



Charitable Giving at Carleton University **Spring 2021 Summary Report**

TOGETHER FOR GOOD



About the survey

In the spring of 2021, Carleton University's Department of University Advancement sent an e-survey to 4,991 donors, alumni, and friends. The goal of the survey was to seek perspective on where higher education and Carleton University stands as a philanthropic cause now and in the future. We are pleased with the 7% response rate and are happy to share our results with you. Such assessments help the university gain insights into how the Carleton community might better contribute to the good of society. Our sincere thanks to everyone who shared their thoughts and stories.

Key findings

- Fifty-nine (59) per cent of respondents said that the COVID-19 pandemic has not shifted their priorities for supporting their favourite causes.
- When considering charitable donations, 39% of respondents ranked Carleton University and higher education as 4 or 5 on a scale of 1='Very Important' to 5='Not Important'.
- When asked to rank four different funding opportunities, 59% of respondents ranked 'Student financial aid' as 1 on a scale of 1='Important' to 5='Not Important'.

Inspiring stories

Global crises like we are now facing often inspire generosity, action and create powerful memories. Many of our alumni, donors and friends shared their memories of why they were inspired to make their first charitable donation. We enjoyed reading all these stories, and here are a few we thought that you would like to read about why some chose to make their first gift to Carleton University*:

I first donated to Carleton University because a scholarship was set up in the name of my dear friend with whom I studied with at Carleton. My friend passed away at an early age, and I donated in her memory.

I did my degree at Carleton in the 90's, and following that experience, I realized that many students needed help financially to further their education. I started to donate to Carleton following my graduation. In order to attend Carleton, I had a part-time job as a nurse and a husband who had a full-time job which allowed me the luxury to go to Carleton on a part-time basis. I was in my 40's at the time and thoroughly enjoyed the whole experience.

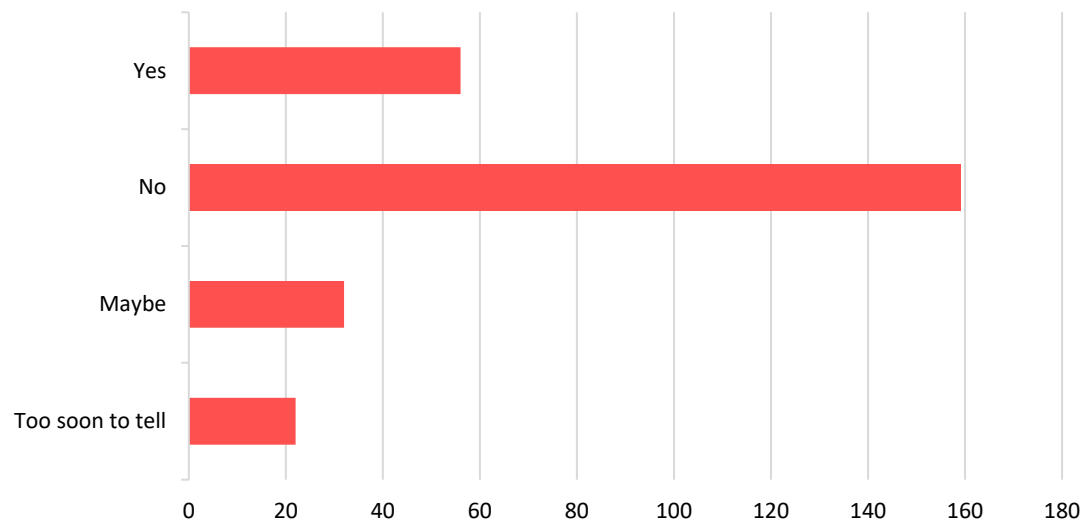
I was privileged to be the first member of my family to attend university and at Carleton University, so this has inspired me to try to support others to pursue their dreams.

My father, who worked at the university in the Industrial Design program, suddenly passed away, and the family wanted to dedicate a memorial award in his name to keep his legacy alive.

Charitable giving

Over 59% of the survey participants replied that the COVID-19 pandemic has not shifted their priorities for supporting their favourite philanthropic causes.

