

CASE Impact Report 2017



Advancing
education to
transform lives
and society.



89,000

advancement practitioners
at member institutions

Advancement encompasses the work of advancement services, alumni relations, communications, fundraising and marketing professionals who build relationships that contribute to the success of schools, colleges and universities.

We Have Much to Honor

“We are most proud of the work CASE staff, volunteers and members have engaged in to advance education across the globe.”

As we reflect on what CASE has accomplished in 2017, we are filled with deep gratitude. As you may know, at the end of the year the CASE Board of Trustees approved our governance model redesign that evolved directly from *Reimagining CASE 2017–2021*, the CASE strategic plan. Thousands of CASE volunteers and members shaped the new plan through numerous meetings and conversations. It was a profoundly consultative process, driven by our magnificent CASE volunteers. The governance redesign process has followed a similar approach.

We look forward during the coming months to what comes next: the detailed development of the design with our district, regional and international volunteers. We will update you on developments as we proceed and also in next year’s report.

This publication is a celebration of 2017, and we have much to honor. CASE membership hit record high numbers: more than 3,700 institutions and nearly 89,000 individuals. Readers of digital *Currents*, only three issues into the new platform, surpassed our print distribution. More than 31,000 members and others participated in CASE conferences, workshops and webinars.

We are most proud of the work CASE staff, volunteers and members have engaged in to advance education across the globe. The schools, colleges and universities CASE represents have worked hard to share their stories, garner support and encourage advocacy on behalf of your own institutions and all of the educational sector combined.

We salute you for all that you do to advance education to transform lives and society. Please enjoy the highlights of what we have accomplished together. We welcome your continued engagement and feedback.



Sue Cunningham
President and CEO, CASE



J. Michael Goodwin
FY16–17 Chair, CASE Board



James T. Harris III
FY18–19 Chair, CASE Board

Reimagining CASE 2017–2021

2017 was a year of progress in advancing the first-year objectives of our strategic plan, *Reimagining CASE 2017–2021*. Of particular significance was the CASE Board of Trustees' approval of a new governance structure—a first step toward our vision of creating a “One CASE” that provides members with a seamless CASE experience—regardless of where they work.

In the following pages, we will share the impact that we made together in these key areas:



Member Engagement

CASE will ensure member loyalty and engagement by providing exceptional value, quality service and expanded opportunities.



Thought Leadership

CASE will be the leading voice on issues of interest to education leaders and professionals whose work advances their institutions.



Talent Management

CASE will be the leading global resource for professional development for an expanding, highly talented, diverse workforce framed by a professional lifecycle, a common curriculum and consistency of delivery.



Global Impact

CASE will play a pivotal role in advancing education globally by engaging with key stakeholders to build educational capacity, impact and success across the world.



80,000+

advancement professionals and stakeholders follow CASE on social media.



More than **2,500** members, volunteers and partners participated in strategic plan development.



CASE placed nearly **100** interns at 68 North American institutions.



New e-Mentoring platform

provides online opportunities for professionals at all levels, worldwide, to share knowledge and enhance their careers.



More than
31,000
participated in conferences,
workshops and webinars.

CASE celebrated record membership with

3,742

institutions in October 2017.



Grow membership.

Completed market research for 50 percent membership growth outside of the United States and Canada.

Advocate for data understanding.

Created conference providing advice and guidance on General Data Protection Regulation.

Share knowledge.

Created an executive symposium for community college CEOs to share knowledge and interest in advancement.



Celebrated 10 years

of growth in educational philanthropy at the CASE Asia-Pacific Advancement Conference in Singapore.



Recorded roughly 1.4 million visits

on CASE website from 221 countries and territories.



Launched study tour

of U.K. institutions with participants from Canada, Hong Kong, Kenya and Ghana.



Grew member-engagement activities

in Mexico and Colombia, helping drive 20 percent growth in membership.



CASE responded to the feedback that we received from our membership worldwide in building a more inclusive and accessible set of membership benefits.

MEMBER ENGAGEMENT

Connecting CASE People

Membership in CASE hit a historic high as colleges, universities and K-12 private schools responded enthusiastically to a new global membership structure.

Advancement staff enjoyed access to all traditional CASE benefits as well as complimentary webinars, the CASE Library resources, digital *Currents* and other new features.

Also contributing to our record growth was a strong focus on member-engagement activities in targeted countries.



Assisting grants professionals.

Developed new programming for community college grants professionals.



Welcome independent school leaders.

