



Survey on Philanthropy **Spring 2023 Summary Report**



About the survey

In the spring of 2023, Carleton University's Department of University Advancement sent an e-survey to approximately 5,000 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 4.5% 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.

Highlights

- Endowed Funds that provide for long-term stability was identified as the preferred choice for Carleton supporters.
- Providing support for students is vital for Carleton and 56% of respondents indicated that student financial aid is their most important philanthropic priority when giving to Carleton.
- 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.

Inspiring stories

Many of our alumni, donors and friends shared their memories about their time at Carleton. 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 had wonderful professors at Carleton and some great classmates. I felt mentored, encouraged, included and challenged. Twenty years later, my son graduated with Honours. Carleton has felt like a welcoming community for twenty-five years.

After the unexpected death of a good friend (who mentored me while working at Carleton and whom I worked with in later years outside Carleton), a number of our mutual friends thought establishing an award at Carleton would be a suitable way to remember him.

I felt a strong sense of belonging during my four years at Carleton. All in all, I had a great experience, and I want to make sure that others can also experience it regardless of financial means.

When I was a student, I was supported when I needed it by Carleton – so it was only fair to do what I could to help others.

After graduating in 2004, I got a wonderful job very quickly in the profession I had studied at Carleton. I was very happy with my success and wanted to give back to Carleton by donating some money that could be used to help students who need assistance to buy books.

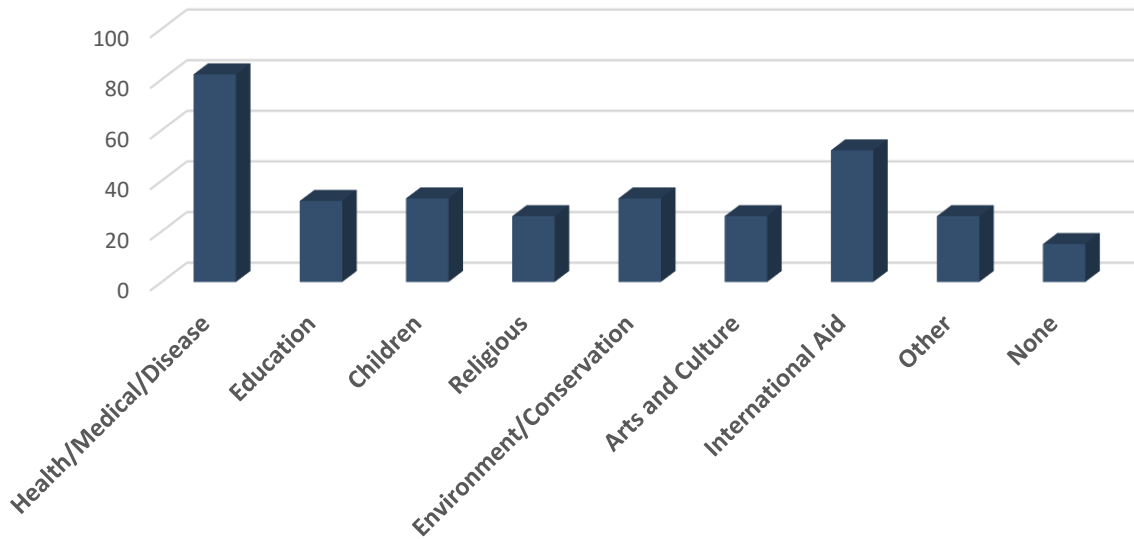
*Stories edited for the privacy of our respondents

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?

