

INTERNATIONAL COALITION OF GIRLS' SCHOOLS

**FUNDRAISING AND
ALUMNAE RELATIONS IN
AUSTRALASIAN GIRLS'
SCHOOLS
2023 SURVEY REPORT**



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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Torres Strait Islander and Aboriginal people who are the traditional custodians of the lands and waters of Australia, and we appreciate their culture of sharing which is the root and branch of philanthropy.

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1. INTRODUCTION

The 2023 ‘Fundraising and Alumnae Relations in Girls’ Schools’ survey is the fourth survey AskRIGHT has conducted with member schools of the Alliance of Girls’ Schools Australasia, now the International Coalition of Girls’ Schools.

The online survey received 43 anonymous responses between late-May and mid-July 2023, representing a variety of girls’ schools, mostly in Australia and some in New Zealand. The participating schools provide a representative sample from which to draw conclusions on the progress being made — as well as the opportunities available — in fundraising and alumnae relations at Australasian girls’ schools.

A total of 77 questions of various types (multiple choice, free text, etc.) were asked in the 2023 survey, which relate to activities and results in schools during 2022 and includes many of the same questions asked in the previous surveys to allow for comparative analysis. For reference, the 2020 survey included 71 questions (relating to 2019) and the 2018 survey included 28 questions (relating to 2017). The 2016 survey had only 20 responses and so these findings are not referenced in this survey report.

AskRIGHT is pleased to work with the International Coalition of Girls’ Schools, and we sincerely thank every school that participated to share valuable insights into the fundraising and alumnae relations of their school.



2. SUMMARY OF FINDINGS

The enrolment, location, affiliation, and boarding of the schools surveyed in 2023 remains mostly consistent with the schools surveyed in 2020 and 2018; however, responses from New Zealand schools have declined, and there is a slight increase in religious schools responding to the survey. (See *School Demographics: Questions 1-5*)

The decline in the number of schools that have a foundation established in comparison to the previous surveys is believed to reflect the particular schools that responded to the survey as opposed to a decline in school foundations in Australasian girls' schools more broadly. Of the schools that have a school foundation, roughly half have a strategic plan, most have between 6-15 board members, the understanding of the role of the board is mostly shared, and many board members were donors/pledgers to the school. (See *School Foundation: Questions 6-10*)

Almost all Australian schools have at least one type of DGR entity, with Building, Scholarship/Bursary, and Library funds being the most common. There are more schools that do not seek funds for activities that are not tax-deductible than those that do. (See *Tax Deductibility – Australia Only: Questions 11-12*)

There is an equal number of schools that use CRM software to those that do not, and, while there has been a steady increase in the use of CRM software in schools compared to previous surveys, all schools should have a CRM; however, respondents again highlighted that the software currently available is not fully sufficient for school fundraising activities. (See *Fundraising Software: Questions 13-15*)

Only slightly more respondents believe COVID-19 has changed the way their school does fundraising — with an increased difficulty in stewardship mentioned — to those that do not believe this is the case for their school. A few respondents suggested the current financial climate and potential recession is having a greater impact on school fundraising than COVID-19. (See *Effects of COVID-19: Question 16*)

There has been an increase in the quantity of financial donations received by the schools surveyed in 2023, but the total value of donations has remained similar to 2020 and 2018 results, which indicates that not enough larger donations are being received to bring the schools into the higher range of total donations for the year. Pledges have decreased in both quantity and value, and annual appeals and regular giving commitments have also seen a slight decrease. (See *Individual Giving & Fundraising Appeals: Questions 17-29*)

The inclusion of an option to donate on fees statements has remained consistent while the asking amount has increased, which demonstrates that schools are leveraging fees statements for philanthropic income and makes a case for all schools to include such an option. (See *Fees Statement Donations: Questions 30-33*)

Support from businesses remains unrealised for many schools, perhaps because the time and complexity involved does not justify the amount of income received. Nevertheless, schools should investigate this as another avenue of giving, or otherwise focus on improving existing avenues of giving, such as annual appeals and bequests. (See *Donations and Sponsorships from Business: Questions 34-37*)

Few schools receive financial grants from trusts and foundations, which may indicate that there is not enough resources to make requests for funding and submit grant applications to achieve the desired results; however, it might also suggest that schools are not fully aware of trusts and foundations as a viable source of funding or how to find suitable trusts



and foundations to engage with. (See Grants from Trusts and Foundations: Questions 38-40)

More than half of the schools surveyed in 2023 did not receive any in-kind donations and, of the schools that did, none received over \$50,000 (unlike the 2020 survey), which is unfortunate as in-kind support can save schools a significant amount of money each year. (See In-Kind Donations: Questions 41-44)

Similar to the previous surveys, most schools run events to raise money, but the higher total amounts raised (\$100,000+) are not being achieved. Ball, Auction, Fete/Fair, Trivia Night, and Lunch/Dinner/High Tea were the top event types mentioned, with many schools running multiple events throughout the year. More schools are fundraising for external purposes than in previous years. (See Fundraising Events: Questions 45-50)

There is an equal number of schools that received a bequest/intention for a bequest than those that did not, which aligns with the previous surveys. Bequest societies are not common among the schools surveyed, but a few schools are currently developing one. Word-of-mouth and face-to-face are the most common bequest promotion activities reported. (See Bequests: Questions 51-58)

The holding of events inter-state and overseas is believed to have dropped, as many schools have not held such events since 2020 (but some schools plan to re-introduce such events in future). Dinners, member events, and reunions are the most common types of inter-state and overseas events. (See Alumnae Relations: Questions 59-60)

Fundraising staff is still an area of underinvestment for many schools, while alumnae relations staff seem to be more common. There is an increased expectance of growth in fundraising and alumnae relations in the next three years, which was not the case for the schools previously surveyed. The majority of schools do not have an allocated fundraising budget and did not implement any new fundraising ideas or initiatives in the past year. (See Fundraising Staff: Questions 61-66)

Many schools are in a stage of a current campaign (at the time of the survey), yet only 41% of these schools have set a financial goal — perhaps because many are still in the early stages of planning. (See Fundraising Campaigns: Questions 67-69)

When it comes to community engagement, many schools engage multiple audience types, with parents of current, future, and then past students being the most targeted. Much of this engagement, which is expected to grow in the next three years, is based on events or meetings at the school or elsewhere. Strategy and set goals are still lacking in this area. (See Community Engagement: Questions 70-74)

Further comments from respondents are insightful and serve as stories of success (or lack thereof) and lessons to be learnt, and these comments have been included in full at the end of the Survey Results section. (See Further Comments: Questions 75-77)



3. RECOMMENDATIONS

Based on the findings of the 2023 survey and how they compare to findings of the previous surveys, AskRIGHT makes the following recommendations for Australasian girls' schools:

1. Run your school data against the survey results and make your own assessments on where you sit in relation to the efforts and outcomes achieved by other schools.
2. Be aware of the CRM software your school is using, and ensure it is meeting your needs as adequately as possible. If you don't yet have a CRM, encourage your school to use one. A CRM is a vital tool that enables fundraising success.
3. If you don't have a Bequest (Gift in Wills) Society, set one up. If you need advice with regards on how to do so, or how to ensure success and establish best practice, external consultants will be able to advise and guide you.
4. A 'Giving Day' is becoming a popular fundraising initiative to undertake, and they can be an effective part of your school's fundraising strategy. It is important to devise a broader strategy and to identify where a giving day 'fits' and adds value – the giving day should not of itself be the strategy.
5. If you don't put in place a professional strategy, budget funding, and employ professional staff to drive that strategy, fundraising income will remain low. Consider whether you are resourcing for long term success.
6. Big events soak up a lot of time and energy (and sometimes a good deal of money). Consider whether it is sensible to have more than one fundraising event a year for your school and whether a number of small events might help with the development of your fundraising strategy.
7. Keep developing the annual appeal program and keep reminding the school community that gifts are welcome until the end of the year. Communicate the impact gifts have and ensure the appeal is for specific projects with measurable outcomes.
8. Regarding fees statement requests for donations, consider how to integrate these requests with annual appeal requests. You may find response rates and gift amounts can rise if the community realises their fees statement request is also their annual appeal 'ask'. Check your data and see how many are giving to both — the evidence should guide you.
9. If you don't have a formal community engagement strategy, consider whether it is the right time for your school to establish one.
10. The schools raising less should be able to learn from those raising significantly more. Success stories outlining how donors were engaged and helped to make gifts should be shared throughout the network.

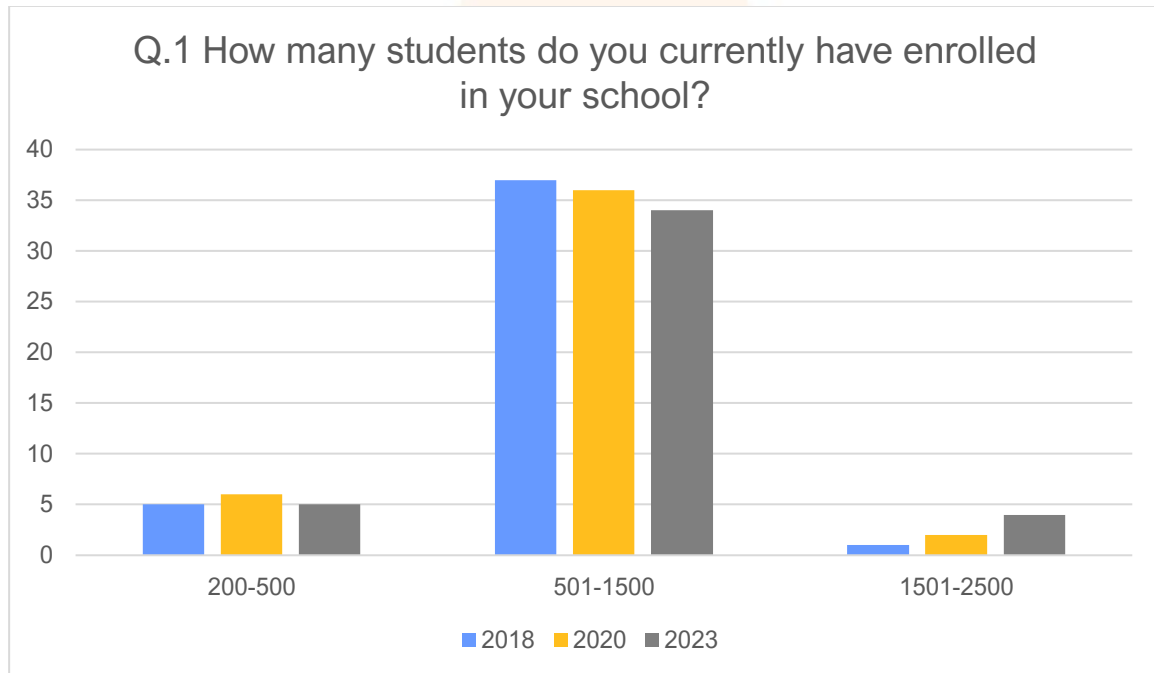


4. SURVEY RESULTS

SCHOOL DEMOGRAPHICS

(QUESTIONS 1-5)

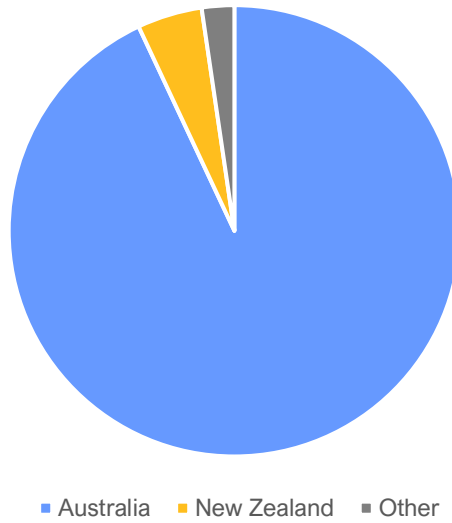
Most of the schools (79%) have a cohort of between 501 to 1,500 students enrolled, followed by 11.6% (5 schools) with a cohort of 200-500, and 9.3% (4 schools) with a cohort of 1,501-2,500.



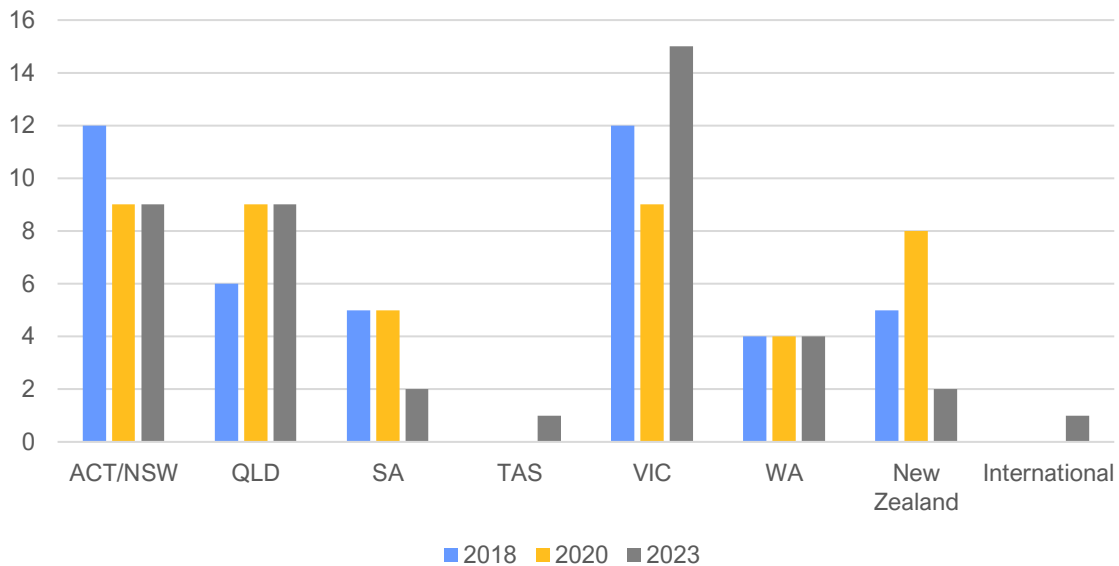
It is common for schools with a larger population of students to also exhibit a higher level of fundraising activity and alumnae relations, as they tend to have more budget and resources for such activities.

The schools in Australia comprise 93% of survey respondents; Victorian schools again led the way (32.5%), followed by New South Wales (20.9%), Queensland (20.9%), Western Australia (9.3%), South Australia (4.6%), Australian Capital Territory (2.3%), and Tasmania (2.3%). The 2023 survey is the first to have received a response from a school in Tasmania, as well as an international school in the Philippines; however, responses from New Zealand schools have declined compared to the previous surveys and represent only 4.7% of total respondents.

Q.2 Where is your school located? (2023)



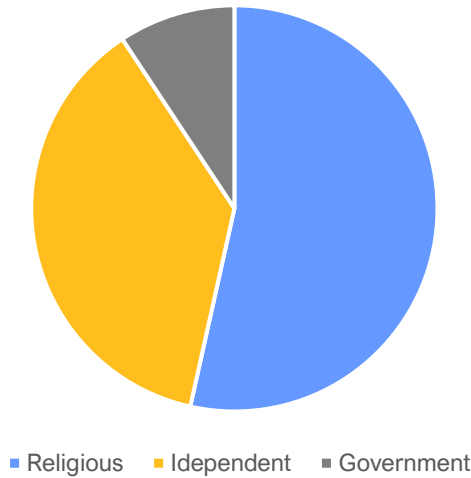
Q.2 Where is your school located?



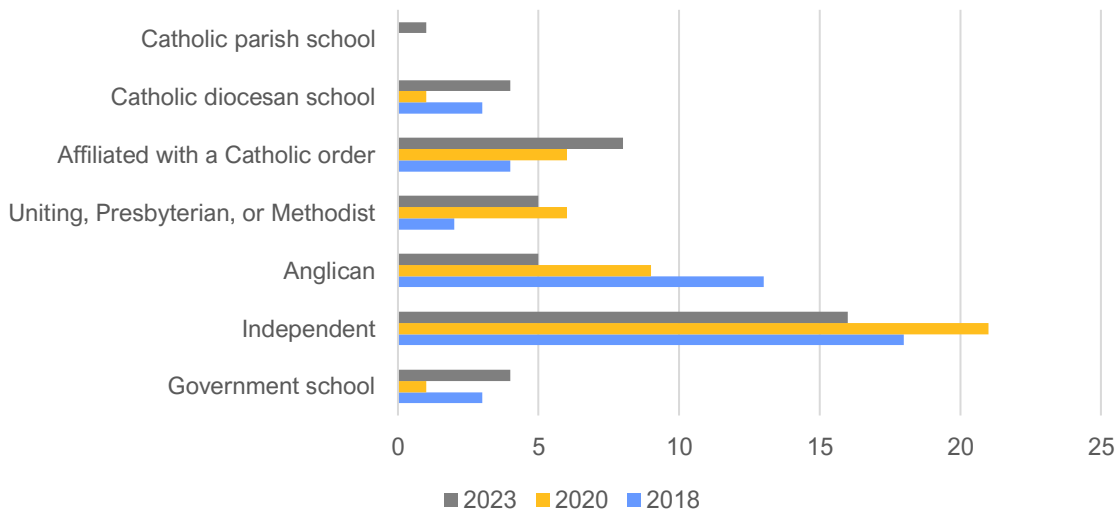
Over half (53.4%) of the schools are affiliated with a religion, including 30.2% Catholic, 11.6% Anglican, and 11.6% Uniting, Presbyterian, or Methodist. Independent schools comprise 37.2% and government schools comprise 9.3% of respondents. The previous surveys received a majority response from independent schools, so the 2023 survey reflects an enhanced response from religious schools, particularly Catholic (including Catholic parish schools, Catholic diocesan schools, and schools affiliated with a Catholic order), and, thus, a likely increased focus on fundraising.



Q.3 Which of the following best describes your school's affiliation?
(2023)



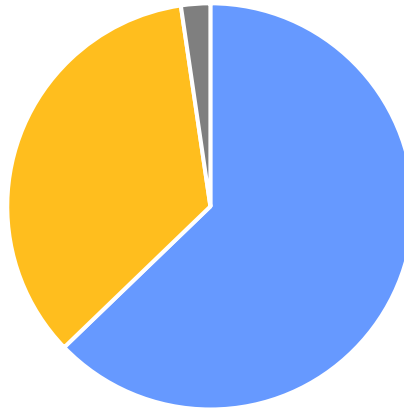
Q.3 Which of the following best describes your school's affiliation?



Many schools (63.7%) offer both primary school and high school, followed by 34.8% high schools and 2.3% upper-primary and high school. This aligns with the previous surveys.

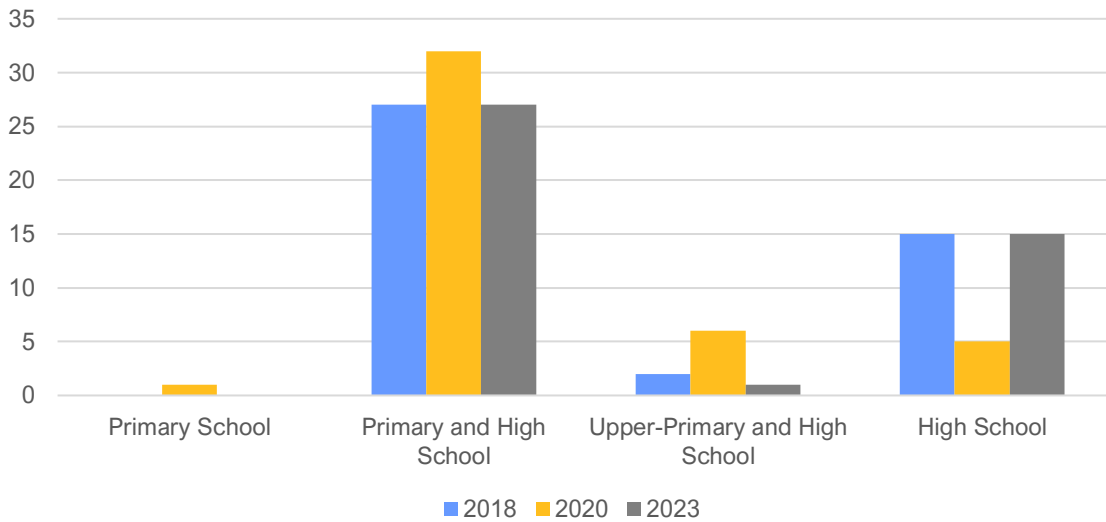


Q.4 Which of the following best describes your school's range of enrolment years?
(2023)



■ Primary and High School ■ High School ■ Upper Primary and High School

Q.4 Which of the following best describes your school's range of enrolment years?



■ 2018 ■ 2020 ■ 2023

Just under half (48.8%) of respondents indicated that their school has boarding, while the remaining schools (51.1%) can be considered day schools. This aligns with the previous surveys.



Q.5 Does your school have boarding?



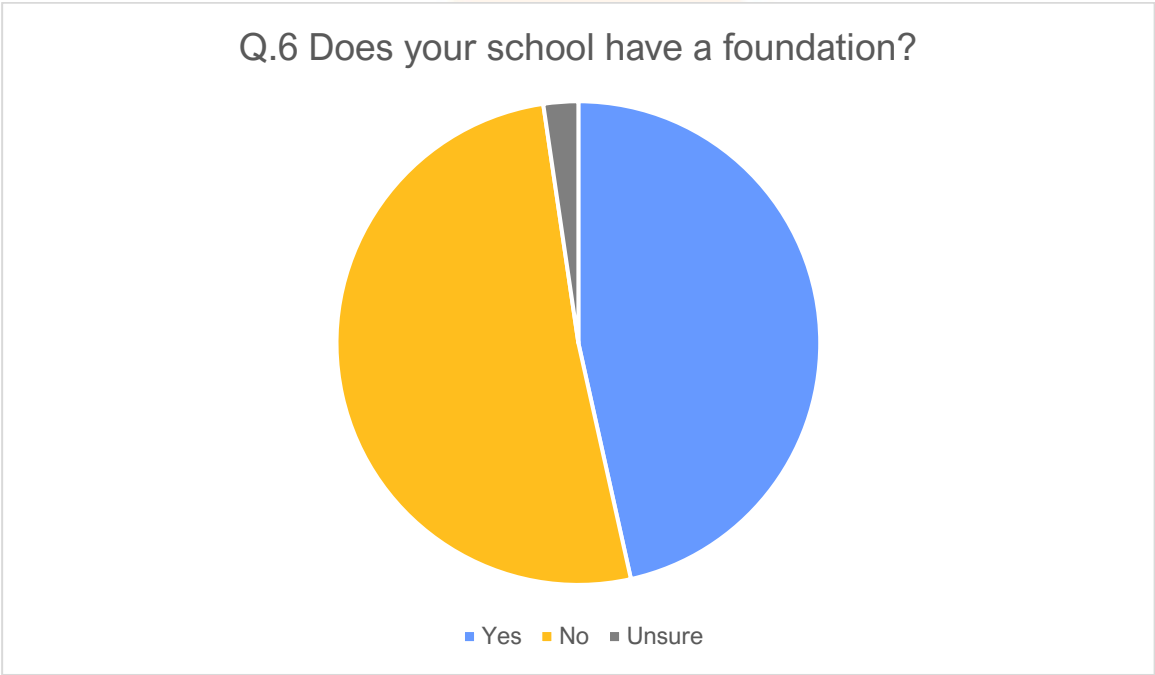
■ Yes ■ No



SCHOOL FOUNDATIONS

(QUESTIONS 6-10)

Just over half (51.2%) of the schools do not have a foundation established — however, 1 of these respondents indicated that their school is developing a foundation board — while just under half (46.5%) have a school foundation, and there was 1 respondent who was unsure. While there has been a decline in the number of schools that have a foundation established, this is believed to reflect the particular schools that responded to the surveys rather than a decline in school foundations in Australasian girls' schools more broadly.