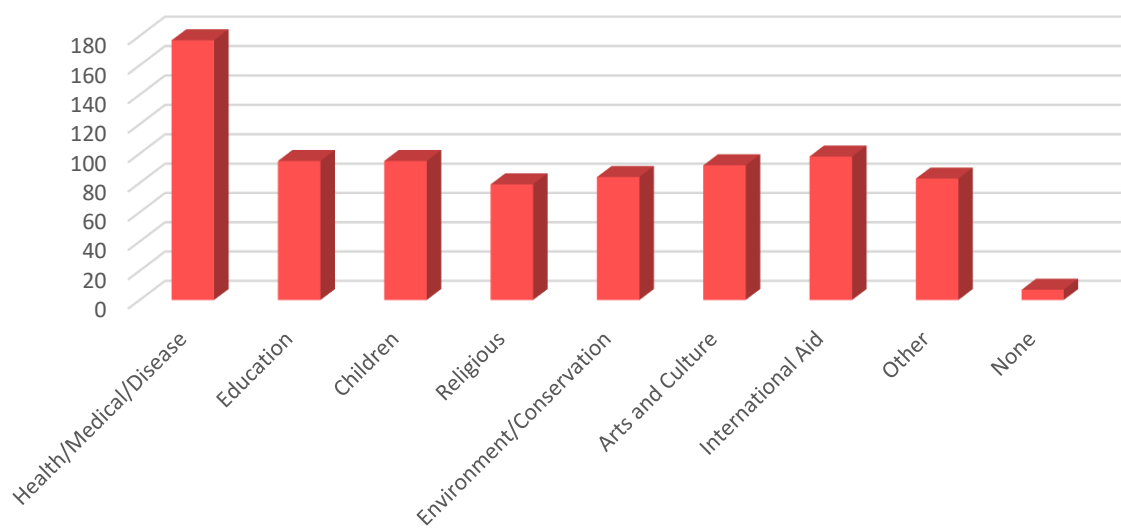
Has the COVID-19 pandemic shifted your priorities for supporting your favourite causes?
Total participants: 269



Categories of charities supported

Carleton donors give to a broad range of organizations from the local community to global concerns. Our society is better because of you. Thank you.

What categories of charitable organizations do you support with donations on a regular basis?
Total participants: 266

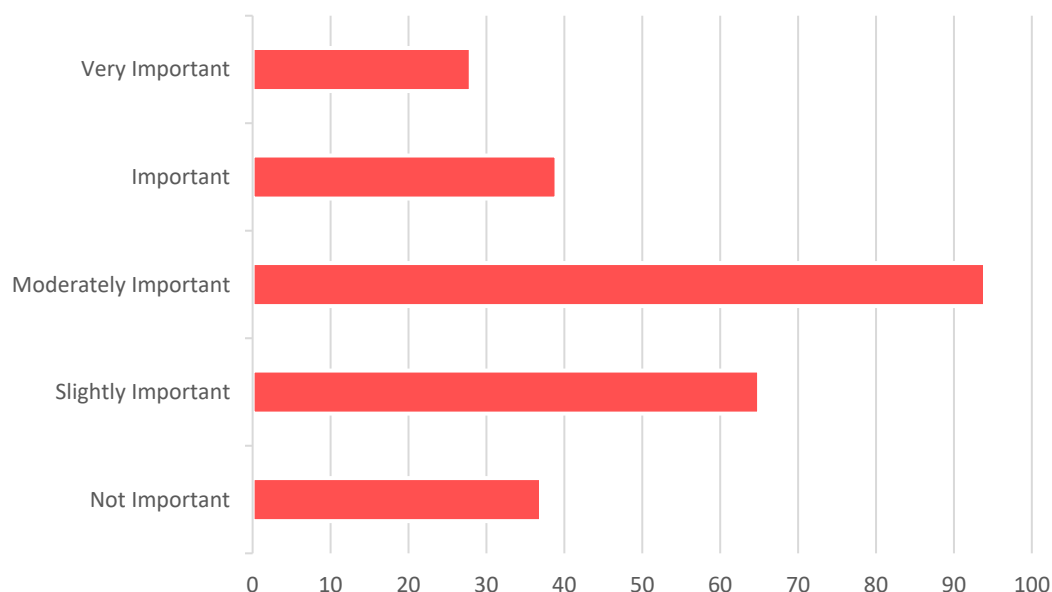


Charitable donations for higher education

When considering charitable donations, 39% of respondents ranked Carleton University and higher education as 4 or 5 on a scale of 1='Very Important' to 5='Not Important'. Many survey respondents believe post-secondary education is a vital philanthropic cause.