Number of respondents: 149

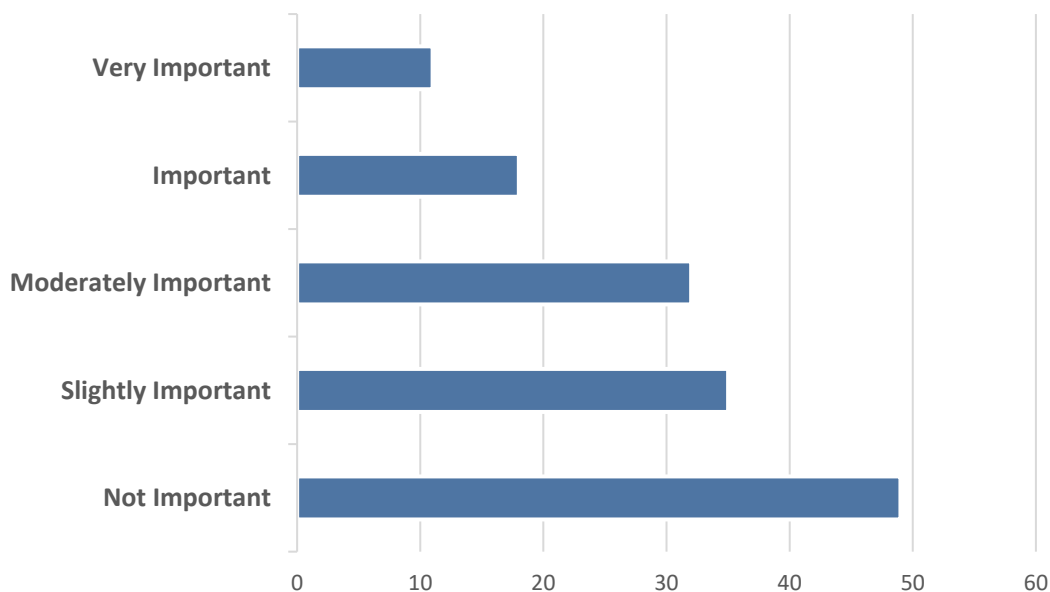


Charitable donations for higher education

When considering charitable donations, 22% of respondents ranked Carleton University and higher education as 3 or lower on a scale of “5= Not Important to 1= Very 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 number of respondents: 145

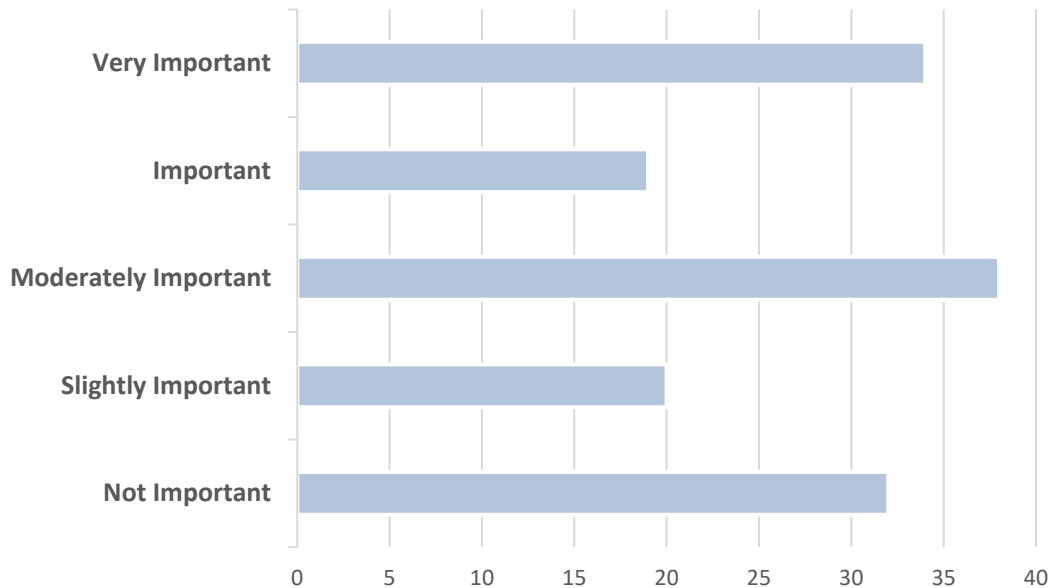


Tax breaks for charitable giving

Although tax breaks may not be the primary motivation for charitable giving, more than 27% of respondents ranked tax breaks as 3 or higher on a scale of “1= Very Important to 5= Not Important” when deciding to donate money to charities. Tax credits reduce the cost of donating by about 50%.

