

CASE-Ross Support of Education: United Kingdom and Ireland 2020

Generating Philanthropic Support for Higher Education

Findings from data collected for 2016–17, 2017–18 and 2018–19



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COVER ART CREDIT

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PRESIDENT'S NOTE

Colleges and Universities around the world are facing truly unprecedented times. Many institutions have, in the course of weeks, adapted deeply rooted academic cultures to online environments in ways that would have been unimaginable just months ago. While the business models of institutions in the UK and Ireland have been evolving for decades, travel and immigration disruptions, social distancing and cascading economic impacts will have significant fiscal implications. While the crisis has created unforeseen challenges, it has also thrown the fundamental value of higher education, as both a private and public good, into high relief.

A creeping scepticism about the academic enterprise has yielded to a fervent faith that scientific research will generate a solution to this current crisis. The image of the ivory tower is being replaced by that of institutions on the forefront of the COVID-19 response, undertaking life-saving research and whose faculty and graduates are providing vital services in their communities.

The recognition that higher education transforms lives and society lies at the heart of educational philanthropy. The over two hundred thousand donors who contributed over £1.3 billion to UK and Irish institutions in 2018-19 were supporting students, faculty, research institutes, the arts and a host of other programmes. They were also affirming the vital importance of higher education institutions. This survey report, in turn, underscores the critical role of institutional advancement. I'm confident that the data from the CASE-Ross Support of Education Survey, along with the other advancement data and metrics available through CASE's AMAtlas (the portfolio of CASE's global survey offerings) will help to demonstrate the importance of sustained investment in institutional advancement. Whilst philanthropic support may well be impacted, in the short term, by the current crisis, philanthropic support will also be more vital than ever in advancing education.

I thank the CASE-Ross Editorial Board for its leadership of this important research and the staff of the one hundred institutions that participated in the 2018-19 survey. The data they contributed provides a valuable resource for CASE's global membership.

With much gratitude,

Sue Cunningham

President and CEO

CASE

FOREWORD

The (recently renamed) CASE-Ross Survey continues as the sector's best measure of philanthropic support for higher education in the UK and Ireland.

Since its inception in the early 2000s, the Survey has been dominated by a long-term trend of substantial growth in fundraising, though last year we noted that growth was at times “lumpy”. In the 2018-19 year, the lump was – happily – a big one.

Following three years of hovering around the £1bn mark, in 2018-19 participating institutions' new funds secured leapt to a total of £1.3bn secured. And for the first time ever, the total cash received by participating institutions was more than £1bn – demonstrating that the cash does follow new funds secured, with a slight lag. For both measures, the long-term trend of linear growth continues apace across nearly all the report's clusters.

For instance, last year we celebrated when one institution from the Elite cluster surpassed £300m of new funds secured; this year, *both* the Elite institutions did so – driven in part by *both* securing a single £100m+ gift. Much of the rest of the sector grew, too. More institutions than ever before have raised more than £10m and of these a higher proportion than ever before have raised £20m or more. Five out of six cluster groups had higher average new funds secured in 2018-19 than in 2017-18, with only the Developing cluster falling slightly.

The long-term trend of growth sits alongside clear evidence that sustained investment into advancement teams pays dividends. The correlation is reflected across the piece and those institutions which invest steadily have clearly developed philanthropy as an income stream which can play a key role in diversifying – and thus strengthening – institutional funding models.

Notably, the hallmark of stop-start investment and growth appears to be a factor in the slower growth of new funds secured and cash received in the Emerging cluster and regression in the Developing cluster. Across the sector, we report that average fundraising investment increased by 6% and average alumni relations investment increased by 7% over the previous year, but it is concerning that most of the growth was concentrated in the highest performing clusters.

There are some other areas for sector reflection. It appears that the scale of growth in new funds secured and cash received is not matched by a comparable growth in donor numbers: fundraising success appears to be built on ever-larger gifts at the top end. There is significant growth in average largest pledges for every cluster group – except, once again, the Developing cluster. This is both a strength and a potential risk. High-level, low-volume fundraising can deliver a positive return on investment, but at a time when our donors are exposed to substantial economic uncertainty, it does mean the risk is more concentrated in fewer donors.

The average number of alumni donors grew by 2% between 2017-18 and 2018-19, but this is a slowing in growth trend over time; and the total number of alumni donors reported to the survey has fallen for the first time (this somewhat confusing point reflects variations in the number of institutions reporting these figures). We know that in North America, regular giving participation has followed a gentle decline for more than a decade. Is the UK going to follow? Are traditional “annual funds” slowing?

The good news at the heart of this report on the 2018-19 data, that philanthropy increased so significantly for the sector, comes at a time when the economic outlook is uncertain and university finances will face unprecedented pressure. We urge leaders to consider the data underpinning this report – and those from previous years – carefully. CASE-Ross results, especially over multiple years, show that sustained investment over time can build robust philanthropic income streams. As the sector faces significant financial uncertainty and extremely tough decisions over the next year, we should remember the long-term prizes which sustained

investment into fundraising and alumni relations deliver: a more evenly balanced financial future and an excellent return on investment.

We are very grateful to the institutions who are sharing case studies to complement this report on the CASE blog. Your stories help bring to life the impressive impact our work has for our institutions and provide templates for others to build on, in the CASE tradition of sharing best practice.

We are also grateful to the professionals who complete the CASE-Ross Survey each year. Over the past year you've shared helpful input about how the Survey can and should evolve, particularly in the context of global CASE survey alignment: your ideas and suggestions will help us build stronger surveys with ever-greater global connectivity in the coming years.

With thanks,

CASE-Ross Editorial Board

EXECUTIVE SUMMARY

The CASE-Ross Survey Supporting Document prescribes definitions for recording philanthropic income, guidance on eligible funding and provides general guidance on completing the survey. Philanthropic income includes gifts/ donations or grants that are eligible and fall within the boundaries of philanthropic intent. It is recorded as new funds secured and cash income received. Philanthropic support is reported in two ways:

- New funds secured in a year includes the value of new gifts/ donations received and new pledges confirmed in the year at their value for up to five years; it excludes legacy payments and cash payments made against pledges secured in previous years. New funds secured reflect the success of current fundraising activity.
- Cash income received includes all cash income received during the year and includes new single cash gifts, cash payments received against pledges secured in the current or previous years and cash from legacies; it excludes new pledges where payment has not been received. Cash income reflects the success of the current and past years' fundraising activity.

Key Findings¹

Overall fundraising results are up – average new funds secured increased by 21% over those received during 2017–18. Average cash income also rose, albeit at a lower rate than that for new funds secured; average cash income received increased by 11% since 2017–18. The average value of the largest new gifts/ pledges and average value of the largest cash gifts received by institutions increased by 20% and 37% respectively. Average donor numbers have increased by 1% while the average number of alumni donors has increased by 2% since 2017–18. Average figures for investments in both fundraising and alumni relations have increased by 6% and 7% over 2017–18 levels.

AVERAGE NEW FUNDS SECURED IN 2018–19 INCREASED BY 21%

- The total new funds secured in 2018-19 exceeded £1.3 billion.
- The average philanthropic funds secured in 2018–19 increased by 21% over 2017–18 figures.
- On average, institutions sourced 52% of their new funds from organisations (including companies, trusts and foundations and lottery) while the remaining 48% was contributed by individuals.
- Amongst 79 institutions that provided the data, 181 donors made gifts or pledges of £500,000 or more during 2018–19 (excludes elite institutions).

AVERAGE CASH INCOME RECEIVED IN 2018-19 INCREASED BY 11%

- The total cash income received in 2018-19 was £1.1 billion.
- The average cash income received in 2018-19 increased by 11% over 2017–18 figures.
- On average, institutions received 51% of cash income from organisations (including companies and trusts and foundations), while individuals contributed 49%.
- Total cash income from legacies was £65m in 2018–19 from 1,103 legacy donations.

AVERAGE NUMBER OF DONORS GREW BY 1%

- 99 participating institutions reported a total of 204,967 donors.
- Average donors increased by 1% since 2017–18 and average alumni donors increased by 2% since 2017–18.
- Of the institutions that provided the break down for total donor figures², 97% were individuals and 3% were trusts and foundations, companies, lotteries or other organisations.
- 1.4% or 141,370 of the reported 10.1m contactable alumni made contributions during the year.

¹All average trend figures are for institutions that participated in the survey for all three years 2016–17, 2017-18 and 2018–19.

²Not all participating institutions provided a break down of total donors into sub-categories.

**AVERAGE INVESTMENTS IN FUNDRAISING
AND ALUMNI RELATIONS INCREASED BY
6% AND 7% RESPECTIVELY**

- In 2018–19 the total expenditure on alumni relations was £56m and the total expenditure on fundraising was £120m.
- Average fundraising investment increased by 6% and average alumni relations investment increased by 7% over the previous year.
- Staff costs accounted for 73% of average fundraising expenditures and 67% of average alumni relations expenditures.

INTRODUCTION

The first CASE-Ross Support of Education Survey (as it is now known) was carried out in 2002 and built on previous surveys undertaken within the Ross Group; the survey has been conducted annually since then.

The survey methodology has been adapted for use in other CASE surveys on philanthropic support for education in Australia and New Zealand, continental Europe, South Africa and Canada.

During 2012–13, the CASE-Ross survey was offered online for the first time. Its methodology also changed substantially (differentiating it from its predecessors) and was enhanced following a review that included scoping interviews with key stakeholders and development directors.

The CASE-Ross Group Support of Education Survey, UK and Ireland, 2018–19 was open to participants from 16 September 2019 to 15 November 2019. Invitations to participate were sent to 161 higher education and specialist institutions in the UK alone that are involved in some form of fundraising or alumni relations activity. Ninety-seven institutions across the UK participated yielding a response rate of 60% (see Appendix for details). Two higher education institutions from Ireland and the Institute of Cancer Research in the UK also took part in the survey. A total of 100 institutions across the UK and Ireland participated during 2018–19.

Participating institutions provided data for the 12-month period from 1 August 2018 to 31 July 2019. Data has not been reweighted to estimate funds raised and other data for non-participating institutions so reported totals only account for a portion of philanthropic support for higher education in the UK and Ireland.

CASE Research staff, with the support of the Editorial Board, queried data submitted by institutions against an exhaustive set of logic, ratio, arithmetic and substantive tests and survey participants were asked to confirm or correct their

responses. Benchmarking data was made available to participating institutions after initial querying was completed.

Cluster Analysis

Latent Class Analysis (LCA) was first conducted in 2013 on data from the CASE-Ross surveys in 2011–12 to explore the possibility of uncovering groups of institutions that had similar fundraising profiles and has been repeated every year. LCA was used to group institutions, into different clusters based on certain defining variables that provided the most information about key characteristics of fundraising activities and for which there was sufficient variation between institutions to offer distinct patterns and differentiating factors. These variables are:

1. Average new funds secured over three years
2. Average cash income received over three years
3. Average largest cash gift received over three years
4. Average number of donors over three years
5. Average proportion of contactable alumni making a gift over three years
6. Average fundraising costs per pound received over three years
7. Average number of fundraising staff (full-time equivalent) over three years

Average figures for these variables across a three-year period were used to ensure that comparisons were based on performance over time rather than any single year. In past years, a five-cluster solution offered a good statistical fit for the data and made substantive sense; however, since 2015–16, additional analysis on the Emerging cluster was conducted and it was found that the institutions in this cluster could be further divided into two sub-clusters producing a total of six clusters in recent years. The same process has been applied to the 2018-19 dataset of 100 institutions using Latent GOLD® v5.0 software to derive six clusters. Through most of this report, data has been presented broken down for the following six clusters of institutions:

1. Fragile (2 institutions)
2. Emerging (26 institutions)
3. Developing (29 institutions)
4. Moderate (33 institutions)
5. Established (8 institutions)
6. Elite (2 institutions)

Interpreting the charts and tables

- Through most of this report data has been presented broken down by the six clusters.
- Descriptive statistics, mainly using the measures of central tendencies – arithmetic mean/average and median – were used to analyse the data and report on key variables on a confidential and aggregated basis.
- Mean figures provide a snapshot of the overall group's performance including outliers, while median figures highlight the exact midpoint in fundraising figures across participating institutions.
- A normally distributed cluster has mean and median figures that are quite similar. Differences

in mean and median figures may reflect the outliers in the data reported by a cluster. Or, it could reflect the varied nature of fundraising operations and/ or maturity of fundraising operations across participating institutions.

- The number of institutions given as the base (n) for a chart or table indicates the number of institutions that provided data for a response to a question or for the given variable or variables.
- For variables that were calculated from the responses to more than one question in the survey, first, the variable was calculated for each institution and then the mean was calculated at a cluster level and at an 'all institutions' level.
- Aggregates reported for 'all institutions' are calculated for all participating institutions that provided a response.
- All income figures in this report are reported in Pound Sterling. Data reported in Euros were converted to Pound Sterling using an average of the conversion rate for the survey period (€1 = 0.88 GBP).