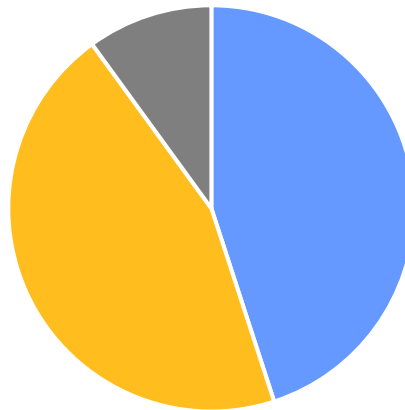


Of the 20 schools that have a school foundation, the number of schools that have a strategic plan (9) is equal to those that do not. There were 2 respondents who were unsure. (This question was not included in the previous surveys.)



Q.7 If you have a foundation, does it have a strategic plan?

n= 20 (46.5%)



■ Yes ■ No ■ Unsure

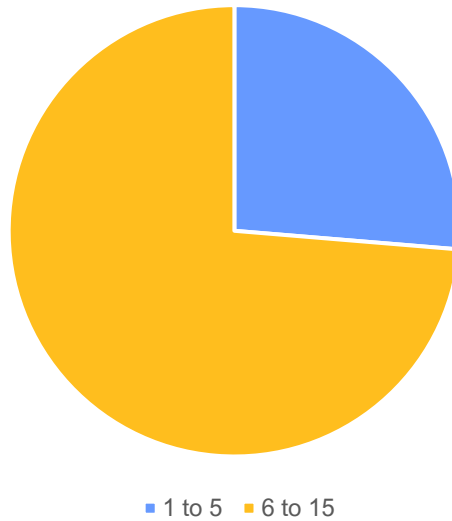
When asked about the role of the school foundation board (Q.8), many respondents stated that the role of the foundation is to support the school and its community through raising funds. Scholarship programs, capital projects and building funds, and other types of funds were mentioned multiple times, and a few respondents mentioned strategy, governance, and funds management. For example:

The Foundation's Mission is to foster a culture of philanthropy in the school community to generate funding for much-needed capital projects, and to support the educational aspirations of girls who may not otherwise be able to attend [this school] through the provision of a scholarship and bursary program.

Most schools (73.6%) have between 6 to 15 members on the school foundation board, while 26.3% have 1 to 5 board members, which aligns with the previous survey.

Q.9 How many people are on your foundation board?

n= 19 (44.1%)

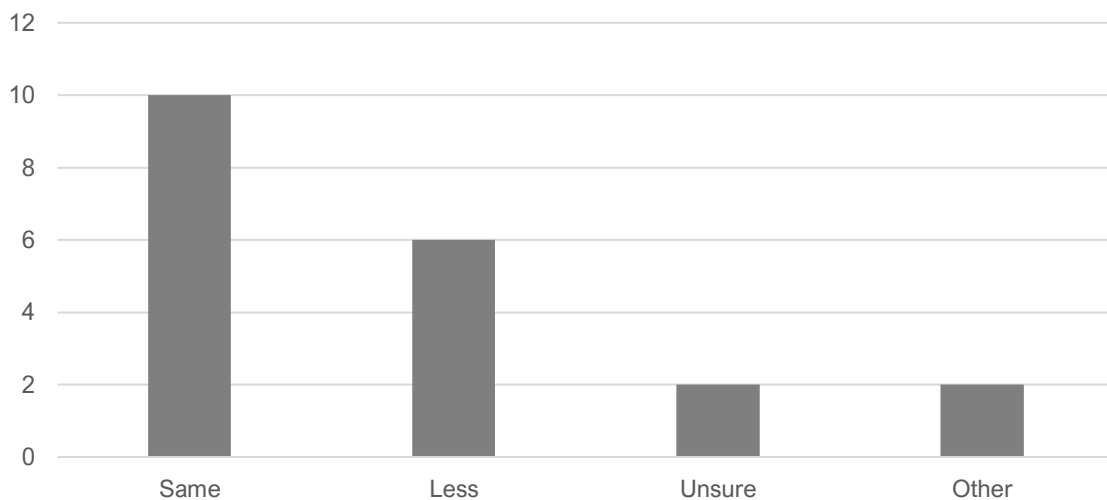


It is not surprising that no boards are larger than 15 members, but it is surprising that roughly a quarter of boards have 5 or fewer members. It is likely that these boards focus more on investing funds than on active fundraising development. A board of 10-12 people tends to be normative when it both leads fundraising and has a focus on funds investment, management, and distribution to the school.

When asked about the proportion of foundation board members that donated or pledged in 2022, roughly half (52.6%) indicated they have an equal number of donors/pledgers to board members and 31.5% have less donors/pledgers than total board members. There were 2 respondents who were unsure, as well as 1 respondent who answered 'not as yet' and 1 respondent who answered that it is 'not the function' of board members to be donors/pledgers to the school ('Other').

Q.10 How many of your foundation board members made a financial donation or pledge in 2022?

n= 19 (44.1%)



Research indicates that the more engagement and active participation by the foundation



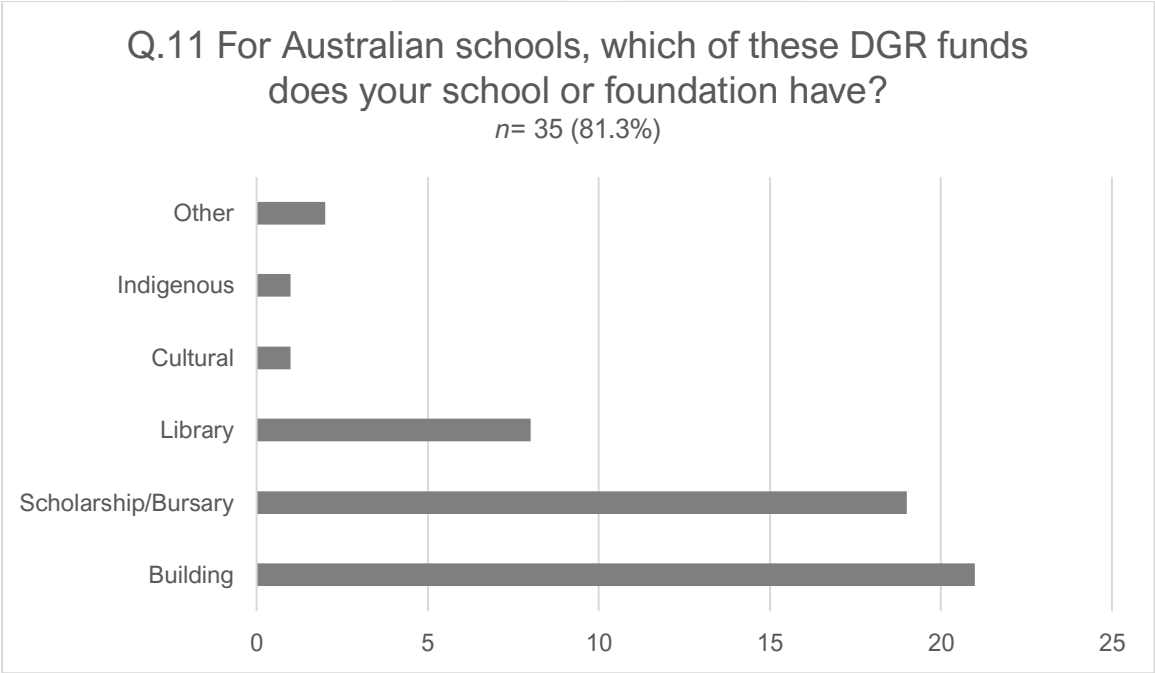
board with fundraising, the greater fundraising success the entity will have. The goal should be to have 100% of foundation members and the majority of other board stakeholders financially contributing to the goals of the school.



TAX DEDUCTIBILITY – AUSTRALIA ONLY

(QUESTIONS 11-12)

Of the 35 respondents that indicated the type of Deductible Gift Recipient (DGR) entity their school has, roughly three quarters of respondents (74.2%) answered with one type of fund, while roughly a quarter of respondents (25.7%) listed multiple funds. The most common type is a Building Fund (21 mentions), followed by Scholarship/Bursary Fund (18 mentions), Library Fund (8 mentions), Cultural Fund (1 mention), and Indigenous Fund (1 mention). There was 1 respondent who named Australian Sports Foundation (a DGR through which a non-DGR can receive tax-deductible donations) and 1 respondent who indicated that their school is investigating a scholarship fund. (There were 5 respondents from schools in Australia that did not provide an answer, and it can be assumed that these schools do not have a DGR fund or that the respondent is unsure.)



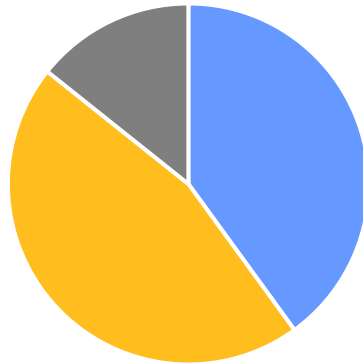
Australian schools are not tax-deductible entities (unlike New Zealand schools), so it is important that a DGR entity is established to offer tax-deductibility as an incentive for donors. Tax-deductibility improves fundraising outcomes and yet some schools do not have a DGR or are not fully leveraging the DGR/s already in existence.

Of 35 responses, 40% of schools seek funds for activities that are not tax-deductible, while 45.7% do not. There were 5 respondents (14.2%) who were unsure.



Q.12 For Australian schools, does your school or foundation seek funds for activities that are not tax-deductible?

n= 35 (81.3%)



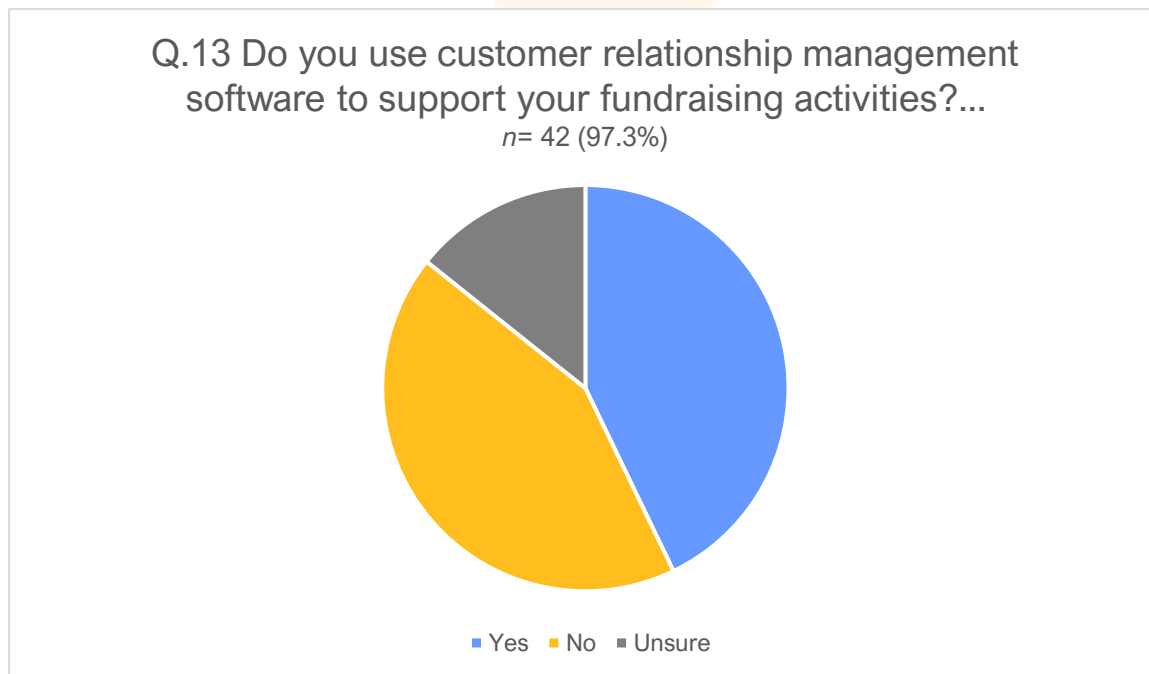
■ Yes ■ No ■ Unsure

Unlike the rules that govern DGR funds, the funds generated through activities that are not tax-deductible are generally unrestricted, so it was expected that more schools would make use of such funds; however, this has declined over the past years, which may indicate that the use of funds is often linked to building, scholarship, library, or other projects (for which a DGR can be established) as opposed to funds from events, merchandise, etc.

FUNDRAISING SOFTWARE

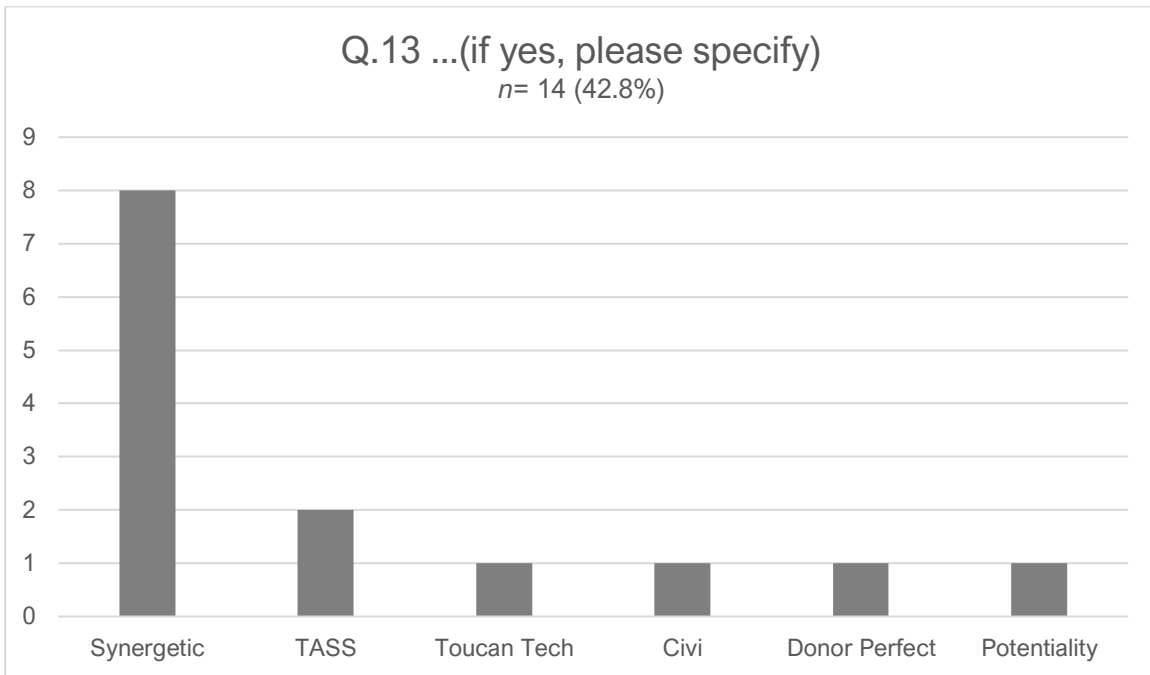
(QUESTIONS 13-15)

Of the 42 respondents that indicated whether their school uses customer relationship management (CRM) software, 42.8% of schools use a CRM, which is equal to those that do not — however, 1 respondent indicated a plan to implement CRM software — and there were 6 respondents who were unsure.



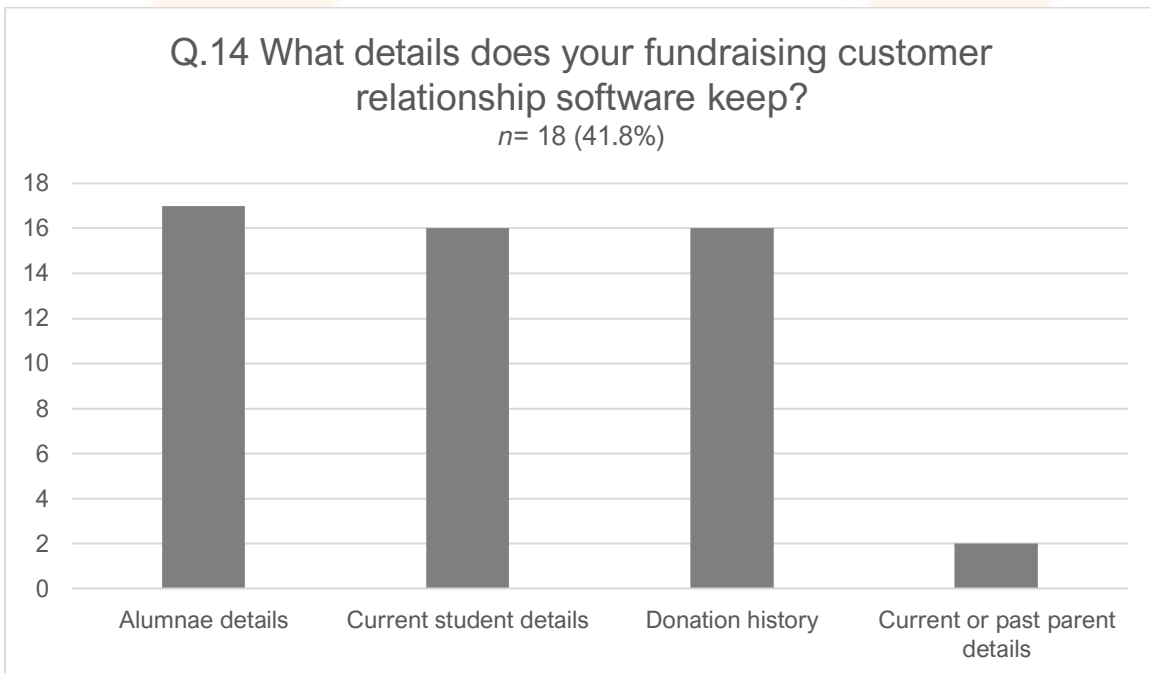
There has been a steady increase in the use of CRM software of the schools surveyed over the past years; however, there is still a significant portion of schools that are not investing in and utilising CRM software. The collection, management, and security of data through such technology is essential to the effective operations of any organisation; schools that utilise a CRM — to plan, conduct, and track appeals or event activities — are likely to be more engaged in the fundraising process and are therefore likely to raise more money.

Of the 14 respondents that named the CRM software their school uses, Synergetic is the most popular (57.1%), followed by TASS (14.2%), and Toucan Tech, Civi, Donor Perfect, and Potentiality were each mentioned once.



Compared to the previous survey, Synergetic has risen in popularity, and many of the CRMs named in the previous surveys (e.g. Outreach, DonMan, Edumate, and so on) are not used — or no longer used — by the schools that responded to the 2023 survey.

Of the 18 respondents that indicated the kind of details kept in their CRM, almost all schools keep alumnae details (17 mentions), current student details (16 mentions), and donation history (16 mentions), while only a few keep current or past parent details (2 mentions) and future students (2 mentions). Grandparents (1 mention), friends of the school (1 mention), and other kinds of details are far less common. This aligns with the previous survey.



Regarding general comments on CRM software (Q.15), there were 2 respondents that indicated the implementation of their CRM software is in its early stages, and 3 respondents who thought the CRM software they currently use has limited potential for fundraising tracking — and respondents from the previous survey made similar remarks. The insufficiency of such technology may be the cause for the lack of implementation, so there is a great need for an improvement in the capability of CRM software for schools.



EFFECTS OF COVID-19

(QUESTIONS 16)

Of 25 responses, 14 respondents (56%) believe COVID-19 has changed the way their school does fundraising — however, 5 of these respondents indicated that these changes were not permanent — while 11 respondents (44%) believe COVID-19 has not changed the way their school does fundraising.

The respondents that believe COVID-19 has had an impact on their school's fundraising mentioned that everyone is more careful — particularly the elderly — and therefore more difficultly to steward, Zoom meetings are not as effective as face-to-face meetings, there is less event-based fundraising, and there is more outsourcing of fundraising support. There were 2 respondents who indicated that their schools have shifted from annual giving to a 'Giving Month' or 'subscription based'.

Importantly, there were 2 respondents who suggested the current financial climate and potential recession is having a greater impact on school fundraising than COVID-19.

