



*Giving to Excellence:*  
**Generating  
Philanthropic  
Support for Higher  
Education**

**ROSS-CASE REPORT 2018**

Findings from data collected for 2014-15, 2015-16 and 2016-17

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## Ross-CASE Editorial Board

The Editorial Board members helped manage the project by contributing their time and expertise at each stage of the Report. They were involved with survey review, script creation, survey promotions, data collection, data verification, analysis, report writing and dissemination. The 2016-17 committee consisted of:

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# Foreword

The Ross-CASE Survey has been in operation for more than 15 years, and a version of this report has been published every year for the last decade.

## Sector going strong

Growth in philanthropic income, donor numbers and investment in development and alumni relations functions have been the hallmark of each successive report. A decade ago, the Survey proudly reported that UK Higher Education institutions raised over half a billion in new gifts and pledges. In 2016-17, for the second year running, we are close to £1 billion raised by the same measure, reaching £979 million. Indeed, new philanthropic funds have grown nearly every year (and when the upward trend was disrupted, it was due to a few mega-gifts being achieved in the previous year).

## Donors, crowdfunding and GDPR

Donor numbers nearly doubled over the decade, growing from 127,093 in 2006-07 to 246,056 in 2016-17. However, we celebrate long-term growth in both donor and alumni donor numbers rather cautiously as we look ahead. The impact of the Fundraising Preference Service, the introduction of General Data Protection Regulation and changes to the Privacy and Electronic Communications Regulations remain unknown. Anecdotal reports of sector shifts in activity could mean that donor number growth slows or even ceases in future years - interesting times ahead!

Higher education institutions need to continue to innovate and shift to take advantage of new opportunities. Reports abound of institutions successfully embarking on community-based fundraising and crowdfunding: successes here may have helped boost the 7 per cent growth this year in total donor numbers, well above the 2 per cent growth in alumni donor numbers.

## Focus on Major Gift programmes

Long-term trends point towards increased larger gifts. More than 35 institutions a new high secured more than £5 million each in total new gifts and pledges in 2016-17; and in another new high 21 of these secured £10 million or more. The focus on growing major gift programmes appears to be adopted by more institutions. Ten institutions reported that all three of their largest new pledges were £1 million or more, and 22 reported that two of their three largest new pledges were at that level.

## Change in Clusters

Continued growth and different rates of growth have an important implication for the cluster analysis we deploy in this report. The Elite cluster was a clear front-runner, and so it remains. Nevertheless, Established institutions are now going through change, with a small group at the forefront of the cluster growing significantly faster than the rest. Indeed, the nature of cluster analysis run annually using

three years of data is such that although individual institutions may have seen growth, they may have moved cluster - evidenced by six Established institutions moving into the Moderate cluster this year. At the other end of the spectrum, the 2016-17 survey has only one Fragile institution, with several previously Fragile institutions moving into the Emerging cluster.

## AMAtlas, case studies and more

Though the survey questions have not evolved recently, some of the survey presentation and capacity has. The CASE Benchmarking Toolkit is available for use for the first time with the 2016-17 data, and offers fantastic capacity to inform reports and analysis, with every question now available for benchmarking. CASE also now offers bespoke report-building support, which we believe may be of particular interest to departments that lack in-house analysis capacity.

Finally, last year we included several case studies as part of this report, which were very well received. Some institutions contacted CASE and the survey editorial board asking for more of these; others asked why they had not been invited to showcase their good work to the sector. Therefore, this year we are inviting institutions with outstanding results to describe their successes which will be published on the CASE blog over the coming months - allowing the sector to share best practice and lived experience in a more dynamic forum.

The UK can be proud of CASE Europe's Ross-CASE Survey, versions of which have been adopted by higher education institutions in mainland Europe, Australia, New Zealand, South Africa, and Canada - not to forget its global variant for international and independent schools too. CASE recently announced the creation of AMAtlas, a new global resource for members on advancement metrics, benchmark and analytics. We are ambitious about building on our success as part of CASE's thought leadership objective, and deploying our insights and experiences more widely.

As the Higher Education sector faces 21st century challenges, political and economic, we as fundraisers are privileged to see firsthand what a vital and increasing role philanthropy plays in strengthening and securing excellence in education and world-changing research.

## Ross CASE Editorial Board

- Karen Goodman, *Head of Development and External Relations, Edinburgh Napier University*
- Tania Jane Rawlinson, *Director of Development and Alumni Relations, Cardiff University*
- Fran Shepherd, *Director of Development and Alumni, University of Glasgow*

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# 1 Executive summary

The Ross-CASE Supporting Document prescribes definitions for recording philanthropic income. The two main methods of reporting philanthropic income are:

1. New funds secured in a year are new gifts and confirmed pledges from donors received during the year. They include both new single cash gifts, and the full value (up to five years) of new confirmed pledges. New funds secured are new, so they do not include cash payments made against gift pledges secured in previous years. This figure reflects the success of current fundraising activity.
2. Cash income received in a year includes all cash which arrives during the year – whether from new single cash gifts, or from cash payments received against pledges secured in this or previous years. Cash income reflects the success of both current, and recent past years' fundraising activity.

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## 1.1 Findings

- **New funds secured:**

The total amount of philanthropic income secured in new funds decreased by 12 per cent since 2015-16 and fell short of the £1 billion mark by £21 million, totalling to £979 million in 2016-17. Fifty-two per cent of this income came from organisations (including companies, and trusts and foundations) and 48 per cent from individuals. The number of donors who gave gifts/pledges of more than £500,000 was 211 in 2016-17.

- **Cash income received:**

Total cash income received increased by 6 per cent since 2015-16 to £886 million in 2016-17. Individuals contributed 49 per cent and organisations (including companies, and trusts and foundations) contributed 51 per cent towards cash income received. Total cash income from legacies was £96 million in 2016-17, from 1,066 legators.

- **Donors:**

The total number of donors was 246,056, with 97 per cent being individuals and 3 per cent organisations. There are 11.4 million contactable alumni across 107 institutions, 2 per cent of alumni donated (191,073 alumni donors). Total donors increased by 7 per cent since 2015-16 and alumni donors increased by 2 per cent since 2015-16.

- **Investment in fundraising and alumni relations:**

In 2016-17 the total investment in alumni relations was £49 million while total investment in fundraising was 2.5 times more at £121 million. Total fundraising costs increased by 8 per cent and alumni relations costs by 11 per cent. This highlights the continued investment in development and advancement operations across the sector. Staff costs accounted for 68 per cent of total fundraising costs and 65 per

cent of alumni relations costs. All costs include the costs of operational and administrative staff.

- **Cluster analysis:**

Since 2013, the Ross-CASE Survey has deployed Latent Class Analysis methodology to identify groups of similar institutions and has consistently found five clusters of reporting institutions with distinct patterns and similar characteristics: Fragile; Emerging; Moderate; Established; and Elite. Last year, additional analysis on the Emerging cluster data revealed how the institutions within this cluster have evolved and shown a marked difference – from those that are still truly emerging and may feel the impact of fluctuations from institutional support, priorities, and staff – to those who are 'developing' from this emerging state and demonstrate more consistency of spend, staffing, and institutional support over time. This year too, we have used the same approach and divided the institutions into six clusters: Fragile; Emerging; Developing; Moderate; Established; and Elite.

Interestingly, the Established cluster this year reduced in size to eight institutions, the six other previously Established institutions having moved to the Moderate cluster. The Fragile cluster was left with one institution as two previously Fragile institutions also moved clusters - one moved to Emerging while the other to Developing. We have not reported data for the Fragile cluster in this report. All the other clusters demonstrate similar characteristics as in previous years.