KEY INDICATORS

The following section reports on new funds secured, cash income received, contactable alumni, donors and investment in fundraising and alumni relations staff and activities. These key indicators provide a

broad overview of the return on investment and economic impact of fundraising across institutions in the UK and Ireland.

Key indicators 2018–19

	<i>n</i>	Total	Mean	Median
Philanthropic Income				
New Funds Secured	99	£1,331,947,556	£13,454,016	£2,379,541
Cash Income Received	100	£1,067,735,618	£10,677,356	£2,512,014
Alumni				
Total Alumni	99	14,467,026	146,132	134,799
Contactable Alumni	98	10,484,646	106,986	100,018
Alumni Donors	94	141,524	1,506	619
Donors				
Total Donors*	99	204,967	2,070	905
Individual Donors [†]	99	198,506	2,005	880
Organisation Donors [‡]	95	6,401	67	45
Costs				
Fundraising Costs	97	£119,886,373	£1,235,942	£558,758
Alumni Relations Costs	98	£55,664,343	£568,004	£271,671
Alumni Magazine Costs	64	£5,327,132	£83,236	£54,926
Staff				
Fundraising Staff (FTE)	97	1,573	16	8
Alumni Relations Staff (FTE)	99	807	8	5

All figures reported in this table are for all institutions that provided the data; this table has been compiled using responses to multiple questions and hence the sample size varies.

*Total donor figures include individual and organisational donors. Total donor numbers for 2018–19 are not comparable with those reported in the 2019 report due to a difference in the institutions included in the data.

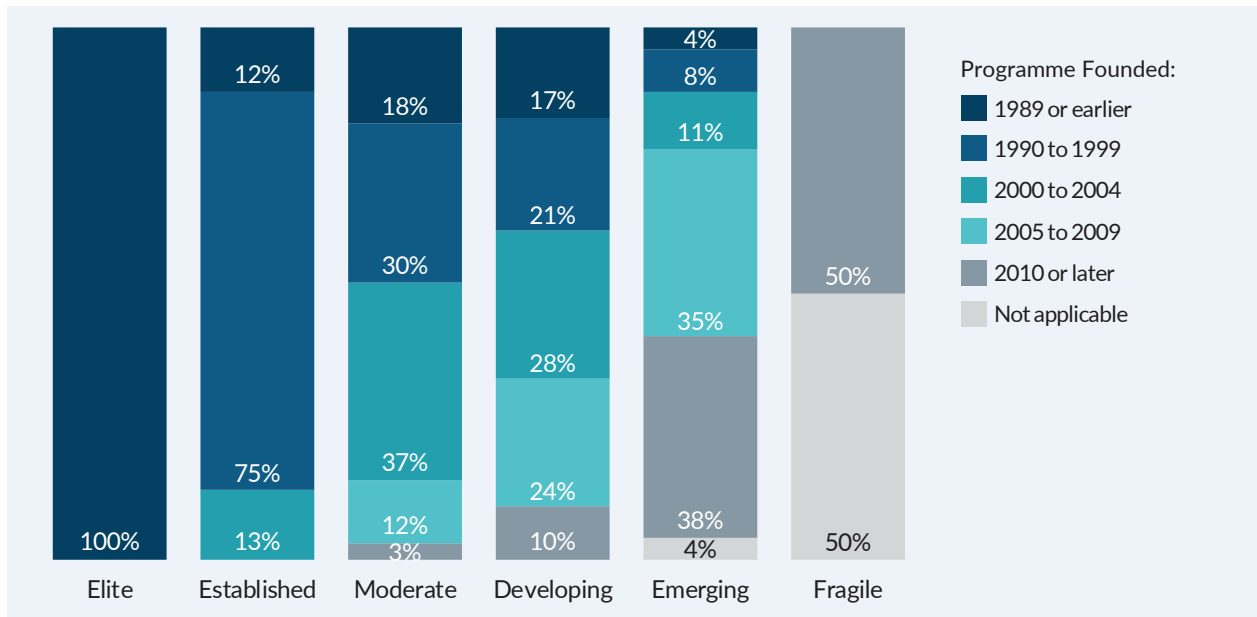
[†]Individual donor figures include alumni donors and non-alumni donors; not all institutions provided a break down of total donors into these sub-categories.

[‡]Organisational donors include trusts and foundations, companies, lottery and other organisations; not all institutions provided a break down of total donors into these sub-categories.

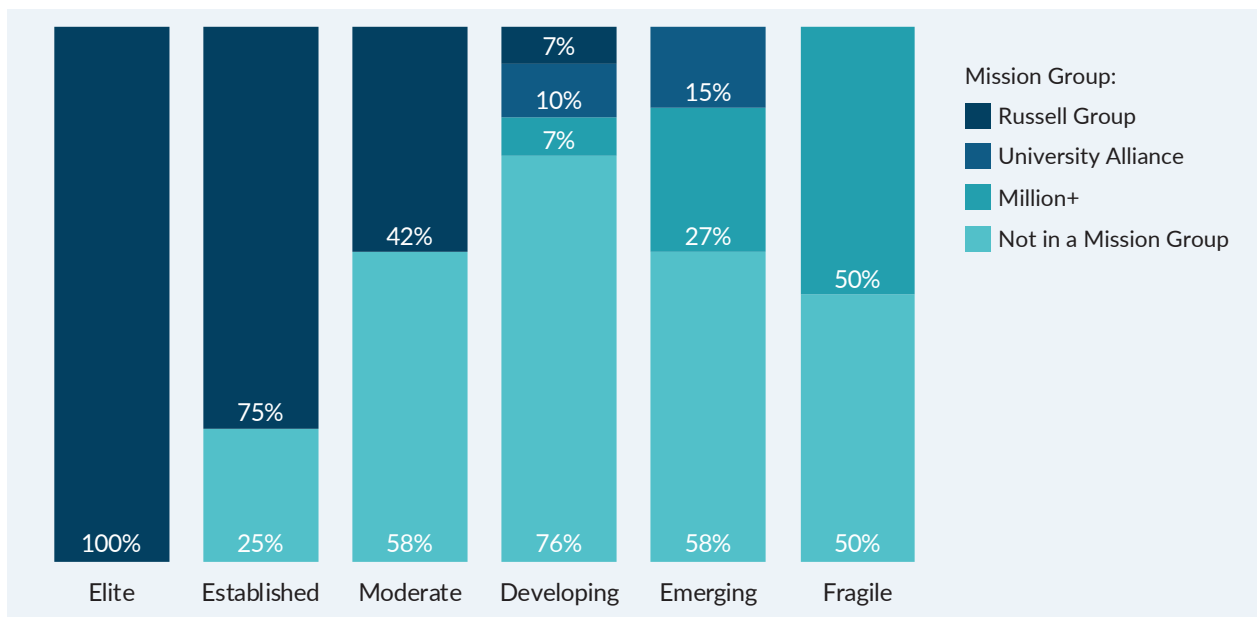
A clear progression of fundraising capacity and performance is apparent, ranging from the nascent programmes in the Fragile cluster to the long-established, well-resourced and highly productive programmes in the Elite group.

It should be noted that the fundraising performance of institutions with less mature programmes and fewer staff may fluctuate from year to year as a result of discontinuities in staffing and investment and may be disproportionately impacted by changes in operations, programmes, or donor interests.

Age of development and alumni relations programme by cluster
(n=98; % number of institutions)



Mission groups³ by cluster
(n=100; % number of institutions)



³This includes the Russell Group, University Alliance and MillionPlus.

New funds secured

New funds secured in a year are new gifts/donations received and new confirmed pledges⁴ (counting multi-year value for up to five years) from donors that are made during the year. The funds pledged may not have been received during the year. New funds secured exclude legacy payments and cash payments made against gift pledges secured in previous years. They reflect the success of current

fundraising activity and demonstrate the true impact of development efforts inclusive of new gift funds received in a year and the value of future commitments.

Gifts given by individuals via charitable vehicles such as a personal trust or foundation or from a privately held company are also recorded as gifts from an individual.

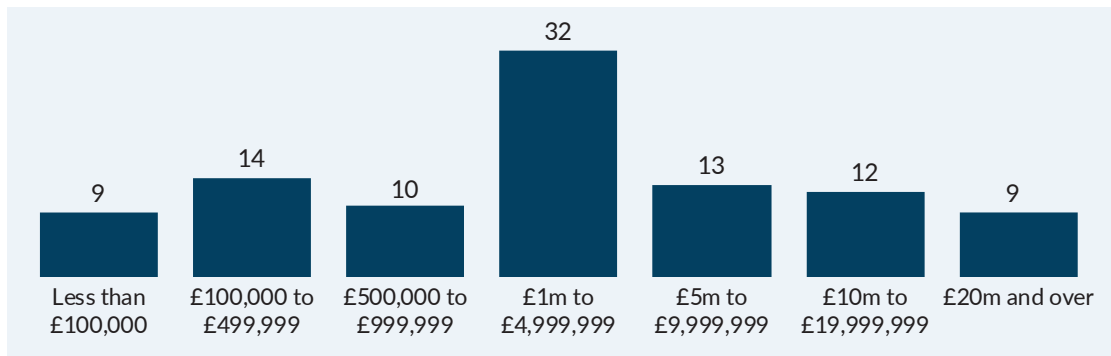
The total value of new funds secured for all institutions exceeded £1.3 billion.⁵

Mean new funds secured 2018–19 (n=99)

	New funds secured	Largest pledge
Elite	£347,357,890	£125,000,000
Established	£33,988,727	£9,597,050
Moderate	£8,656,323	£2,767,729
Developing	£2,372,434	£871,980
Emerging	£507,200	£201,631
Fragile	£23,977	£6,097
All	£13,454,016	£4,523,046

This table has been compiled using responses to multiple questions.

Total number of institutions that secured new funds at different income levels 2018-19 (n=99; number of institutions)



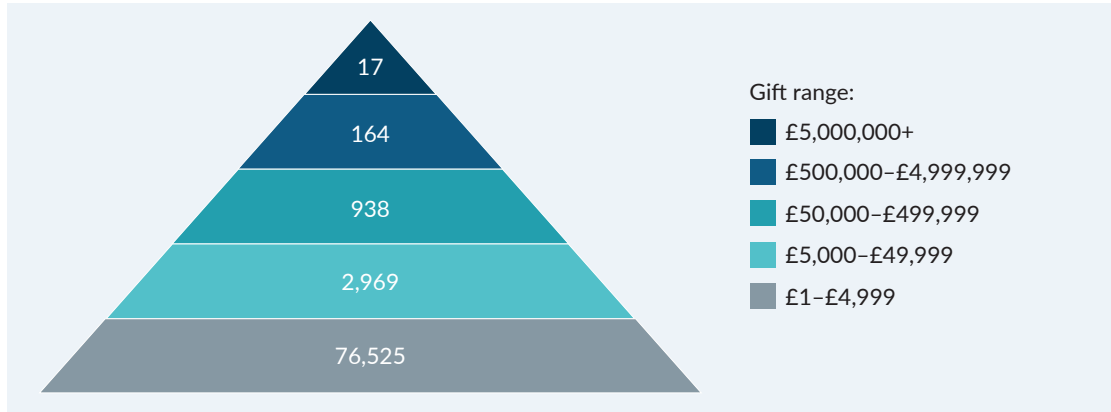
⁴Legacies are a pledge or commitment that a transfer of wealth will occur upon a donor's death.

⁵See the table on page 12 for more information on key indicators.

Participating institutions (excluding Elite institutions) secured 181 confirmed pledges of more than £500k each. Of these, 88% were secured

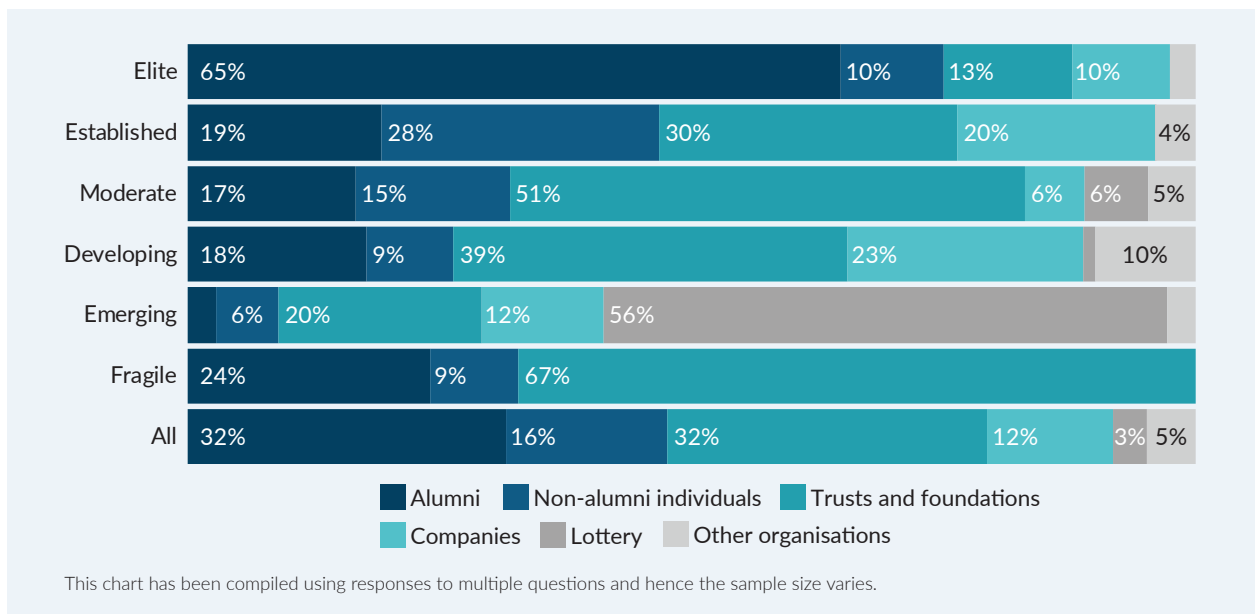
by Established and Moderate institutions, while the remaining 22% were secured by Developing, Emerging and Fragile institutions.