Are tax breaks important to you personally when deciding whether to donate money to charities?

Total number of respondents: 143

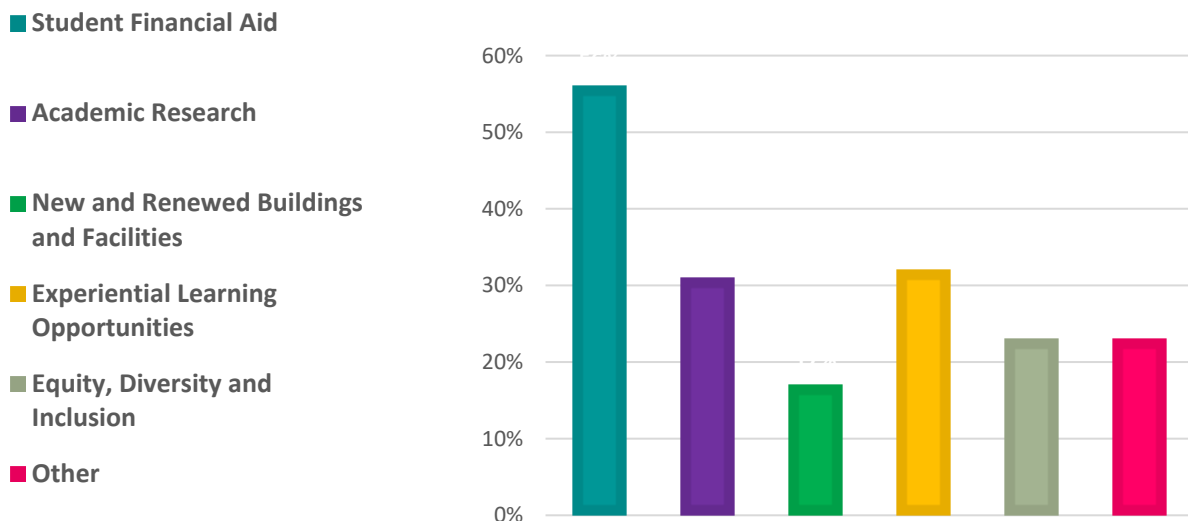


Top philanthropic priority for Carleton University

Providing support for students is vital for Carleton and 56% of respondents indicated that student financial aid is their most important philanthropic priority when giving to Carleton.

How important do you think the funding opportunities listed below are?

