begin before students graduate. It is important for students to see that the institution wants to have a long-term relationship and that their affiliation with the institution is lifelong. By engaging students, an advancement office can establish a cadre of young alumni leaders who will help engage their peers.

Attendees recommended several strategies for engaging students. One attendee suggested hiring student interns in the advancement office. Not only do these students develop a relationship with the advancement team, but some like the work so much that they go on to careers in philanthropy. This experience has sparked discussion with business faculty about formalizing a program.

“When I look at the younger people who are working in advancement, they started by accidentally interning or doing a phone-a-thon and they figured out that they loved it. Well, why can't we begin to develop a program within our institutions? And so, this is something I've been talking to the business school about to develop philanthropy as a career.”

Another participant recounted that their institution recruits student government leaders and the Homecoming “Royal Court” to serve as student ambassadors at football games and other alumni events. After graduation, the alumni relations office continues to recognize these individuals at events such as homecoming. Student leaders typically have a strong connection to the institution and can transition naturally into a leadership role as young alumni.

Establishing mentor relationships between students and alumni is a win-win-win. The student gains a trusted advisor. The alumnus experiences the satisfaction of connecting with a young person and of sharing their experience and expertise. And, for the institution, the recent graduate who has benefited from mentoring has a built-in connection to the network of active alumni.

Another attendee reported that their institution sponsors a “pre-alumni” student group, and that members of this group are recognized with a special cord to wear at graduation when they make a nominal donation.

YOUNG ALUMNI

Attendees reported that young alumni, or recent graduates, in particular are most interested in giving opportunities that have immediate impact. For example, young alumni may be attracted to the “gap funding” concept because they would see the direct benefit of their gift.

As volunteers, young alumni often prefer to have specific roles and responsibilities that keep them engaged and motivated, and that result in a tangible outcome. They volunteer for a sense of personal satisfaction and, sometimes, to build their personal and professional networks. As a result, they also typically enjoy helping with larger events and activities that will allow them to network socially and professionally with fellow alumni.

Even when institutions have active programs for young alumni, as they start families and are in that particularly busy phase of life, it can be easy to lose touch. Attendees discussed the importance of creating volunteer opportunities and events that connect alumni with others in similar circumstances and that welcome spouses and children into the alumni circle. For example, an institution sponsored an alumni cook-out that featured games and toys for children of varying ages. Events such as these are attractive to young families and offer alumni an opportunity to connect with peers.

“I think sometimes we’re missing that middle group of our alumni [between young and older alumni]. There’s this middle group like myself, where some of us might have families, we might have spouses. Oftentimes those engagement opportunities don’t include those people in our circle. Nor am I being connected to people in that same phase of life. If we can look at opportunities where we can connect volunteers with other volunteers in their same walk of life, then we have opportunities for more volunteer engagement.”

Volunteer and Giving Opportunities for All Alumni

As already noted, alumni engagement is not only valuable as a means of securing donations. It is a good unto itself and benefits the institution in many ways. During the focus groups, attendees emphasized the importance of providing means for all alumni – regardless of their financial circumstances – to engage with the institution and be recognized for their contributions.

Participants called out the following strategies:

- Partner with the “Divine Nine” fraternities and sororities to promote service opportunities for alumni, both at the institution and in the wider community

- Recognize the contributions of alumni who volunteer, including those who do not or cannot give

“A lot of times we look at someone who has given the most as a person who will do the most for us, and they’re not necessarily the same person. Someone may write a check for \$50,000, but they don’t volunteer their time.”

Especially because many HBCUs serve students and families that have limited financial resources, it is important to dispel the myth that “philanthropy” is only for the wealthy. Attendees emphasized it is important to help donors understand that all gifts matter, and to provide opportunities for stacking small gifts over time. By giving small amounts on a regular basis, alumni can have a major impact.

Events that Build Engagement and Promote Giving

Participants described a number of events that catalyze engagement and giving. Some of these events may be familiar, but can be approached in new ways to more fully engage alumni.

Several participants reported outstanding results from investing in giving days. For example, one participant has seen giving increase from \$125,000 on the first day of giving to \$700,000. The key to success was spotlighting students through an eight-hour, live student-produced broadcast.

“For the first time ever, we had an eight-hour live segment associated with day of giving produced by our TV broadcast center, which consists of 35 plus students that actually led the entire broadcast. We demonstrated in action the students that your investments are supporting.”

Participants also cited the value of using a giving platform that enabled donors to see – and be recognized for – their gifts in real time.

Not surprisingly, many galvanizing events center around sports. Participants talked about providing an elevated experience at home football games for important supporters. An “investor tent” can be visited by student ambassadors, the band, mascot, cheerleaders, and institution leaders as a way of making alumni feel special and ensuring that they enjoy and look forward to attending campus events.

Likewise, out-of-town games are a great time to meet with alumni who don’t necessarily travel back to campus, and to connect with local alumni organizations. Attendees reported that they try to create experiences that extend beyond the game, including volunteer opportunities in the local community.

Homecoming is a major event at many HBCUs and draws alumni and community members for a wide array of celebrations and activities. Attendees mentioned other events that can provide an opportunity to convene and rally alumni, including founding anniversaries, commencement ceremonies, and the installation of a new president.