Number of donors that gave or pledged new funds at various contribution levels 2018-19
(n=79; excluding data for Elite institutions)



Individuals contributed 50.2% of the total new funds secured while organisations⁶ contributed 49.8%.

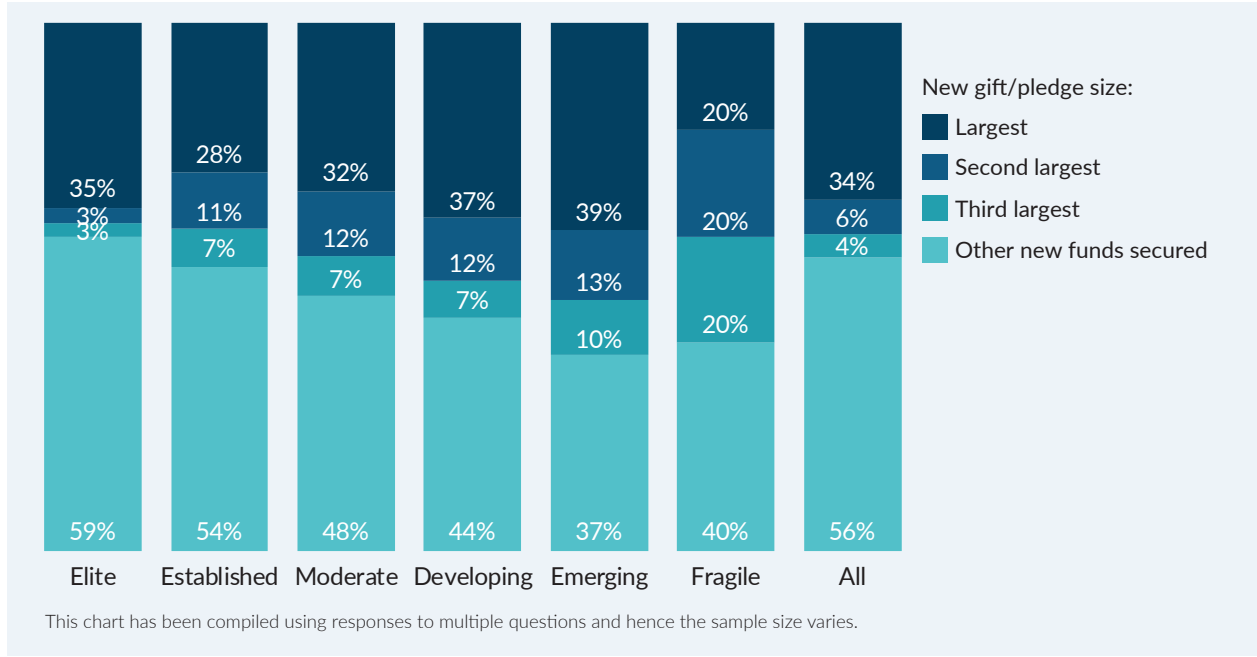
Mean sources of new funds secured 2018-19
(n = 84 to 92; % of income)



⁶Organisations include trusts, foundations, companies, lotteries and other organisations.

On average, the largest single new gift/pledge accounted for 34% of average funds secured by institutions.

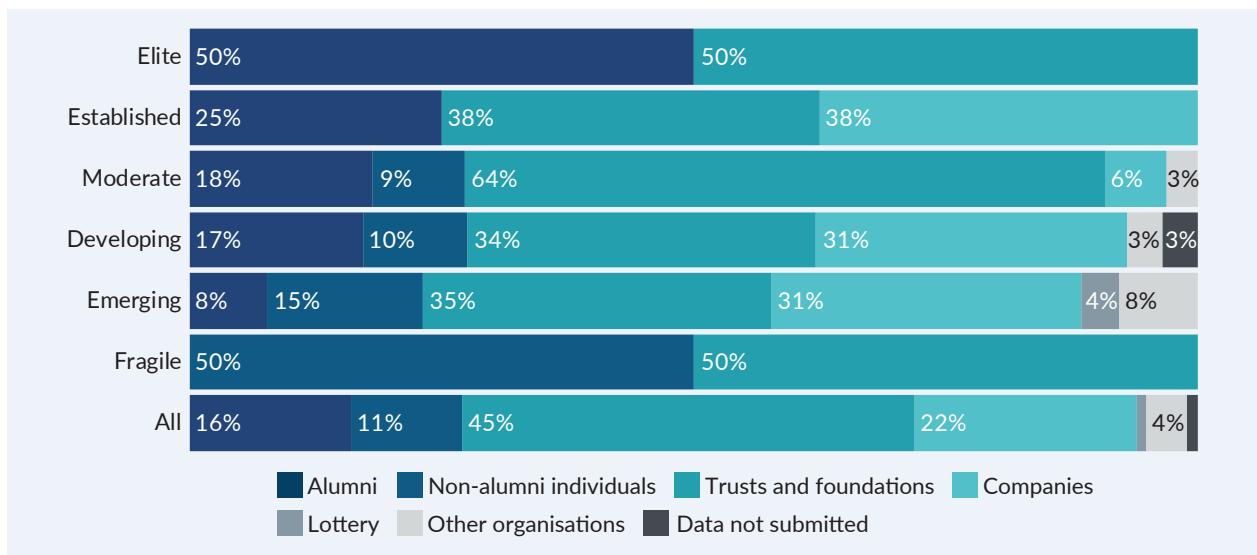
Three largest gifts/pledges as a percentage of new funds secured 2018-19
(n = 96 to 99; % of income; chart shows mean figures)



Individuals contributed 37% of the largest gifts/pledges received by all institutions. Just under half the number of participating institutions (45%) secured their largest new gift/pledge from a trust or foundation.

As noted earlier, gifts given by individuals via other vehicles (such as their personal trust/ foundation or own company) are recorded as gifts from an individual.

Sources of largest gifts/pledges 2018-19
(n = 99, % number of institutions)



Cash income received

Cash income received includes all donations received during the year. This includes new single cash gifts, cash payments received against pledges secured in the current or previous years and cash

from legacies⁷; it excludes new pledges where payment has not been received. Cash income reflects the success of the current and past years' fundraising activity.

The total cash income received by all institutions in 2018-19 was £1.1 billion⁸.

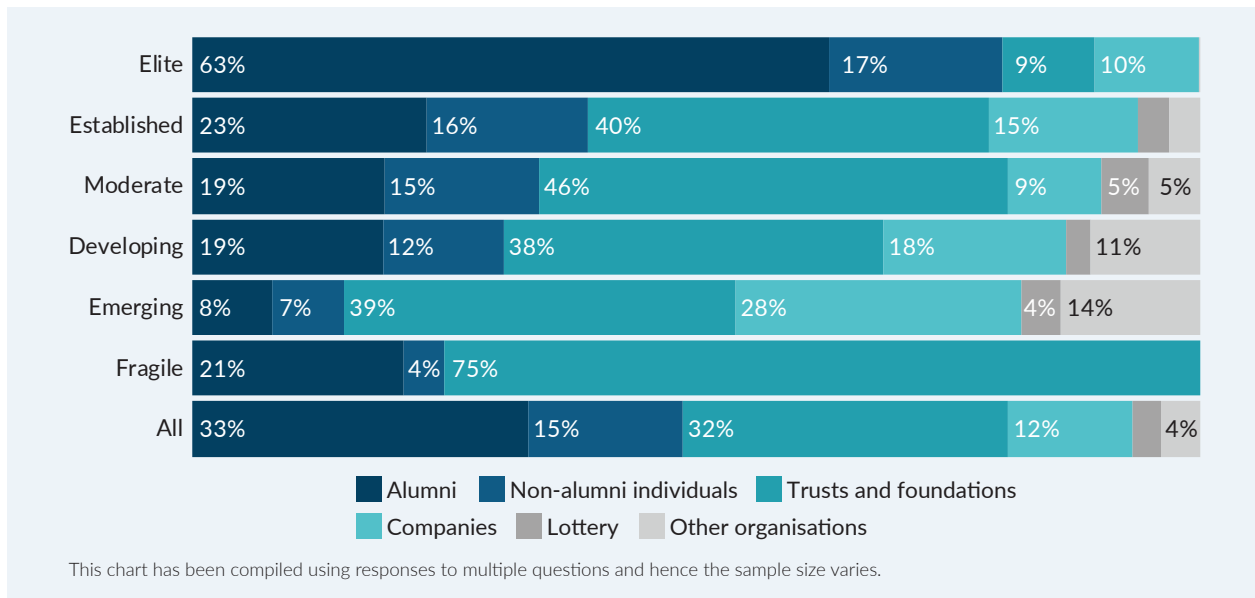
Mean cash income received 2018-19

	Cash income received n=100	Largest cash gift n=99
Elite	£244,799,879	£41,333,333
Established	£31,605,623	£6,105,081
Moderate	£7,787,178	£1,601,565
Developing	£2,002,618	£557,826
Emerging	£391,582	£147,025
Fragile	£28,477	£6,097
All	£10,677,356	£1,646,843

This table has been compiled using responses to multiple questions and hence the sample size varies.

Individual donors, on average, contributed half of all cash income received.

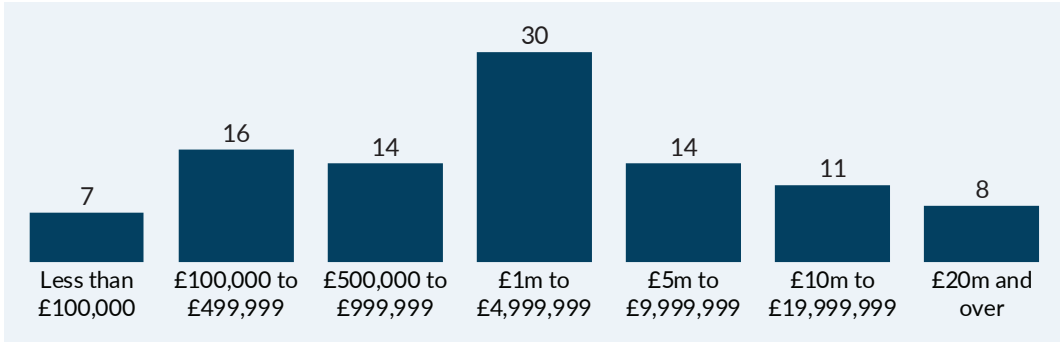
Sources of cash income received in 2018-19 (n = 90 to 93; % of mean cash income)



⁷Legacies are a commitment that a transfer of wealth will occur upon a donor's death.

