



Creating a Culture of Philanthropy

(With or Without Government Support)

16 June 2017



MY (UNEXPECTED) JOURNEY



SHARED ASPIRATIONS

“Contribuir al logro de los fines y a la mejora continua de las funciones de sus asociadas, mediante la representación de sus intereses, la prestación de servicios de calidad y la concertación de políticas públicas que fomenten la integración, ampliación e innovación del sistema de educación superior para propiciar el desarrollo social y humano de México.”

-- ANUIES

“Advancing education to transform lives and society.”

-- CASE





YOU ARE NOT ALONE



The background of the slide is a collage of Mexican banknotes. Visible denominations include 50 pesos (top left), 100 pesos (middle left), 200 pesos (center), and 500 pesos (bottom right). The banknotes are from the Banco de México. A blue rectangular box is overlaid on the top right portion of the banknotes.

**YOU NEED RESOURCES;
CASE CAN HELP**



LIDERAZGO





People support what they help to create.



CASE

WHY HAVE AN INSTITUTIONALLY RELATED FOUNDATION (IRF)

- More flexibility to raise and/or manage private support.
- Can invest in a more diversified manner.
- Can develop for-profit subsidiaries.
- Can perform business functions in a competitive and expeditious manner.
- Can involve prominent business leaders, alumni and others.

SOME RESOURCES

- **Foundation FAQs**

http://www.case.org/Browse_by_Professional_Interest/Institutionally_Related_Foundations/Foundation_FAQs.html

- **Management and Governance Checklist for Institutionally Related Foundations**

http://www.case.org/Browse_by_Professional_Interest/Institutionally_Related_Foundations/Foundation_FAQs.html

- **CASE Reporting Standards and Management Guidelines**

http://www.case.org/Samples_Research_and_Tools/CASE_Reporting_Standards_and_Management_Guidelines.html



THE MOST IMPORTANT RESOURCE: PEOPLE



REMINDER: IT TAKES TIME



HERE'S WHAT YOU'RE REALLY DOING

- Advancing...
- Growing...
- Improving...
- Achieving...
- Changing...



IT'S NOT ABOUT ASKING FOR MONEY

- It's about matching your institution's goals with the philanthropic goals of others.

YOU AND YOUR GOVERNMENT SHARE GOALS

Including...

- Economic development
- Community improvement
- Research that improves lives
- An enlightened, educated population

The Matched Funding Scheme to support UK universities (2008-11)



MATCHED FUNDING SCHEME GOALS

- Increase private support to universities
- Persuade universities to invest in capacity building for a professional fundraising department and team

HOW IT WORKED

- The UK government made available up to £200 million for a matched funding initiative.
- Set the stage for increased philanthropy in support of higher education.

HOW CASE HELPED (AND CONTINUES TO HELP)

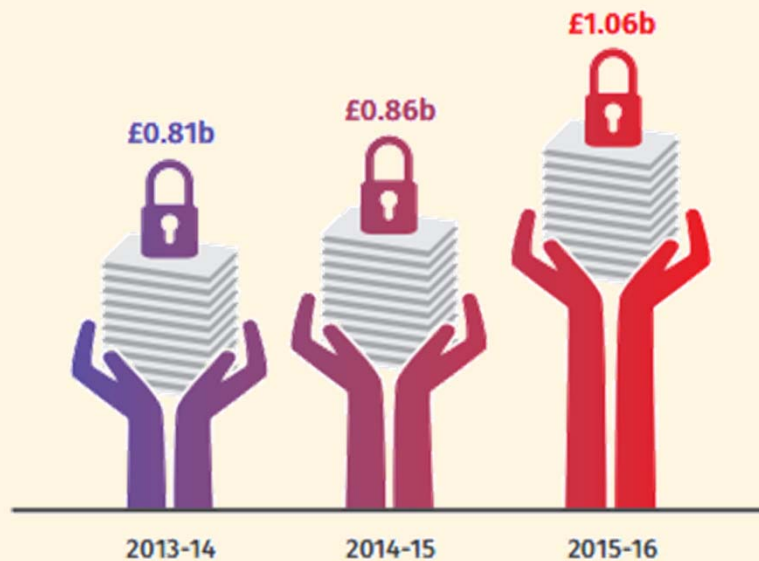
- Provided professional development training and resources for vice chancellors.
- Developed an extensive UK awards program.
- Convenes Institute in Educational Fundraising.
- Hosts international study tours.

SUCCESSFUL RESULTS

- Funds raised in the UK from 2008 to 2011 increased by more than one-third -- from £513 million to £693 million.
- Established clear correlation between philanthropic revenue and investment in fundraising staff.
- Capacity building is working.

THE UK GROWTH CONTINUES

Total new funds secured (£Billion)



The report also shows a **27-percent increase** in the number of donors pledging gifts worth £500,000 or more.

Source: Ross CASE 2017 Survey

STRATEGIC

Thought
Leadership



Talent
Management



Global
Impact



Member
Engagement



Reimagining CASE

BUILDING A PIPELINE OF PROFESSIONALS

Advancement Internship Program (N. America)

- 93 interns at 59 host institutions (Goal: 75 interns)

Educational Fundraising Graduate Trainee Program (Australia)

- Launched April 2017
- 7 trainee positions

Graduate Trainee Scheme (Europe)

- 13 trainees began placements in fall 2016
- Recruiting host institutions for 2017/18 (Goal: 10)



BUILDING A PIPELINE OF PROFESSIONALS

E-mentoring (Global)

- 170+ mentors signed up in nine countries
- Full rollout and promotion later in 2017
- www.case.org/imagine/List-of-New-Benefits/E-Mentoring



**STRATEGIC
GOALS**

Thought
Leadership



Talent
Management



Global
Impact



Member
Engagement



COMING ATTRACTIONS

- Alumni Engagement Metrics
- CASE Fellows senior volunteer group
- A member-centric website
- CASE Summit welcomes Mexican Rectors

JUST FOR MEXICO... COMING ATTRACTIONS

- **Seminar:** “Fundraising: A Challenge for Public Universities in Mexico. The Importance of the President’s Role.”
- **Workshop:** “From the Intention to the Operation: Developing a Foundation with Educational Objectives.”

HOW CASE VIEWS THE WORLD ...AND OUR ROLE IN IT



Inauguró la UV, Laboratorio de Investigación en Medicina Traslacional

Firman convenio GEM y UAEM para ampliar espacios educativos

Estudiantes de Chiapas reclaman becas

En la BUAP se desarrolla bota para diagnóstico temprano de pie diabético

UABC primer lugar en concurso internacional de Ingeniería Aeroespacial

Egresados de la UAEH reciben premio a la excelencia

Lanzará UANL plan de emprendedores con enfoque en Asia



YOU MAKE THIS POSSIBLE







Keep in touch!

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