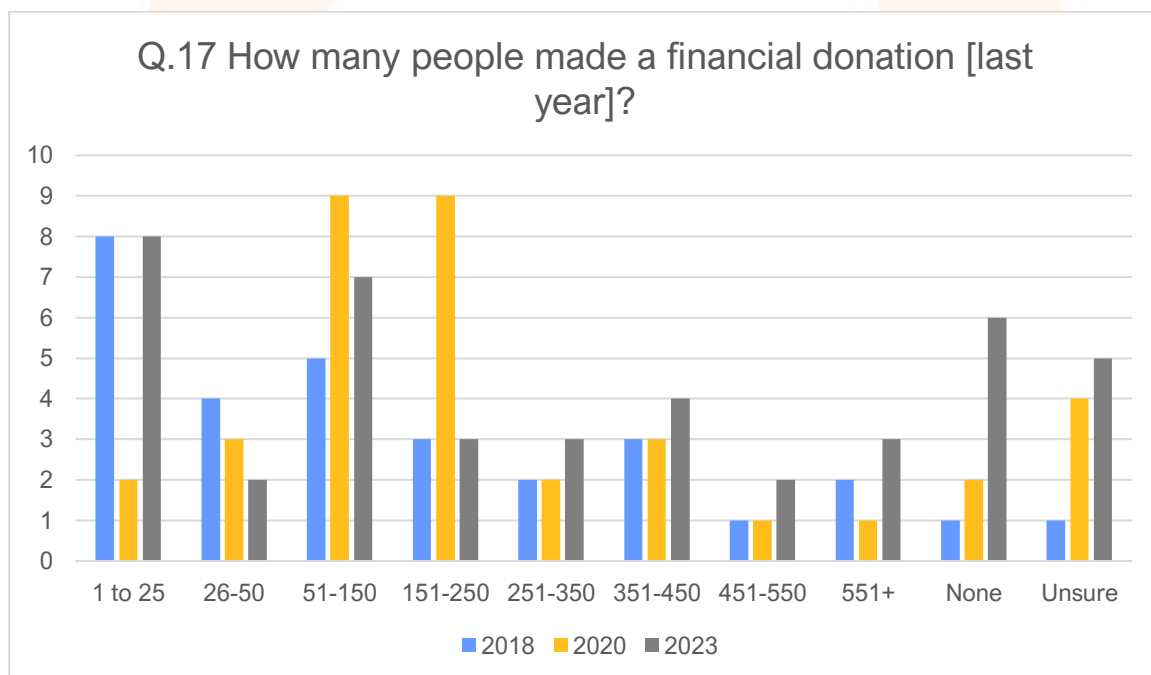
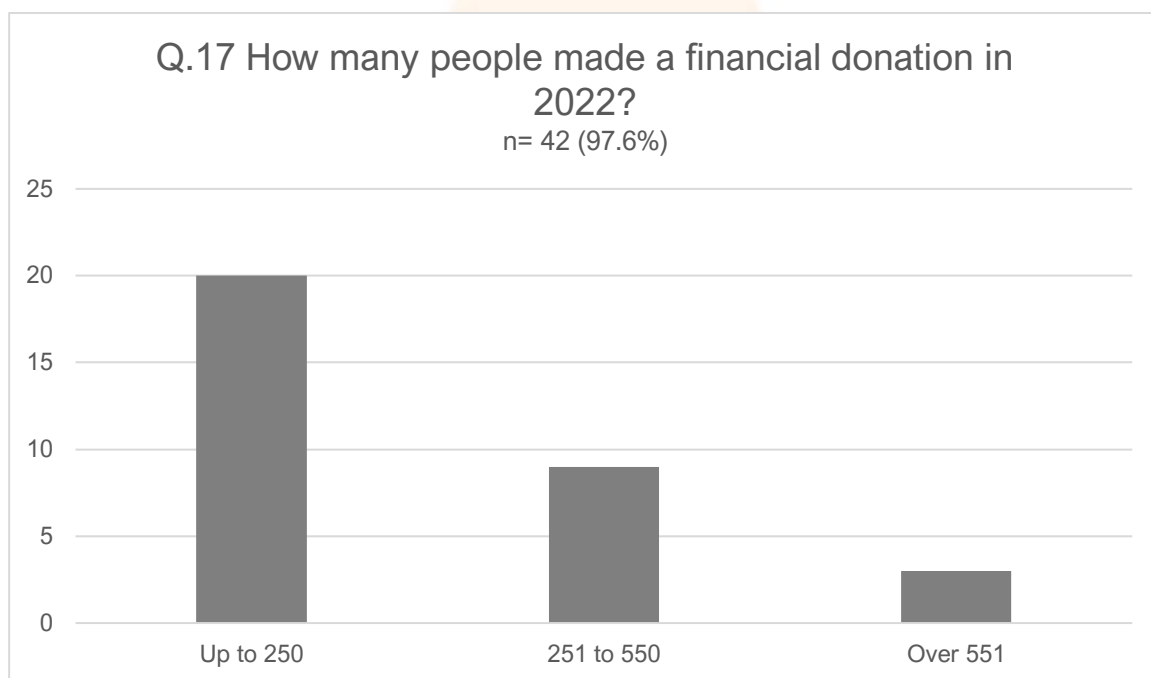


INDIVIDUAL GIVING & FUNDRAISING APPEALS

(QUESTIONS 17-29)

In 2022, 32 schools (74.4%) received financial donations from individuals, 6 schools (14%) did not, and there were 5 respondents who were unsure about the number of people that made a financial donation, which does not necessarily mean their school did not receive any financial donations in 2022.

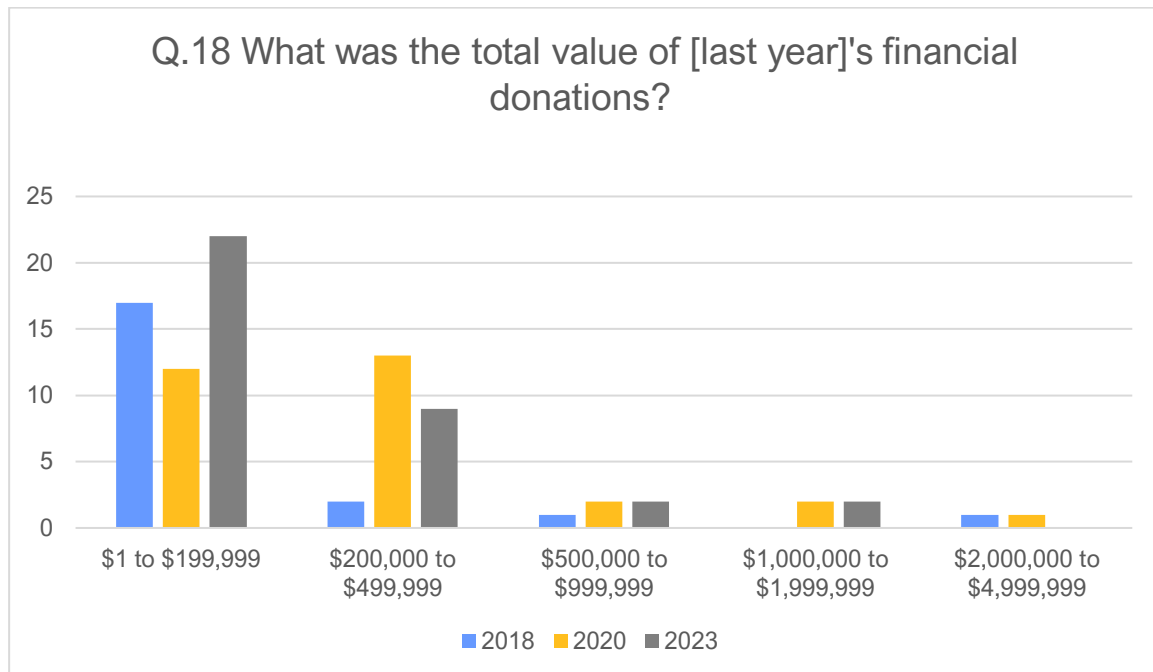
Of the schools that did receive financial donations, 20 (62.5%) had up to 250 donors, 9 (28.12%) had between 251-550 donors, and 3 (9.4%) had over 551 donors.



The 2023 survey data shows an increase in the total number of individual donors; however, this does not necessarily equate to a higher total value of donations.



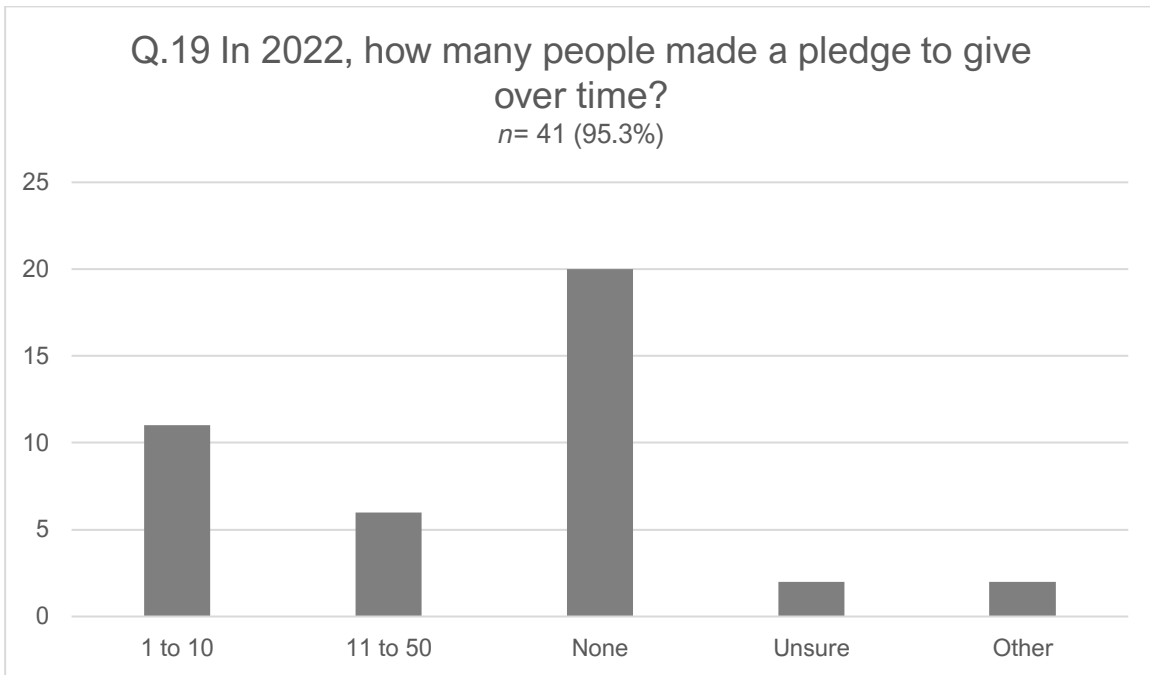
Of 35 responses, the total value of donations received in 2022 was up to \$199,999 for 22 schools (68.75%), followed by 9 schools (28.1%) that received between \$200,000-\$499,999, 2 schools (6.25%) that received \$500,000-\$999,999, and 2 schools (6.25%) that received \$1,000,000-\$1,999,999.



Compared to the previous surveys, donations income has remained the same or increased in each dollar range, except \$200,000-\$499,999, but none of the schools surveyed in 2023 received over \$2 million in 2022 — representing a decline in the higher range of total income received from donations.

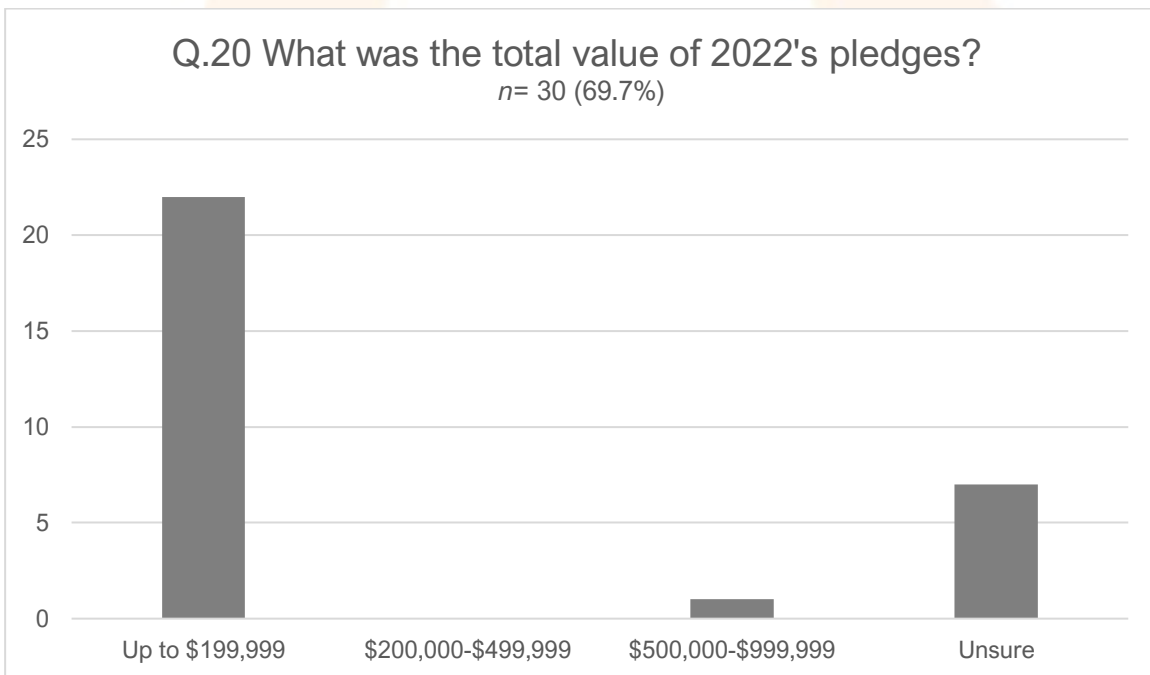
For pledges to give over time, 11 schools received up to 10 pledges and 6 schools received between 11-50, while most schools (20) did not receive any pledges. There was 1 respondent who said their school does not ask for pledges and 1 respondent whose school asks each parent to donate \$50/year ('Other'). There were 2 respondents who were unsure.





There were schools that had up to 200 and up to 300 pledges in the 2018 survey, and schools that only had up to 10 or up to 50 in the 2020 survey; the 2023 survey confirms a decrease in the total number of pledges to give over time.

For the total value of pledges in 2022, 22 schools had up to \$199,999 and 1 school had between \$500,000 to \$999,999. There were 7 respondents who were unsure.



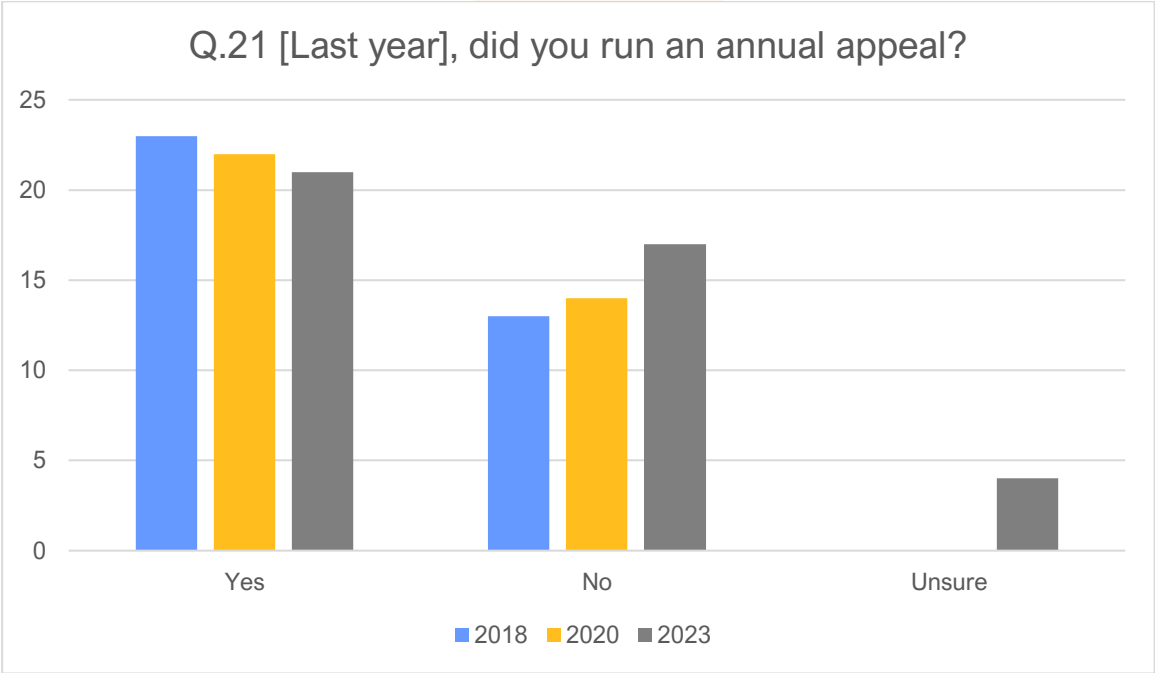
The 2020 survey had a similar total value of pledges to the 2018 survey despite a decrease in the total number of pledges, which indicated that the value of each pledge was increasing; unfortunately, this is not the case for the 2023 survey, with no schools receiving a total of \$1 million or more.

Pledges are most likely to occur in relation to a major project, such as a capital campaign, as the size of the gift often warrants multi-year payments — though smaller gifts (e.g.

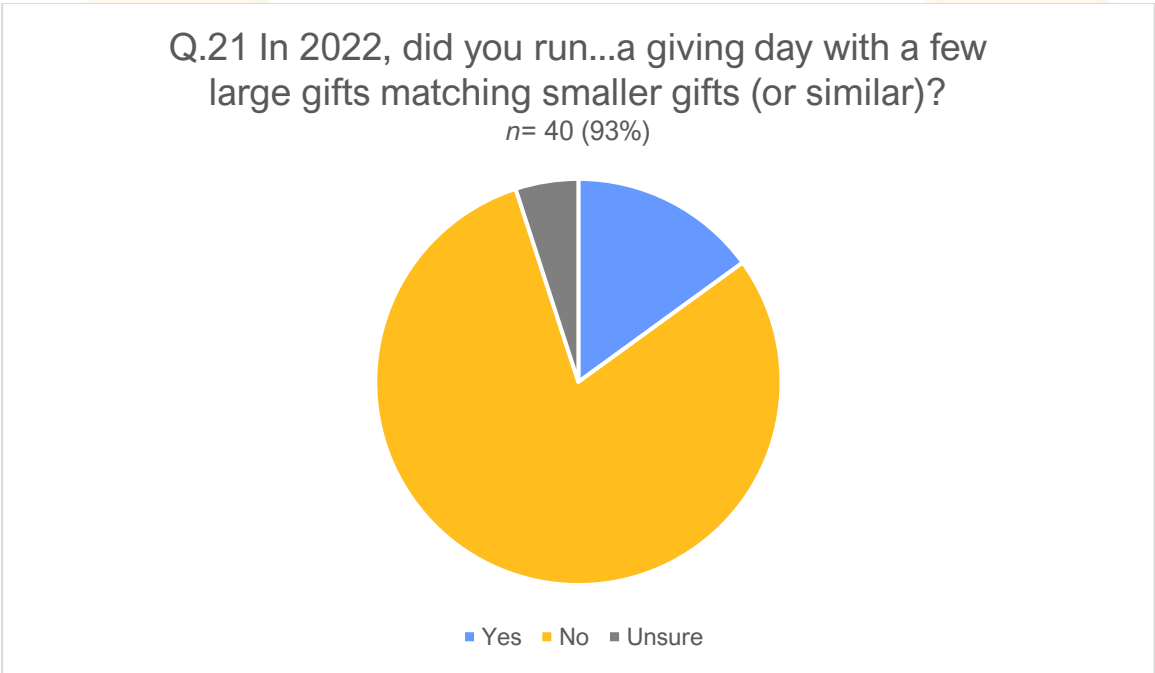


\$5,000) can also be made over multiple years and do not have to be linked to a major project. The schools that responded in 2023 may not have a major project underway and/or they may not be offering or encouraging pledging as an option for donors, which necessitates strategic major gift activity in this area.

Of 41 responses, over half of the schools (53.6%) had an annual appeal. Of 40 responses, 15% of schools had a giving day for which large gifts matched smaller gifts. There were only 2 schools that had both an annual appeal and a giving day.

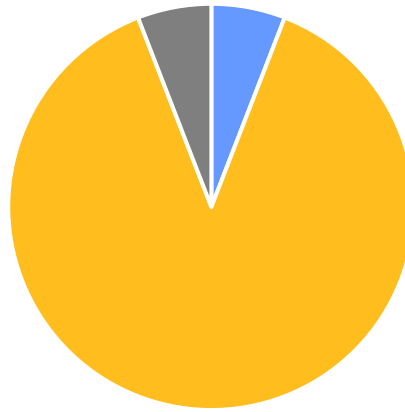


There has been a slight decrease in the number of annual appeals being run over the years that the survey has been conducted; annual appeals are key identifiers of bequest prospects and future major donors, so it is hoped that this is only indicative of the particular respondents participating in the surveys rather than a decline in annual appeals at Australasian girls' schools more broadly.



Q.21 In 2022, did you run...both an annual appeal and a giving day?

n= 34 (79%)

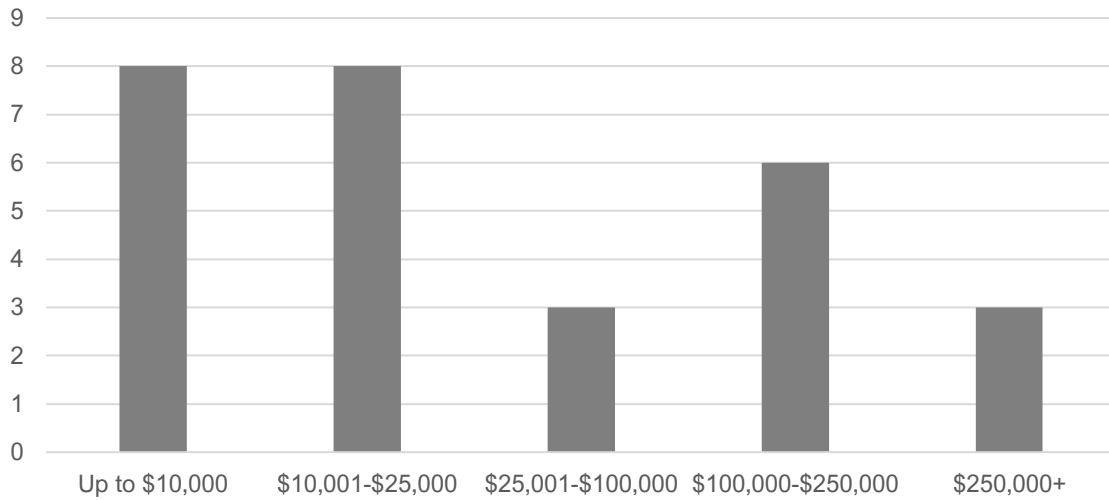


■ Yes ■ No ■ Unsure

Of 28 responses, the total amount raised from both annual appeals and giving days was up to \$10,000 for 8 schools, \$10,001-\$25,000 for 8 schools, \$25,000-\$100,000 for 3 schools, \$100,000-\$250,000 for 6 schools, and over \$250,000 for 3 schools.