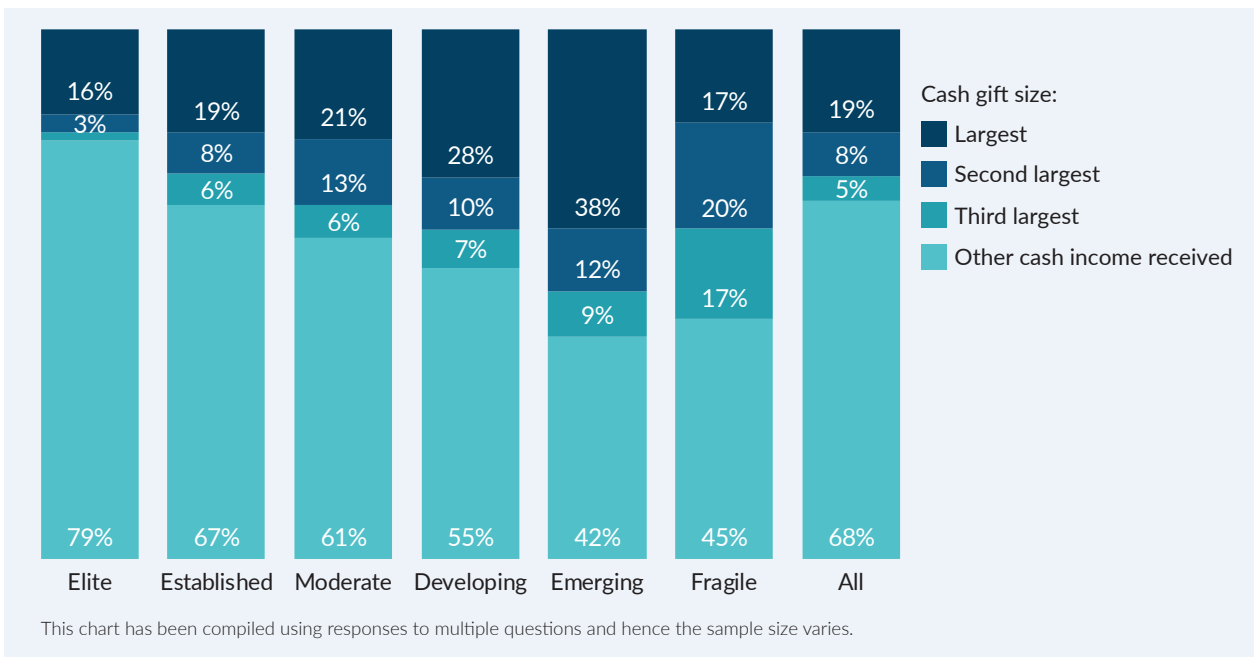
⁸See the table on page 12 for more information on key indicators.

Total number of institutions that received cash income at different income levels 2018-19
(n=100)



On average, an institution's largest cash gift accounted for 19% of the average cash income received by the institution.

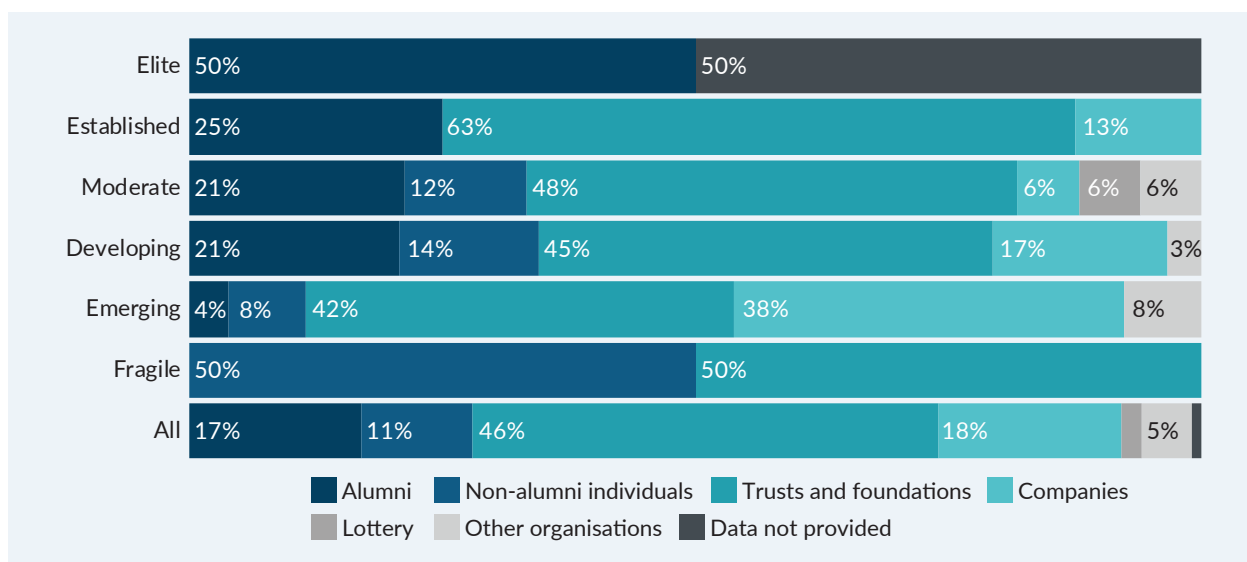
Three largest gifts as a percentage of mean cash income 2018-19
(n=98 to 99; % of income; chart shows mean figures)



Individuals contributed 33% of the largest cash gifts received by all institutions.

Sources of largest cash gifts 2018-19

(n = 99; % number of institutions)



Mean cash income received from legacies was £0.9m across 67 institutions that received legacy gifts (and provided the number of legacy gifts).

On average, the value of a legacy gift received was around £64k.

Mean cash income received from legacies 2018-19

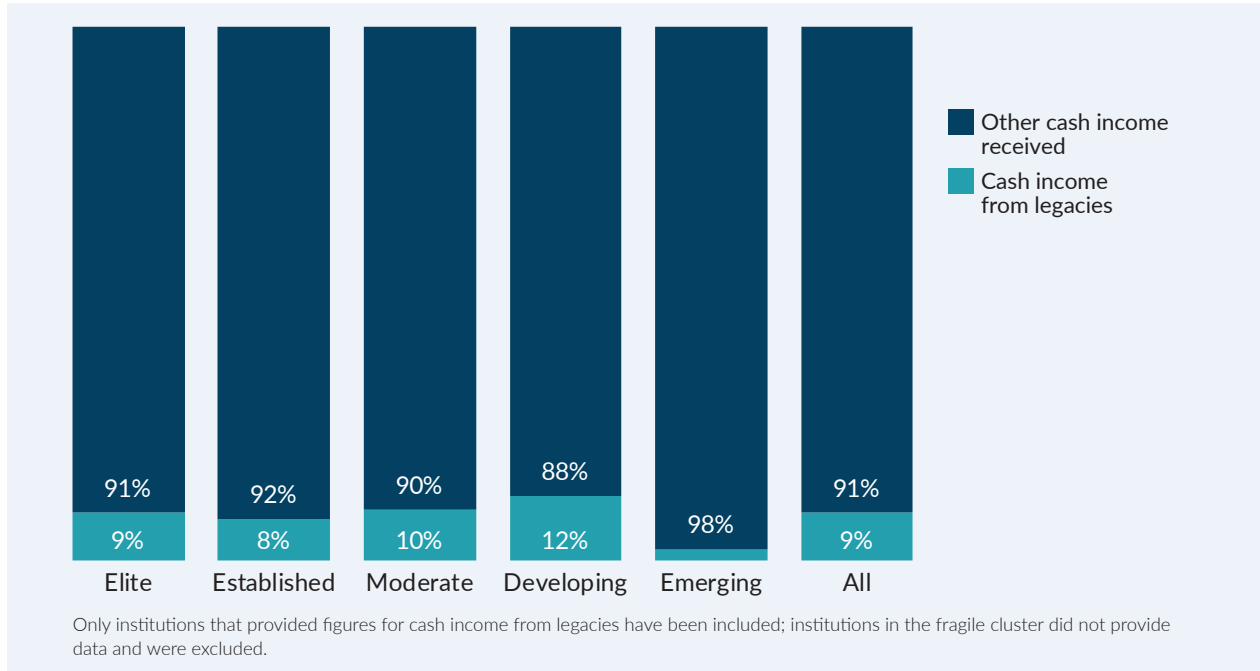
(n=67)

	Cash income from legacies	Cash income per legacy
Elite	£17,572,923	£64,606
Established	£2,675,975	£69,782
Moderate	£746,366	£69,658
Developing	£214,227	£65,440
Emerging	£14,483	£14,483
Fragile	Not applicable	Not applicable
All	£989,270	£64,137

This table has been compiled using responses to multiple questions. Only institutions that provided data for both cash income from legacies and number of legacies have been included; one outlier has been excluded.

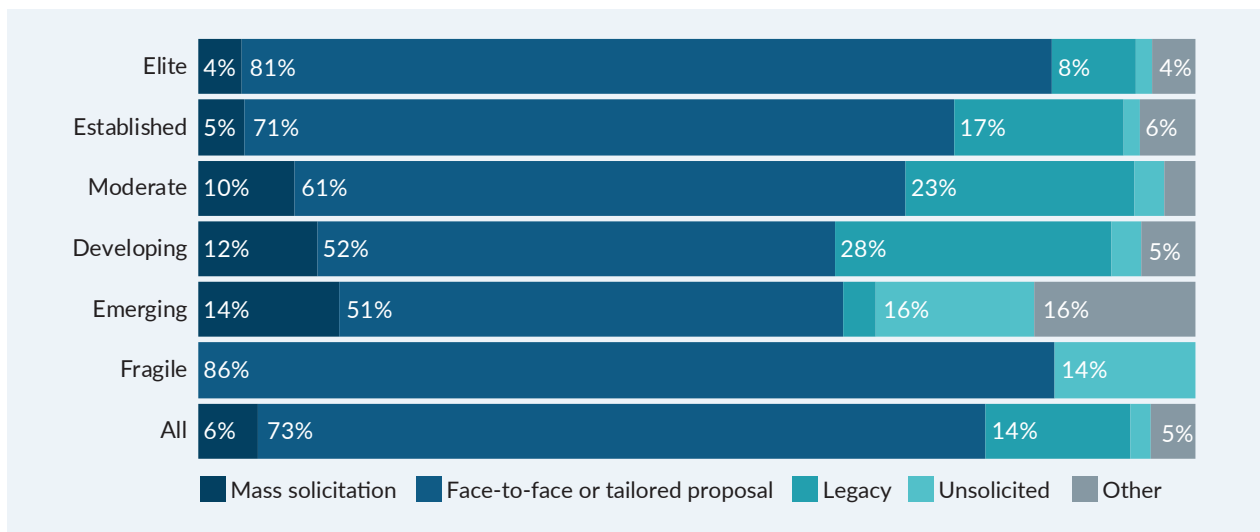
Overall, 9% of cash income received came from legacies.

Cash from legacies as a percentage of total cash income 2018-19
(n=68; % of income)



Almost three-quarters of cash income from individuals was received as a result of face-to-face meetings or tailored proposals.

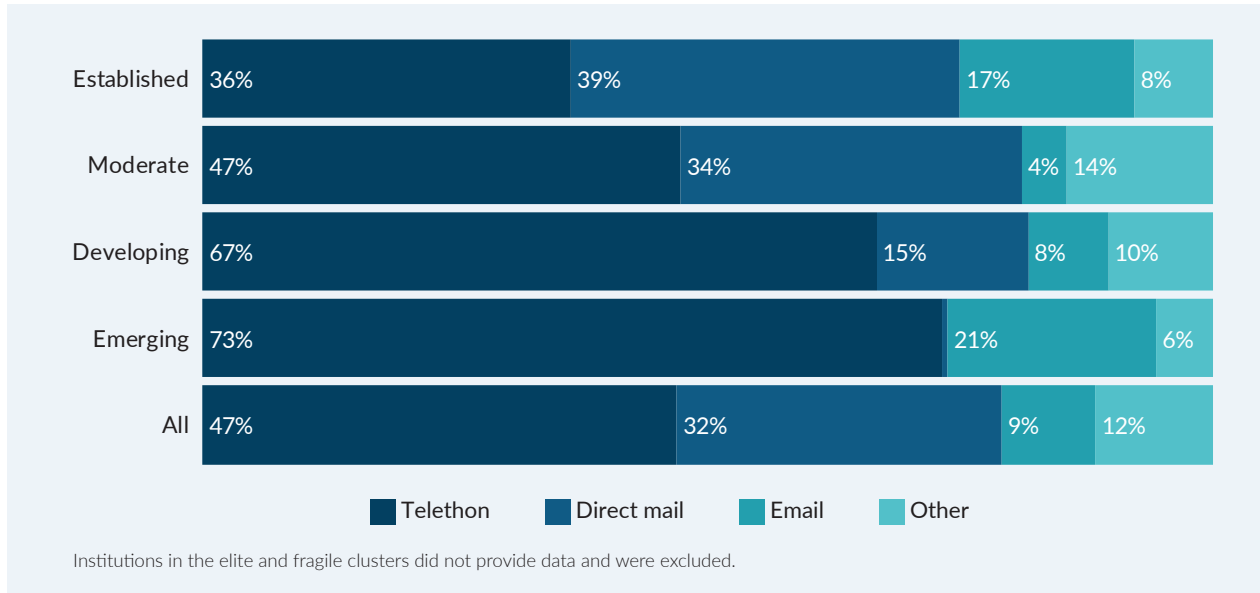
Cash income received from individuals by communication trigger 2018-19
(n=95; % of income)



Telethon campaigns accounted for 47% of all total cash income secured from individuals via

mass solicitations, followed by direct mail which accounted for 32%.