When you are considering charitable donations, how important is Carleton University and higher education to you?

Total participants: 263

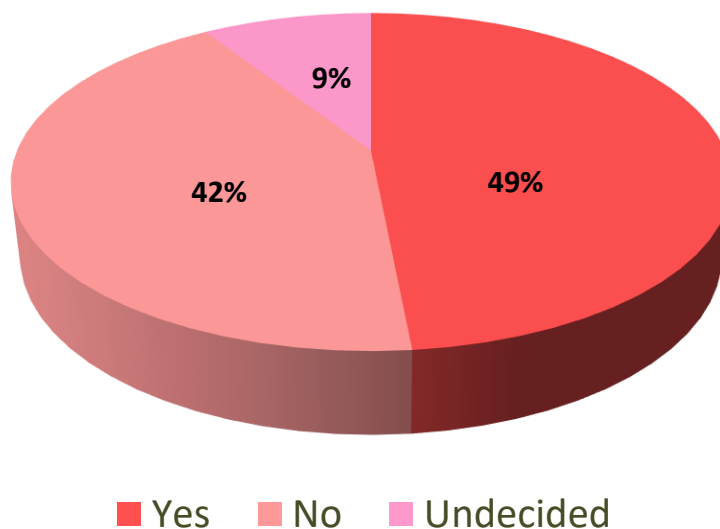


Tax breaks for charitable giving

Although tax breaks may not be the primary motivation for charitable giving, more than a third of respondents indicated that tax breaks are an important factor when deciding to donate money to charities. Tax credits reduce the cost of donating by about 50%.

There are two ways of generating social purpose funds in Canada: taxes and charitable giving. Everyone knows about taxes but not everyone knows that the tax breaks in Canada for charitable gifts are among the most generous in the world. Keeping this in mind, are tax breaks important to you personally when deciding whether to donate money to charities?

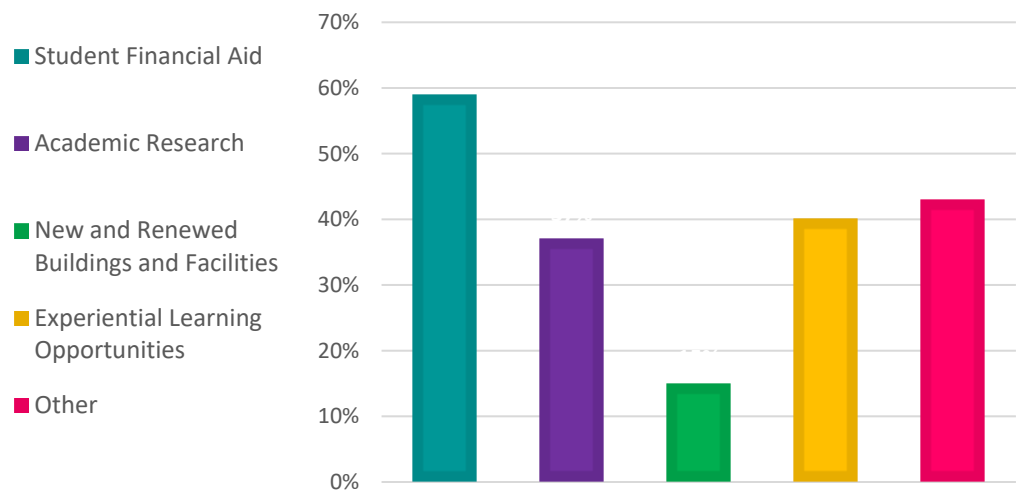
Total participants: 259



Top philanthropic priority for Carleton University

Providing support for students is vital for Carleton and 59% of respondents indicated that student financial aid is their most important philanthropic priority when giving to Carleton.