Launched a community of chief advancement officers at independent schools.



CASE is responding to the needs of institutions for highly talented staff with diverse backgrounds that will help them better serve all populations.

TALENT MANAGEMENT

Advancing Our Profession

In 2017, CASE accelerated its efforts to meet the growing global demand for advancement professionals.

Primary drivers of our success were initiatives that raised awareness of the profession as a career to recent college graduates and those who work in other professions.

We also provided institutions with the training and tools needed to attract and retain talented professionals of diverse backgrounds.



We are the world.
Advanced strategy to create a global community of senior volunteers.



Xin chào from Vietnam!
Held first conference in Vietnam for alumni relations practitioners new to the profession.



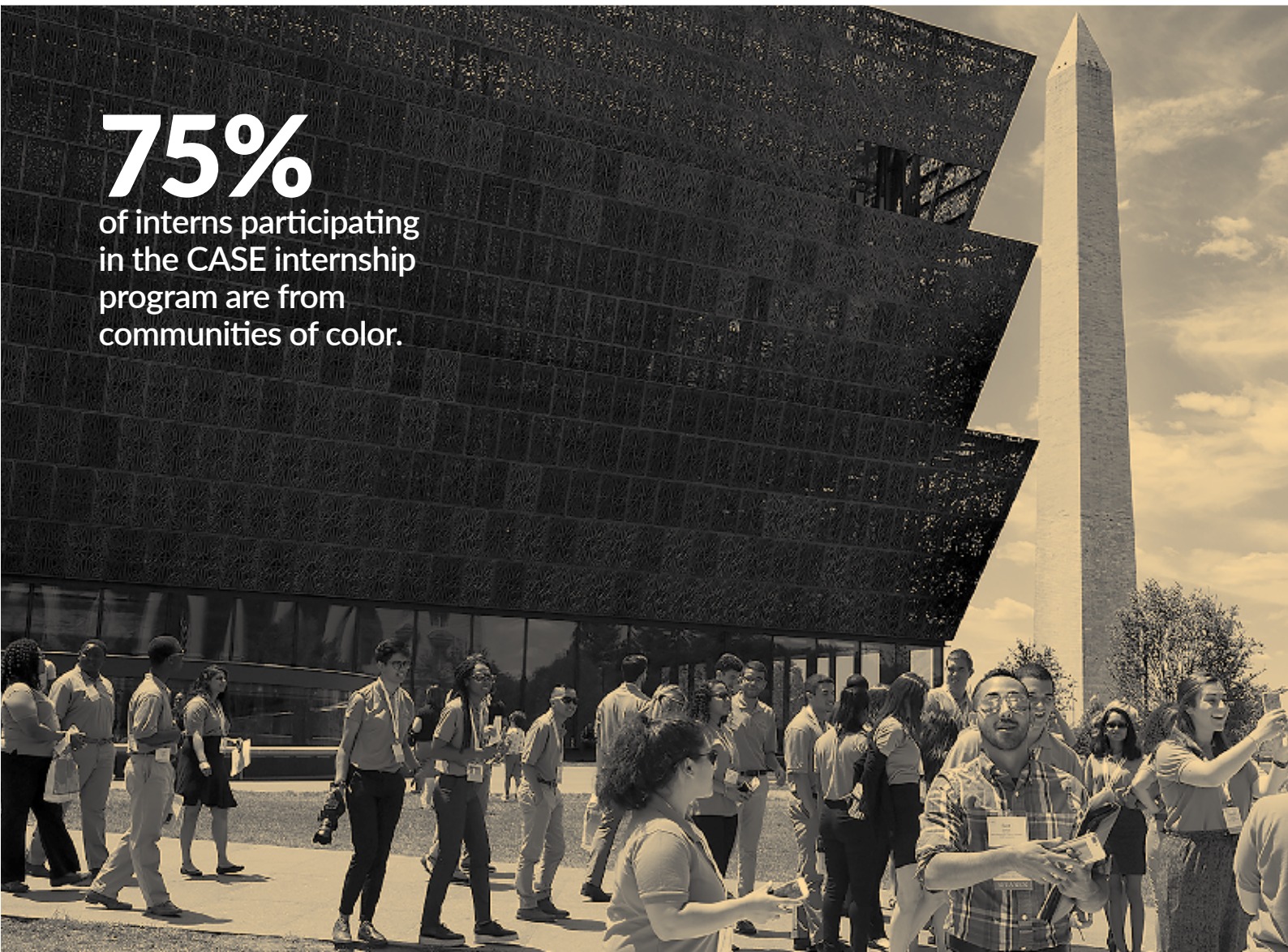
Launched
a graduate
trainee initiative
in Australia for
graduates interested
in advancement
careers.