Cash income received from individuals by mass solicitation 2018-19
(n=71; % of income)



Alumni and donors

Contactable alumni refer to addressable alumni (former students of the institution) – those who have reliable postal or email addresses anywhere in

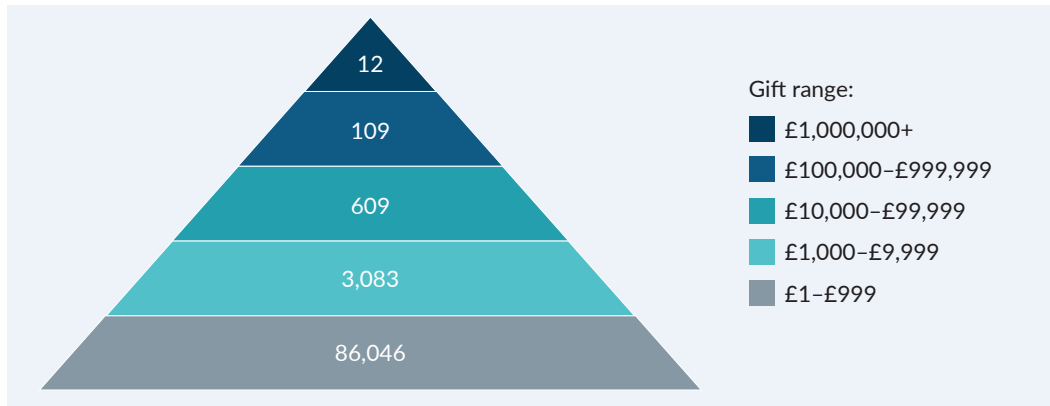
the world and who have not opted out of communications. The average number of donors across all participating institutions (that provided both total donor and alumni donor figures) was 2,059

Mean number of alumni and donors 2018–19

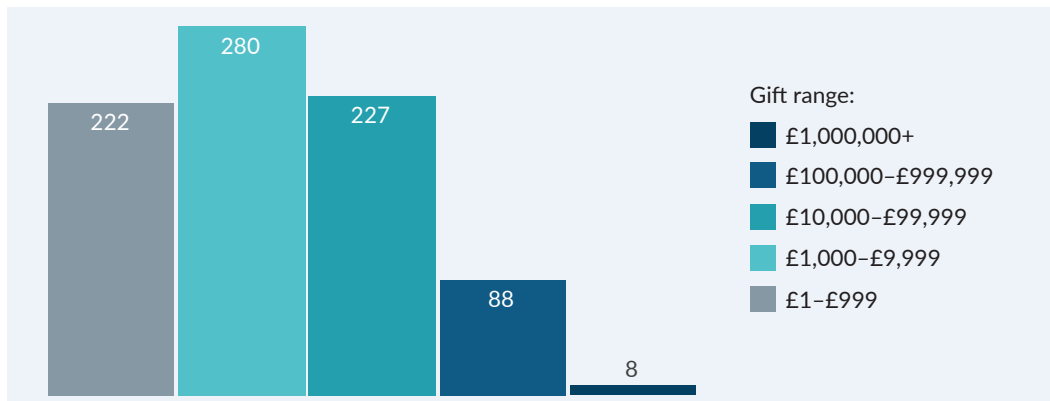
	No. of alumni n=98*	Contactable alumni n=98*	Total donors n=94†	Alumni donors n=94†	Number of legacies n=67
Elite	319,134	260,713	43,975	31,883	272
Established	244,945	190,478	3,938	3,040	29
Moderate	157,060	116,167	2,628	1,926	16
Developing	127,791	88,149	945	666	4
Emerging	108,072	84,532	279	190	1
Fragile	75,174	26,229	98	3	0
All	144,713	106,986	2,059	1,506	16

This table has been compiled using responses to multiple questions and hence the sample size varies.
 *This includes institutions that provided both alumni figures and contactable alumni figures
 †This includes institutions that provided both total donor figures and alumni donor figures.

Number of alumni donors making cash contributions by gift range 2018–19 (n=76)

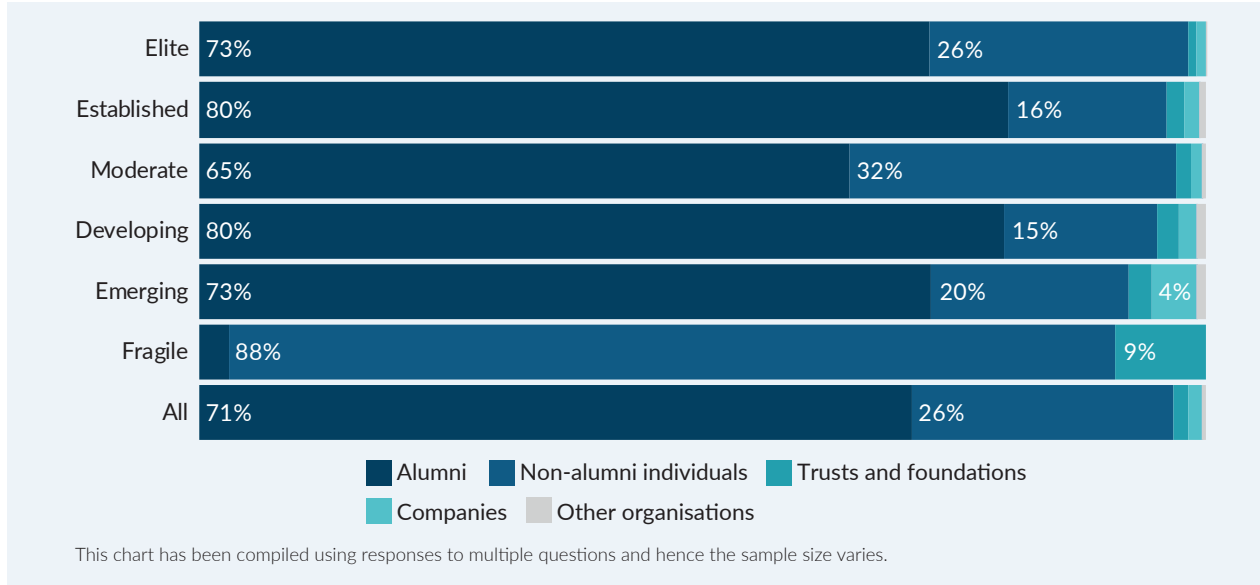


Number of legacies received by gift range 2018–19 (n=76)



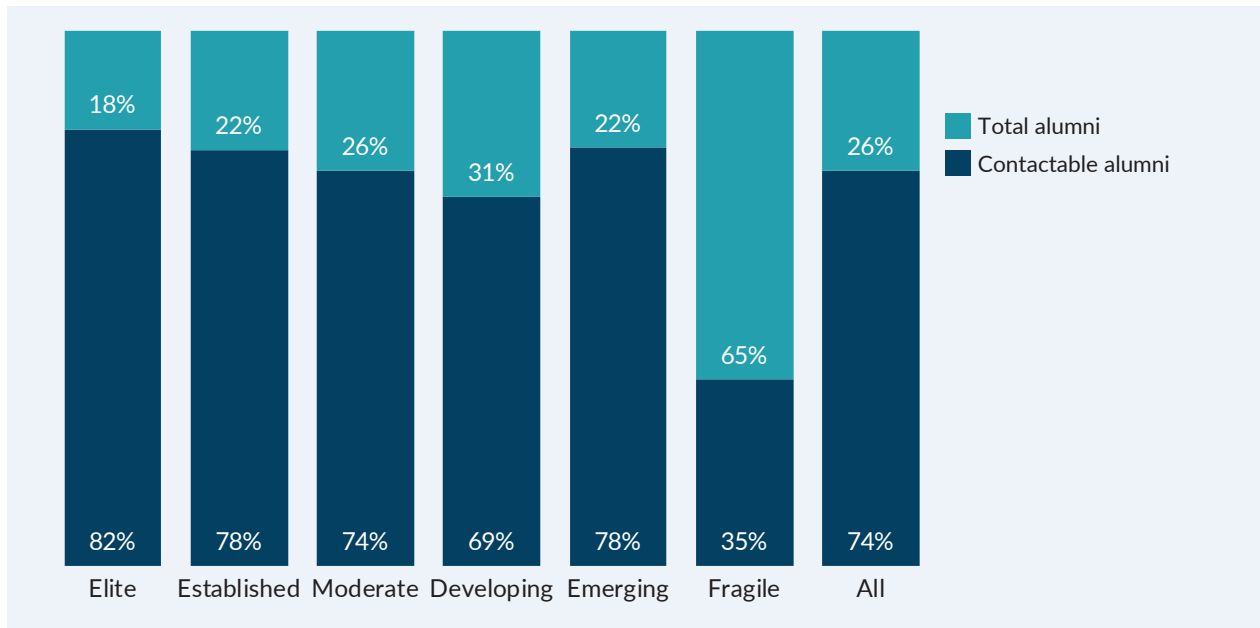
Individuals accounted for 97% of total donors.

Composition of donor population 2018–19
(n=88 to 94; % number of donors)



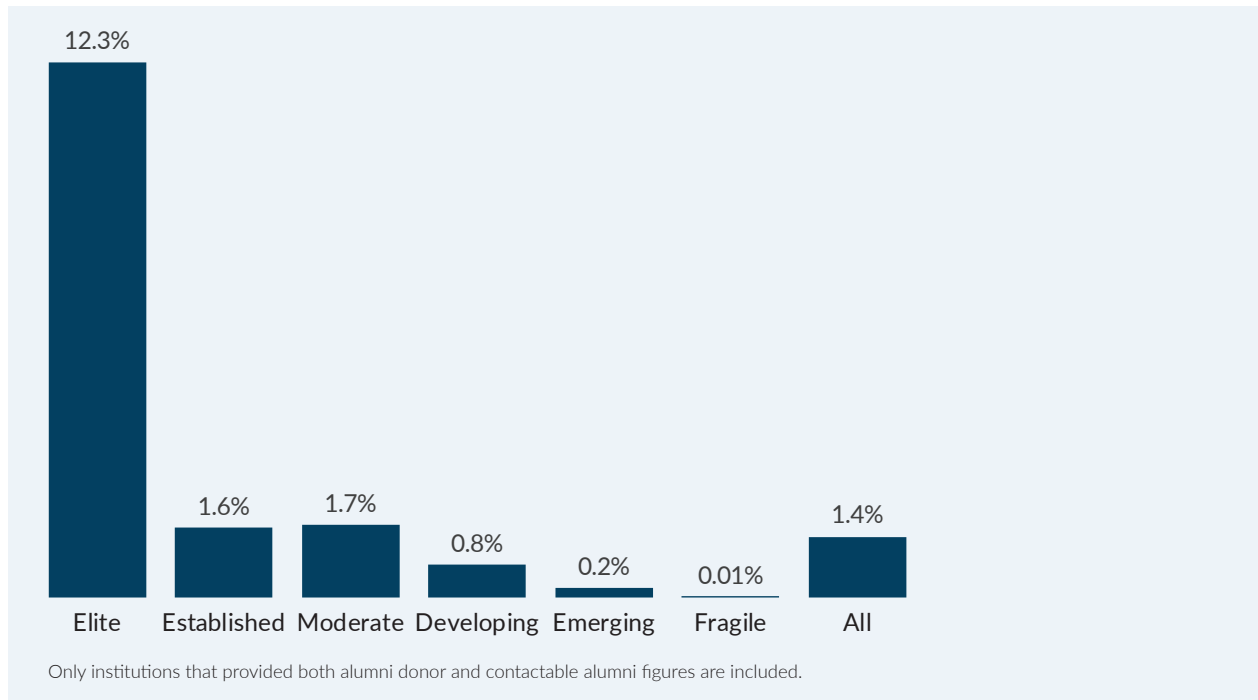
Institutions reported that they could contact 74% of their alumni via at least one of two contact mediums – email or post.

Percentage of contactable alumni 2018–19
(n=98)



On average, across all participating institutions, 1.4% of contactable alumni made a gift.

Percentage of alumni donating 2018-19
(n=93; alumni donors as a percentage of the contactable alumni)



Fundraising and alumni relations investments

Fundraising costs are costs associated with the efforts to gather and process new funds secured and cash income received. It includes the cost of the staff undertaking fundraising activity and advancement services (staff expenditure) and the other costs of running and maintaining the fundraising operations (non-staff expenditure). When the cost of both staff expenditure and non-staff expenditure is combined this equals the total fundraising expenditure.

Alumni relations costs are costs associated with engagement activity with an institution's alumni and community, including staff and non-staff expenditure.

The return on investment in fundraising and alumni relations could, in theory, be calculated

based on total advancement costs and total funds secured. Numerous factors, however, influence charitable giving decisions and impact an institution's ability to secure philanthropic support. As an example, the value of institutional leadership and other academic time invested in fundraising can be substantial and the cost of this time is outside the scope of this report. Similarly, advancement activities benefit institutions in multiple ways and advancement activities yield returns in the form of alumni engagement, annual and major giving and legacies over the course of years or decades.