## 2 Sector highlights

This chapter presents an in-depth analysis of the key indicators for 2016-17.

The key findings are based on cash income received, new funds secured, contactable alumni, donors and investment in fundraising and alumni relations activities. The important figures to note in Table 2.1 are the sum totals of the different key indicators. They give a broad overview of the economic impact of fundraising across institutions in the UK and the Republic of Ireland. One-hundred and five institutions participated in this year's survey out of 164 higher education and specialist institutions in the UK involved in some form of fundraising or alumni relations activity (a response

rate of 64 per cent). Data has not been reweighted to estimate figures for all 164 institutions and total figures in Table 2.1 are, therefore, conservative estimates of where the sector currently stands. Three institutions from the Republic of Ireland took part in the survey and their data has been included in the analysis presented in this report.

The means and medians differ significantly due to the presence of outliers in the sample. This demonstrates the varied nature of fundraising operations across the higher education sector and the different stages of an institution's maturity cycle.

### 2.1 Key indicators – 2016-17

Table 2.1 Key indicators 2016-17	Base	Sum	Mean	Median
Ross-CASE Survey of Charitable giving to Universities 2016-17				
<b>Philanthropic income</b>				
New funds secured	108	£978,707,399	£9,062,106	£1,305,241
Cash income received	108	£886,137,252	£8,204,975	£1,634,714
<b>Alumni</b>				
Total alumni	107	15,929,871	148,877	130,284
Contactable alumni	107	11,410,552	106,641	93,119
Alumni donors	107	191,073	1,786	437
<b>Donors</b>				
Total donors	108	246,056	2,278	764.5
Individual donors*	108	239,764	2,220	704.5
Organisation donors**	107	6,292	58.8	34
<b>Resources</b>				
Total institutional expenditure	108	£30,202,670,651	£279,654,358	£190,753,000
Fundraising staff	103	1,575	15.29	7.89
Alumni relations staff	107	778	7.27	3.5
Fundraising costs	100	£120,983,602	£1,209,836	£533,152
Alumni relations costs	102	£48,947,534	£479,878	£248,715

\*Includes alumni donors

\*\*Includes trusts and foundations, companies, lottery and other organisations

## 2.1.1 New funds secured

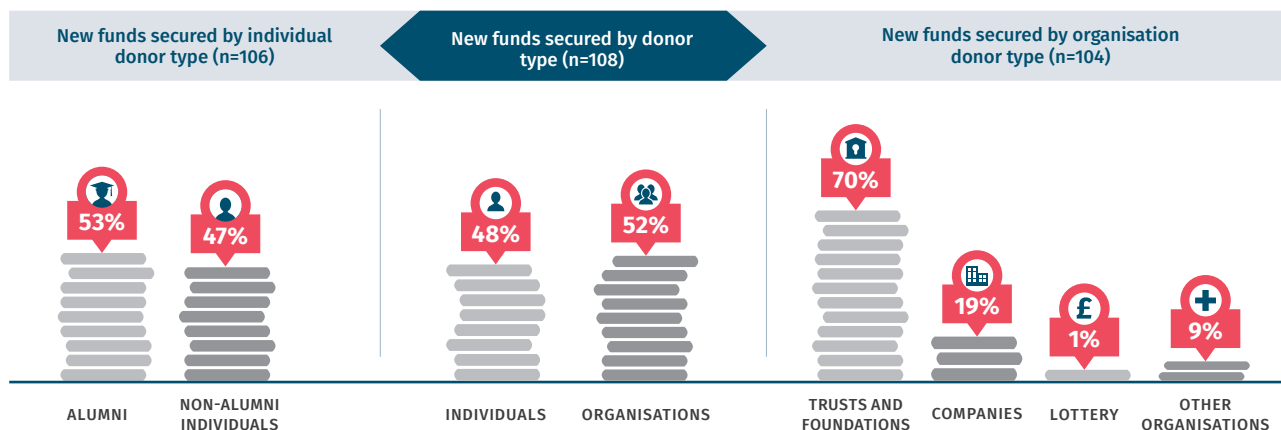
New funds secured enables an institution to see the true impact of philanthropic support and its future

pipeline, not just in the current financial period but over several years. It can assist in demonstrating the success of an advancement programme.

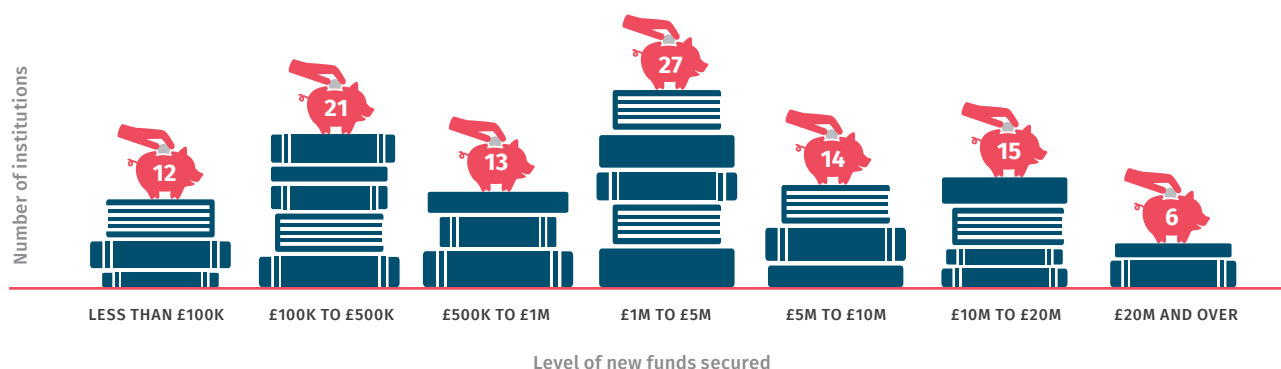
Table 2.1.1 New funds secured 2016-17	Base	Sum	Mean	Median
Ross-CASE Survey of Charitable giving to Universities 2016-17				
<b>New funds secured</b>	108	£978,707,399	£9,062,106	£1,305,241
<b>New funds secured from individuals</b>	108	£468,062,406	£4,333,911	£503,681
New funds secured from alumni	106	£249,953,869	£2,358,055	£180,564
New funds secured from non-alumni individuals	106	£218,022,461	£2,056,816	£192,847
<b>New funds secured from organisations</b>	108	£510,644,993	£4,728,194	£740,383
New funds secured from trusts and foundations	103	£359,459,632	£3,489,899	£425,013
New funds secured from companies	103	£99,175,252	£962,867	£187,585
<b>Largest new gift/pledge</b>	106	£199,798,310	£1,884,890	£431,780
Largest new gift/pledge as a percentage of new funds secured*	106		32%	27%

\*Calculated as per Section 2.5.3 iv) Computed variables

Chart 2.1.1 New Funds secured by type and income level



Distribution of new funds secured across income levels (n=108)