Q.22 What was the total money raised from your 2022 annual appeal/s/giving day?

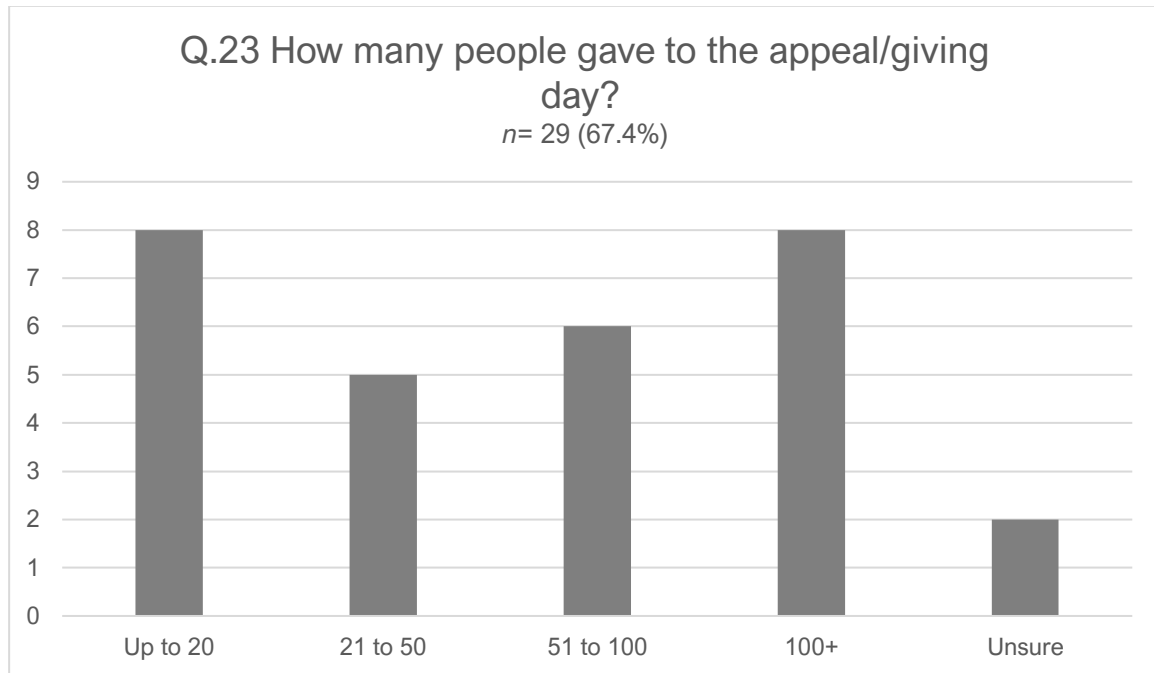
n= 28 (65.1%)



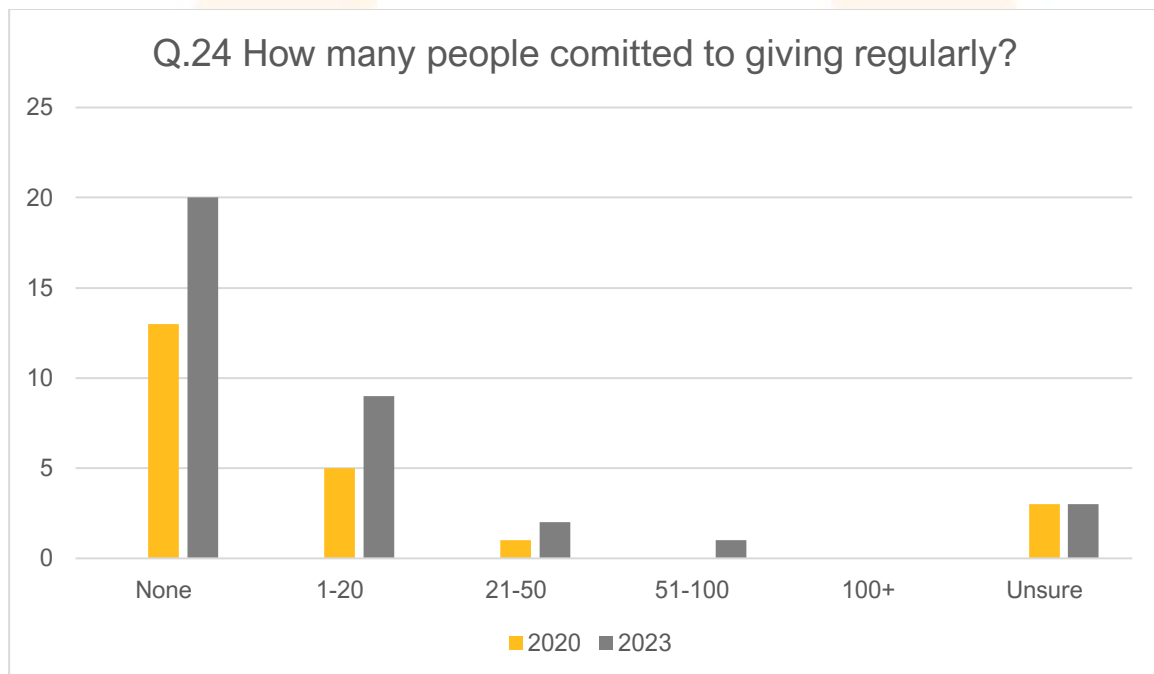
While there are less schools in the \$25,001-\$100,000 bracket in the 2023 survey when compared to the 2020 survey, it is positive that around a quarter of the schools reported income from annual appeals/Giving Days of more than \$100,000.



Of 29 responses, 8 schools indicated that up to 20 people gave to the fundraising appeals, 5 schools had 21-50 people, 6 schools had 51-100 people, and 8 schools had over 100 people. There were 2 respondents who were unsure.



For commitments to become regular givers, of 35 responses, 9 schools had up to 20 people, 2 schools had 21-50, 1 school had 51-100, and most schools (20) had none. There were 3 respondents who were unsure.

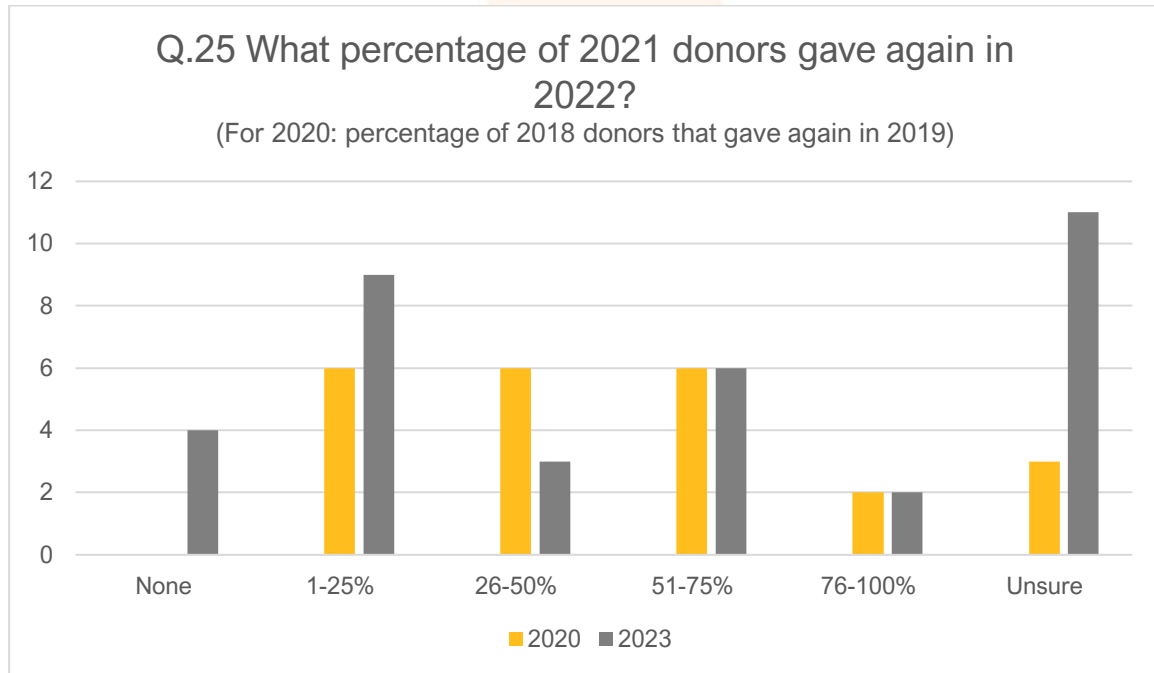


Similar to 2020, the majority of schools do not have any people commit to giving regularly. The benefit of securing regular monthly or quarterly donations is that income arrives without asking (after the first solicitation) and can provide a more reliable, forecastable source of



revenue for schools in addition to appeals, so this is still an area of potential opportunity for many schools.

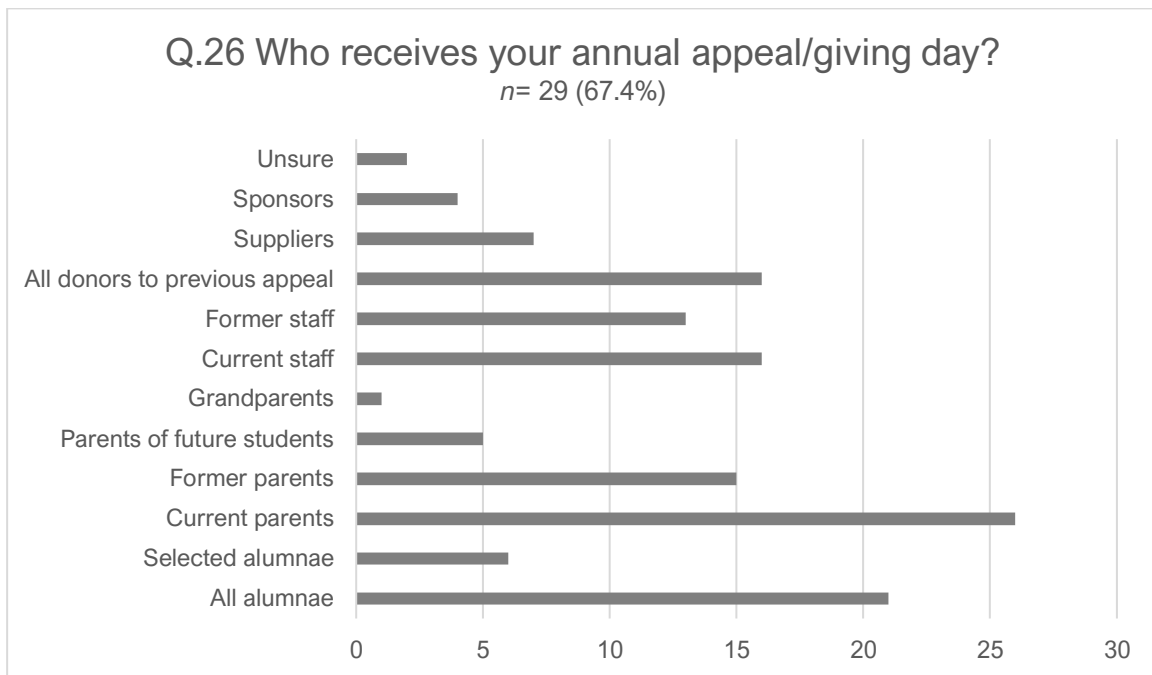
When asked about the percentage of 2021 donors that gave again in 2022, of 35 responses, 9 schools indicated that they had up to 25%, while 3 schools had 26-50%, 6 schools had 51-75%, and 2 schools had 76-100%. There were 4 schools that said none of their 2022 donors gave again in 2023 and 11 schools that were unsure.



Donor renewal rates are very important for maintaining income. Schools should aim for a renewal rate of up to 80% based on the assumption that approximately 20% of families depart the school each year; however, the actual renewal rates for many schools fall short, as shown in the 2023 and 2020 survey results. It is important that renewal rates continue to be tracked as an ongoing measure of performance in this area.

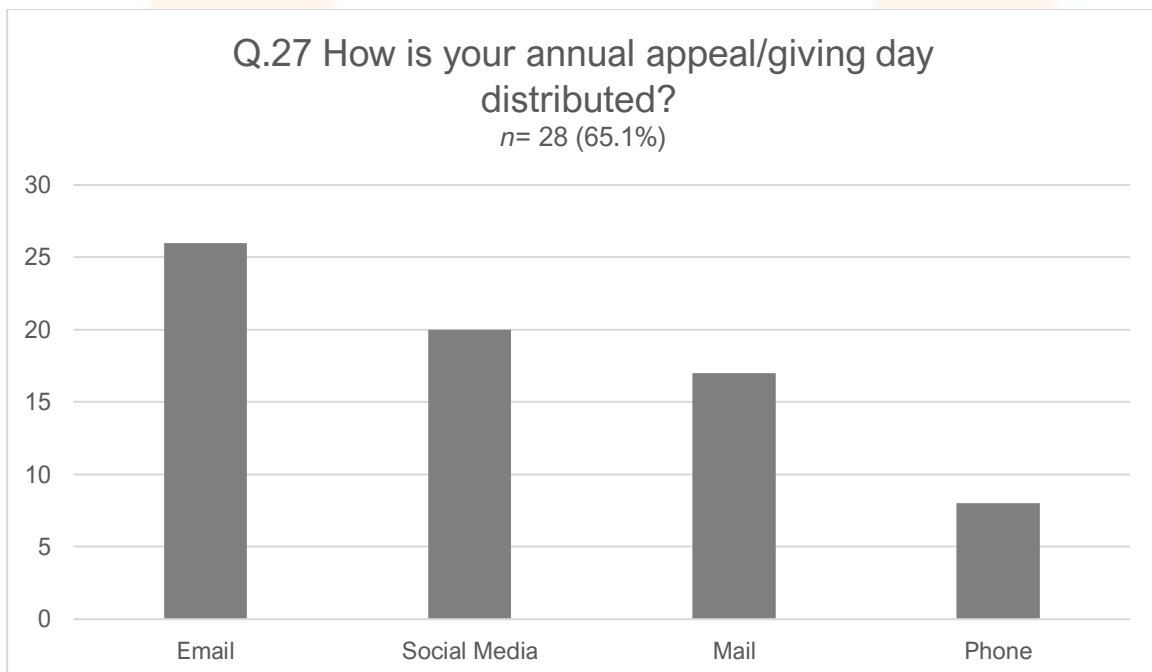
Of 29 responses, annual appeals and giving days were received by all alumnae for most schools (21 mentions), while 6 schools selected specific alumnae. Current parents were the largest group of recipients, closely followed by current staff and all donors to previous appeal. There were 2 respondents who were unsure.





Compared to 2020, there is a slight increase in selected alumnae, former staff, former parents, suppliers, and sponsors as recipients, but the other recipients are similar. It is important that appeals and giving days are personalised and customised to reflect the different kinds of recipients, and that former staff and former parents of the school are not overlooked as they can often still be deeply embedded within the school community.

Email and social media were the most common methods of distributing the annual appeal and giving day; however, many schools also use physical mail, while only a few use phone.



It is important to learn which method of distribution people prefer and to make contact



according to preference; for example, those over 60 years of age often prefer information in print (i.e. physical mail) or by phone, while those under 30 prefer a digital format (such as email or social media).

For general comments on individual giving (Q.28), some respondents said that it is difficult to encourage people to give and challenging to create the imperative to give, but others that suggested an increase focus on stewardship can improve results. There was 1 respondent who believes their school is not capable of running an individual giving program.

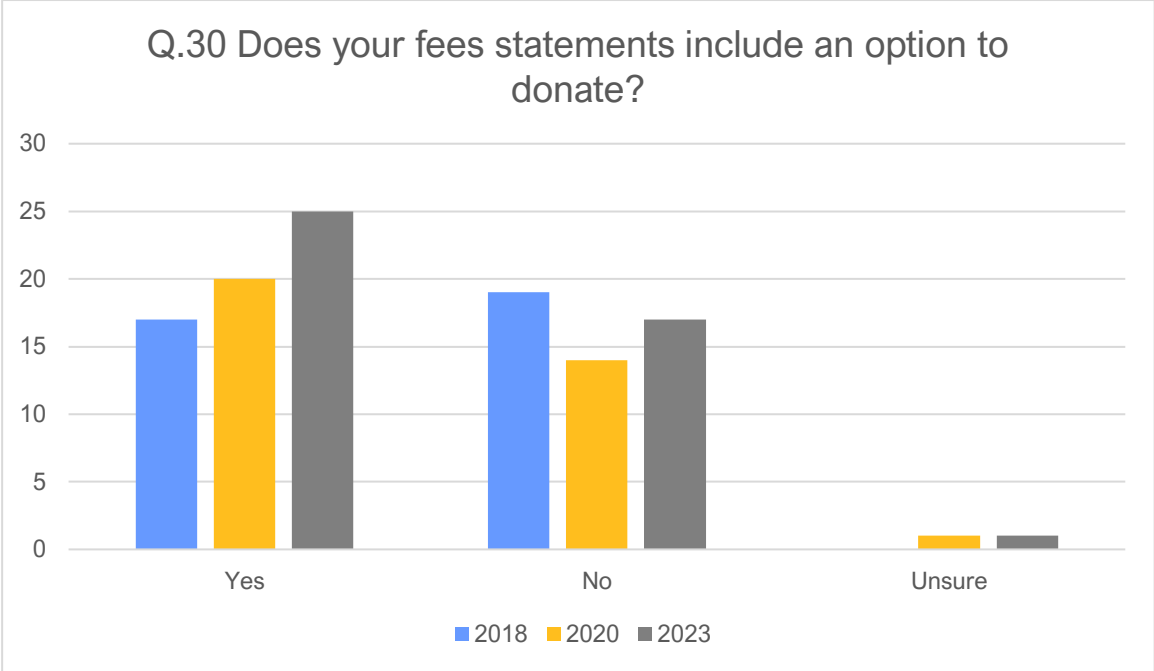
For thoughts on a move from an annual appeal to a giving day (Q.29), 3 out of 8 respondents indicated they have already done so, and that engagement is higher. 4 respondents indicated they will introduce a giving day in 2024. There was 1 respondent who said that a giving day is not a good idea when the school is in the quiet phase of a campaign.



FEES STATEMENT DONATIONS

(QUESTIONS 30-33)

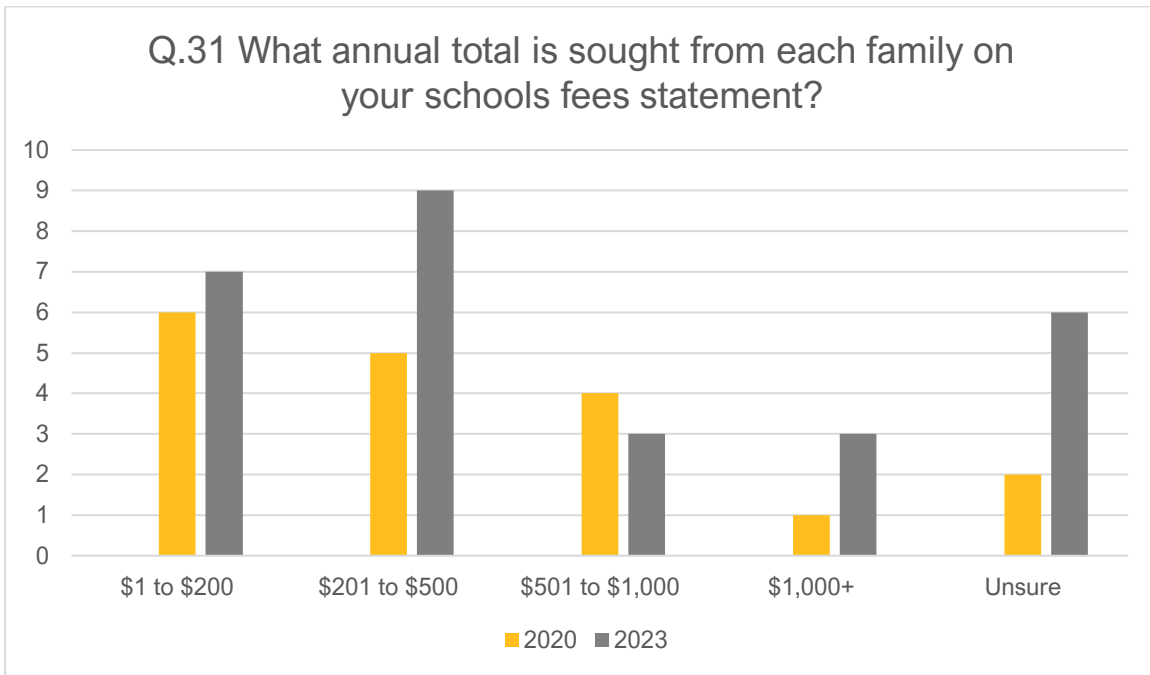
For over half of the respondents (58.1%), an option to donate is included on their schools' fees statements, while 39.5% of schools do not include such an option. There was only 1 respondent who was unsure.



The results remain consistent when considering the 2020 survey had 35 responses to this question (compared to 43 responses in 2023), and it is also worth noting that the 2020 survey specified donations to a building fund as opposed to general donations as above.