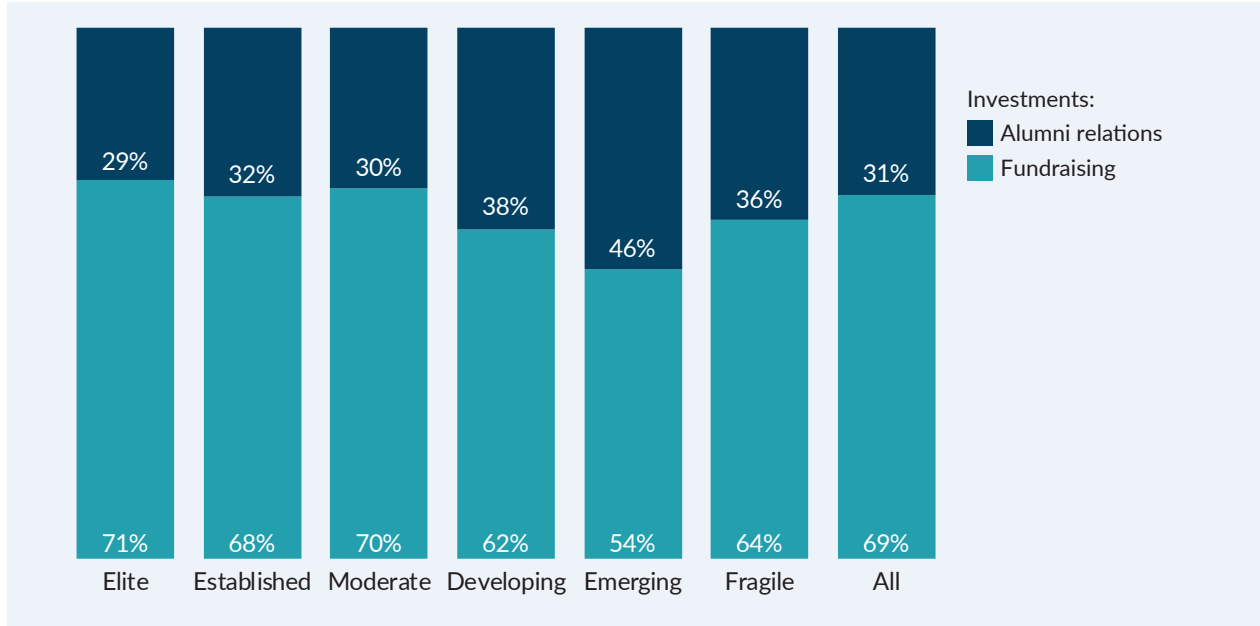
Overall, £176m was invested in fundraising and alumni relations in total across all institutions. 68% of the total investment was for fundraising and 32% was for alumni relations. Institutions spent about £5m on alumni magazines annually.

Mean fundraising and alumni relations investments 2018–19

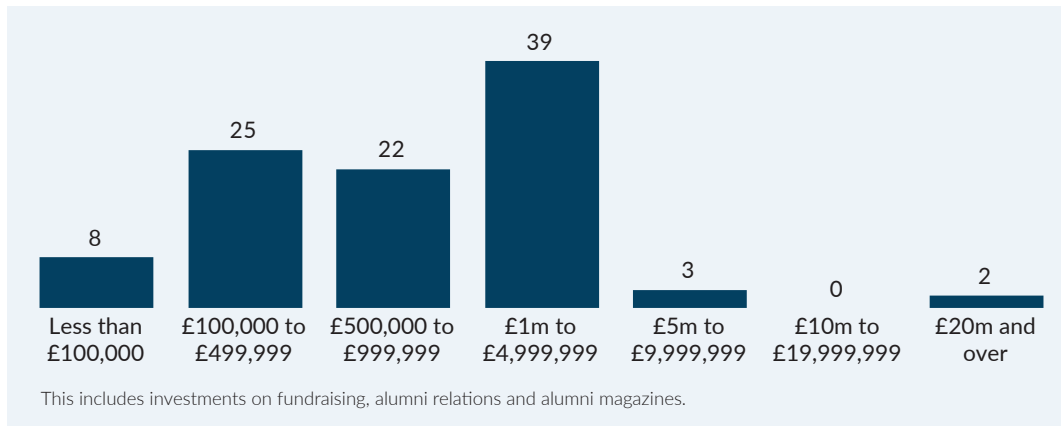
	Fundraising investments <i>n</i> =97	Alumni relations investments <i>n</i> =98	Fundraising and alumni relations investments <i>n</i> =99	Alumni magazine investments <i>n</i> =64	Institutional expenditure <i>n</i> =97
Elite	£19,446,476	£7,881,910	£27,328,386	£615,317	£1,702,484,500
Established	£3,459,893	£1,611,245	£5,071,138	£183,640	£873,102,525
Moderate	£1,084,710	£470,573	£1,541,023	£89,676	£392,974,479
Developing	£450,727	£275,884	£726,611	£42,881	£220,431,460
Emerging	£182,259	£152,231	£319,910	£32,505	£140,737,275
Fragile	£127,903	£72,903	£200,805	Not applicable	£66,494,950
All	£1,235,942	£568,004	£1,773,240	£83,236	£341,447,490

This table has been compiled using responses to multiple questions and hence the sample size varies.

Mean fundraising and alumni relations investments by cluster 2018-19
 (n = 99; % of fundraising and alumni relations investments)

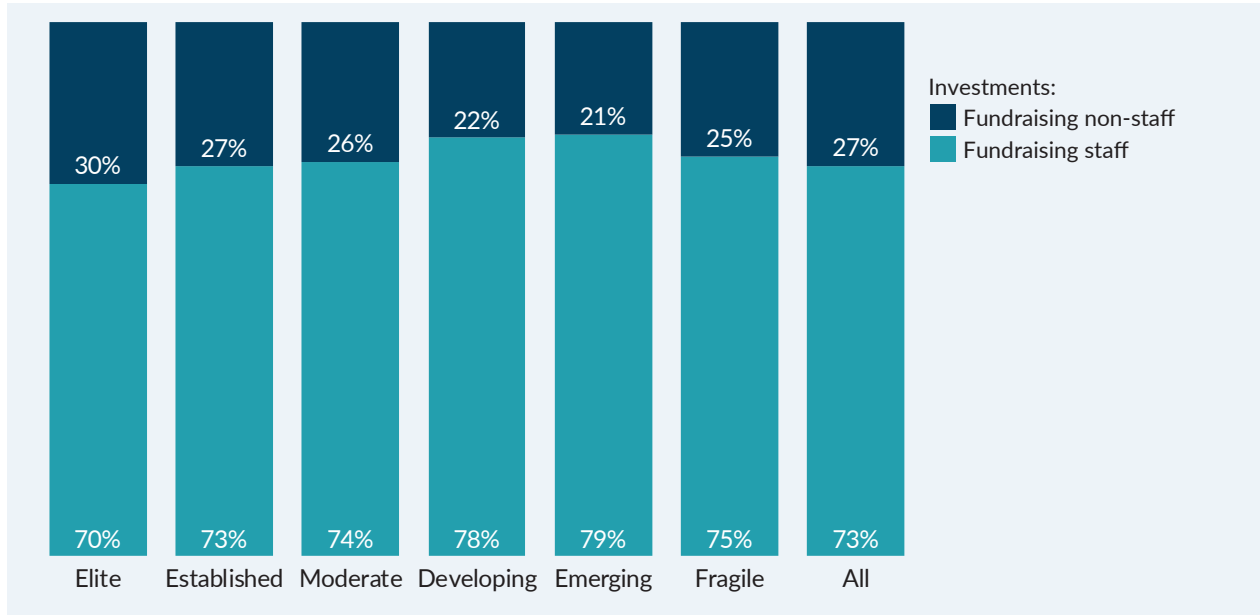


Total number of institutions that made fundraising and alumni relations investments at different levels 2018-19
 (n=99)



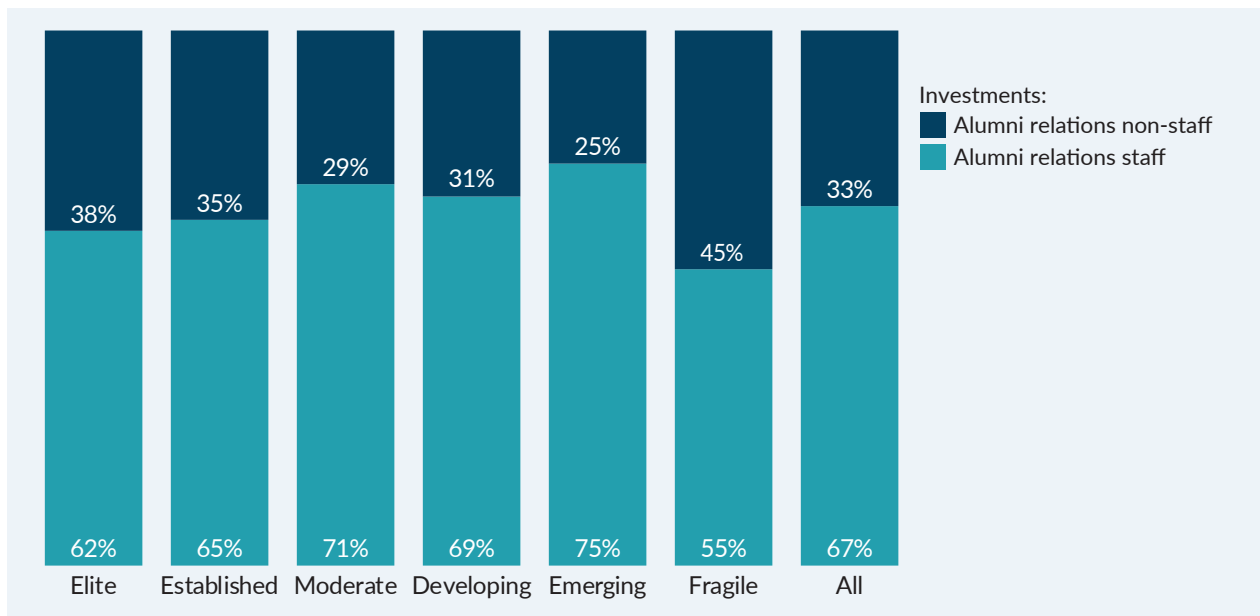
On average, staff costs accounted for 73% of total fundraising expenditures.

Mean staff and non-staff fundraising investments 2018–19
(n=97; % of fundraising investments)



Of the average alumni relations costs, 33% was spent on non-staff costs and 67% on staff costs.

Mean staff and non-staff alumni relations investments 2018–19
(n=98; % of alumni relations investments)



Fundraising and alumni relations staff

A total of 2,380 staff (full-time equivalent or FTE) were employed in fundraising and alumni relations roles across the sector⁹.

47% of these staff members were employed in Elite and Established institutions.

The ratio of average FTE fundraising staff to average FTE alumni relations staff was 2:1 across all participating institutions. This figure was highest for Elite institutions where the average ratio was 2.4:1.

Mean fundraising and alumni relations staff 2018–19 (n=96)

	Fundraising staff	Alumni relations staff	FR:AR staff ratio
Elite	234.0	97.5	2.4
Established	36.5	18.2	2.0
Moderate	16.3	7.9	2.1
Developing	6.8	4.6	1.5
Emerging	3.2	3.3	1.0
Fragile	1.3	0.8	1.7
All	16.2	8.4	1.9

This table has been compiled using responses to multiple questions. Only institutions that provided both fundraising and alumni relations staff figures were included

⁹See the table on page 12 for more information on key indicators.

TRENDS IN KEY INDICATORS

Trends are calculated using data from a base of 87 institutions that provided information for a key set of variables for all three years – 2016–17, 2017–18 and 2018–19. Trends are based on consistent

year-over-year samples. Since institutions did not provide data for all key indicators for all three years, samples sizes vary.