Source: Ross-CASE Survey of Charitable giving to Universities 2016-17



## 2.1.2 Cash income received

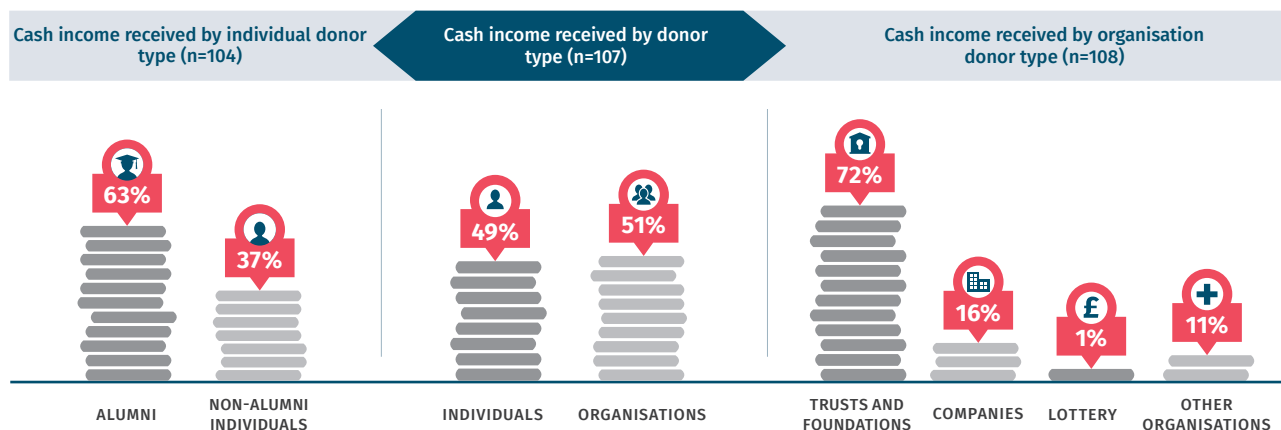
Cash income received in a year includes all cash which arrives during the year – whether from new single cash

gifts, or from cash payments received against pledges secured in this or previous years.

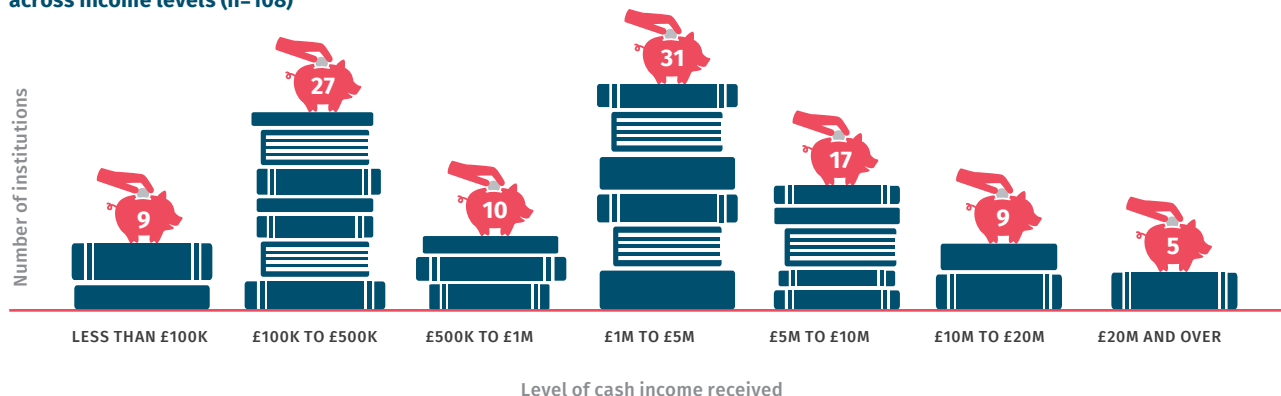
Table 2.1.2 Cash income received 2016-17	Base	Sum	Mean	Median
Ross-CASE Survey of Charitable giving to Universities 2016-17				
<b>Cash income received</b>	108	£886,137,252	£8,204,975	£1,634,714
<b>Cash income received from individuals</b>	107	£434,320,148	£4,059,067	£504,026
Cash income received from alumni	104	£273,867,038	£2,633,337	£175,334
Cash income received from non-alumni individuals	104	£156,467,753	£1,504,498	£156,544
<b>Cash income received from organisations</b>	107	£449,764,148	£4,203,403	£737,612
Cash income received from trusts and foundations	99	£321,646,674	£3,248,956	£552,313
Cash income received from companies	99	£71,191,694	£719,108	£188,607
<b>Cash income received from legacies</b>	74	£95,642,758	£1,292,470	£244,749
Number of legacies	61	1066	17	5
<b>Largest cash gift</b>	106	£112,958,566	£1,065,647	£368,372
Largest cash gift as a percentage of cash income received*	106		30%	24%

\*Calculated as per Section 2.5.3 iv) Computed variables

Chart 2.1.2 Cash income received by type and income level



Distribution of cash income received across income levels (n=108)



Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

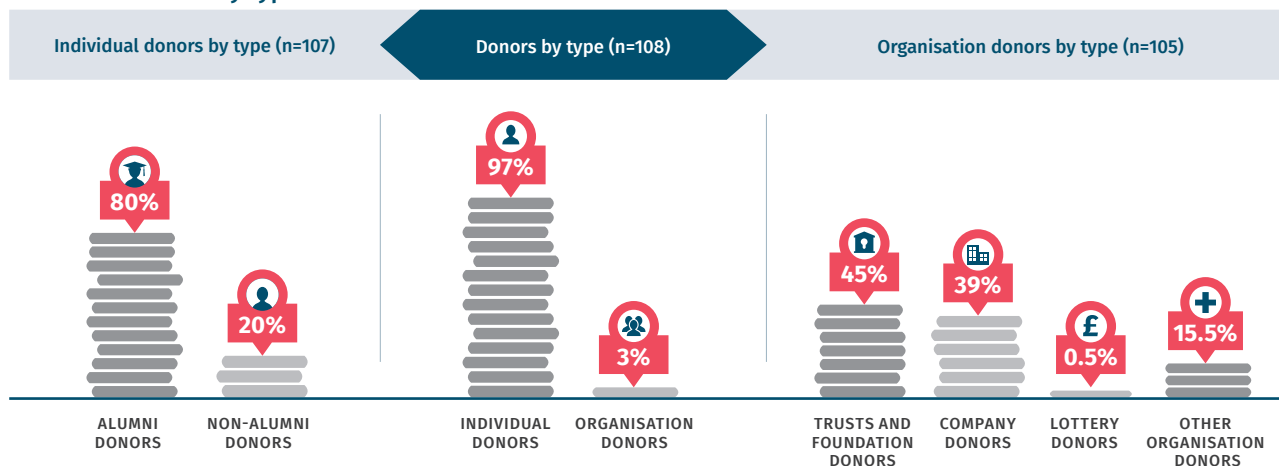
## 2.1.3 Contactable alumni and donors

The 107 institutions that provided this data had 16 million alumni of which 11 million (72 per cent) were contactable. Of the contactable alumni, 191,073 donated to their alma mater.