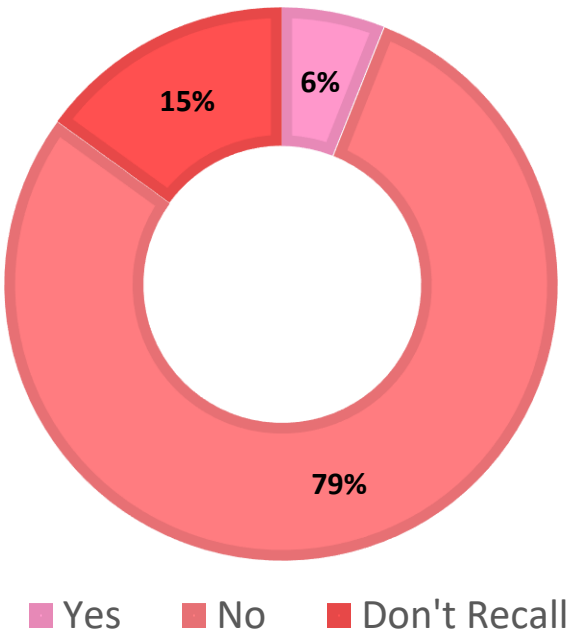
Carleton University is seeking advice from donors and alumni on the direction of the University’s future and our priorities for seeking philanthropic support. Which funding opportunity do you think is most important?
Total participants: 251



Giving Tuesday

Carleton University’s Giving Tuesday initiative is an opportunity for the university to fundraise for a wide range of campus projects to support students and encourage efforts to solve real-world problems. 6% of respondents remember donating to Carleton University last Giving Tuesday.

For the past few years, Carleton University has offered 1:1 matched funding for donations made on Giving Tuesday for many different projects. Did you make a donation to Carleton University last Giving Tuesday?
Total participants: 252

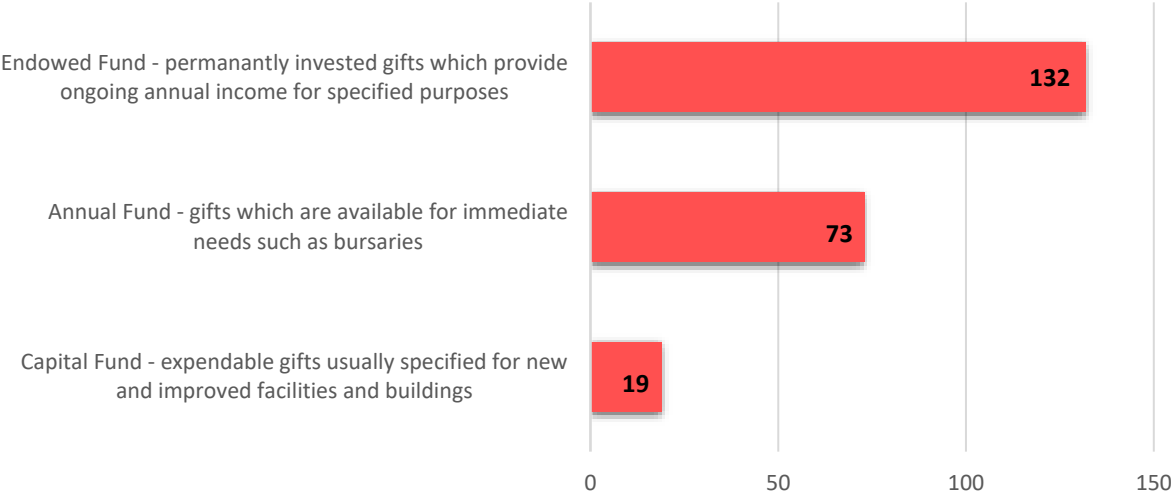


Fund type preference

Endowed Funds that provide for long-term stability was identified as the preferred choice for Carleton supporters. The Annual Fund, which takes care of immediate funding needs for a broad range of causes, was second choice.