Began a **6**-month
management training institute
for advancement managers.

75%

of interns participating
in the CASE internship
program are from
communities of color.





Nearly
160 conferences
and workshops connect
participants worldwide.



Brought together
10 global higher
education leaders
to share their “10 big ideas”
on securing continued impact
and success of institutions.



Launched
advocacy
network to keep
members updated on
legislative developments.



4,900
volunteer leaders, conference
planners, speakers, moderators,
judges and authors.



The work that our members do is more important than ever before, and CASE is privileged and humbled to support that work.

THOUGHT LEADERSHIP

Sharing Our Knowledge

CASE made the most of its position as the largest association serving advancement professionals worldwide by strategically directing resources to conduct timely, relevant research that offered insights on specific industry trends and challenges. This included newly launched or expanded surveys in alumni relations and fundraising.

We also stepped up our advocacy efforts in the United States and the U.K. to fulfill our responsibility of advancing education to transform lives and society.



Go for the gold.
Received 3,364 entries to Circle of Excellence international awards program honoring leadership, service and best practices.



We've got answers!
Provided personalized research on advancement topics for nearly 1,400 member requests.



No matter how we might reimagine ourselves, our capacity to connect all those who care about advancing education will always be at the core of what we do.

GLOBAL IMPACT

Changing the World

To enhance our global work, CASE introduced initiatives to help us seamlessly deliver member services worldwide and advocate as one voice.

CASE is already beginning to see the impact of the “One CASE” concept as members attend conferences, study tours and other training outside their geographic regions.

CASE also focused on strengthening relationships with existing partners and exploring new opportunities to serve educational institutions around the world.

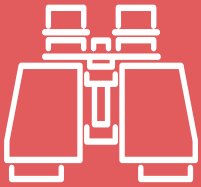
Impacting Our Future

2018

Solidify a global, “One CASE” understanding with staff worldwide to seamlessly deliver member services.

2019

Implement plan for a senior community of volunteers to help CASE deliver its ambitions.



Began an intensive review of conference curriculum with volunteer task force.

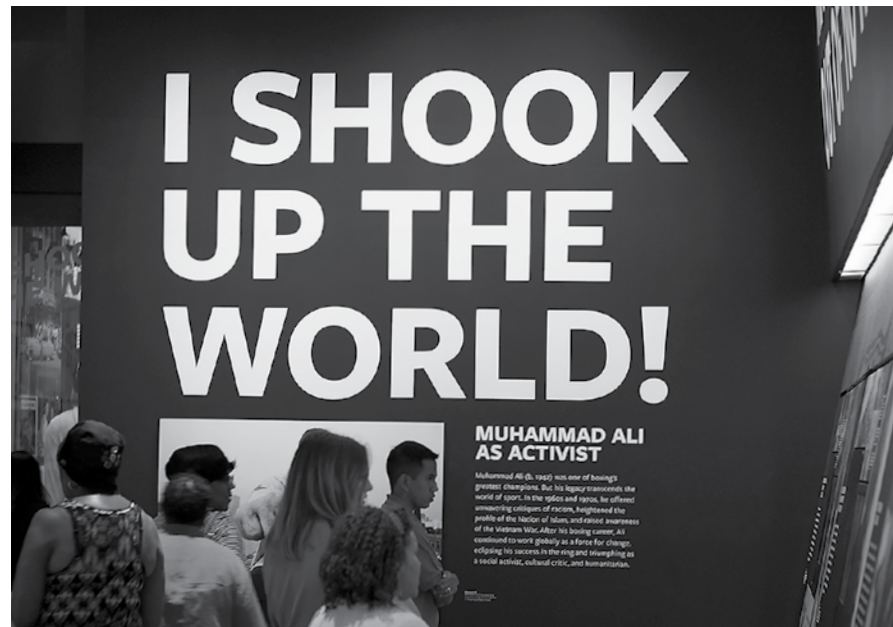


£1BN

in fundraising surpassed for first time by U.K. institutions as reported in Ross-CASE Survey of Charitable Giving to Universities.



CASE members live and work in **82** countries.



I SHOOK UP THE WORLD!