Table 2.1.3 Donors 2016-17	Base	Sum	Mean	Median
Ross-CASE Survey of Charitable giving to Universities 2016-17				
<b>Alumni</b>				
Total alumni	107	15,929,871	148,877	130,284
Contactable alumni	107	11,410,552	106,641	93,119
<b>Donors</b>				
<b>Total donors</b>	108	246,056	2,278	764.5
<b>Individual donors</b>	108	239,764	2,220	704.5
Alumni donors	107	191,073	1,786	437
Non-alumni individual donors	107	48,596	454.17	111
<b>Organisation donors</b>	107	6,292	58.8	34
Trusts and foundations	105	2,824	26.9	11
Companies	105	2,484	23.66	12
<b>Percentage of contactable alumni who donated*</b>	107		1.3%	0.9%

\*Calculated as per Section 2.5.3 iv) Computed variables

Chart 2.1.3 Donors by type



Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

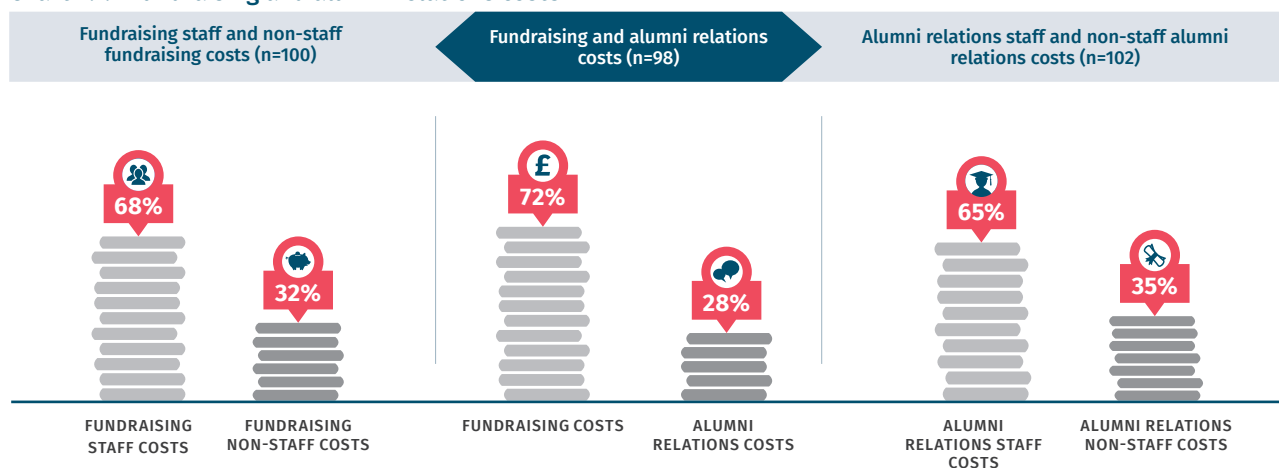
## 2.1.4 Fundraising and alumni relations investment

A fundraising and alumni relations return on investment for fundraising departments could be calculated by comparing the staff and non-staff costs of development and alumni relations offices to the philanthropic income received. However, it is difficult for institutions to differentiate between philanthropic income received solely as a result of the activities of development and advancement offices and

philanthropic income received due to activities that are outside the scope of these offices. Also, the value of institutional leadership and other academic time invested in fundraising can be substantial, particularly at higher performing institutions, and the cost of this time is outside the scope of this report.

Table 2.1.4 Resources 2016-17	Base	Sum	Mean	Median
Ross-CASE Survey of Charitable giving to Universities 2016-17				
<b>Total institutional expenditure</b>	108	£30,202,670,651	£279,654,358	£190,753,000
<b>Fundraising staff</b>	103	1,575	15.29	7.89
<b>Alumni relations staff</b>	107	778	7.27	3.5
<b>Fundraising and alumni relations costs</b>	99	£167,263,294	£1,689,528	£760,207
<b>Fundraising costs</b>	100	£120,983,602	£1,209,836	£533,152
Fundraising staff costs	100	£82,365,813	£823,658	£403,342
Fundraising non-staff costs	100	£38,617,789	£386,178	£134,310
<b>Alumni relations costs</b>	102	£48,947,534	£479,878	£248,715
Alumni relations staff-costs	102	£31,828,984	£312,049	£166,519
Alumni relations non-staff-costs	102	£17,118,549	£167,829	£64,154
Alumni relations magazine costs	70	£6,534,468	£93,350	£54,893

Chart 2.1.4 Fundraising and alumni relations costs



Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

## 2.2 Trends in key indicators

Trends are calculated using data from institutions who participated and provided information for the key variables for 2013-14, 2014-15, 2015-16 and 2016-17.

Table 2.2 Trends in key indicators 2016-17	% Change			
	Ross-CASE Survey of Charitable giving to Universities 2016-17			
Philanthropic income	Base	2013-14 to 2014-15	2014-15 to 2015-16	2015-16 to 2016-17
New funds secured	91	10%	23%	-12%
Largest new gift/pledge	87	9%	58%	-34%
Cash income received	93	13%	9%	6%
Cash income received from legacies	72	21%	7%	-6%
Largest cash gift	91	4%	20%	-4%
Alumni and donors				
Contactable alumni	90	8%	6%	6%
Total donors	94	1%	-0.8%	7%
Alumni donors	90	1%	-3%	2%
Resources				
Fundraising staff	89	7%	6%	5%
Alumni relations staff	93	10%	3%	6%
Fundraising costs	89	11%	15%	8%
Fundraising staff costs	89	9%	12%	7%
Fundraising non-staff costs	88	15%	24%	8%
Alumni relations costs	77	9%	10%	11%
Alumni relations staff-costs	79	8%	9%	10%
Alumni relations non-staff-costs	76	11%	13%	12%

Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

## 2.3 Findings by mission group

In recent years, membership of the mission groups has not remained static and, in November 2013, the 1994 Group disbanded. Moreover, a significant number of universities are not affiliated to any mission group. In recognition of this, Table 2.3.1 presents mean values for each of the existing mission groups. If an institution is part of more than one mission group, it is included in the primary mission group.

Table 2.3.2 presents mean values for those institutions that are not part of any mission groups. These institutions have been grouped as per the groupings prescribed in the Pearce Review<sup>1</sup>. Please note institutions included in Table 2.3.1 are not included in the data presented in Table 2.3.2.

Table 2.3.1 Mean values for key indicators by mission groups 2016-17	Russell Group	Base	Russell Group excl. Oxbridge	Base	Million+	Base	University Alliance	Base	GuildHE	Base	Not in a group	Base
Ross-CASE Survey of Charitable giving to Universities in UK 2016-17												
<b>New funds secured</b>	£31,952,019	24	£15,357,761	22	£706,748	11	£1,020,841	12	£261,390	6	£414,234	5
New funds secured from individuals	£16,130,289	24	£6,822,698	22	£236,550	11	£312,266	12	£35,123	6	£284,804	5
New funds secured from organisations	£15,821,730	24	£8,535,063	22	£470,198	11	£708,575	12	£226,267	6	£129,430	5
Largest new gift/pledge	£5,748,072	23	£4,504,846	22	£343,022	10	£175,010	12	£89,753	6	£212,906	5
<b>Cash income received</b>	£28,679,075	24	£12,392,269	22	£536,924	11	£738,293	12	£134,935	6	£1,111,070	5
Cash income received from individuals	£14,511,301	24	£5,108,861	22	£246,531	11	£298,755	12	£26,330	6	£291,590	5
Cash income received from organisations	£14,167,775	24	£7,283,409	22	£290,393	11	£439,538	12	£108,605	6	£819,480	5
Largest cash gift	£2,684,336	23	£2,380,063	22	£270,747	11	£154,047	12	£40,545	6	£537,000	5
<b>Total alumni</b>	236,254	24	229,101	22	112,266	11	203,343	12	18,263	6	79,531	5
Contactable alumni	180,261	24	173,350	22	81,761	11	158,128	12	15,498	6	68,317	5
Alumni donors	5,826	24	3,090	22	114.64	11	1,252	11	31.83	6	203	5
<b>Total donors</b>	7,030	24	4,023	22	166.64	11	1,262	12	106	6	293.6	5
Individual donors*	6,895	24	3,910	22	147	11	1,238	12	96.33	6	272.4	5
Organisation donors	140.35	23	112.82	22	19.64	11	24.75	12	9.67	6	21.2	5
<b>Total Institutional expenditure</b>	£662,345,264	24	£593,773,652	22	£225,855,943	11	£228,412,690	12	£29,063,497	6	£84,385,797	5
<b>No. of Fundraising staff</b>	42.36	24	26.07	22	3.06	9	7.27	11	0.79	6	5.29	5
<b>No. of Alumni relations staff</b>	19.12	24	12.81	22	1.83	11	4.65	12	1.06	6	2.87	5
<b>Total fundraising costs</b>	£3,218,321	24	£1,829,918	22	£178,430	10	£877,897	11	£125,297	5	£471,305	5
Fundraising staff costs	£2,293,794	24	£1,360,556	22	£136,808	10	£305,725	11	£30,097	5	£289,460	5
Fundraising non-staff costs	£924,527	24	£469,361	22	£41,623	10	£572,172	11	£95,200	5	£181,845	5
<b>Total alumni relations costs</b>	£1,246,745	24	£785,325	22	£142,156	11	£235,613	11	£52,047	6	£149,771	5
Alumni relations staff costs	£795,594	24	£537,071	22	£76,587	11	£179,441	11	£39,586	6	£97,961	5
Alumni relations non-staff costs	£451,151	24	£248,254	22	£65,568	11	£56,173	11	£12,461	6	£51,810	5