Planned Giving

Planned Giving is not always a longstanding feature of the giving programs at HBCUs – and the term may not be broadly familiar – so attendees emphasized the importance of educating alumni about the concept and also branding it in a way that makes it more broadly accessible.

“No one knows what that term means. And so, I’ve had to change the language to ‘legacy giving,’ something that makes a little bit more common sense to folks, something that resonates a little better.”

Once an institution has a critical mass of alumni and other supporters who have committed to planned giving, establishing a dedicated group for those individuals and engaging them as ambassadors is a strategy that attendees recommended.

“The most successful discovery tool for us has been for our Legacy Society members to connect with like-minded individuals and to give the testimony of why they left a legacy gift. Most of my prospects actually come from the Legacy Society, not from our general prospecting pool because we have to start with a lot of education. I think a combination of the education, the ambassadors through our Legacy Society, and just consistent marketing of the term have been our keys to success.”

A traditional assumption about planned giving is that it is a discussion to have with older, longstanding donors. However, an attendee made a compelling case that it is the millennial generation that is actively engaged in estate planning and should be engaged in discussion regarding legacy giving.

“When you look at the population age-wise, who is estate planning at the highest rates, it’s millennials. It is because millennials, we’ve been experiencing near death since adulthood with, you know, Y2K and 9-11 and a mortgage crisis and recession after recession and COVID. Every seven years, we’re here again. So, we’re very much aware. And, we’re also the new sandwich generation where you have a lot more millennials who are caring for parents as well as starting their families at the same time. They see the burden. So, millennials are already there. You don’t have to do a lot of education regarding estate planning and legacy planning.”

NEXT STEPS: CASE AND HBCUs

As this project draws to a close, CASE has taken stock of what it has learned and is considering how it will incorporate those lessons into its ongoing work.

This project has opened up a new level of dialogue between CASE and the HBCU advancement community. CASE has benefited from listening to the sector- and institution-specific challenges, needs, and advantages of HBCUs, and recognizes that “national trends” do not always apply to this sector of American higher education.

CASE intends to continue creating space for HBCU advancement professionals to compare notes and learn from each other. Upcoming opportunities include:

- HBCU Philanthropy Symposium (July 6-10, 2025 in Lake Buena Vista, FL)
- UNCF UNITE Conference (July 20-24 in Atlanta, GA)
- CASE District III Annual Conference (February 8-10, 2026, in Nashville, TN)

Additionally, CASE leadership is discussing options to dive deeper into topics that might be helpful to individual HBCUs.

CASE identified the following potential next steps, and welcomes feedback from HBCU advancement staff on which efforts would be particularly helpful:

- Create a video tutorial on how to submit data for the Voluntary Support of Education (VSE) survey
- Provide training opportunities for student workers at HBCUs on advancement concepts
- Conduct peer analysis for institutions to show growth rates and to help demonstrate the impacts of investments in advancement
- Provide data on how institutions determine what constitutes a major gift

- Share best practices on how institutions collect VSE data over time to streamline the submission process
- Reach out to HBCUs not currently participating in CASE surveys to understand barriers and encourage participation
- Provide more granular data comparing HBCUs to public land-grant institutions, allowing for deeper comparisons across institutions founded under the two very different land-grant programs (1862 and 1890)
- Analyze and share data on alumni engagement rates for HBCUs compared to PWIs

Focus group participants also identified several next steps for themselves, including:

- Consider participating in the Voluntary Support of Education (VSE) and Alumni Engagement surveys if not already doing so
- Explore using tools like Foundation Directory for prospect research with student workers
- Review the CASE Global Reporting Standards, which includes ethics statements and principles of practice for advancement professionals
- Explore participating in the UNCF Unite Conference (<https://uncfcb.org/unite/attend/>)

Together, CASE and HBCU advancement staff can learn from the strategies highlighted in this report to help institutions with campaign planning, advocacy for increased staffing & investment, and engaging faculty, boards, and institutional leadership in more productive collaboration with their advancement colleagues.

APPENDIX: PARTICIPATING INSTITUTIONS

Bennett College (NC)
Bethune-Cookman University (FL)
Bowie State University (MD)
Clark Atlanta University (GA)
Elizabeth City State University (NC)
Fayetteville State University (NC)
Fort Valley State University (GA)
Grambling State University (LA)
Hampton University (VA)
Lincoln University (MO)
Meharry Medical College (TN)
Morehouse College (GA)
Morris Brown College (GA)
Norfolk State University (VA)
North Carolina Central University
Oakwood University (AL)
Savannah State University (GA)
Spelman College (GA)
Virginia State University
Wilberforce University (OH)

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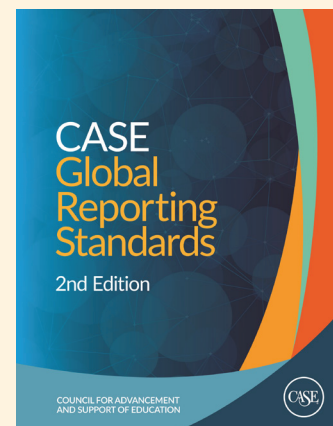
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CASE is the home for advancement professionals, inspiring, challenging, and equipping them to act effectively and with integrity to champion the success of their institutions. CASE defines the competencies and standards for the profession of advancement, leading and championing their dissemination and application for more than 90,000 advancement professionals at 3,100 member institutions in 80 countries.

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