Total number of respondents: 137

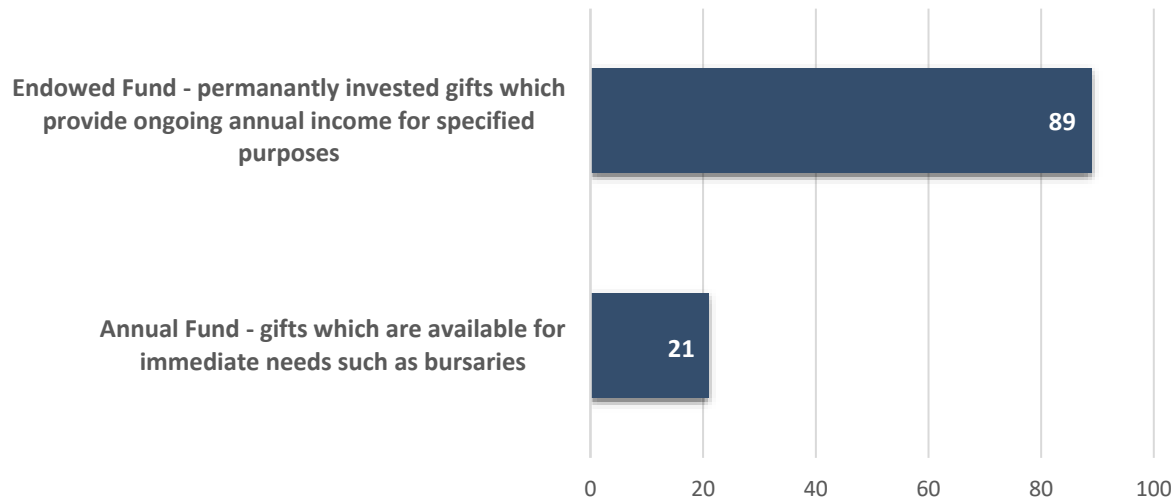


Fund type preference

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, and annual funds take care of immediate needs. Both are very important to the quality of the student experience. Which type of fund do you think is the most important? Please rank in order of importance.

Total number of respondents: 143

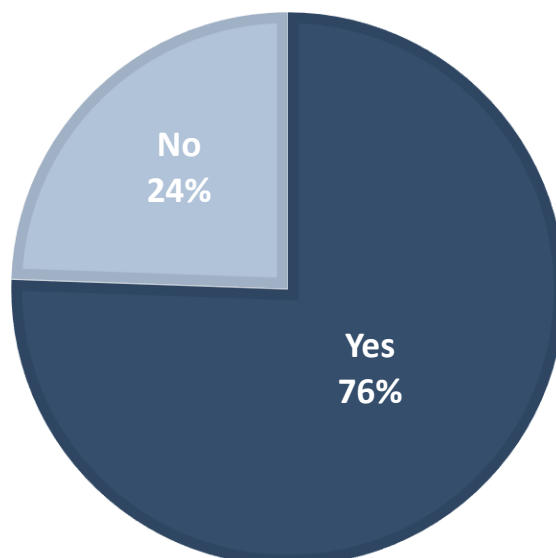


Do you have a will?

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 already have a will or estate plan?

Total number of respondents: 135

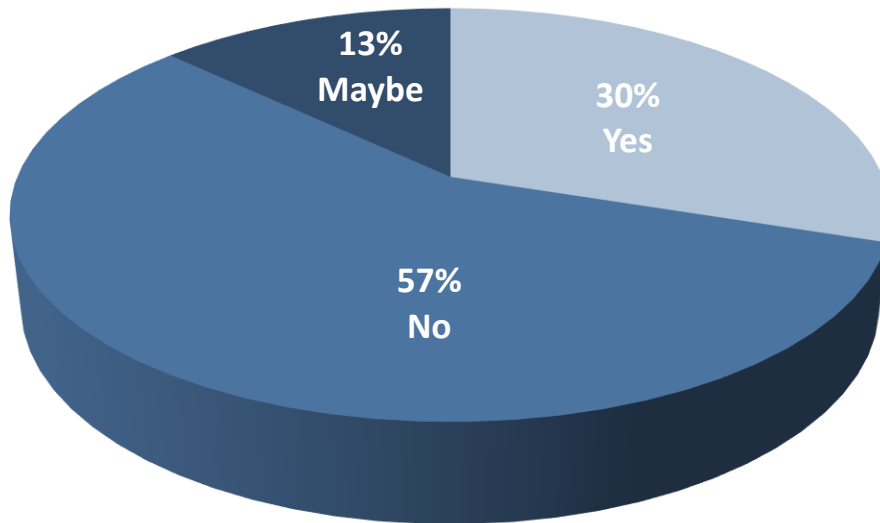


Charitable giving in estate plans

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 do you have plans to arrange a gift in your will to any of your favourite charitable causes?