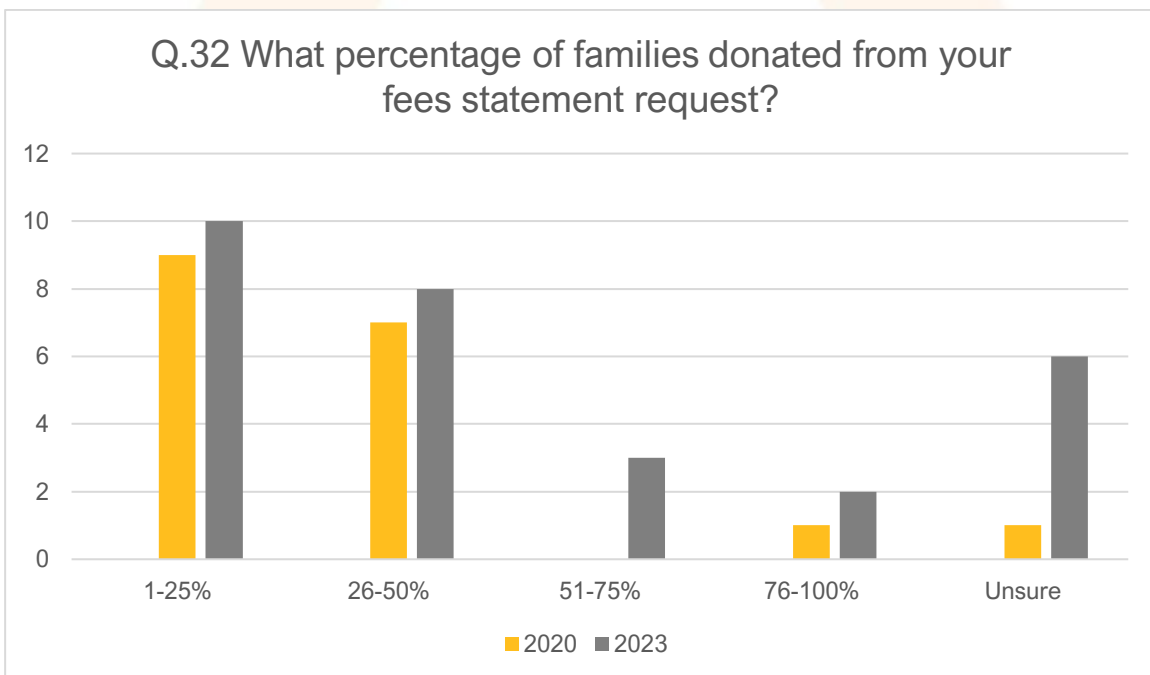
Of the 22 responses that indicate a specific annual donation amount that is sought from families on the fees statement, the most common amount is between \$201-\$500 (9 schools), followed by \$1-\$200 (7 schools), then \$501-\$1,000 (3 schools) and \$1,000+ (3 schools).





It is positive to see an increase in the asking amount, particularly \$1,000+, when compared to the previous survey.

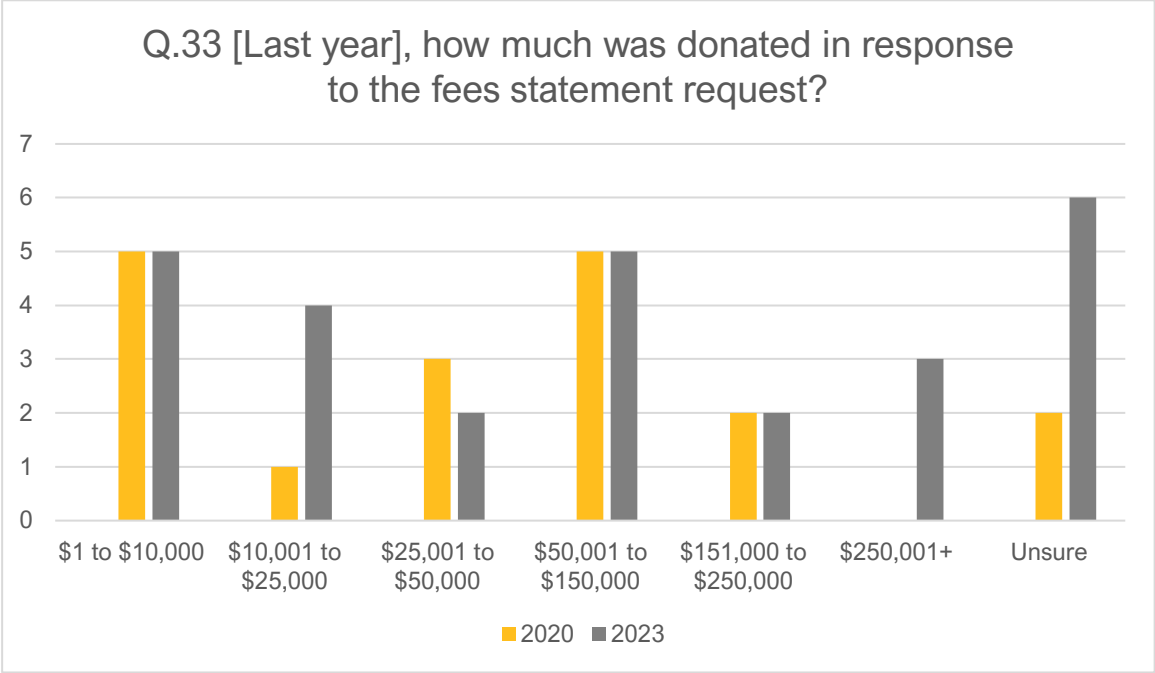
For the percentage of families donating from the fees statement request, 10 schools had up to 25%, followed by 8 school with 26-50%, 3 schools with 51-75%, and 2 schools with 76-100%.



The increase shows that schools are leveraging the fees statement for philanthropic income; however, the fees statement should not be the only ask for donations and schools should ensure that they are targeting other audiences in addition to those that receive fees statements.



Of the actual donations resulting from the fees statement request, 5 schools received up to \$10,000, 4 schools received \$10,001-\$25,000, 2 schools received \$25,001-\$50,000, 5 schools received \$51,000-\$150,000, and 3 schools received \$250,000+.



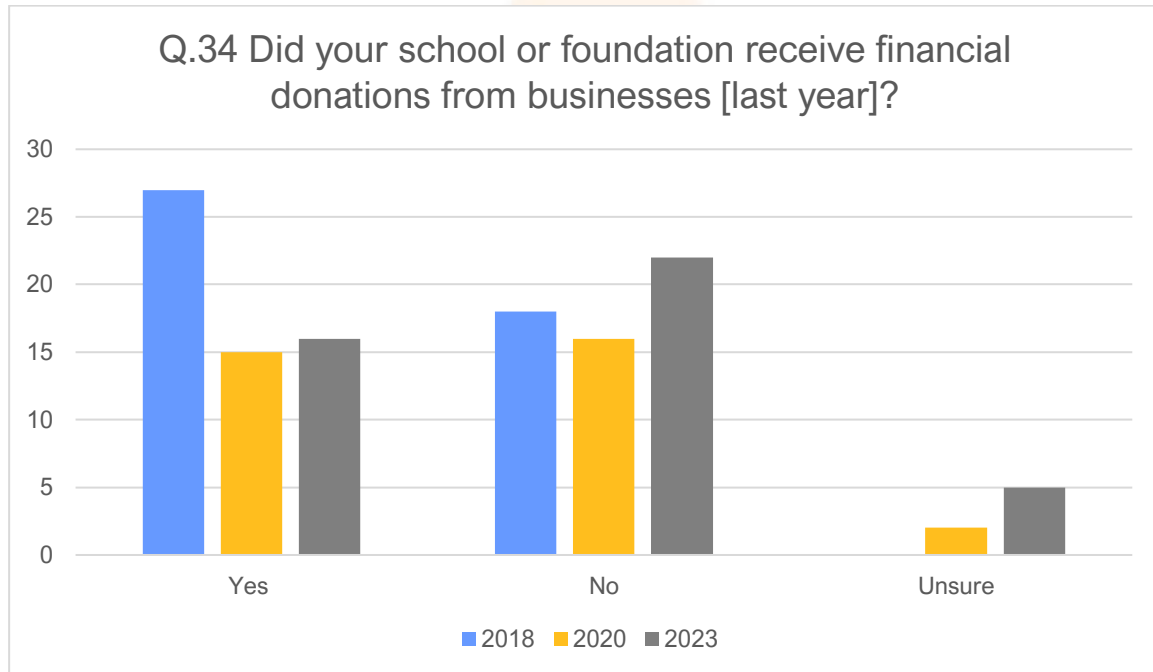
Again, this increase is very positive and should encourage all schools to include a request for donations on their fees statement. It is recommended that schools consider this type of request in the context of other donation requests (such as an annual appeal).



DONATIONS AND SPONSORSHIPS FROM BUSINESS

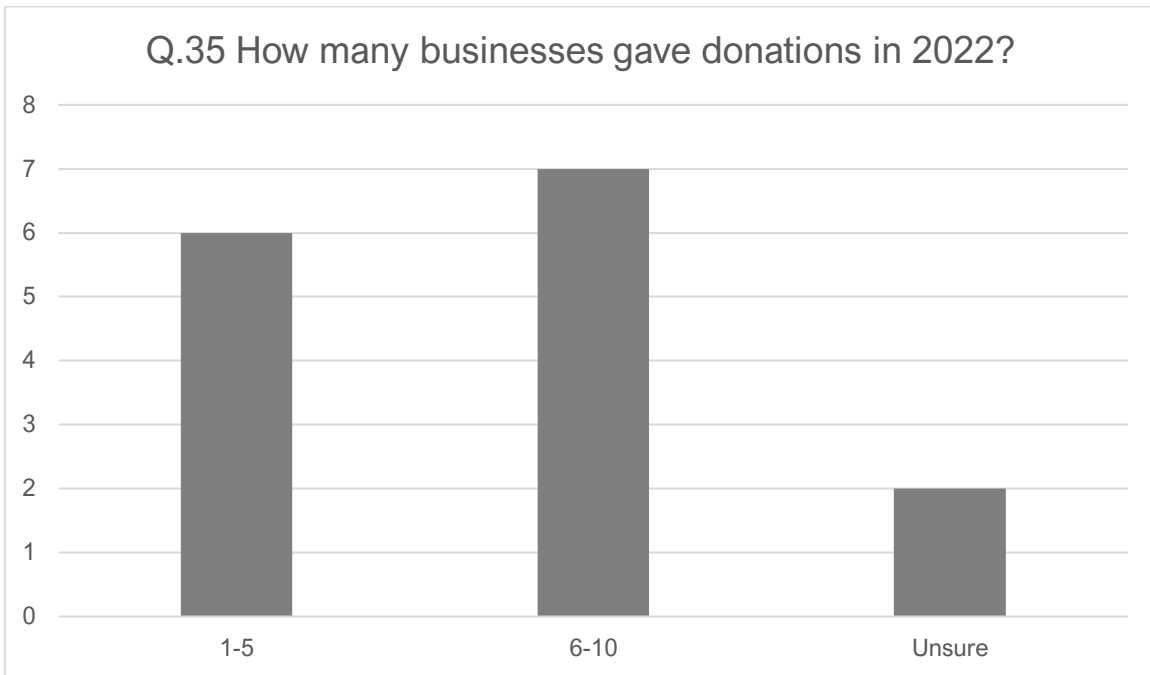
(QUESTIONS 34-37)

There were 16 schools that received financial donations from businesses in 2022, while most schools (22) did not receive this kind of support. There were 5 respondents who were unsure.*

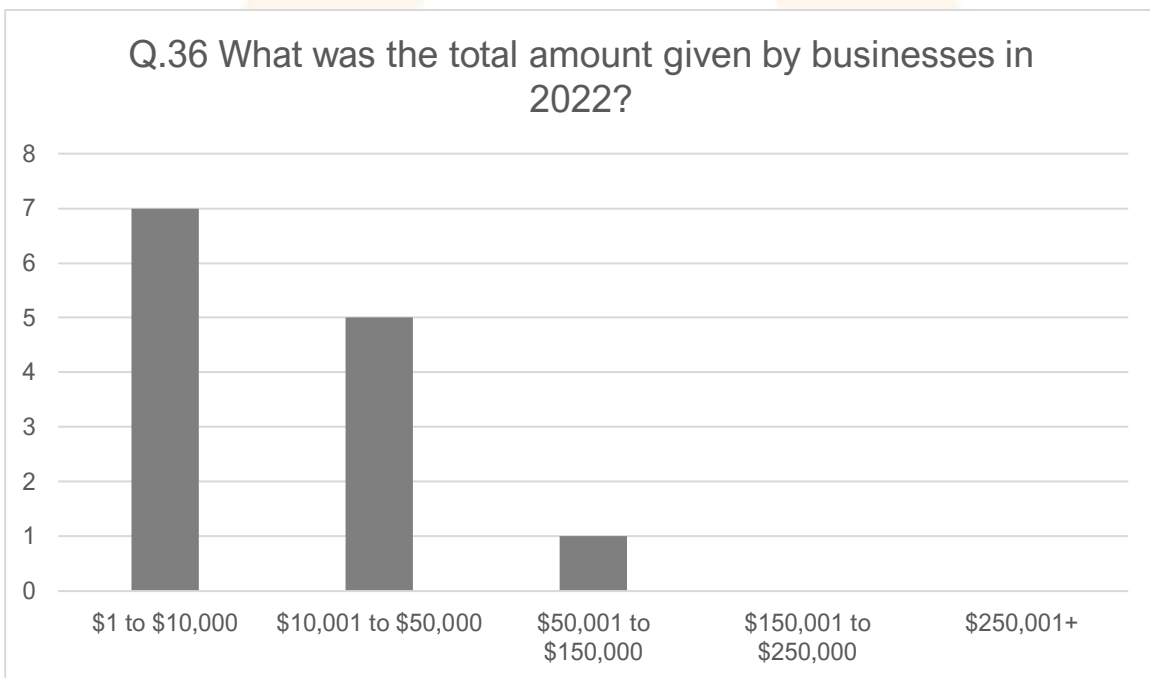


When a school seeks gifts from businesses, it is essential to have a specific policy/procedure governing how this is to work within the school.

Of the 16 schools that received financial donations from businesses in 2022, 7 had between 6-10 businesses as financial supporters and 6 had 1-5, while 2 respondents were unsure and 1 did not provide an answer.



Of the 13 responses that indicate the total value of donations from businesses in 2022, 7 schools received a total of up to \$10,000, 5 schools received between \$10,001-\$50,000, and 1 school received between \$50,001-\$150,000.



For schools, the income received from businesses may not justify the time and complexity involved. It is recommended that schools develop and focus on an ongoing program for receiving support from businesses, or otherwise put the energy into annual giving, major gifts, and bequests.

*For general comments on donations and sponsorship from businesses (Q.37), respondents highlighted that donations are different to sponsorships and, while they answered 'no' or



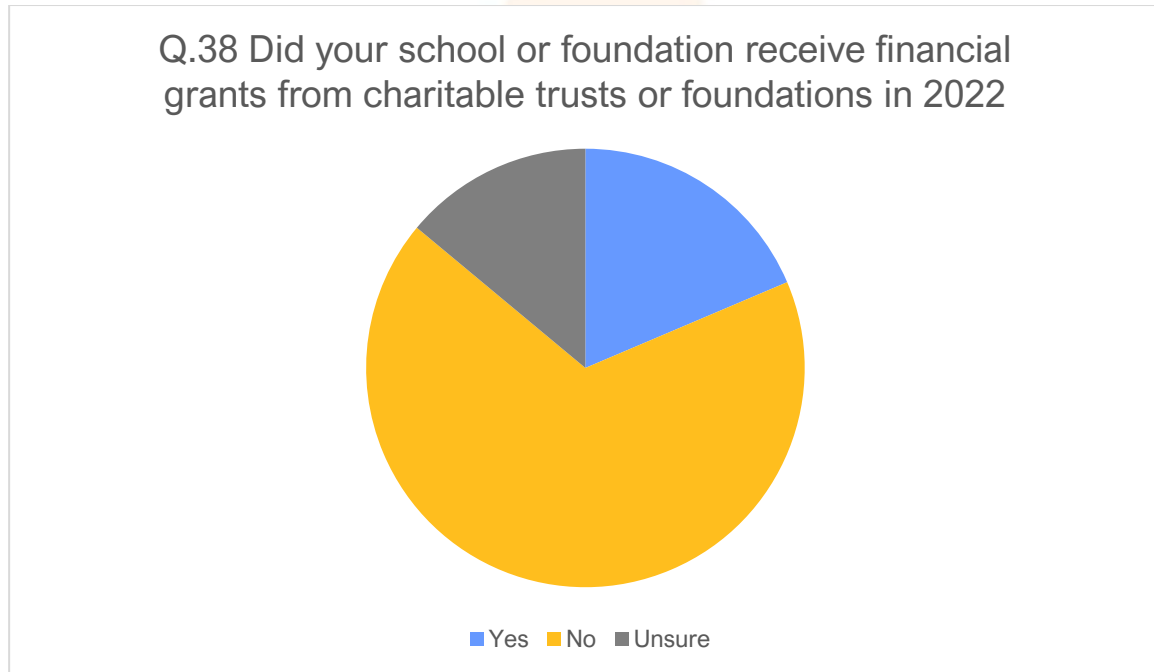
'unsure' to the previous questions about donations from businesses, their comments indicate that their school has received, or currently receives, support from businesses in the form of sponsorships (at least 4 schools). Some of the comments include that businesses are more likely to support the school when they receive recognition and that sponsorships work well when connected to a fundraising event. There was 1 respondent who said, "this is an area that the school is currently investigating as another avenue of giving".



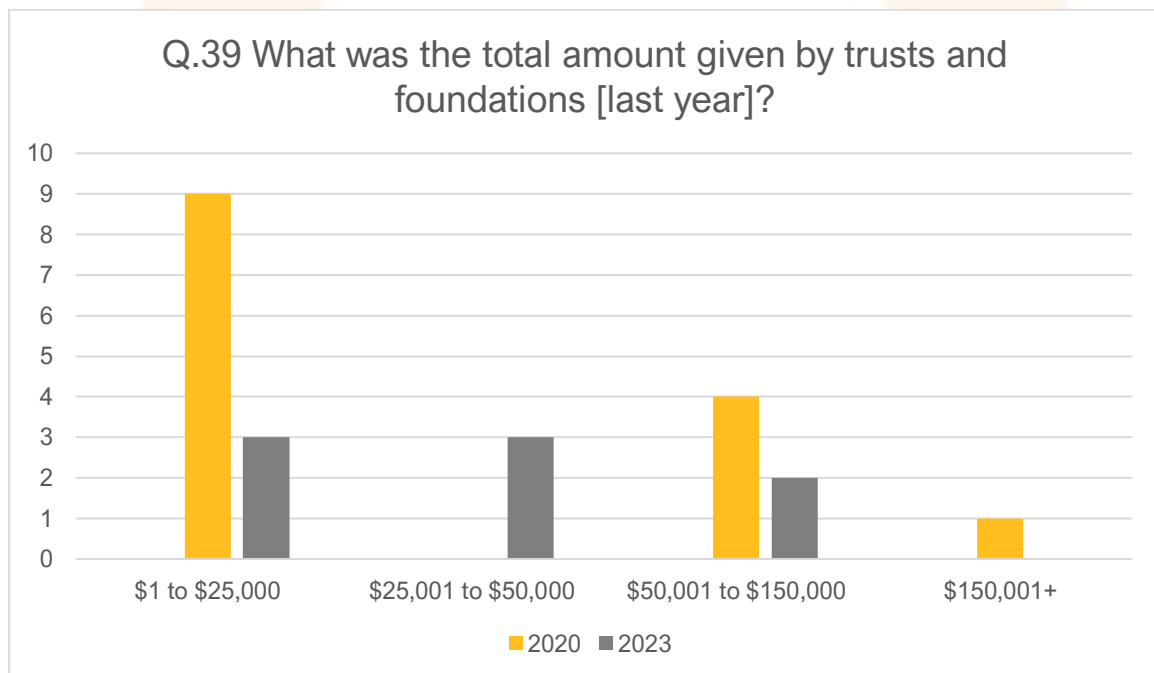
GRANTS FROM TRUSTS AND FOUNDATIONS

(QUESTIONS 38-40)

Financial grants from trusts and foundations in 2022 were not common among the schools surveyed; 8 schools (18.6%) received at least one grant from a trust or foundation, while 29 schools (67.4%) did not receive any, and 6 respondents were unsure.



Of the schools that did receive such support, 3 schools received a total of up to \$25,000, 3 schools received between \$25,001-\$50,000, and 2 schools received \$50,001-\$150,000.



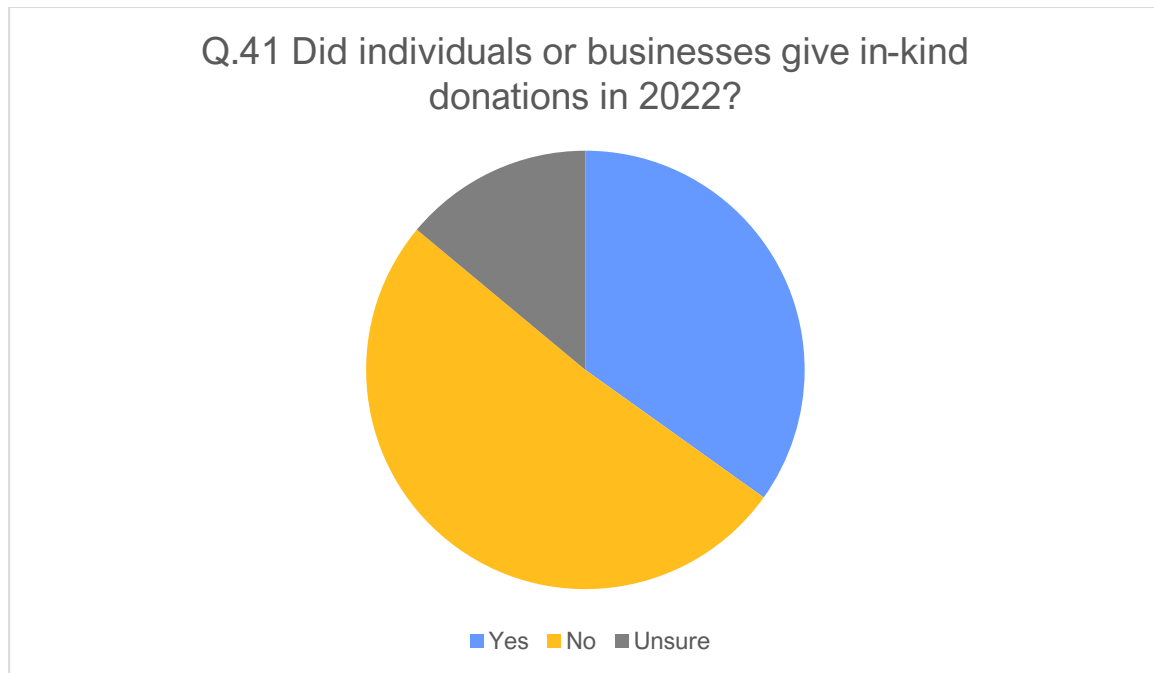
While many trusts and foundations support the cause of education, schools are sometimes excluded from being eligible for funding, as the trust or foundation may favour supporting youth welfare organisations, for example, as these kinds of organisations may not receive government or other sufficient financial support. When a trust or foundation does support a school, it is usually for something specific — a capital project, scholarship, and so on. Careful research on eligibility and funding requirements is essential, as it saves wasted time and can result in significant funding success.