MUHAMMAD ALI AS ACTIVIST

Muhammad Ali (b. 1936) was one of America's greatest champions. But his legacy transcends the world of sports. In the 1960s and 1970s, he offered pioneering critiques of racism, heightened the profile of the nation of Islam, and raised awareness of the Vietnam War. After his boxing career, Ali continued to work globally as a force for change, earning his success in the ring and emerging as a social activist, cultural critic, and humanitarian.

2020

Engage with partners who have a global footprint to develop, deliver and support CASE endeavors.

2021

Grow membership outside of North America by 50 percent.



Hello from Africa!

CASE partnered with a leading U.K. institution on a research project exploring educational philanthropy in Africa.

VOLUNTEER LEADERSHIP

FY 2016–2017

CASE BOARD OF TRUSTEES

The CASE Board of Trustees comprises 31 voting members, including four officers, eight district trustees and 18 trustees-at-large. The primary responsibilities of the board include setting CASE policies, approving the annual budget and ensuring sound management of the organization. The president of CASE serves as a nonvoting, ex-officio member. Names and titles are for the 2016–2017 fiscal year.

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American University

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Director of Public and Community Relations
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Associate Vice President of
Alumni Relations and Individual Giving
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Senior Vice President for University
Advancement and External Affairs
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Manchester University

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University College London

Jeffery Johnson

At-Large Trustee
President and CEO
Iowa State University
Alumni Association

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Associate Vice President for Development
Bellarmine University

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Immediate Past Chair
Vice President for Development
and Institute Relations
California Institute of Technology

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District II Trustee
Vice President of Development
and Alumni Relations
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The University of Hong Kong

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At-Large Trustee
President and CEO
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District VIII Trustee
Vice-President of Development
and Alumni Engagement
The University of British Columbia

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At-Large Trustee
Associate Vice President of
Advancement Information Services
James Madison University

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At-Large Trustee
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and University Attorneys

Fritz Schroeder

At-Large Trustee
Vice President of Development
and Alumni Relations
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Beth Smith

District IV Trustee
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Alumni Association

Tracy Syler-Jones

At-Large Trustee
Vice Chancellor for
Marketing and Communication
Texas Christian University

Nancy Treser-Osgood

District VII Trustee
Senior Director of Alumni Relations
Pitzer College

**FY 2016–2017
CASE ASIA-PACIFIC
BOARD OF DIRECTORS**

The CASE Asia-Pacific Board of Directors provides input and advice on CASE's operations, programming and services within the Asia-Pacific region.

Peter Mathieson

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President and Vice-Chancellor
The University of Hong Kong

Joanne Agnew

Vice Chair
Director, Development
and Alumni Relations
University of Western Australia

Cheng Man Shan Ricky

Executive Vice President
United Board for Christian Higher Education
in Asia, Hong Kong

Sue Cunningham

Representative of Sole Member
President and CEO
CASE

Simone Garske

Director, Alumni and Development
Queensland University of
Technology, Australia

J. Michael Goodwin

President and CEO
Oregon State University Foundation

Elizabeth Hawkins

Director, Programming and Development
Adelaide Festival Centre, Australia

Huang Jianhua

Executive Board Director
China Association of Higher Education
(Resigned on 25 April 2017)

David Shepherd

Director, College Advancement
United World College of
South East Asia, Singapore

Soon Min Yam

Director, Alumni Affairs Office
Nanyang Technological University, Singapore

Toh Hoon Meng Bernard

Director, Office of Alumni Relations
National University of Singapore

Philip Man-Tsuen Sohmen

Deputy Chairman of Governors
YK Pao School, China
(Appointed on 25 April 2017)

**FY 2016–2017
CASE EUROPE
BOARD OF TRUSTEES**

The CASE Europe Board of Trustees oversees programming, services and resources for advancement professionals in the United Kingdom and continental Europe.

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Vice-Chancellor
The University of Nottingham

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Director of External Relations
University of Liverpool

Craig Considine

Headmaster
Millfield School

Sue Cunningham

Honorary Trustee
President and CEO
CASE

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University of Oxford

Lee Fertig

Director
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J. Michael Goodwin

President and CEO
Oregon State University Foundation

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Director of Alumni Relations
and Annual Giving
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Director of Finance
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University Advancement
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Glasgow University

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Director of Development,
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University of Warwick

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Director of Community Relations
Zurich International School

Serge Sych

Vice President for Enrollment
Management, Career Services
and Alumni Relations
Central European University, Hungary

Jean van Sinderen-Law

Associate Vice President of Development
University College Cork, Ireland

Salima Virji

Development Director
Highgate School

SUPPORTERS

CASE SPONSORS

CASE is grateful to those companies that sponsored events and other services to CASE members between July 1, 2016, and June 30, 2017.