\*Includes alumni donors

<sup>1</sup> Review of Philanthropy in UK Higher Education: 2012 Status Report and Challenges for the Next Decade (Accessed 11 March 2016)



## 2.3 Findings by mission group *(continued)*

Table 2.3.2 Mean values for key indicators by groups 2016-17	Pre-1960	Base	1960s	Base	1990s-2000s	Base	Former 1994	Base	Specialist	Base
Ross-CASE Survey of Charitable giving to Universities in UK 2016-17										
<b>New funds secured</b>	£6,646,295	8	£2,241,332	12	£318,337	10	£5,137,783	9	£5,336,851	11
New funds secured from individuals	£2,190,676	8	£665,197	12	£68,614	10	£2,081,229	9	£2,547,864	11
New funds secured from organisations	£4,455,619	8	£1,576,135	12	£249,723	10	£3,056,553	9	£2,788,987	11
Largest new gift/pledge	£2,312,420	8	£445,419	12	£124,181	10	£2,002,641	9	£1,577,210	11
<b>Cash income received</b>	£6,250,858	8	£1,988,813	12	£298,427	10	£4,210,571	9	£5,632,433	11
Cash income received from individuals	£2,370,781	8	£585,846	12	£35,318	10	£1,318,862	9	£3,991,675	10
Cash income received from organisations	£3,880,077	8	£1,402,967	12	£263,109	10	£2,891,709	9	£1,998,705	10
Largest cash gift	£1,459,858	8	£327,880	12	£125,522	10	£1,329,543	9	£1,462,926	10
<b>Total alumni</b>	250,015	8	127,188	12	106,746	10	119,568	9	40,755	10
Contactable alumni	100,939	8	96,660	12	81,451	10	87,626	9	28,224	10
Alumni donors	1,380	8	851.08	12	92.3	10	1,071	9	291.64	11
<b>Total donors</b>	1,672	8	1,189	12	230.4	10	1,332	9	1,484	11
Individual donors*	1,613	8	1,139	12	213.4	10	1,280	9	1,423	11
Organisation donors	59.25	8	50.17	12	17	10	52.44	9	60.82	11
<b>Total institutional expenditure</b>	£228,646,790	8	£213,104,500	12	£127,392,952	10	£205,210,889	9	£88,859,169	11
<b>No. of Fundraising staff</b>	13.07	8	8.2	12	3.29	8	9.44	9	9.56	11
<b>No. of Alumni relations staff</b>	7.14	8	5.42	12	2.46	10	5.04	9	3.05	10
<b>Fundraising costs</b>	£976,032	8	£560,847	12	£152,794	7	£576,373	9	£860,437	10
Fundraising staff costs	£699,453	8	£413,195	12	£121,106	7	£443,313	9	£567,440	10
Fundraising non-staff costs	£276,580	8	£147,652	12	£36,969	6	£133,060	9	£292,997	10
<b>Alumni relations costs</b>	£450,631	8	£343,937	12	£129,813	8	£296,724	9	£270,306	9
Alumni relations staff costs	£310,855	8	£227,166	12	£97,618	8	£222,507	9	£139,975	9
Alumni relations non-staff costs	£139,776	8	£116,771	12	£36,795	7	£74,217	9	£130,331	9

\*Includes alumni donors

Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

## 2.4 Findings by cluster

Universities vary widely by their fundraising profile and there is a substantial degree of variation within mission groups.

Inspired by the mission groups, the 2011-12 survey explored the possibility of uncovering 'communities' of universities that have a fundraising profile similar to each other. This analysis was conducted using Latent Class Analysis (LCA). The analysis has been repeated every year since then, including this year.

LCA is a statistical approach used to group records or, in this case, institutions, into different clusters on the basis of key characteristics or variables. Each cluster brings together institutions with the most similar answers to the chosen questions.

LCA is typically carried out on datasets which represent a large number of cases. However, the size of the Ross-CASE Survey dataset is limited to the number of institutions that take part in the survey. Given the (naturally) small number of cases available, the number of questions used in the analysis was restricted to a handful considered to be the most informative. The seven computed variables listed in Table 2.4.1 were chosen because they reflect the key characteristics of fundraising activities and because they vary sufficiently between institutions to offer differentiating factors. Average figures across three years were used to ensure that the results reflect the overall performance over time and not small annual fluctuations.

In past years, the resulting five-cluster solution offered both the best statistical fit with the data and made substantive sense. This solution did result in a very small class size for two clusters (five institutions in the Fragile cluster and two institutions in the Elite cluster), although this was not surprising due to the nature of the study, the small total sample size or

the maturity of philanthropic giving in the UK and the Republic of Ireland. However, it should also be noted that the uniqueness of the University of Oxford and the University of Cambridge in terms of fundraising makes the identification of just those universities as a distinct cluster appropriate.

In 2016-17, the five-cluster solution demonstrated the above mentioned characteristics too. Last year we did additional analysis on the 'Emerging' cluster and found that the institutions included in this cluster could further be divided into two sub-clusters. We followed the same analytical procedures on the 2016-17 dataset to derive six clusters. However, only one institution was categorised as 'Fragile' and responses for this institution have not been reported in the Table 2.4.2

As highlighted in Table 2.4.3, the Elite cluster was a clear front-runner, followed by a much smaller Established cluster this year (as compared to the Established cluster in 2015-16). This was due to a small group of the cluster growing significantly faster than the rest. As a result six previously Established institutions moved into the Moderate cluster this year. At the other end of the spectrum, the Fragile cluster was left with one institution as two previously Fragile institutions also moved clusters - one moved to Emerging while the other to Developing.

Changes in the composition of the survey sample also affect the results of the cluster analysis. Thirteen institutions (one Fragile, eight Emerging, three Developing and one Moderate) who were included in the cluster analysis in 2015-16 did not take part in 2016-17. While 11 institutions (four Developing, five Emerging and two Moderate) took part in the 2016-17 survey but did not take part in 2015-16 and were not included in the cluster analysis last year.