Total number of respondents: 100

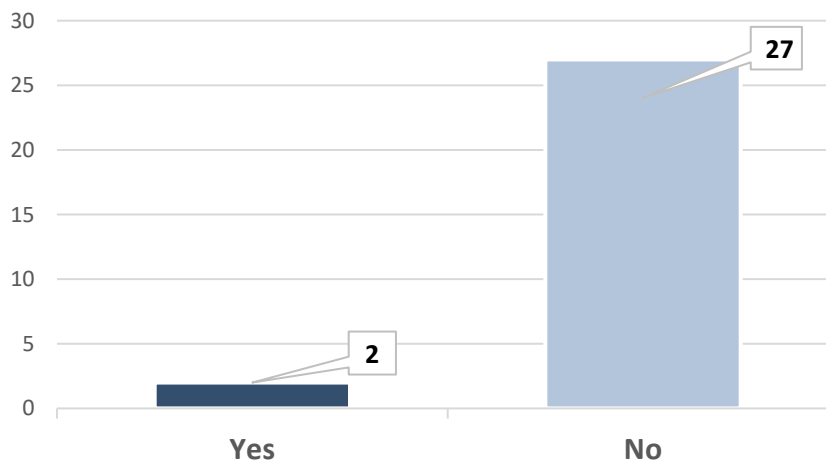


Future gifts for Carleton University

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?

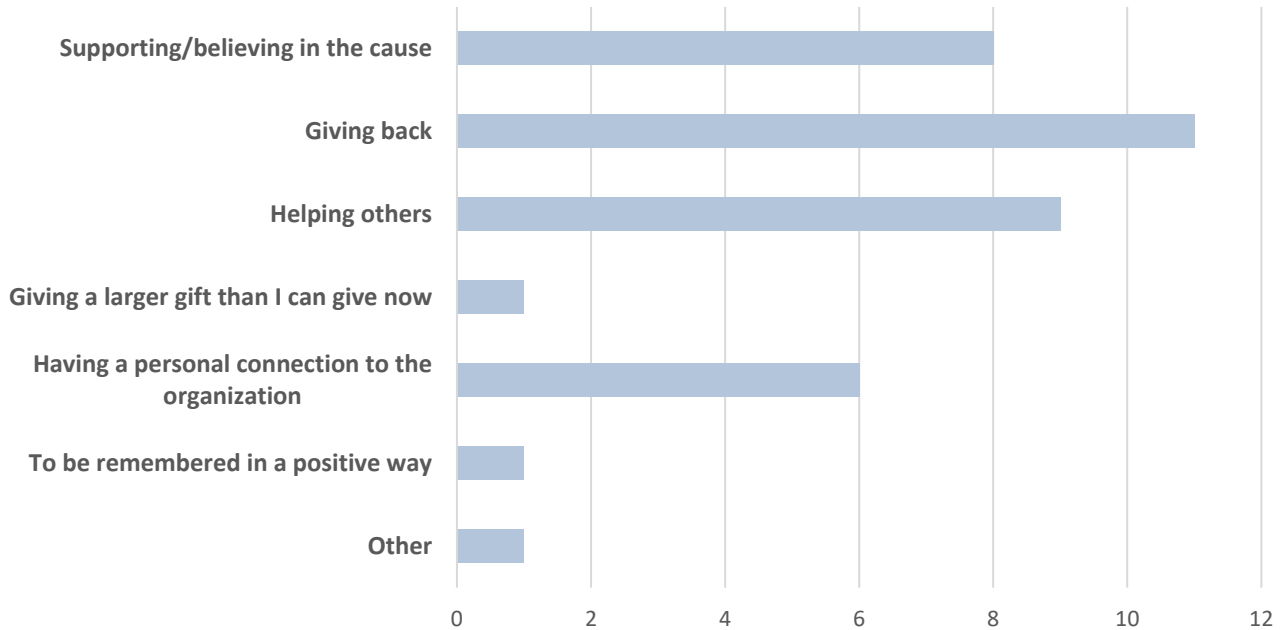
Total number of respondents: 29



Why should a person arrange a gift by will?

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 number of respondents: 39



THANK YOU

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