ADVIZOR Solutions	Community Funded	Micro 9
Agenda Consulting Limited	EAB/Royall & Company	MIRA Brakeley
Aluminati	Ede & Ravenscroft	More Partnership
Aspen Leadership Group	Education Cubed	NAFSA: Association of International Educators
AT&T California	Educe	Nationwide Insurance
Awardspring	Ellucian	Neota Logic
Balfour College Division	Essenza Software	Northern Kentucky University
Bentz Whaley Flessner	Execucare	Payden & Rygel Investment Management
Blackbaud	f2uni	Penna
Blackbaud Europe Ltd	Feats Inc.	Pickle Jar Communications
Blackbaud Pacific Pty. Ltd.	Finalsite	Quadwrangle Inc.
Brakeley Asia	Fund Evaluation Group	QS Stars
Brakeley Briscoe Inc.	GEICO	Reeher LLC
Brakeley Nordic	GiveCampus Inc.	Richmond Associates
Buffalo Fundraising Consultants	The Giving Collaborative	Ruffalo Noel Levitz
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Campbell & Company	Graham-Pelton (UK) Limited	SEI Investments
Carney, Sandoe & Associates	Grenzebach Glier and Associates	SIA Funderful
CCS	The Guardian	Singapore Tourism Board
Commonfund	Harris Made	Smarteezie
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	Higher Talent Inc.	Stratelistcreative
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	Knowledge Cube Ltd.	Uprising Technology
	Lane Press	Vidigami
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	Liberty Mutual Insurance Company	Withers LLP
	Lipman Hearne	Witt/Kieffer
	Lois L. Lindauer Searches	
	Marketing Communication Resource Inc.	
	Marts & Lundy	

CASE CORPORATE PARTNERS

We value the commitment of companies that affiliate with CASE as corporate partners at the platinum, gold, silver, bronze and associate levels. The following list recognizes CASE Corporate Partners from July 1, 2016, to June 30, 2017.

PLATINUM

Blackbaud
Grenzbach Glier and Associates
Ruffalo Noel Levitz

GOLD

Deloitte
Ellucian
Graham-Pelton (UK) Limited

SILVER

Bentz Whaley Flessner
Campbell & Company
CCS
HEP Development
Lipman Hearne
Marts & Lundy Inc.
Quad/Graphics Inc.
The Ward Group
Witt/Kieffer

BRONZE

160over90
Academic Assembly Inc.
Academic Impressions
Academy Communications
Advancement Resources Inc.
The Advisory Board Company
Agenda Consulting Limited
Alexander Haas
AlmaBase Inc.
Aluminati
The Angeletti Group LLC
Aria Communications Corporation

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Bryant Group
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Carter
Cheney & Company
Cognitive Marketing
Community Funded
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Educational Marketing Group Inc.
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Independent School Management (ISM)
Innovative Systems
Isaacson Miller
iWave Information Systems Inc.
Jaques & Company Inc.
Jerald Panas, Linzy & Partners
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KCI Ketchum Canada Inc.
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Lane Press
The Lawlor Group Inc.
Leapfrog Group

Lois L. Lindauer Searches
Membership Management Services
Meyer and Associates
Mindpower Inc.
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Storbeck/Pimentel & Associates LP
Switchboard
TextAim
ThankView LLC
Trade and Investment Queensland
TVP Communications
Universal Wilde
USI Affinity
Valtim Marketing Solutions
Washburn & McGoldrick LLC
Whaley LeVay
Wilson-Bennett Technology
The Woolbright Group
Zehno Cross Media Communications

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Brian Lacy and Associates
Capstone Communications
Carol O'Brien Associates Inc.
Carolyn J. Whitehead, Fundraising Leadership
Caylor Solutions
Coleman Hastings Advancement Consulting
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Crouch & Associates
Donor Relations Guru
Geeta Rajaraman Consultancy
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The Hong Kong Foundation For Charities
J.C. Anderson Consulting LLC
John H. Taylor Consulting LLC
KDD Philanthropy
LML Marketing & Communications LLC
Luka Partners LLC
Marie Earl
Marilyn Silverstein and Associates
Meno Systems
Meritam Investment Advisors
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Patouillet Consulting LLC
Patricia King Jackson Associates
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Philanthropy Company
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Susan J. Burlingame (sjbwords)
Susan Shullaw & Associates
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USEED
VincentViktoria Philanthropy Advisors
WhiteRock Consulting Group Inc.
Windmill Hill Consulting LLC