For general comments on financial grants from trusts and foundations (Q.40), a respondent indicated that a number of parents and alumnae have philanthropic foundations through which they give to the school, and another respondent indicated that the support is in the form of a bequest and relief from school fees. For the schools that did not report receiving any grants, it might be the case that they did apply but were not successful, which aligns with a comment from one respondent; however, another respondent commented, “I’m not sure how they may contribute to a school’s philanthropic endeavours”, which suggests a need for an increase in awareness of trusts and foundations as a viable source of funding for schools.

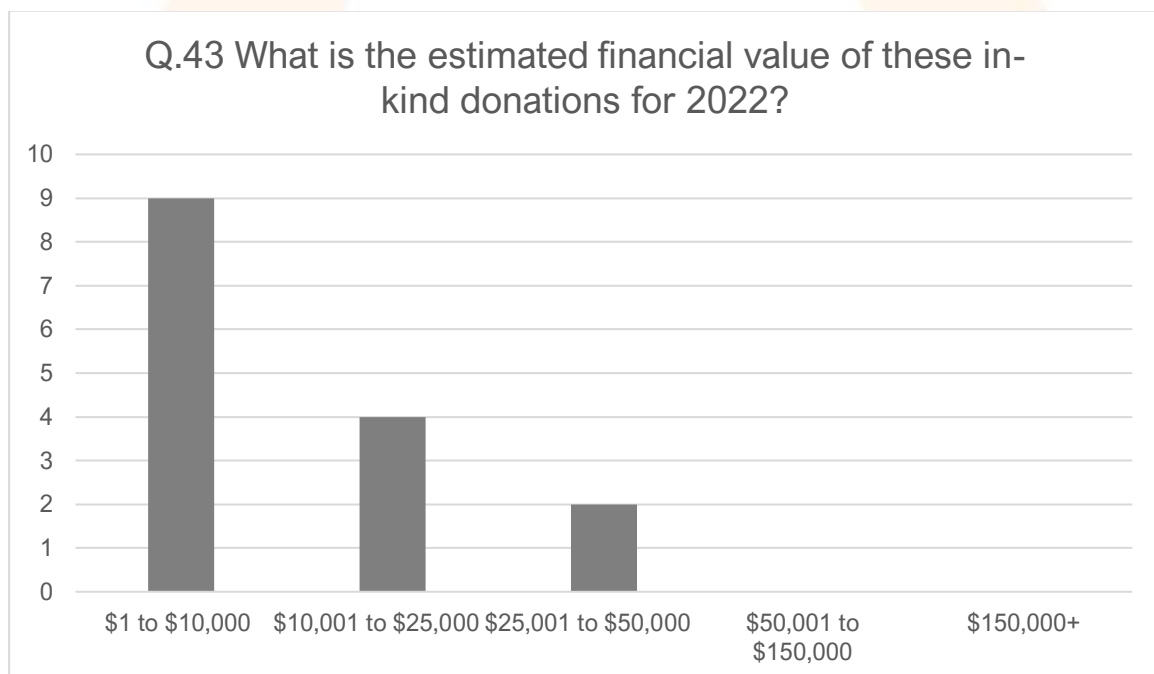
IN-KIND DONATIONS

(QUESTIONS 41-44)

Just over half of the schools (51.1%) did not receive any in-kind donations from individuals and/or businesses in 2022, while 15 schools (32.5%) did, and 6 respondents were unsure.



Of the schools that did receive such support, the estimated total value is up to \$10,000 for 9 schools, \$10,001-\$25,000 for 4 schools, and \$25,001-\$50,000 for 2 schools.



Unlike the previous survey, no schools reported receiving over \$50,000 in in-kind donations in 2022.



The sorts of in-kind donations received in 2022 by the schools surveyed include:

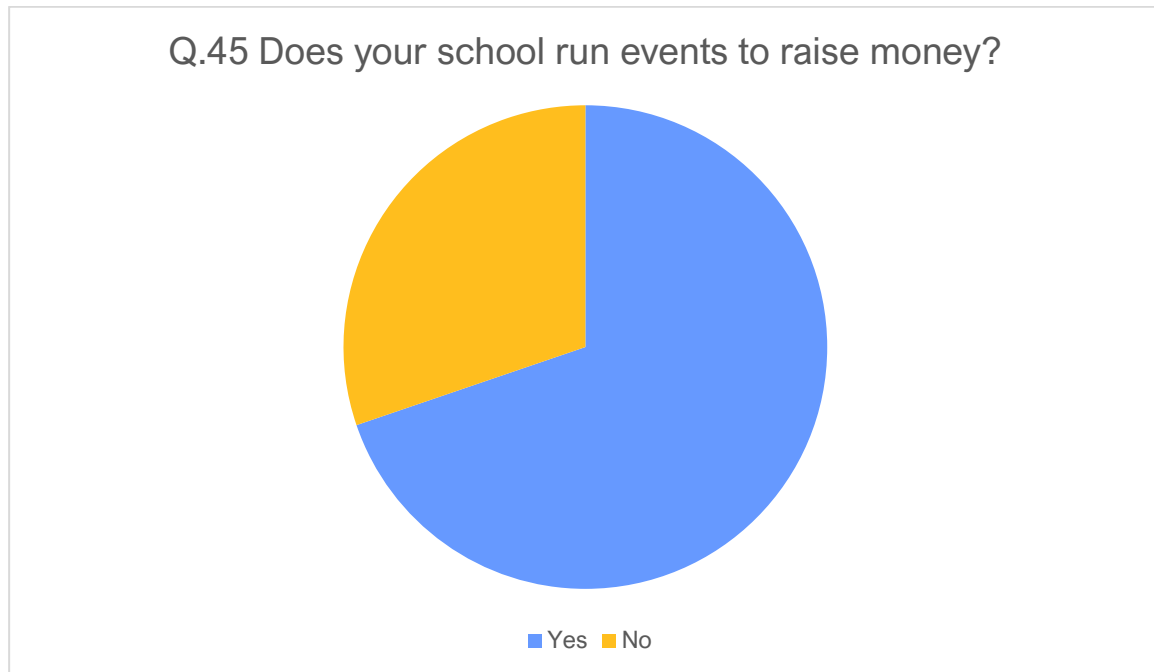
- Equipment, e.g. computers and iPads, tractor
- Free use of venues
- Products, e.g. skin care and hair care, hampers
- Services, e.g. advertising, printing
- Vouchers, e.g. holidays, restaurants, sporting events

In-kind donations have decreased both in quantity and value in schools when the 2023 data is compared to that of 2020 and 2018. This is unfortunate as in-kind support can save a school a significant amount of money each year.

FUNDRAISING EVENTS

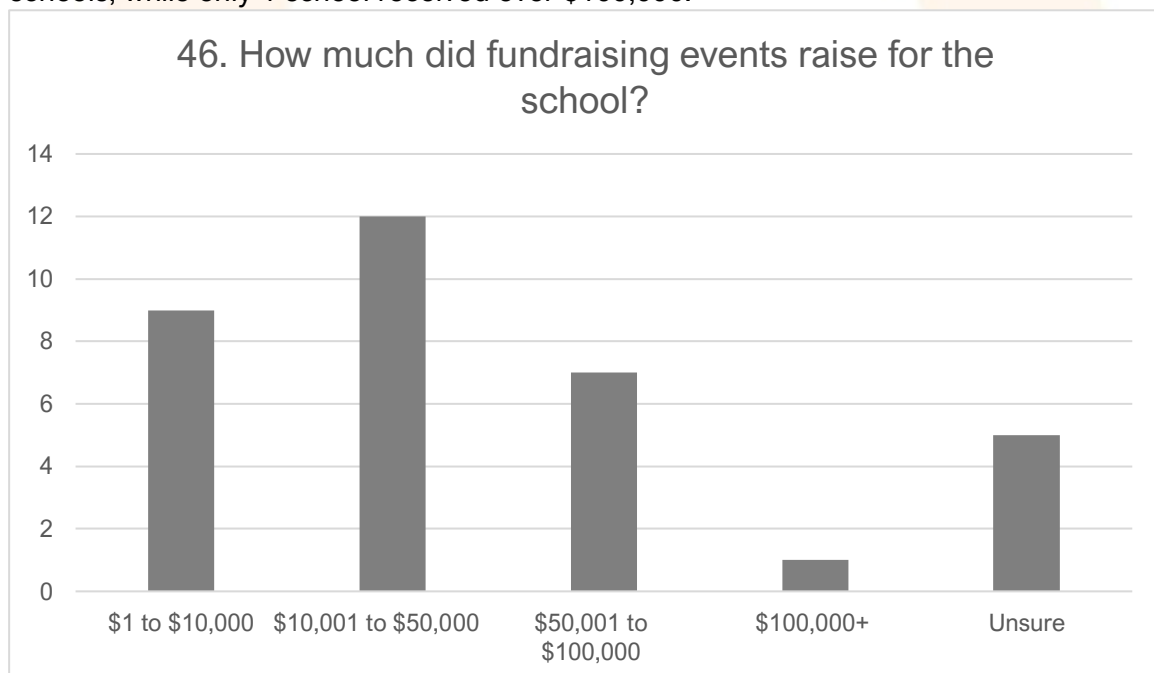
(QUESTIONS 45-50)

Respondents from all the schools surveyed were able to answer whether their school runs events to raise money; most schools (69.8%) do, while 30.2% do not.



This is similar to the previous surveys, which found that approximately 75% of schools did run fundraising events and 25% did not.

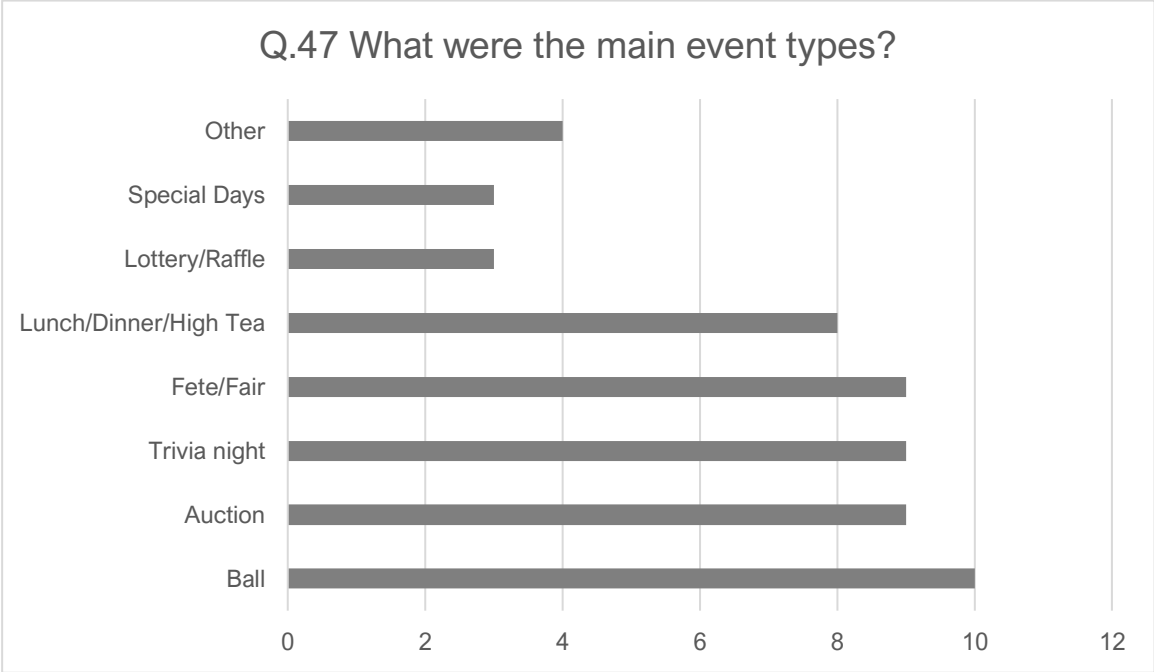
The approximate value (after deductions and expenses) of the total raised from such events is up to \$10,000 for 9 schools, \$10,001-\$50,000 for 12 schools, and \$50,001-\$100,000 for 7 schools, while only 1 school received over \$100,000.



In 2020 and 2018, a handful of schools reported receiving over \$100,000 in total from fundraising events, so the above shows that the higher values were not achieved by as many schools in 2022.

It is more common for schools to have multiple types of fundraising events according to the respondents surveyed, as 12 schools listed a single event and 17 schools listed between 2 to 5 events. The main fundraising event types include:

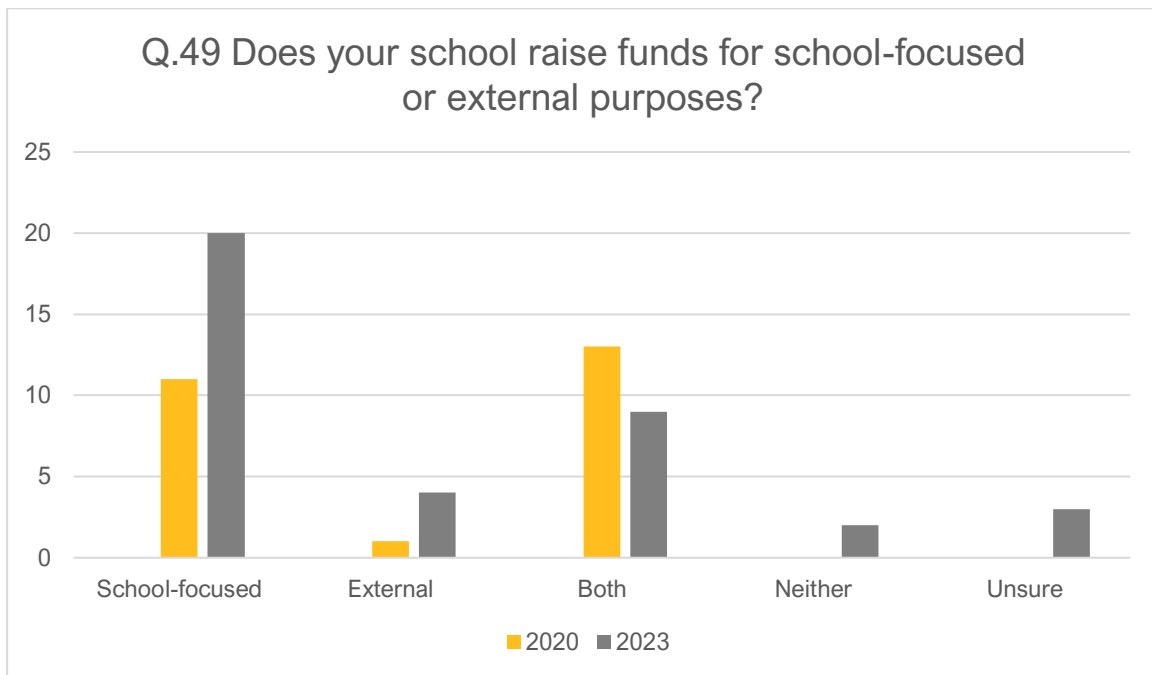
- Ball (10 mentions)
- Auction (9 mentions)
- Trivia night (9 mentions)
- Fete/Fair (9 mentions)
- Lunch/Dinner/High Tea (8 mentions)
- Lottery/Raffle (3 mentions)
- Special Days — Dress Up Day, Foundation Day, Golf Day, etc. (3 mentions)
- Other: Carwash, Sporting Events, Home Tours, and Walkathon (1 mention each)



It is important for schools to consider donor fatigue when running multiple fundraising events throughout the year; 1-2 events is most sustainable, but, particularly for 3 or more events, schools must ensure that each event is targeted to the right potential donors and integrated into the fundraising strategy of the school.

For most schools (20), the funds raised are school-focused (i.e. channelled into the school), as opposed to external (i.e. invested in the community or a different entity, such as a charity) (4 schools), but some schools (9) fundraise for both internal and external purposes.





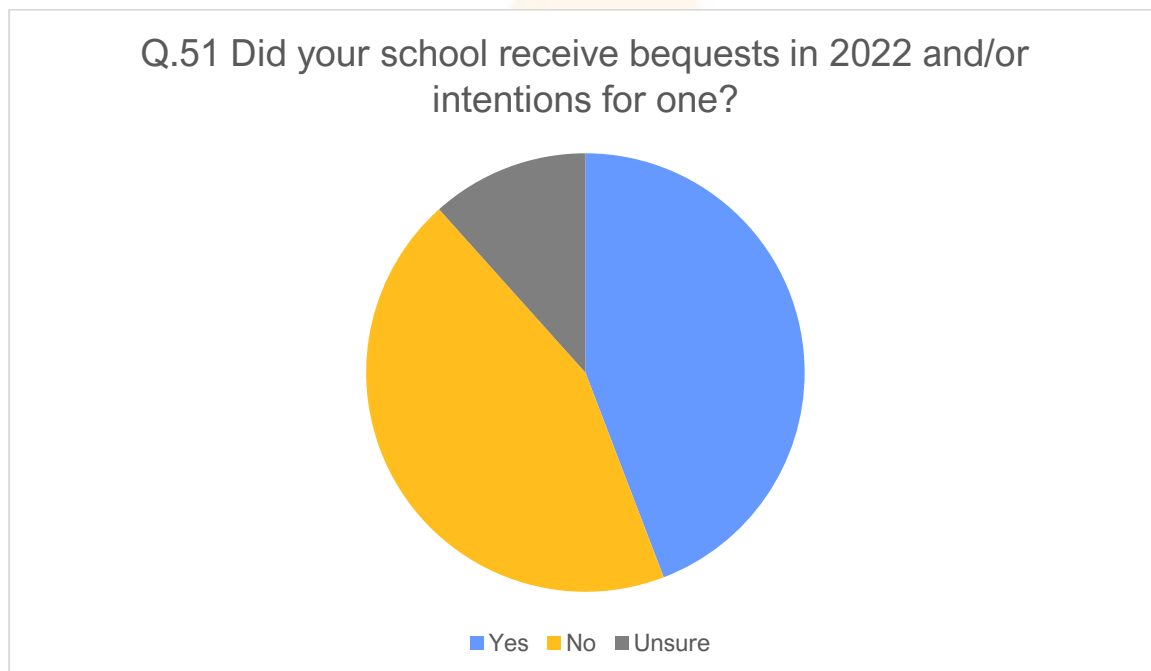
As shown above, there has been an increase in fundraising for external purposes. Perhaps this demonstrates a growing objective for schools to support — and be seen to support — the wider community, particularly considering the timing and occurrence of COVID-19.

For general comments on fundraising events (Q.50), two respondents indicated they are a lot of work for little return, while others suggested a story or compelling reason for funding is essential and a clear target works well.

BEQUESTS

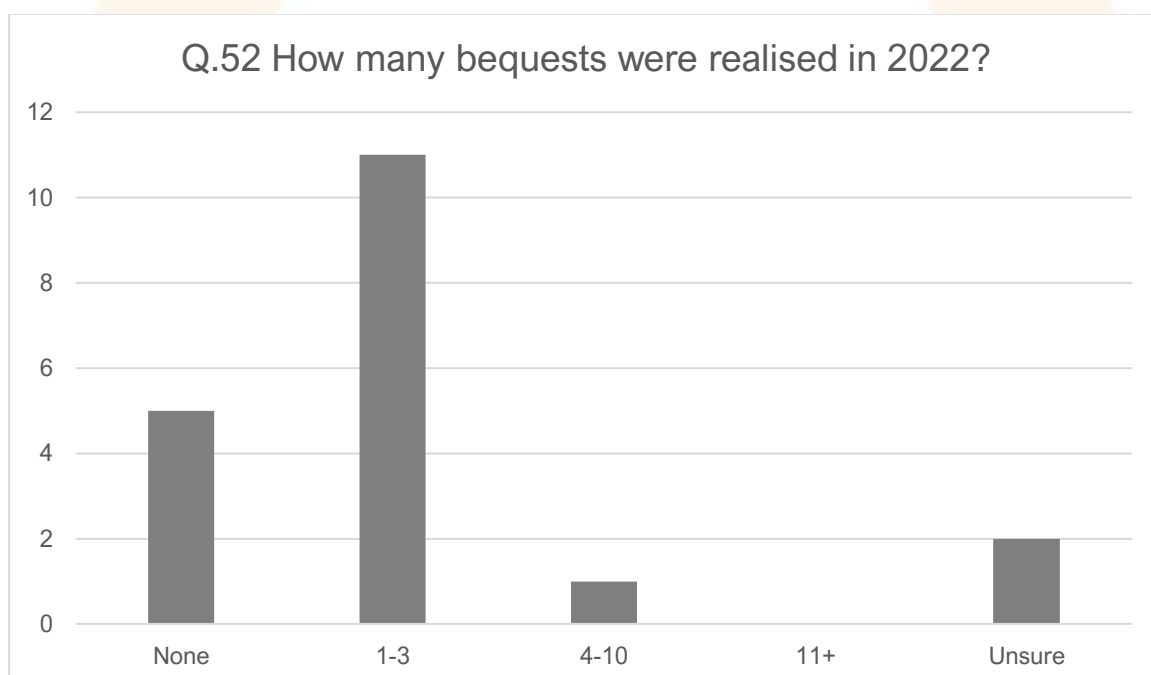
(QUESTIONS 51-58)

The number of schools that received a bequest or intention for a bequest in 2022 — 19 (44.1%) — is equal to the number of schools that did not. There were 5 respondents who were unsure.