At Carleton, endowed funds provide for long term stability, capital funds provide for growth and annual funds take care of immediate needs. All three are very important to the quality of student experience. Which type of fund do you think is the most important?

Total participants: 224

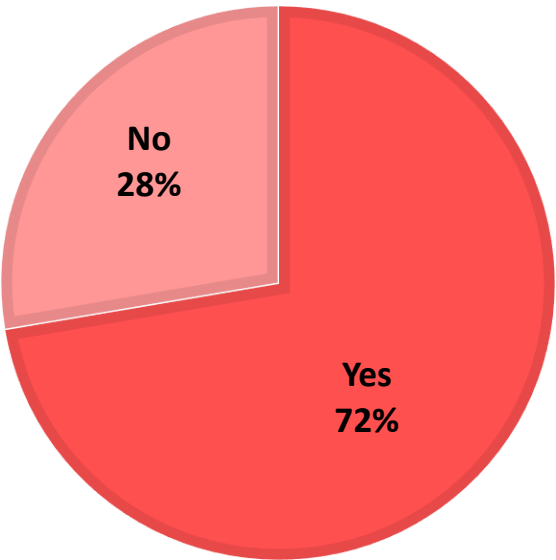


Do you have a will?

As a result of the pandemic, the idea of creating or revising a will is very much on people’s minds. The importance of having a valid will cannot be overstated.

Do you have, or are you currently revising a will?

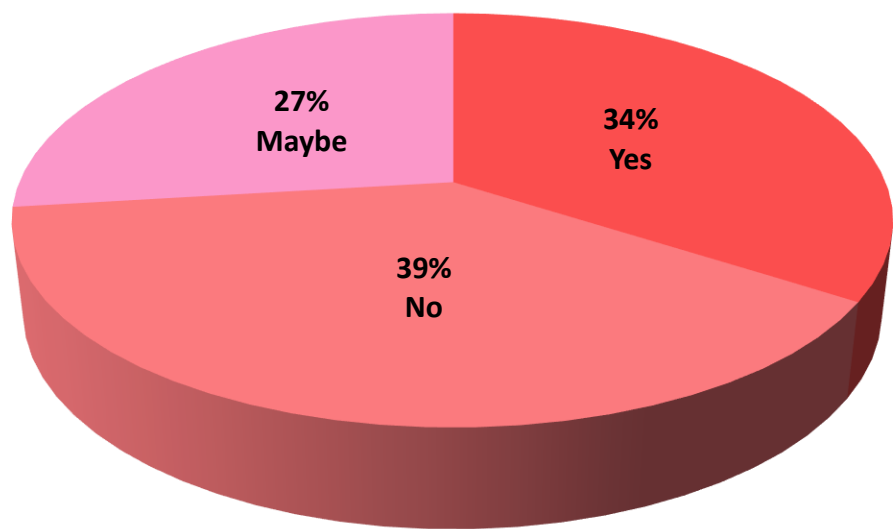
Total participants: 253



Charitable giving in estate plans

The proportion of survey respondents who have planned gifts in their wills for their favourite causes far exceeds the Canadian average of 7-10%. Congratulations, you are doing something extraordinary!

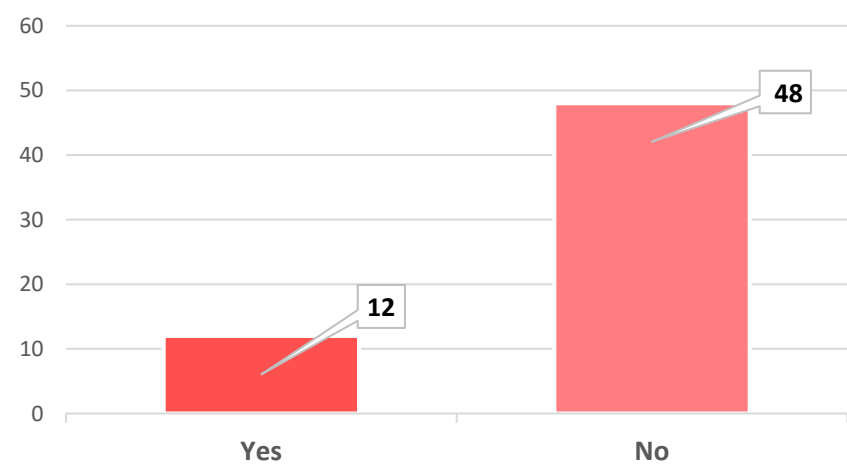
Have you already or will you be arranging a gift in your will to any of your favourite charitable causes?
Total participants: 182