CASE Impact Report 2017

2016–2017 Financials

STATEMENT OF FINANCIAL POSITION

Consolidated Statements of Financial Position

<i>June 30,</i>	2017	2016
Assets		
Cash and cash equivalents	\$ 2,141,346	\$ 3,442,415
Investments	24,062,715	21,694,177
Accounts receivable, net	405,368	310,381
Publication inventory, net	170,627	221,721
Prepaid expenses and other assets	1,404,520	1,499,498
Property and equipment, net	6,372,878	6,513,112
Total assets	\$ 34,557,454	\$ 33,681,304
Liabilities and Net Assets		
Liabilities		
Accounts payable and accrued expenses	\$ 2,443,288	\$ 2,358,382
Deferred revenue	6,271,365	6,239,082
District escrow funds	4,159,248	3,861,245
Mortgage payable	3,081,888	3,518,041
Accrued postretirement benefits	580,348	835,833
Total liabilities	16,536,137	16,812,583
Net assets		
Unrestricted	17,772,338	16,422,429
Temporarily restricted	248,979	446,292
Total net assets	18,021,317	16,868,721
Total liabilities and net assets	\$ 34,557,454	\$ 33,681,304

STATEMENT OF ACTIVITIES

Consolidated Statements of Activities

Year Ended June 30,	2017	2016
Unrestricted activities		
Revenue and support		
Conferences and workshops	\$ 12,315,584	\$ 11,769,816
Membership dues	8,125,301	7,407,848
Publications	1,609,477	1,859,526
Awards	1,510,501	1,261,374
Contributions	198,001	577,107
Other income	282,307	340,330
Investment income from operations	18,072	27,479
	24,059,243	23,243,480
Net assets released from restrictions	277,580	198,863
Total unrestricted revenue and support	24,336,823	23,442,343
Expense		
Program services		
Conferences and workshops	11,626,260	11,919,223
Information and research	2,620,194	2,538,453
External affairs	2,405,420	1,892,543
Publications	1,970,159	1,772,664
Awards and services	322,602	439,494
District services	414,591	411,218
Total program services	19,359,226	18,973,595
Supporting services		
Management and general	5,498,722	5,176,296
Strategic plan	480,949	-
Fund raising	18,950	32,881
Total supporting services	5,998,621	5,209,177
Total expense	25,357,847	24,182,772
Change in unrestricted net assets before other items	(1,021,024)	(740,429)
Net gain (loss) from investments	1,762,254	(428,810)
Interest and dividends from investments	365,371	326,432
Change in other comprehensive income	243,308	(68,897)
Change in unrestricted net assets	1,349,909	(911,704)
Temporarily restricted activities		
Contributions	78,096	271,332
Investment return, net	2,171	(161)
Net assets released from restrictions	(277,580)	(198,863)
Change in temporarily restricted net assets	(197,313)	72,308
Change in net assets	1,152,596	(839,396)
Net assets, beginning of year	16,868,721	17,708,117
Net assets, end of year	\$ 18,021,317	\$ 16,868,721

About CASE

CASE has
offices in:



Washington, D.C.
1974



London
1994



Singapore
2007



Mexico City
2011

CASE believes in advancing education to transform lives and society. As a global nonprofit membership association of educational institutions, CASE helps develop the communities of professional practice that build institutional resilience and success in challenging times. The communities include staff engaged in alumni relations, communications, government relations, fundraising, marketing, stakeholder engagement and student recruitment. CASE is volunteer-led and uses the intellectual capital of senior practitioners to build capacity and capability across the world.

CASE has offices in Washington, D.C., London, Singapore and Mexico City. Member institutions include more than 3,700 colleges and universities, primary and secondary independent and international schools, and nonprofit organizations in 82 countries. CASE serves nearly 89,000 practitioners. For more information about CASE, visit www.case.org.

Vision

Advancing education to transform lives and society.

Mission

As a catalyst for advancing education worldwide, we inspire, challenge and equip communities of professionals to act effectively and with integrity to champion the success of their institutions.

Values

We value professional excellence, integrity and respect for our community of volunteers and staff as partners, stakeholders and leaders. We aspire to be bold, agile and innovative. And we are committed, in all that we do, to be collaborative, inclusive and embracing of diversity.



COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION
@caseadvance **case.org**