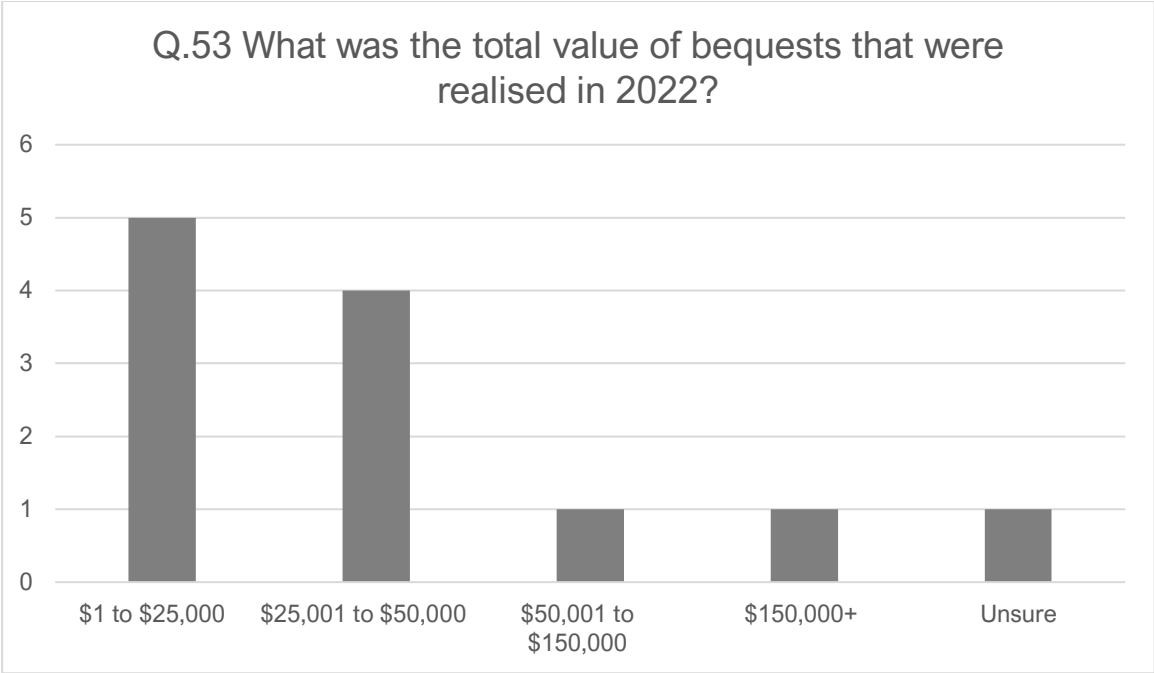


The previous surveys also had roughly an equal proportion of schools in each category.

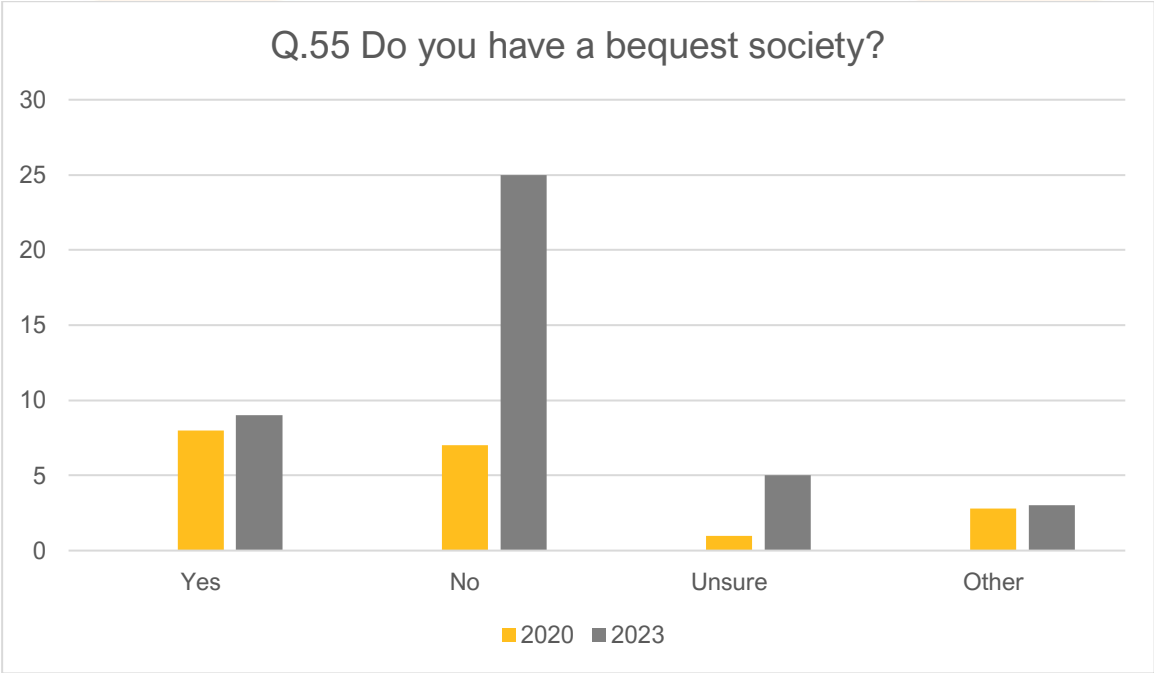
Of the schools that received a bequest or intention for a bequest in 2022, 11 indicated that between 1-3 bequests were realised, while 1 indicated 4-10, and 5 did not have any bequests realised. There were 2 respondents who were unsure.



Of the 12 schools for which bequests were realised, up to \$25,000 was the most common total value (5 schools), closely followed by \$150,000+ (4 schools), and then \$25,001-\$50,000 (1 school) and \$50,001-\$150,000 (1 school). There was 1 respondent who was unsure.



Many schools (25) do not have a bequest society (however, 1 respondent expressed interest in establishing a bequest society), while 9 schools do, 2 schools are developing a bequest society ('Other'), and there were 5 respondents who were unsure and 3 who did not provide an answer. Of the 7 (out of 9) schools that were able to indicate the number of members in their bequest society, 4 schools have between 10-30 members, while 3 schools have under 10.



There were 7 (out of 9) schools who invited bequest society members to an event in 2022. (Q.56)

For the schools that conducted bequest promotion activities in 2022, word-of-mouth was reported as the most successful (8 mentions), closely followed by face-to-face (7 mentions), and brochures/magazines, alumni engagement, event invitations, and lunch/high tea were also mentioned. (Q.57)

For general comments (Q.58), a few respondents highlighted the importance of bequests, for example:

Bequests are the future and strength of philanthropy with all institutions, especially within schools.

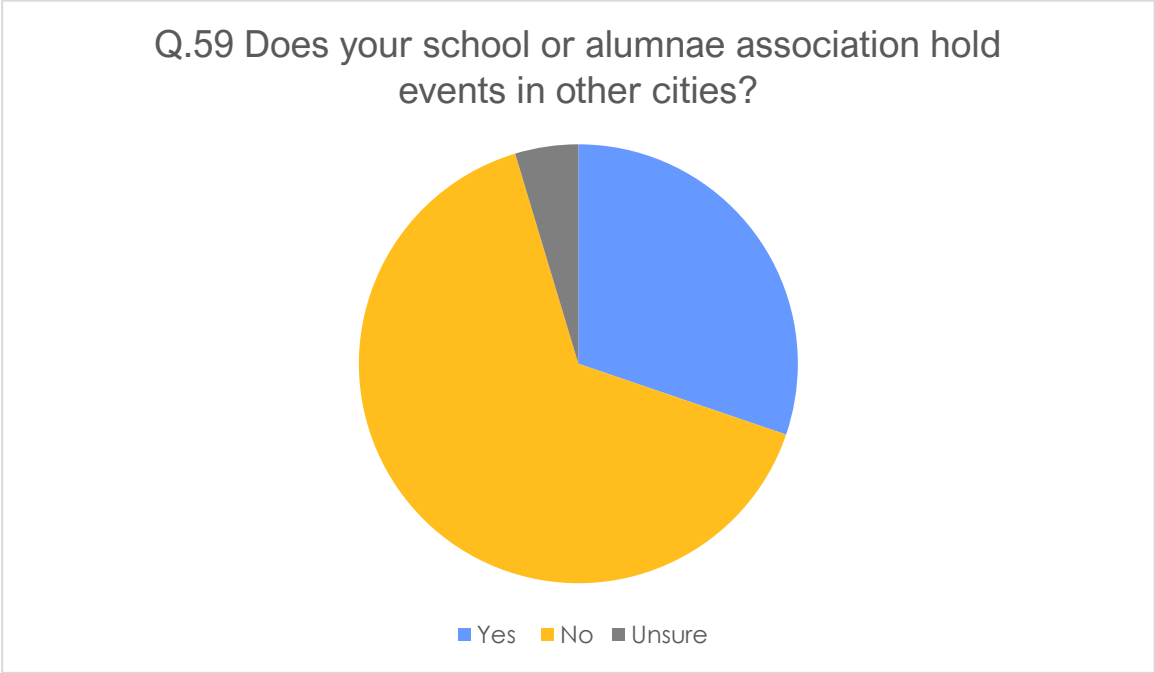
Indeed, a carefully run bequests program provides the best fundraising return on investment.



ALUMNAE RELATIONS

(QUESTIONS 59-60)

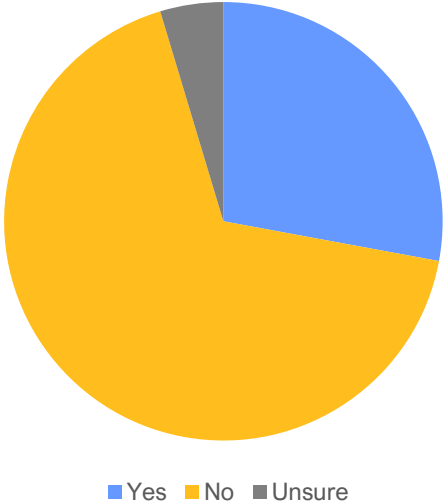
There are 13 schools (32.5%) that hold inter-state events, and 28 schools (65.1%) that do not — however, one respondent indicated that their school previously held inter-state events before 2020, and another respondent indicated that they will relaunching inter-state events in 2023 — and there were 2 respondents who were unsure. The types of events held inter-state include dinners, lunches, gatherings, member events, Old Girls and reunions.



Just under a quarter of the schools (23.2%) hold events overseas, while the majority (72%) do not hold events overseas, and there were 2 respondents who were unsure. Similar to inter-state events, there are at least two schools that previously held events overseas but have not done so since 2020 or earlier. Only a few event types were mentioned, including dinners, member events, and Old Girls.



Q.60 Does your school or alumnae association hold events overseas?



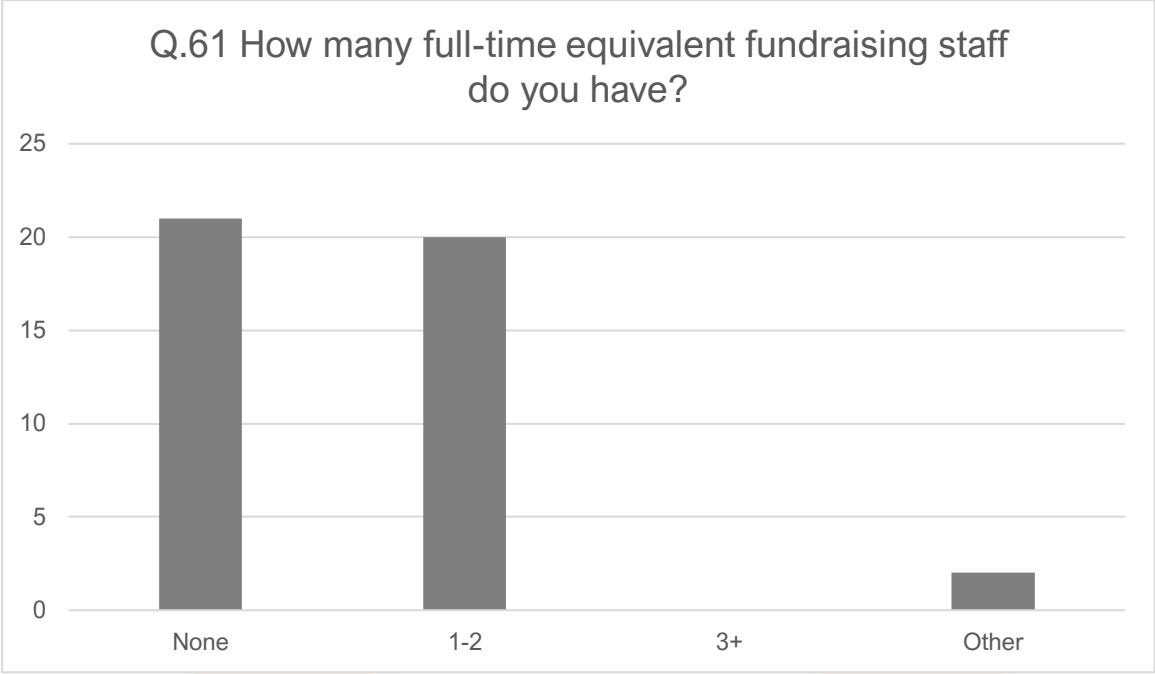
(There is not enough data relating to this area from the previous surveys with which to compare the 2023 results — as is likely the case for other questions that do not provide comparative analysis.)



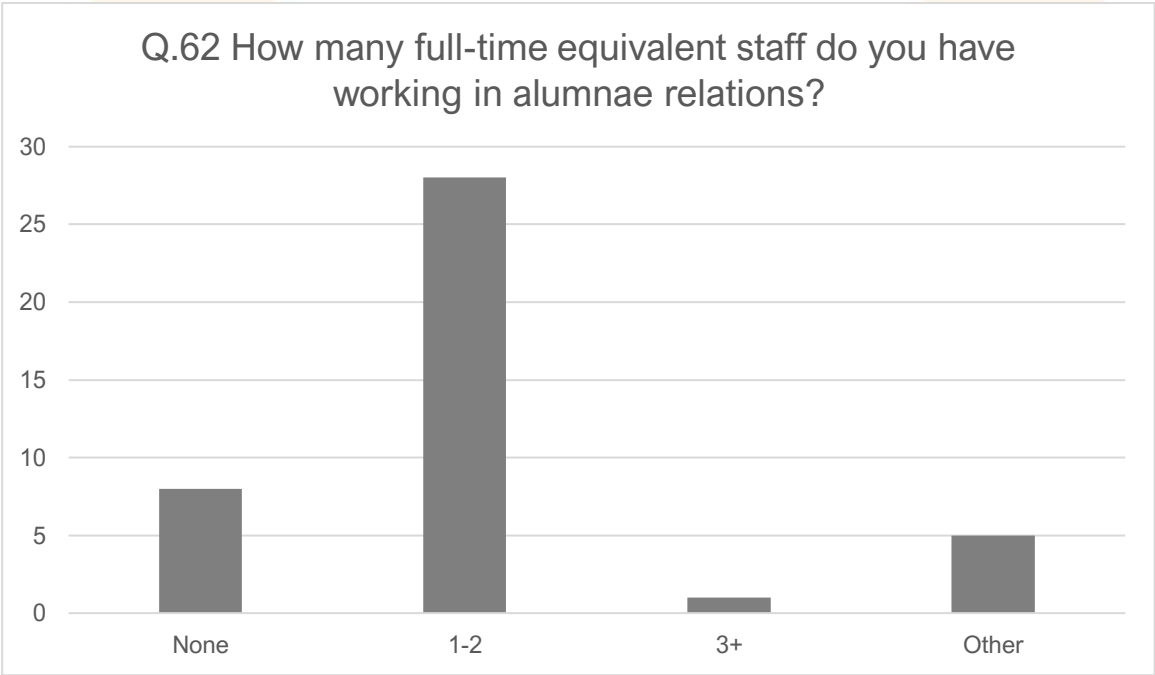
FUNDRAISING STAFF

(QUESTIONS 61-66)

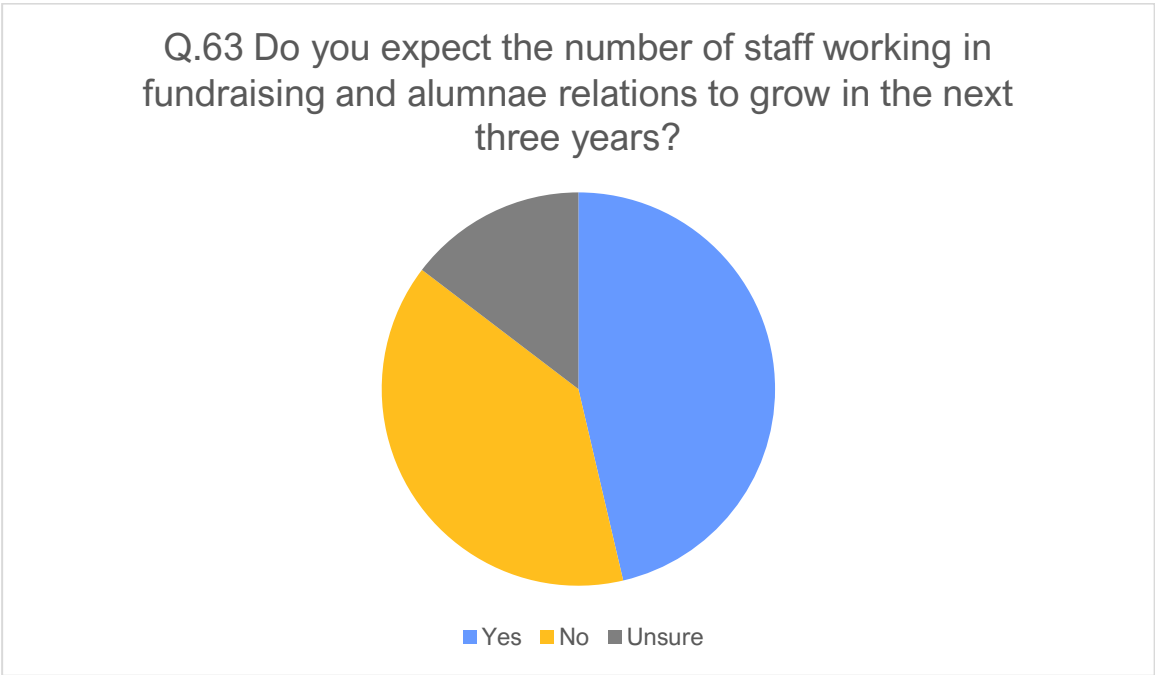
Just under half of the schools (51.1%) have full-time equivalent fundraising staff (including database management, research, and administration, etc.), while 48.8% of schools do not have any fundraising staff. Between 1-2 staff is most common (20 schools) and 2 schools answered with less than 1 FTE ('Other').



In comparison to fundraising staff, a higher percentage of the schools (79%) have full-time equivalent alumnae relations staff; 28 schools have 1-2 staff, 5 schools have less than 1 FTE ('Other'), and 1 school has over 3 staff. There are 8 respondents (18.6%) that do not have any staff working on alumnae relations at their school.



Of 41 responses, there are 19 schools that expect fundraising and/or alumnae relations teams to grow at their school in the next three years, 16 schools that do not, and 6 respondents were unsure.

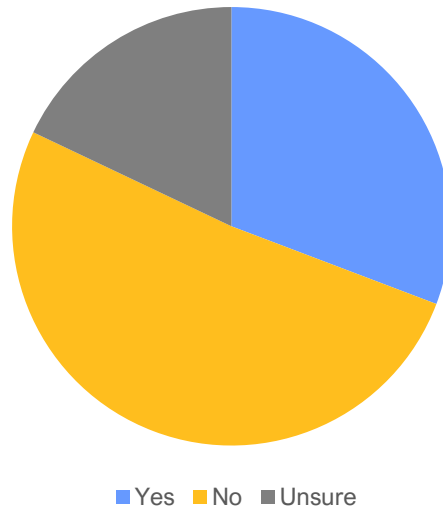


While staff numbers remain minimal as in the previous surveys, there is an increased expectance of growth in this area of the schools surveyed in 2023.

Of 38 responses, there are 11 schools (31.5%) that have an allocated fundraising budget for the Advancement/Development Office — mostly for events (5 mentions) and advertising/marketing/promotion (3 mentions), but also for giving day/annual appeal expenses (2 mentions), capital developments (1 mention), stewardship (1 mention), and merchandise (1 mention). Of the remaining schools, 20 (52.6%) do not currently have an allocated fundraising budget — however, 2 of these respondents indicated that it is in development — and 7 were unsure.

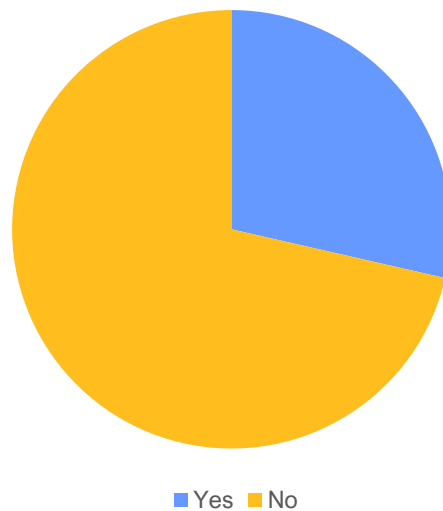


Q.64 Is there an allocated fundraising budget for the Advancement/Development Office?



There are also 12 schools that implemented new fundraising ideas and initiatives in 2022 — including events, bequest programs, a capital campaign, and Giving Days — while the majority (30 schools) did not implement any new fundraising ideas or initiatives, and there was 1 respondent who did not provide an answer.

Q.65 Have you implemented any new fundraising ideas or initiatives in 2022?



All schools should invest in fundraising and alumnae relations staff and resources to achieve appropriate fundraising income.

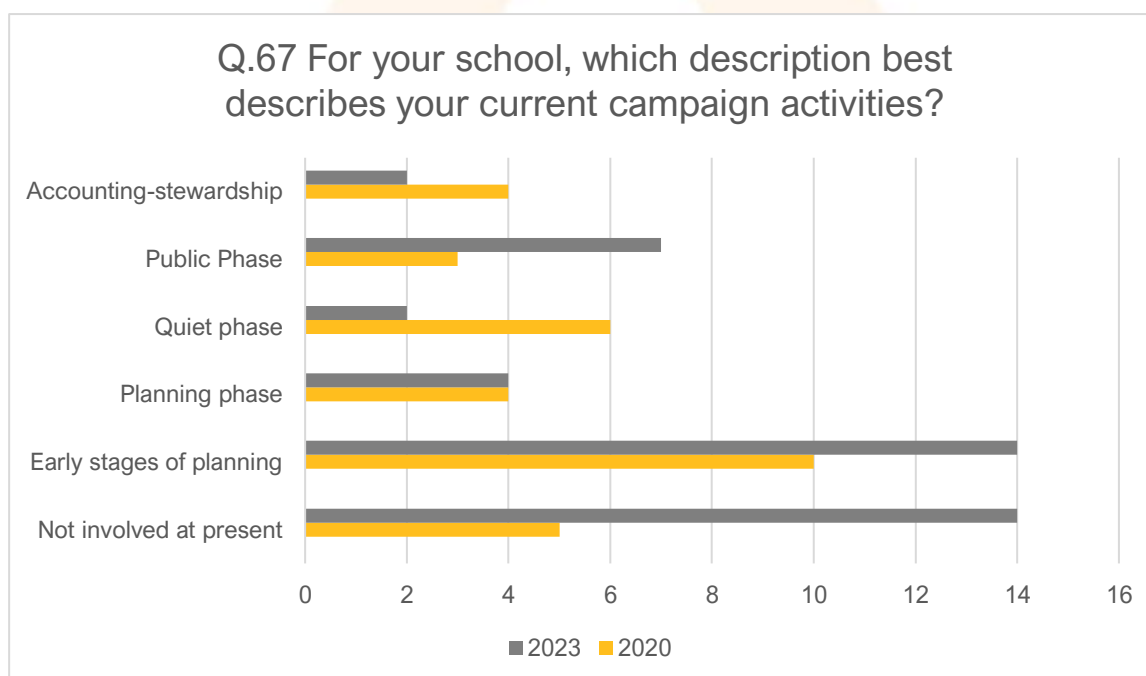
FUNDRAISING CAMPAIGNS

(QUESTIONS 67-69)

Many of the schools surveyed (67.4%) are at various stages of a current campaign, including:

1. Early stages of planning (14 schools)
2. Planning phase (4 schools)
3. Quiet phase (2 schools)
4. Public phase (7 schools)
5. Accounting-stewardship (2 schools)

There are 14 schools that are not involved in a fundraising campaign at present.