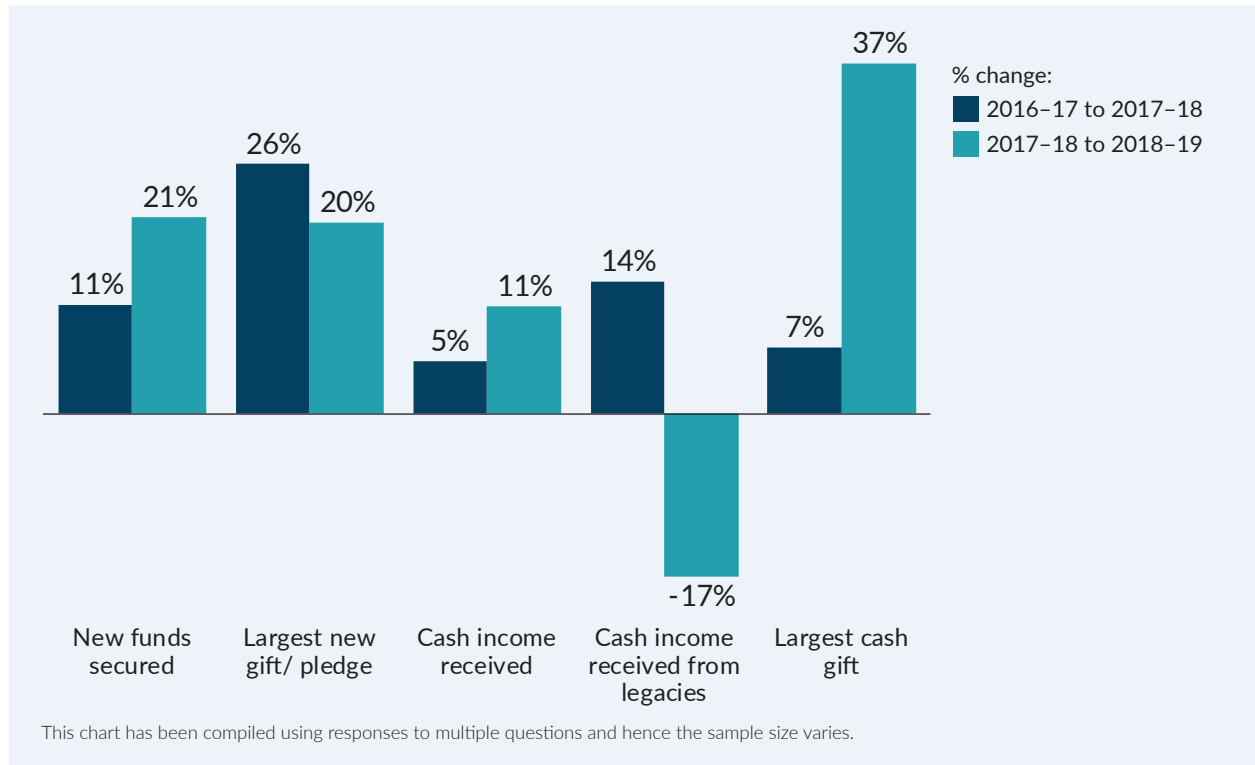
Philanthropic income

- Average new funds secured increased by 21% over 2017–18 figures.
- In the case of the largest new gift/ pledge received, the average percentage increase was 20% over the previous year.

- Average cash income received increased by 11% over 2017–18 figures.
- Average cash income from legacies decreased by 17% since 2017–18.
- In the case of the largest cash gift received, the average percentage increase was 37% over the previous year.

Mean percentage change in philanthropic income 2016–17, 2017–18 and 2018–19

(n=87 for New funds secured;
n=86 for Largest new gift/pledge;
n=87 for Cash income received;
n=50 for Cash income received from legacies;
n=85 for Largest cash gift)



Alumni and donors

- The average contactable alumni increased by 4% since 2017–18.
- The average number of donors increased by 1% since 2017–18 (this was similar to the increase over the previous year).

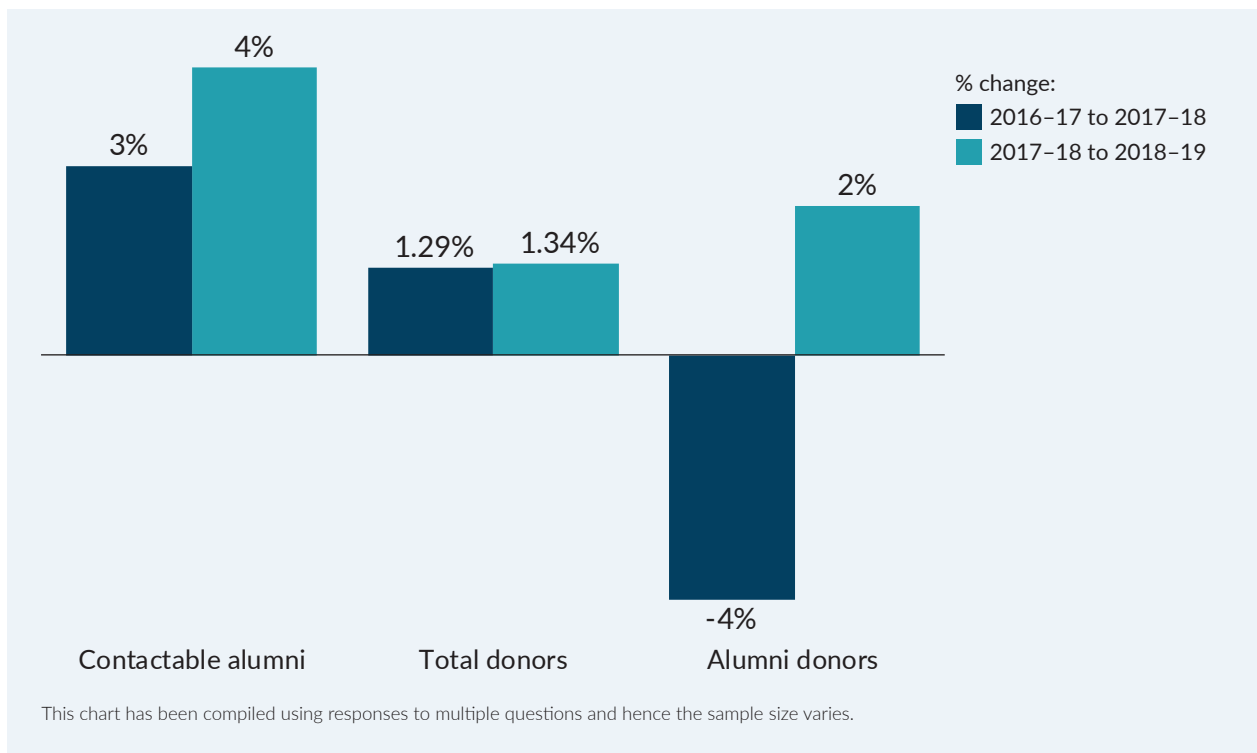
- Average number of alumni donors increased by 2% since 2017–18.

Mean percentage change in alumni and donors 2016–17, 2017–18 and 2018–19

(n=85 for Contactable alumni;

n=86 for Total donors

n=79 for Alumni donors)



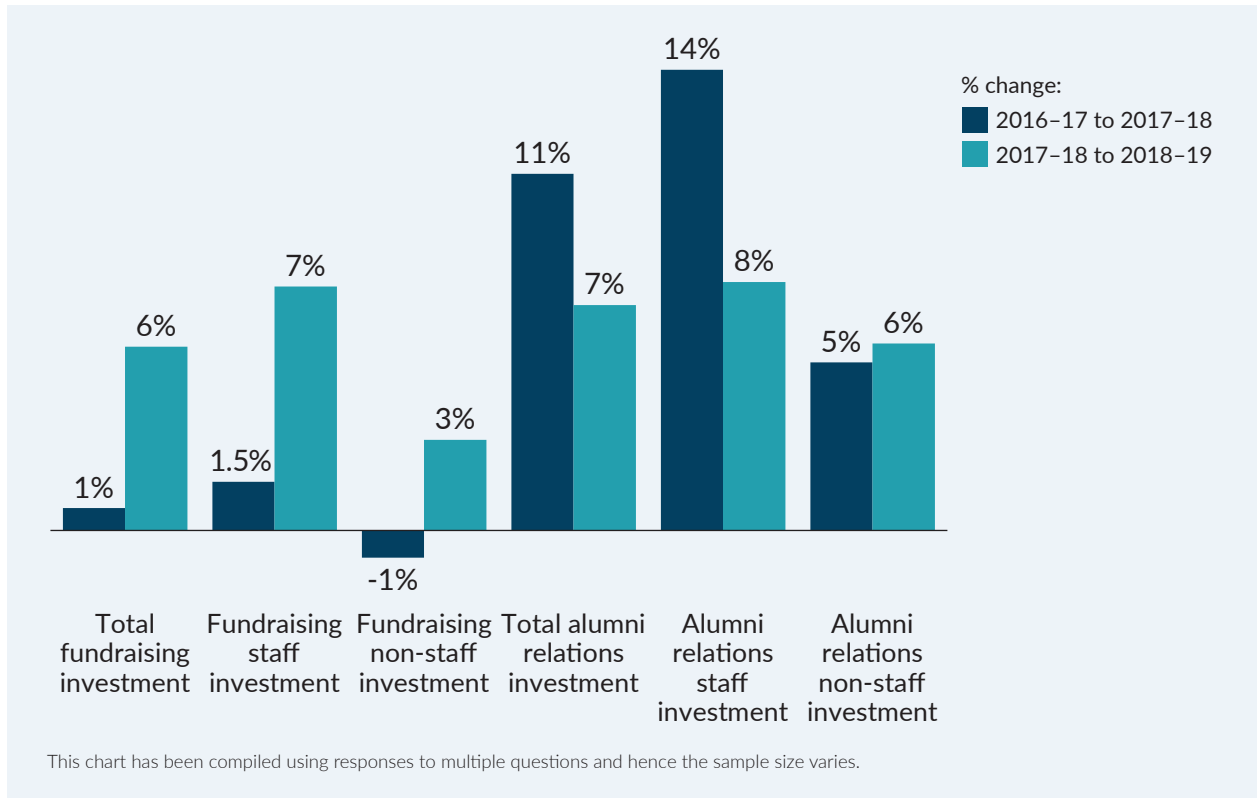
Fundraising and alumni relations investments

- The average fundraising and alumni relations investments increased since 2017–18, by 6% and 7% respectively.

- Average fundraising staff and average fundraising non-staff investments increased by 7% and 3% respectively since the previous year.
- Average alumni relations staff and average alumni relations non-staff investments increased by 8% and 6% respectively since the previous year.

Mean percentage change in fundraising and alumni relations investments 2016–17, 2017–18 and 2018–19

(n=81 for Total fundraising investment;
 n=79 for Fundraising staff investment;
 n=79 for Fundraising non-staff investment;
 n=81 for Total alumni relations investment;
 n=80 for Alumni relations staff investment;
 n=79 for Alumni relations non-staff investment)

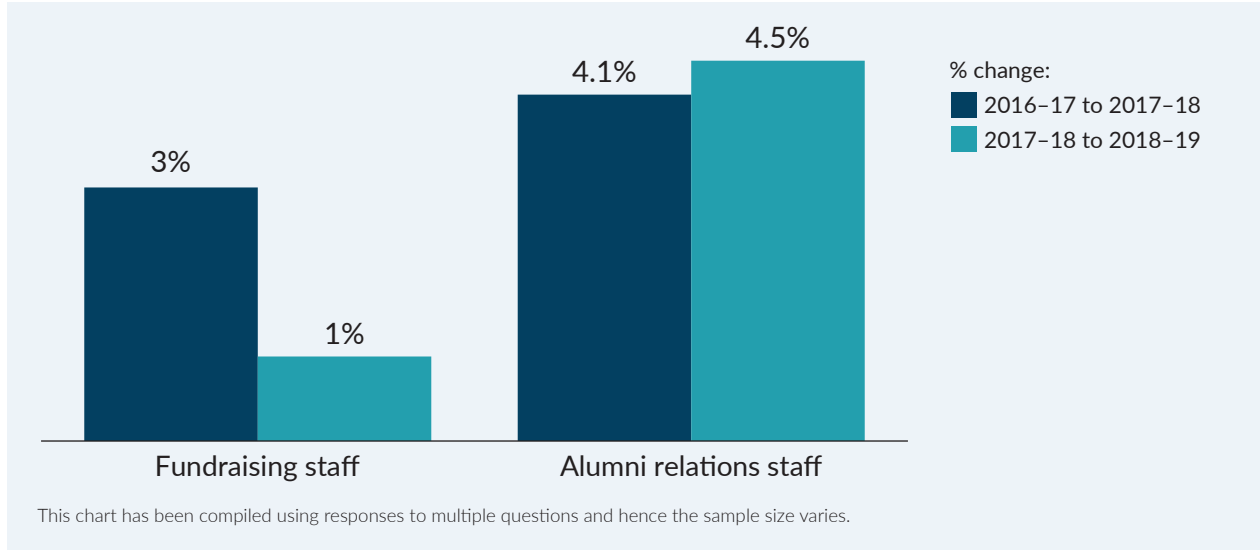


Fundraising and alumni relations staff

- The average number of fundraising staff increased by 1% since 2017–18.

- The average number of alumni relations staff increased by 4.5% since 2017–18.

Mean percentage change in fundraising and alumni relations staff 2016–17, 2017–18 and 2018–19
(*n*=84 for Fundraising staff;
n=86 for Alumni relations staff)



Trends by cluster

The composition of clusters, as determined by the cluster analysis described on pages 10–11, varies from year to year. To provide accurate year-over-year comparisons, the following trends have, however, been calculated using clusters consisting of

the same 85 institutions for each year. For example, an institution identified as moderate in 2018–19 would be included in the moderate cluster for the three years prior even if they were identified as “developing” in prior-year cluster analyses.