**Table 2.4.1 Variables used to group institutions into clusters**

Average new funds secured over last three years
Average cash income received over last three years
Average largest cash gift received, as a percentage of total cash income received over last three years
Average number of donors over last three years
Average proportion of alumni making a gift over last three years
Average fundraising costs per pound received over last three years
Average number of fundraising staff over last three years (FT equivalent) <sup>2</sup>

A clear progression of fundraising performance for all key indicators was evident across the six clusters with the Fragile institution being at a very nascent stage

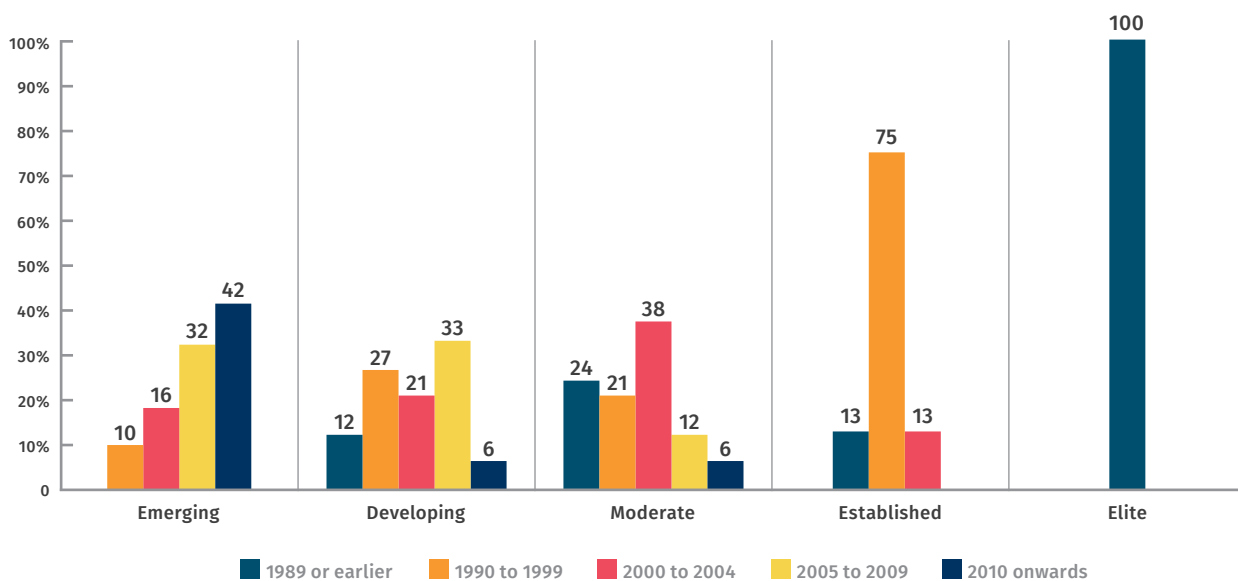
in its fundraising journey, and prone to see significant impact from fluctuations in staffing and institutional priorities and support.

*Source: Ross-CASE Survey of Charitable giving to Universities 2016-17*

<sup>2</sup> The 2011-12 Ross-CASE Survey included average number of gifts over £500,000 over 3 years. This variable was replaced with average number of fundraising staff over the last 3 years since the 2013-14 survey.

## 2.4 Findings by cluster *(continued)*

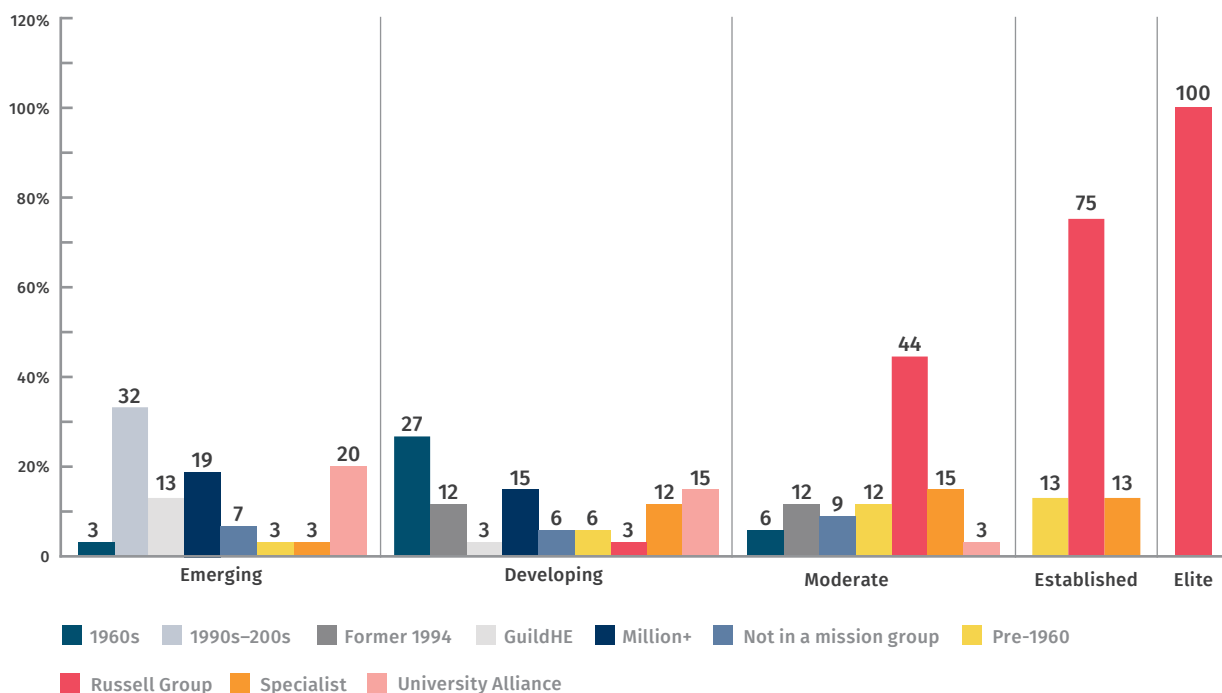
Figure 2.4.1 Length of development and alumni relations programme by cluster



Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

Figure 2.4.2 Mission groups by cluster

Out of the eight Established institutions, six institutions were part of a mission group, while 15 Emerging institutions and 21 Developing institutions were not part of a mission group.



Source: Ross-CASE Survey of Charitable giving to Universities 2016-17

## 2.4 Findings by cluster *(continued)*

Table 2.4.2 reports **mean figures** for the five clusters and can be used to benchmark an institution's fundraising performance.