There are many more schools that are not currently involved in a fundraising campaign at the time of the 2023 survey when compared to the previous survey; however, just as many schools are in the early stages of planning for a fundraising campaign.

Of the 29 schools that are in a phase of a current campaign, 12 schools have a financial goal set — with amounts ranging from \$80,000 to \$20 million+ AUD — 15 schools have not set a financial goal (however, 1 respondent indicated that a goal of \$5 million is yet to be finalised), and there were 2 respondents who did not provide an answer.



Q.68 Have you set a financial goal for the fundraising campaign?



There should be many more schools with a financial goal than those without; the 2020 survey found that 54.55% of schools had a financial goal and 45.45% did not, which is more positive than the 2023 findings, but there should still be a much higher percentage of schools aiming for a particular dollar amount or range.

For comments on fundraising campaign goals, one respondent mentioned the importance of conducting a feasibility study:

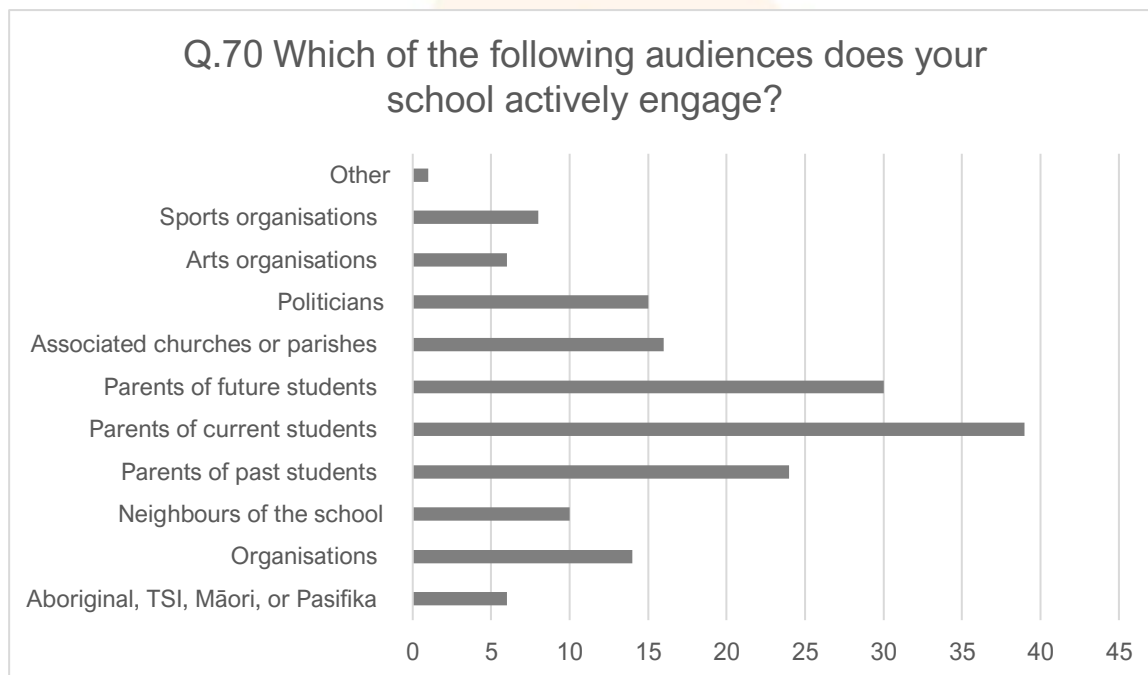
Feasibility study is crucial step for goal setting, helps manage Board expectations and key to ensuring a successful campaign.

A feasibility study should be the preliminary activity for any potential fundraising campaign; for a comparatively small investment, having an assessment of campaign readiness and prediction of results can avoid months or years of struggling and ensure schools only run campaigns that are feasible.

COMMUNITY ENGAGEMENT

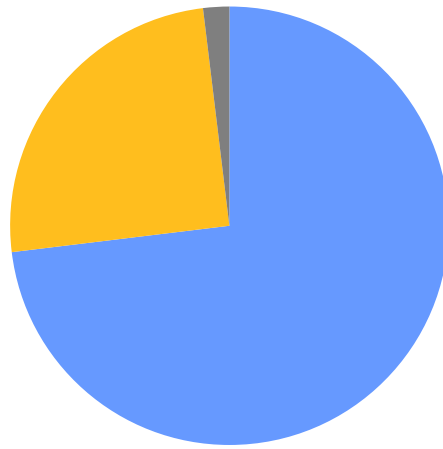
(QUESTIONS 70-74)

When it comes to community engagement, only a handful of schools (5) focus on one audience — including parents of past, current, or future students — while most schools (36) engage with multiple audiences, and there were 2 respondents who did not provide an answer. Parents of past, current, and/or future students is the most popular audience type, followed by churches or parishes (16 mentions), politicians (15 mentions), organisations (14 mentions), neighbours of the school (10 mentions), Aboriginal/Torres Strait Islander/Māori/Pasifika (6 mentions), and alumni (1 mention – ‘Other’). There were 2 respondents who did not provide an answer.



For many schools, community engagement is based on events or meetings at the school (38 mentions) as well as events or meetings elsewhere (13 mentions). There was 1 respondent who mentioned social media, and there were 5 respondents who did not provide an answer.

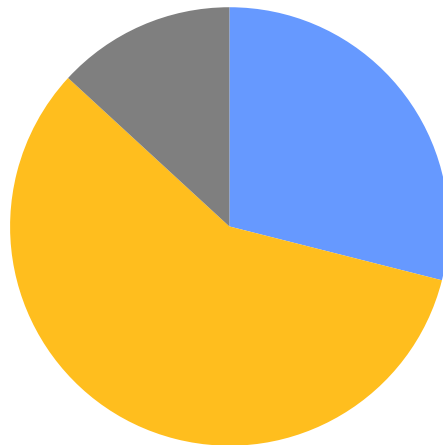
Q.71 Which of the following is your community engagement based on?



■ Events or meetings at the school ■ Events or meetings elsewhere ■ Other activities

Respondents from 11 schools indicated that goals are set for community engagement — mostly related to engagement, number of volunteers, and revenue — while 22 schools do not set such goals, 5 respondents were unsure, and 5 respondents did not provide an answer.

Q.72 Does your school set goals for its community engagement activities?

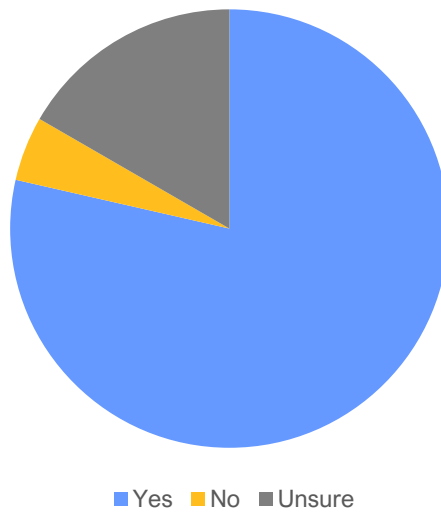


■ Yes ■ No ■ Unsure

The role of community engagement is expected to grow in the next three years at the majority of the schools (79%), according to the responses provided, while 2 respondents do not believe it will grow and 7 respondents were unsure.

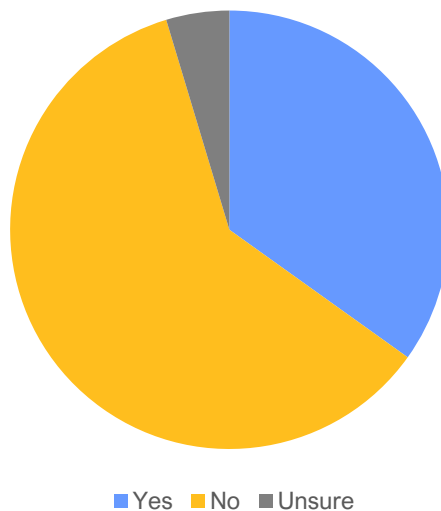


Q.73 Do you think the role of community engagement will grow in the next three years?



When asked about the implementation of a formal community engagement strategy, 15 respondents (34.8%) indicated that their school has such a strategy, 26 (60.4%) do not, and 2 were unsure.

Q.74 Does your school have a formal community engagement strategy?



The results for many of the questions related to community engagement are similar to the previous surveys and, again, exhibit a need for schools to develop strategies for engaging with and raising funds from different audiences in the community.

FURTHER COMMENTS

(QUESTIONS 75-77)

Respondents were asked about their best fundraising or alumnae program success (Q.75), and the answers are as follows:

- *Annual Giving for scholarships - named in memory of a much loved and long serving staff member. Very successful. A means tested scholarship.*
- *Spring Lunch 2022*
- *Mapping out events, initiatives and programs based on alumnae life stages. Sharing good quality successes of alumni on socials. Good quality case for support assets for Giving campaigns*
- *We invited all past students back to the College anniversary - about 600 people came along. No fundraising involved.*
- *Networking works very well.*
- *Giving Days*
- *Our alumni program and Capital Campaign*
- *School Gala where students all help raise money for the school.*
- *Drought relief concert with all money directed to a Registered Charity*
- *Founders' Day, Individual Reunions and Distinguished Lecture Series*
- *Amalgamating two events into one larger event. Successfully marketed and now the go to event of the year, which sells out in hours. Also raises significant funds each year. Introduced an Alumni campaign which has provided significant number of updated contacts, career information and improved their involvement in the school.*
- *Celebrating 130 years of the college - raising funds and drawing in more Alumni - but also it was Covid affected*
- *Our alumni programmes where we connect students to our oldest Alumni, recognise an alumna for brining honour to the school and encourage a student to pursue their dreams.*

Respondents were asked for further comments on fundraising and alumnae relations programs (Q.76), and the answers are as follows:

- *Alumni program is very engaging - much more connected in the last five years.*
- *We are just commencing the process of fundraising/philanthropy and are working on a whole school approach including Board and Executive team.*
- *Certainly an area for future growth and a higher priority*
- *The role of a full time Marketing and Communications Manager is fairly new and therefore all programs and planning are yet to be implemented or adapted.*
- *Just about to start a Foundation Committee*
- *No other than we are beginning our new fundraising strategies*
- *Alumnae are not very engaged. Happy to come to a reunion or to mentor current students when contacted but otherwise don't engage, especially not for fundraising activities.*
- *Not organised.*
- *Important to focus on seeking major gifts and getting people to*
- *All fundraising and alumnae relations are built on personal relationships with a foundation built of community engagement. Our community engagement is underpinned with our values.*
- *early days*
- *It is hard to strike a balance between meeting the operational needs of the College and generating the resource needed for fundraising and alumnae relations.*
- *Between 2017 and 2020, no work was done in the Advancement area, apart from a connection with a donor to a co-curricular music program. The past three years have been spent working on re-engaging with our Alumnae. At the end of 2020 an experienced fund-raising Director was employed in Advancement with a focus on the*



School's Master Plan, in particular a campaign for the upgrade and enhancement of the Sports Field, as well as other particular programs and initiatives, including Scholarships, and the introduction of a Giving Day. The Alumnae Officer role was vacant for two years and the Advancement focus shifted to re-engaging with our Alumnae.

- *Hard work*
- *Need a consistent, proactive and long term approach to fundraising and alumnae relations.*
- *Starting to establish a strategy and framework around alumnae program*
- *Needs improving and we have commenced looking at employing someone to support us in this area.*
- *Over the last two years we have created an Alumni Hub through Toucan Tech, we currently have 10% of our alumni engaged through this Hub. Working hard in encourage others to engage. Our Capital Master Plan is due to be released in coming months, the School is looking at holding a Giving Day to start our Capital Fundraising Campaign later in 2023.*



5. APPENDIX: SURVEY QUESTIONS

1. How many students do you currently have enrolled in your school?

200-500

501-1500

1501-2500

2500+

2. Where is your school located?

New Zealand

NSW

VIC

QLD

TAS

WA

SA

ACT

International (please specify)

3. Which of the following best describes your school's affiliation?

Government school

Independent

Anglican

Uniting, Presbyterian, or Methodist

Affiliated with a Catholic order

Catholic diocesan school

Catholic parish school

Other Christian

Jewish

Other religious

4. Which of the following best describes your school's range of enrolment years?

Primary School

Primary and High School

Upper-Primary and High School



High School
Special School

5. Does your school have boarding?

Yes
No

6. Does your school have a foundation?

Yes
No
Unsure

7. If you have a Foundation, does it have a Strategic Plan?

8. What is the role of your foundation board?

9. How many people are on your foundation board?

1-5
6-15
16+

10. How many of your foundation board members made a financial donation or pledge in 2022?

1-5
6-15
16+
Other (please specify)

11. For Australian schools, which of these DGR* funds do your school or foundation have? (*deductible gift recipient, for more information, visit: www.abr.business.gov.au/)

Building Fund
Library Fund
Scholarship Fund
Cultural Gifts fund
Other (please specify)



12. For Australian schools, does your school or foundation seek funds for activities that are not tax- deductible?

Yes

No

Unsure

N/A

13. Do you use customer relationship management software to support your fundraising activities?

No

Unsure

Yes (please specify)

14. What details does your fundraising customer relationship software keep? (Tick all that apply)

Alumnae details

Current student details

Donation History

Unsure

Other (please specify)

15. Do you have any comments about fundraising customer relationship management software?

16. Has Covid changed the way you do fundraising – and how? Do you think those changes will be permanent (or at least long lasting)?

17. How many people made a financial donation in 2022? (Please count couples and families once and include money donated on fee statements. Exclude bequests or gifts in kind donations.)

1-25

26-50

51-150

151-250

251-350

351-450

451-550

551+

None



Unsure

18. What was the total value of 2022's financial donations?

\$1 to \$199,999

\$200,000 to \$499,999

\$500,000 to \$999,999

\$1,000,000 to \$1,999,999

\$2,000,000 to \$4,999,999

\$5,000,000+

19. In 2022, how many people made a pledge to give over time?

None 1-10

11-50

50-150

151-300

300+

Other (please specify)

20. What was the total value of 2022's pledges?

\$1 to \$199,999

\$200,000 to \$499,999

\$500,000 to \$999,999

\$1,000,000 to \$1,999,999

\$2,000,000 to \$4,999,999

\$5,000,000+

Unsure

21. In 2022 -did you run:

An annual appeal (even if the appeal ran more than once in the year it still qualifies as an annual appeal)

Yes

No

Unsure

A Giving Day with a few large gifts matching many smaller gifts (or similar)

Yes

No

Unsure



Both an annual appeal and a Giving Day

Yes

No

Unsure

22. What was the total money raised from your 2022 annual appeal/s/Giving Day

\$1 to \$10,000

\$10,001 to \$25,000

\$25,001 to \$100,000

\$100,000 - \$250,000

\$250,000+

23. How many people gave to the appeal/ Giving Day?

1-20

21-50

51-100

100+

Unsure

24. How people committed to giving regularly (i.e. monthly, quarterly)?

None

1-20

21-50

51-100

100+

Unsure

25. What percentage of 2021 donors gave again in 2022?

1-25%

26-50%

51-75%

76-100%

Unsure

None

26. Who receives your annual appeal/ Giving Day? (Tick all that apply)



All alumnae
Selected alumnae
Former staff
Current staff
Former parents
Current parents
Parents of future students
Suppliers
Sponsors
All donors to previous appeal
Unsure
Other (please specify)

27. How is your annual appeal / Giving Day distributed? (Tick all that apply)

Mail
Email
Phone
Social media
Unsure
Other (please specify)

28. Do you have any general comments on individual giving?

29. Have you any thoughts you can share (or lessons learnt) regarding a move from an annual appeal to a Giving Day?

30. Does your fees statements include an option to donate?

Yes
No
Unsure

31. What annual total is sought from each family on your fees statement?

\$1 to \$200
\$201 to \$500
\$501 to \$1,000
\$1,000+
Unsure



32. What percentage of families donated from your fees statement request?

- 1-25%
- 26-50%
- 51-75%
- 76-100%
- Unsure

33. In 2022, how much was donated in response to the fees statement request?

- \$1 to \$10,000
- \$10,001 to \$25,000
- \$25,001 to \$50,000
- \$51,000 to \$150,000
- \$151,000-\$250,000
- \$250,000+
- Unsure

34. Did your school or foundation receive financial donations from businesses in 2022?

- Yes
- No
- Unsure

35. How many businesses gave financial donations in 2022?

- 1-5
- 6-10
- 11-15
- 16-20
- 20+
- Unsure

36. What was the total amount given by businesses in 2022?

- \$1 to \$10,000
- \$10,001 to \$50,000
- \$50,001 to \$150,000
- \$150,001 to \$250,000
- \$250,000+



Unsure

37. Do you have any comments on donations and sponsorship from businesses?

38. Did your school or foundation receive financial grants from charitable trusts or foundations in 2022?

Yes

No

Unsure

39. What was the total amount given by trusts and foundations in 2022?

\$1 to \$25,000

\$25,001 to \$50,000

\$50,001 to \$150,000

\$150,000+

Unsure

40. Do you have any comments on financial grants from trusts and foundations?

41. Did individuals or businesses give in-kind donations in 2022? (excluding volunteering)

Yes

No

Unsure

Other (please specify)

42. Of individuals and businesses that provided in-kind donations in 2022, how many contributed in 2018?

1-10

11-50

51-100

100+

Unsure

None

43. What is the estimated financial value of these in-kind donations for 2022?

\$1 to \$10,000



- \$10,001 to \$25,000
- \$25,001 to \$50,000
- \$50,001 to \$150,000
- \$150,000+
- Unsure

44. What sort of in-kind donations have you received?

45. Does your school run events to raise money?

- Yes
- No

46. How much did fundraising events raise for the school? (Approximate value after deductions and expenses)

- \$1 to \$10,000
- \$10,001 to \$50,000
- \$50,001 to \$100,000
- \$100,000+
- Unsure

47. What were the main event types? (Tick all that apply)

- Fete Ball
- Trivia night Auction Lottery
- Other (please specify)

48. How many fundraising events did you hold in 2022?

- 0
- 1-2
- 3-5
- 6+
- Unsure

49. Does your school raise funds for school-focused (e.g. new building, new equipment, scholarships, etc) or external purposes?

- School-focused
- External
- Both



Neither
Unsure

50. Do you have any comments on fundraising events?

51. Did your school receive bequests in 2022 and/or intentions for one?

Yes
No
Unsure

52. How many bequests (or indications of bequests) were realised in 2022?

None 1-3
4-10
10+
Unsure

53. What was the total value of bequests that were realised in 2022?

\$1 to \$25,000
\$25,001 to \$50,000
\$50,001 to \$150,000
\$150,000+
Unsure

54. How many new bequests (written but not realised) were you advised of in 2022?

None
1-3
4-10
10+
Unsure

55. Do you have a bequest society?

No
Unsure
Yes (please specify size)

56. Did you invite bequest society members to an event in 2022?



Yes

No

Unsure

57. What has been your most successful Bequest promotion activity to date? (Tick all that apply)

Word-of-mouth

Marketing Events

Face-to-face

Other (please specify)

58. Do you have any comments about bequests?

59. Does your school or alumnae association hold events in other cities?

No

Unsure

Yes (please describe)

60. Does your school or alumnae association hold events overseas?

No

Unsure

Yes (please describe)

61. How many full-time equivalent fundraising staff do you have? (including database management, research, administration, etc.)

None

1-2

3+

Other (please specify)

62. How many full-time equivalent staff do you have working in alumnae relations?

None

1-2

3+

Other (please specify)



63. Do you expect the number of staff working in fundraising and alumnae relations to grow in the next three years?

Yes

No

Unsure

Other (please specify)

64. Is there an allocated fundraising budget for the Advancement/Development Office?

Yes

No

If yes, please list budgeted items.

65. Have you implemented any new fundraising ideas or initiatives in 2022?

Yes

No

Please let us know what you have tried – and how it went

66. If you have implemented any new fundraising ideas or initiatives in 2022, please let us know what you tried - and how it went

67. For your school, which description best describes your current campaign activities?

Not involved in a fundraising campaign at present

Early stages of planning for a fundraising campaign

Planning phase (project development, feasibility study, or considering a fundraising campaign)

Quiet phase (recruitment of volunteer leaders and lead gifts)

Public Phase (active, publicised fundraising campaign)

Accounting-stewardship (wrapping up)

Other (please specify)

68. Have you set a financial goal for the fundraising campaign?

No

Yes (please specify amount)

69. Do you have any comments on fundraising campaign goals?



70. Which of the following audiences does your school actively engage? (Tick all that apply)

Aboriginal, Torres Strait Islander, Māori, or Pasifika

Organisations

Neighbours of the school

Parents of past students

Parents of current students

Parents of future students

Associated churches or parishes

Politicians

Arts organisations

Sports organisations

Other (please specify)

71. Which of the following is your community engagement based on? (Tick all that apply)

Events or meetings at the school

Events or meetings elsewhere

Other activities (please specify)

72. Does your school set goals for its community engagement activities?

No

Unsure

Yes (please specify)

73. Do you think the role of community engagement will grow in the next three years?

Yes

No

Unsure

Other (please specify)

74. Does your school have a formal community engagement strategy?

Yes

No

Unsure

75. Tell us about your best fundraising or alumnae program success



76. Do you have any further comments about your school's fundraising or alumnae relations programs?

77. Please indicate whether the Alliance or AskRIGHT can offer any assistance that might be helpful to your school in reaching its fundraising or alumnae relations goals.