Mean percentage change in philanthropic income by cluster for 2015–16, 2016–17, 2017–18 and 2018–19

Variable	Year	Elite	Established	Moderate	Developing	Emerging
New funds secured	2015–16 to 2016–17	-12%	-33%	22%	-5%	-39%
	2016–17 to 2017–18	25%	12%	-19%	62%	16%
	2017–18 to 2018–19	30%	4%	23%	2%	23%
Cash income received	2015–16 to 2016–17	7%	15%	5%	-7%	-20%
	2016–17 to 2017–18	3%	8%	1%	48%	1%
	2017–18 to 2018–19	14%	6%	13%	1%	20%

Outliers and clusters for which no data was available have been excluded.

Mean percentage change in donor numbers by cluster for 2015–16, 2016–17, 2017–18 and 2018–19

Variable	Year	Established	Moderate	Developing	Emerging
Total donors	2015–16 to 2016–17	6%	15%	5%	-19%
	2016–17 to 2017–18	7%	-6%	6%	-28%
	2017–18 to 2018–19	-28%	17%	18%	9%
Alumni donors	2015–16 to 2016–17	1%	2%	1%	3%
	2016–17 to 2017–18	-6%	-3%	5%	-20%
	2017–18 to 2018–19	-18%	14%	19%	4%

Outliers and clusters for which no data was available have been excluded.

Mean percentage change in fundraising and alumni relations investments by cluster for 2015–16, 2016–17, 2017–18 and 2018–19

Variable	Year	Elite	Established	Moderate	Developing	Emerging	Fragile
Fundraising investments	2015–16 to 2016–17	6%	6%	10%	7%	2%	0%
	2016–17 to 2017–18	1%	-2%	1%	3%	-7%	6%
	2017–18 to 2018–19	4%	12%	0%	8%	1%	15%
Alumni relations investments	2015–16 to 2016–17	15%	12%	17%	14%	-1%	0%
	2016–17 to 2017–18	2%	25%	11%	9%	4%	6%
	2017–18 to 2018–19	22%	4%	-6%	9%	1%	15%

Mean percentage change in fundraising and alumni relations staff by cluster for 2015–16, 2016–17, 2017–18 and 2018–19

Variable	Year	Elite	Established	Moderate	Developing	Emerging
Fundraising staff	2015–16 to 2016–17	4%	2%	6%	7%	4%
	2016–17 to 2017–18	4%	-2%	1%	12%	-9%
	2017–18 to 2018–19	2%	-5%	2%	3%	4%
Alumni relations staff	2015–16 to 2016–17	9%	4%	7%	0%	0%
	2016–17 to 2017–18	1%	0%	5%	22%	-6%
	2017–18 to 2018–19	9%	2%	-1%	9%	13%

Outliers and clusters for which no data was available have been excluded.

FINDINGS BY MISSION GROUPS

The Russell Group is an Association of 24 research-intensive institutions in the UK.

The University Alliance represents institutions in the UK that are leaders in technical education,

professional training, research and development, enterprise and innovation.

The MillionPlus is the Association for Modern Universities in the UK and the voice of 21st century higher education.

Key indicators for Mission Groups 2018–19 (mean figures)

	Russell Group (n=24)	Russell Group excluding Oxbridge (n=22)	University Alliance (n=7)	Million Plus (n=10)
Philanthropic income				
New funds secured	£44,748,910	£17,239,002	£709,035	£750,794
New funds secured from individuals	£17,614,137*	£7,604,819	£189,030	£103,600#
New funds secured from organisations	£12,645,701*	£9,634,184	£606,845‡	£657,555
Largest new gift/ pledge	£14,534,095	£4,491,740	£213,063	£604,258
Cash income received	£34,816,895	£15,727,533	£844,208	£393,808
Cash income received from individuals	£15,304,822*	£6,537,295	£163,426	£100,685
Cash income received from organisations	£10,995,427*	£9,190,238	£681,179	£302,943
Cash income received from legacies	£3,192,051	£1,492,989	£73,122‡	£256,966#
Largest cash gift	£4,606,945*	£2,937,564	£221,026	£198,193
Number of legacy gifts	29*	18	1‡	1#
Alumni				
Total alumni	255,482	249,696	221,253	99,318
Contactable alumni	195,897	190,004	154,936‡	67,678
Donors				
Total donors	12,236	3,564	675	162
Individual donors	5,181*	3,452	647	142
Alumni donors	3,848*	2,574	470	74#
Organisation donors	140*	112	26	22#
Costs				
Fundraising costs	£3,403,963	£1,945,553	£311,470	£163,988#
Alumni relations costs	£1,496,212	£915,694	£268,759	£114,170
Non-staff production and distribution costs of alumni magazine	£186,823*	£160,042†	£72,481‡	£17,608#
Staff				
Fundraising staff	44	27	5	3#
Alumni relations staff	21	14	6	2

*n<24, †n<22, ‡n<7, #n<10

FINDINGS BY OTHER GROUPS

GuildHE is an officially recognised representative body for UK Higher Education. Member institutions include some major providers in professional

subject areas including art, design and media, music and the performing arts, agriculture and food, education, maritime, health and sports.

Key indicators for other groups 2018–19 (mean figures)

	Arts (n=9)	Medical (n=5)	Specialist ^{††} (n=17)	GuildHE (n=9)
Philanthropic income				
New funds secured	£8,306,789*	£4,050,741	£8,054,921 [‡]	£642,951
New funds secured from individuals	£3,194,594*	£1,567,360	£2,845,357 [‡]	£120,451 [#]
New funds secured from organisations	£5,112,195*	£3,104,227 [†]	£5,556,869 [‡]	£602,839 [#]
Largest new gift/ pledge	£4,001,293*	£1,355,518	£3,628,483 [‡]	£347,044
Cash income received	£5,938,941	£4,062,188	£6,616,879	£568,049
Cash income received from individuals	£1,423,010*	£1,787,585	£2,624,172 [‡]	£94,498
Cash income received from organisations	£4,954,446*	£2,843,255 [†]	£4,537,971 [‡]	£532,768 [#]
Cash income received from legacies	£396,487*	£1,131,652 [†]	£630,679 [‡]	£179,912 [#]
Largest cash gift	£1,684,543	£901,958	£1,846,564	£350,505
Number of legacy gifts	6*	70 [†]	26 [‡]	1 [#]
Alumni				
Total alumni	39,521	19,780 [†]	42,970 [‡]	37,927
Contactable alumni	23,524	16,527 [†]	29,720 [‡]	31,832
Donors				
Total donors	661	2,829	1,418	190
Individual donors	610	2,773	1,365	174
Alumni donors	127	218 [†]	340 [‡]	58 [#]
Organisation donors	52*	71 [†]	57 [‡]	18 [#]
Costs				
Fundraising costs	£537,753	£827,467	£865,458	£99,551
Alumni relations costs	£97,248	£248,517 [†]	£311,847 [‡]	£63,931
Non-staff production and distribution costs of alumni magazine	£17,439*	£44,777 [†]	£34,717 [‡]	£23,620 [#]
Staff				
Fundraising staff	7	8	9	1
Alumni relations staff	2	3 [†]	3 [‡]	1

*n<9, †n<5, ‡n<17, #n<9

††Includes institutions grouped under the categories of arts and medical.

FINDINGS BY PEARCE REVIEW GROUPS

The 2012 HEFCE Pearce Review of Philanthropy in UK higher education looked at how fundraising changed over the previous 10 years and how the

sector responded to the Thomas Report on Voluntary Giving to UK Universities 2004.

Key indicators by Pearce Review groups^{††} 2018–19 (mean figures)

	Pre-1960s (n=32)	1960s (n=19)	1990s (n=16)	2000s (n=10)
Philanthropic income				
New funds secured	£13,002,822	£4,960,117	£928,818	£2,014,617 [#]
New funds secured from individuals	£5,817,132	£1,242,246	£162,462	£1,815,671 [#]
New funds secured from organisations	£7,185,690	£3,718,450	£817,517 [‡]	£624,507
Largest new gift/pledge	£3,446,822	£1,258,967	£467,903	£914,554
Cash income received	£12,263,528	£4,373,334	£570,565	£1,743,665
Cash income received from individuals	£5,317,786	£905,364	£116,190	£243,029
Cash income received from organisations	£6,945,743	£3,467,970	£454,548	£1,678,284 [#]
Cash income received from legacies	£1,193,247 [*]	£255,531 [†]	£41,298 [‡]	£357,500 [#]
Largest cash gift	£2,345,846	£787,012	£174,674	£611,801
Number of legacy gifts	14 [*]	4 [†]	1 [‡]	2 [#]
Alumni				
Total alumni	207,756	154,002	176,101	52,068
Contactable alumni	153,820	112,260	126,932	41,664
Donors				
Total donors	2,666	2,098	496	104
Individual donors	2,570	2,032	468	94
Alumni donors	2,145	1,415	384 [‡]	63 [#]
Organisation donors	95	66	27	12 [#]
Costs				
Fundraising costs	£1,607,121	£668,725	£267,450 [‡]	£167,447 [#]
Alumni relations costs	£789,701	£338,838	£205,003 [‡]	£81,117
Non-staff production and distribution costs of alumni magazine	£133,728 [*]	£50,939 [†]	£43,249 [‡]	£17,653 [#]
Staff				
Fundraising staff	22	10	5 [‡]	2 [#]
Alumni relations staff	12	6	4	1

*n<32, †n<19, ‡n<16, #n<10

††Review of Philanthropy in UK Higher Education, 2012.

APPENDIX

Response rate

Response rates for UK higher education institutions 2013 to 2019*

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19
English higher education institutions						
Invited to participate	131	128	144	133	133	133
Participants	101	91	90	87	80	77
Response rate	77%	71%	63%	65%	60%	58%
Welsh higher education institutions						
Invited to participate	8	9	9	9	9	9
Participants	5	6	6	4	3	4
Response rate	63%	67%	67%	44%	33%	44%
Scottish and Northern Irish higher education institutions						
Invited to participate	21	18	19	22	19	19
Participants	18	16	14	14	14	16
Response rate	86%	89%	74%	64%	74%	84%
UK higher education institutions						
Invited to participate	160	155	172	164	161	161 ¹⁰
Participants	124	113	110	105	97	97
Response rate	78%	73%	64%	64%	60%	60%

*Two higher education institutions from Ireland and the Institute of Cancer Research in the UK also participated in the survey.

¹⁰The Higher Education Statistics Agency (HESA) reports that there were 169 higher education providers in the UK during 2018–19 which reported student data to HESA (2020).

Participating institutions

1. Abertay University
2. Aberystwyth University
3. Aston University
4. Bath Spa University
5. Birkbeck, University of London
6. Bournemouth University
7. Canterbury Christ Church University
8. Cardiff University
9. City, University of London
10. Cranfield University
11. Durham University
12. Edinburgh Napier University
13. Glasgow Caledonian University
14. Goldsmiths University of London
15. Guildhall School of Music & Drama
16. Heriot-Watt University
17. Imperial College London
18. Keele University
19. King's College London and King's Health Partners
20. Kingston University
21. Lancaster University
22. Leeds College of Music
23. Liverpool Hope University
24. London Business School
25. London School of Hygiene & Tropical Medicine
26. Loughborough University
27. Manchester Metropolitan University
28. Newcastle University
29. Newman University
30. Northumbria University
31. Nottingham Trent University
32. Queen Margaret University
33. Queen Mary University of London
34. Queen's University Belfast
35. Royal Academy of Music
36. Royal Agricultural University
37. Royal College of Art
38. Royal College of Music
39. Royal College of Surgeons in Ireland
40. Royal Holloway, University of London
41. Royal Northern College of Music
42. Sheffield Hallam University
43. SOAS University of London
44. Solent University
45. SRUC
46. St. George's, University of London
47. St. Mary's University, Twickenham
48. Swansea University
49. The Courtauld Institute of Art
50. The Institute of Cancer Research
51. The London School of Economics and Political Science
52. The Royal Veterinary College
53. The University of Edinburgh
54. The University of Manchester
55. The University of Nottingham
56. The University of Sheffield
57. The University of Warwick
58. Trinity College Dublin
59. Trinity Laban Conservatoire of Music and Dance
60. Ulster University
61. University College London
62. University of Aberdeen
63. University of Bath
64. University of Bedfordshire
65. University of Birmingham
66. University of Bradford
67. University of Brighton
68. University of Bristol
69. University of Cambridge
70. University of Cumbria
71. University of Dundee
72. University of East Anglia
73. University of Exeter
74. University of Glasgow
75. University of Huddersfield
76. University of Hull
77. University of Kent
78. University of Leeds
79. University of Leicester
80. University of Lincoln
81. University of Liverpool
82. University of Oxford
83. University of Reading
84. University of Roehampton
85. University of Salford
86. University of South Wales
87. University of Southampton
88. University of St Andrews
89. University of Stirling
90. University of Strathclyde
91. University of Suffolk
92. University of Surrey
93. University of Sussex
94. University of the Arts London
95. University of the West of England
96. University of the West of Scotland
97. University of Westminster
98. University of Wolverhampton
99. University of York
100. York St John University

For further information about this report contact europe@case.org.

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