Table 2.4.2 Mean values for key indicators by cluster 2016-17	Emerging	Base	Developing	Base	Moderate	Base	Established	Base	Elite	Base
Ross-CASE Survey of Charitable giving to Universities in UK 2016-17										
<b>New funds secured</b>	£284,302	31	£1,650,440	33	£8,271,375	33	£26,687,026	8	£214,488,854	2
New funds secured from individuals	£64,323	31	£524,354	33	£3,746,745	33	£11,011,785	8	£118,513,786	2
New funds secured from organisations	£219,978	31	£1,126,086	33	£4,524,630	33	£15,675,241	8	£95,975,068	2
Largest new gift/pledge	£87,976	30	£515,201	33	£2,563,484	33	£7,807,921	8	£33,099,026	1
<b>Cash income received</b>	£291,544	31	£1,376,520	33	£6,729,175	33	£24,242,912	8	£207,833,945	2
Cash income received from individuals	£66,311	31	£491,502	33	£3,157,181	32	£9,892,326	8	£117,938,144	2
Cash income received from organisations	£225,233	31	£885,018	33	£3,722,906	32	£14,331,467	8	£89,895,801	2
Largest cash gift	£103,827	31	£414,099	33	£1,511,581	32	£4,790,713	8	£9,378,328	1
<b>Total alumni</b>	106,969	31	144,786	33	169,333	32	220,550	8	314,939	2
Contactable alumni	82,664	31	86,894	33	127,568	32	170,349	8	256,280	2
Alumni donors	95	30	504	33	2,067	33	3,942	8	35,915	2
<b>Total donors</b>	180	31	705	33	2,913	33	5,111	8	40,102	2
Individual donors*	165	31	671	33	2,826	33	4,974	8	39,729	2
Organisation donors	16	31	34	33	87	33	137	8	746	1
<b>Institutional expenditure</b>	£136,342,417	31	£209,969,626	33	£322,517,943	33	£693,486,493	8	£1,416,633,000	2
<b>No. of Fundraising staff</b>	3.046461538	26	5.725121212	33	16.67939394	33	39.08875	8	221.55	2
<b>No. of Alumni relations staff</b>	2.398387097	31	4.298181818	33	7.52434375	32	17.9325	8	88.55	2
<b>Fundraising costs</b>	£191,569	25	£406,103	33	£1,275,010	32	£3,132,794	8	£18,490,762	2
Fundraising staff costs	£133,861	25	£302,947	33	£795,115	32	£2,315,720	8	£12,559,406	2
Fundraising non-staff costs	£60,112	24	£103,156	33	£479,895	32	£817,074	8	£5,931,356	2
<b>Alumni relations costs</b>	£130,663	28	£265,571	33	£450,239	31	£1,244,898	8	£6,322,366	2
Alumni relations staff costs	£92,357	28	£177,885	33	£315,418	31	£795,918	8	£3,639,349	2
Alumni relations non-staff costs	£39,726	27	£87,686	33	£134,821	31	£448,980	8	£2,683,017	2

\*Includes alumni donors

## 2.4 Findings by cluster *(continued)*

<b>Table 2.4.3 Key features of each cluster</b>	<b>Emerging</b>	<b>Developing</b>	<b>Moderate</b>	<b>Established</b>	<b>Elite</b>
Ross-CASE Survey of Charitable giving to Universities 2016-17					
Number of institutions	31	33	33	8	2
Year DARO started	40% after 2010	33% between 2005 to 2009	38% between 2000 to 2004	75% between 1990 to 1999	100% before 1989
New funds secured	Average less than £300k	Average exceeds £1.5m	Average exceeds £8m	Average is 3.5 times average reported by Moderate institutions	Average is 7.5 times average reported by Established institutions
New funds secured by source	23% from individuals and 77% from organisations	32% from individuals and 64% from organisations	45% from individuals and 55% from organisations	46% from individuals and 54% from organisations	55% from individuals and 45% from organisations
% of contactable alumni	77%	60%	75%	78%	81%
% of contactable alumni donating	0.11%	0.58%	1.62%	2.04%	12.93%
Average cash income received from individual donors	£293	£732	£1,123	£1,948	£2,969
Average cash income received from organisations donors	£14,312	£26,335	£43,883	£113,186	£241,008
Ratio of fundraising (FR) staff to alumni relations (AR) staff	1 FR : 0.9 AR	1 FR : 0.8 AR	1 FR : 0.5 AR	1 FR : 0.5 AR	1 FR : 0.4 AR
Ratio of fundraising (FR) costs to alumni relations (AR) costs	1 FR : 0.8 AR	1 FR : 0.6 AR	1 FR : 0.4 AR	1 FR : 0.3 AR	1 FR : 0.3 AR
Fundraising staff	Average exceeds crosses 2.5 FTE staff	Average exceeds 5.5 FTE staff	Average 3 times the average reported by Developing institutions	Average 2.5 times the average reported by Moderate institutions	Average 6 times the average reported by Established institutions
Average cash income received per fundraising staff	£107,520	£240,435	£405,900	£637,312	£938,090
Average fundraising costs per fundraising staff	£47,284	£52,915	£47,854	£64,004	£56,689



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## 2.5 Appendix

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### 2.5.1 CASE

The Council for Advancement and Support of Education (CASE) is a professional not-for-profit association serving educational institutions and the advancement professionals who work on their behalf in alumni relations, communications, development, marketing and allied areas.

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### 2.5.2 About the survey

This report presents findings from the Ross-CASE Survey of Philanthropic Giving to Universities 2016-17. The project was conducted by CASE Europe.

The first Ross-CASE Survey was carried out in 2002 (building on previous surveys undertaken within the Ross Group); it has been repeated annually since then. The methodology of the survey changed substantially in 2012-13, differentiating it from its predecessors. The survey was offered online for the first time in 2012-13, and following a review, which included scoping interviews with key stakeholders and development directors, it was enhanced.

The survey is overseen by the Ross-CASE Editorial Board. The board and CASE research staff review the survey script and the Ross-CASE Supporting Document annually before launching the survey to eligible institutions in Europe. This report compiles findings from institutions based in the UK and the Republic of Ireland.

The 2016-17 survey was opened on 11 September 2017 and closed on 8 December 2017. The survey was migrated to the CASE Benchmarking Toolkit and hosted on this platform for the first time. CASE Research staff queried the data submitted by the institutions against an exhaustive set of logic, ratio, arithmetic and substantive tests (a full list can be obtained on request). The queries were emailed to the participating institutions who had the option of rectifying the errors by amending their data or leaving the answers unchanged. Best possible efforts were made to remove any unreliable data that was submitted. Descriptive statistics, mainly using the measures of central tendencies (mean and median), was used to analyse the data and key indicators were reported on this basis. Latent Cluster Analysis was conducted on 108 participating institutions using seven computed variables using Latent Gold v 5.0.

Results were published by the medium of this report accompanied by an infographic. An interactive infographic was also published with the financial support of Blackbaud. All participating institutions also received access to the reporting functions of the CASE Benchmarking Toolkit.

All data collected has been reported on a confidential and aggregated basis in this report (except for the University of Oxford and the University of Cambridge).

All income figures in this report were converted to Pounds Sterling. As with previous reports this year's data is intended for benchmarking purposes, and as such does not provide sector or organisational context, nor does it speculate as to reasons why differences may have occurred between years.

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### 2.5.3 Reporting conventions

#### i) Trend data

Trend data are presented on a like-for-like basis for each variable reported in Chart 2.2 in percentages only.

#### ii) Base size

For a few questions results are presented as a percentage or proportion comparing two or more variables. In such instances, data used for calculations correspond to the lowest base size across the variables in consideration. Not all participants provided usable responses to every question in the survey. The number of institutions given as the base in tables and figures refers to the number of institutions answering a particular question or set of questions, rather than the total number participating in the survey. Where a table or chart brings together responses to a number of different questions, the smallest base size is always reported.

#### iii) Measures of central tendencies

Mean figures provide a snapshot of the overall group's performance while median figures highlight the distribution in fundraising figures across the participating institutions. Where the mean and median are close together, the group is relatively homogeneous and where the mean is significantly different to the median, the group is much more diverse. Differences in mean and median figures could also be due to the presence of outliers in a sample. Given that the sample size is large, there is a large variation between institutions with some institutions having substantially higher values than others and vice-versa. Thus, some mean values are skewed upwards and are generally much higher than the median values. This variation is reduced when mission groups are analysed. This is because mission group institutions are generally very similar to each other in terms of their operations.