Future gifts for Carleton University

Thank you! Several respondents have chosen Carleton as one of their top picks for estate giving. Their generous support of Carleton University will make a significant difference in the lives of many students for years to come.

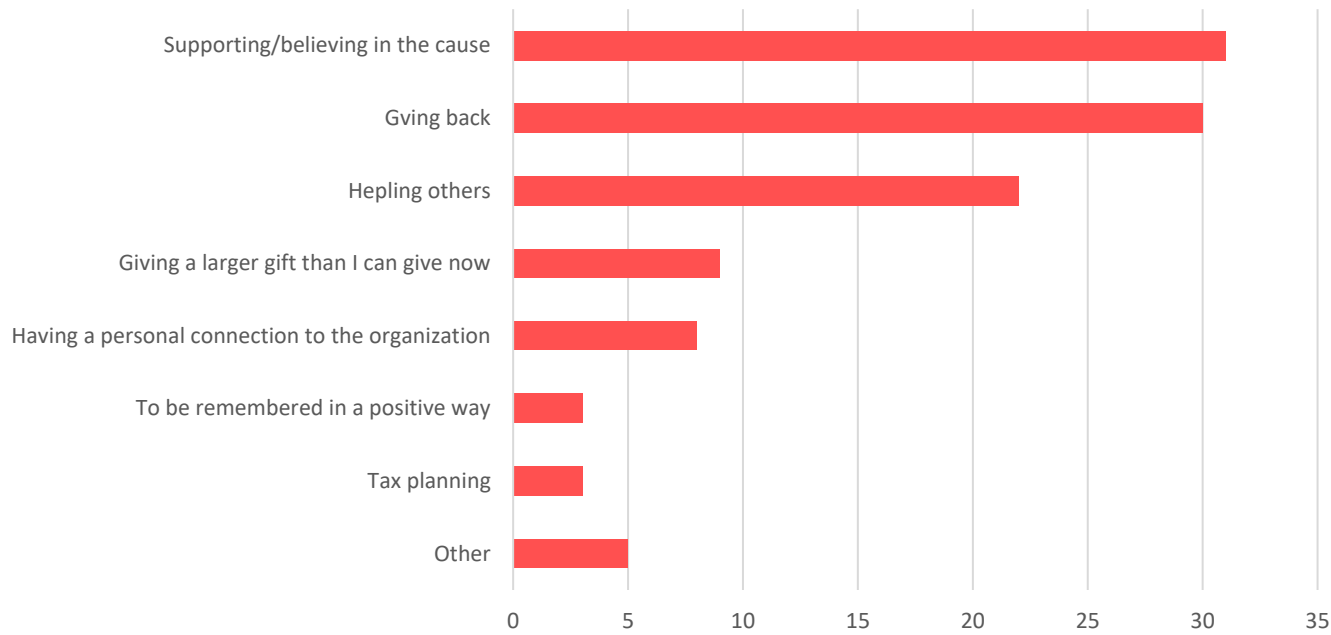
Have you arranged a gift for Carleton University in your will or other estate plan?
Total participants: 60



Why should a person arrange a gift by will?

When family and friends are cared for, there are many reasons why people arrange charitable gifts in their wills. Here is what you told us are some of the most important reasons.

In your opinion, what is the most important reason for making a charitable gift by will?
Total participants: 111



THANK YOU

Our sincere thanks to everyone who took the time to complete the survey.