#### iv) Computed variables

Some variables are calculated on the basis of two variables from the survey. For example largest cash gift as a percentage of total cash income received was calculated by first computing the percentage of largest cash gift to total cash income received for each institution and then the median was calculated from these figures rather than computing it by using the total of the largest cash gift and dividing that by total cash income received.

## 2.5 Appendix *(continued)*

### 2.5.4 Acknowledgements

First and foremost we would like to thank the university staff who gave their time to provide information about the philanthropic income of their institutions. A special thanks to all the new institutions participating in the study for the first time and we are hopeful of increasing this number in the future. The study has now been expanded to other regions in Europe as the CASE

Europe Fundraising Survey and the CASE CCAE Survey of Higher Education Fundraising in Canada. In addition we are grateful to the Ross-CASE Editorial Board for their guidance and support and sincere thanks to Blackbaud for supporting the new interactive infographic.

### 2.5.5 Participating institutions

One-hundred and five institutions participated in the 2016-17 survey out of 164 higher education and specialist institutions that are involved in some form of fundraising or alumni relations activity (a response rate of 64 per cent). In addition, three Irish institutions from the Republic of Ireland also took part in the survey.

<b>Table 2.5.5 Response rates by UK country 2013-14 to 2016-17</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>
Ross-CASE Survey of Charitable giving to Universities 2016-17				
<b>English higher education institutions</b>				
Invited to participate	131	128	144	133
Number participating	101	91	90	87
Response rate	77%	71%	63%	65%
<b>Welsh higher education institutions</b>				
Invited to participate	8	9	9	9
Number participating	5	6	6	4
Response rate	63%	67%	67%	44%
<b>Scottish and Northern Irish higher education institutions</b>				
Invited to participate	21	18	19	22
Number participating	18	16	14	14
Response rate	86%	89%	74%	63%
<b>British higher education institutions</b>				
Invited to participate	160	155	172	164
Number participating	124	113	110	105
Response rate	78%	73%	64%	64%

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## 2.5 Appendix *(continued)*

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### 2.5.5 Participating institutions

#### Institutions who are part of a Mission Group:

##### Million+

1. Abertay University
2. Bath Spa University
3. Canterbury Christ Church University
4. Edinburgh Napier University
5. Glasgow Caledonian University
6. London South Bank University
7. Middlesex University
8. Solent University
9. The University of West London
10. University of Cumbria
11. University of Sunderland

##### Russell Group

1. Cardiff University
2. Durham University
3. Imperial College London
4. King's College London and King's Health Partners
5. Newcastle University
6. Queen Mary University of London
7. Queen's University Belfast
8. The London School of Economics and Political Science
9. The University of Edinburgh
10. The University of Nottingham
11. The University of Sheffield
12. The University of Warwick
13. University College London
14. University of Birmingham
15. University of Bristol
16. University of Exeter
17. University of Glasgow
18. University of Leeds
19. University of Liverpool
20. University of Manchester
21. University of Southampton
22. University of York
23. University of Cambridge
24. University of Oxford

##### University Alliance

1. Kingston University
2. Manchester Metropolitan University
3. Nottingham Trent University
4. Oxford Brookes University
5. Sheffield Hallam University
6. Teesside University
7. The Open University
8. University of Brighton

9. University of Greenwich
10. University of Huddersfield
11. University of Salford
12. University of the West of England

##### GuildHE

1. Leeds College of Music
2. Newman University
3. Ravensbourne
4. Royal Agricultural University
5. St. Mary's University, Twickenham
6. University of Suffolk

The survey has categorised the remaining institutions who are not in a pre-defined mission group as follows:

##### Former 1994

1. Birkbeck, University of London
2. Goldsmiths, University of London
3. Lancaster University
4. Loughborough University
5. Royal Holloway, University of London
6. SOAS, University of London
7. University of East Anglia
8. University of Leicester
9. University of Sussex

##### Specialist

1. Guildhall School of Music & Drama
2. London Business School
3. London School of Hygiene & Tropical Medicine
4. Royal College of Art
5. Royal Academy of Music
6. Royal College of Music
7. Royal College of Surgeons of Ireland
8. The Courtauld Institute of Art
9. The Institute of Cancer Research
10. Trinity Laban Conservatoire of Music and Dance
11. University of the Arts London

##### Pre-1960s

1. Aberystwyth University
2. Swansea University
3. Trinity College Dublin
4. University of Aberdeen
5. University of Hull
6. University of London
7. University of Reading
8. University of St Andrews

##### 1960s

1. Aston University
2. City University London
3. Cranfield University
4. Heriot-Watt University
5. Keele University
6. Ulster University
7. University of Bath
8. University of Dundee
9. University of Kent
10. University of Stirling
11. University of Strathclyde
12. University of Surrey

##### 1990s-2000s

1. Bournemouth University
2. Cardiff Metropolitan University
3. Northumbria University
4. Queen Margaret University
5. University of Lincoln
6. University of Westminster
7. University of Wolverhampton
8. Edge Hill University
9. Liverpool Hope University
10. University of Roehampton

##### Not in a group

1. De Montfort University
2. Dublin City University Educational Trust
3. St. George's, University of London
4. University of Bradford
5. University of Buckingham

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## 2.5 Appendix *(continued)*

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### 2.5.6 Glossary

**Cash income received:** Income actually received by the institution including payments received towards pledges made in previous years, excluding new pledges where payment has not been received.

**Clusters:** Latent Class Analysis based on seven key variables grouped the participating institutions into six clusters - Fragile, Emerging, Developing, Moderate, Established and Elite.

**Individuals:** Includes undergraduate alumni, postgraduate alumni, other award alumni, other alumni, staff, parents, grateful patients and other non-alumni individuals.

**Investment in fundraising:** The costs associated with the efforts to gather new funds secured. It includes the cost of the staff (staff expenditure) undertaking the fundraising and the other costs (non-staff expenditure) of running and maintaining the fundraising operations. When the cost of both staff expenditure and non-staff expenditure is combined this equals the total fundraising expenditure.

**Investment in alumni relations:** The costs associated with engagement activity with alumni and community, including staff and non-staff expenditure.

**Legacy gifts:** A commitment (pledge) that a transfer of wealth will occur upon a donor's death. Within the survey legacy income is only counted (to both new funds secured and cash income received) when it is actually received.

**Mean:** A measure of central tendency which is the average value i.e. the sum of the sampled values divide by the number of items in the sample. In this report mean denotes the arithmetic mean.

**Median:** A measure of central tendency that separates the higher half of a data sample, a population, or a probability distribution, from the lower half.

**New funds secured:** New funding secured by the institution, including new donations received and new confirmed pledges not yet received but excluding payments of pledges made in previous years.  
**Organisations:** Includes trusts, foundations, companies, lottery and other organisations.

**Philanthropic income:** This is defined in the Ross-CASE Supporting Document and includes gifts or donations that meet two criteria – source of funds should be eligible and the nature of gifts should meet the survey's definition of philanthropic intent. The survey defines philanthropic income in two ways – new funds secured and cash income received.

**Ross-CASE Supporting Document:** This document provides guidance and definitions on funding that is eligible for inclusion in the Ross-CASE survey and how that funding is recorded. It also contains general guidance on completing the Ross-CASE Survey, including a detailed question by question guide.

**Sum:** Summation is the operation of adding a sequence of numbers; the result is their sum or total.





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