
UK Schools Philanthropic Giving Report 2015

Findings from the latest CASE UK Schools Survey of Philanthropic Giving



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UK Schools Philanthropic Giving Survey Committee

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1. Introduction

Development in the education sector has matured; fundraising in schools has become more disciplined and systematic. Senior management teams and governors increasingly understand that the success of a development office is not dependent on a single charismatic individual but is the result of excellent planning, a structured and well-managed database, a strong programme of engagement and a clear action plan.

The foundation of good planning is setting clear measurable objectives which align with the school's strategic plan. Benchmarking helps development directors set realistic and achievable goals by enabling them to view their own institution's performance against peers and industry leaders over time. Benchmarking also supports the process of reflection and continuous improvement essential to good management.

Robust benchmarking data has been a critical component in fundraising success in other sectors such as higher education. The role of longstanding studies, such as the Ross-CASE and Oxford Colleges benchmarking surveys, in disseminating best practice and raising standards is clear. The diversity of the schools' sector, however, presents challenges: independent and state schools of varying types, co-ed and single-sex, boarding and day schools are all now involved in development. Many school development offices manage with limited staff and budgetary resource, and have little appetite or capacity for complex benchmarking studies.

Designed for development offices in the schools' sector, the UK Schools Philanthropic Giving Survey looks at the length of time a development office has been in operation, considers the size of the development team, the methods of gift solicitation, the numbers of gifts donated by alumni and parents, as well as staff costs and budgets.

Based on the solid foundations of previous Buffalo-CASE surveys, this survey is small but perfectly formed. Collecting and analysing only the most essential data, the survey utilises robust and consistent methodology drawn from previous surveys, notably the Ross-CASE Survey. Tried and tested definitions such as 'cash income received' and 'new funds raised' ensure clarity. As a result, participants can report their own data quickly and easily and be confident that the results will enable them to draw useful comparisons with other schools.

The findings of the report should be read in light of the fact that, as we expected from the outset, the number of schools participating this year represents a small proportion of UK schools with active development programmes. We believe, though, that the survey which emerges from the process will serve as a sound basis for the future and that more and more schools will choose to participate in the years ahead.

We are grateful to Buffalo for sharing their survey methodology with us and to Ed Lang for his generous advice and support, and our thanks also to CASE for allowing us to draw on the experience they have built up over the years of their involvement in the Ross-CASE Survey and to CASE staff – Carolee Summers-Sparks, Bethan Rodden, Judith Kroll, Philip Bakerman, Kate Wallace and Yashraj Jain – for all their expertise and hard work in making this year's UK Schools Philanthropic Giving Report a reality.

We hope that more schools will take part in future years when they see the very evident benefits of being able to benchmark their success.

Good luck with all your development plans and the future of your school.

Jane Pendry (Dragon School) and Ian Jones (Charterhouse)
Members of the UK Schools Philanthropic Giving Survey Committee

2. Executive summary

- On average there were twice as many alumni in a school's database as there were parents and guardians, with alumni accounting for 67% of constituents and parents and guardians the remaining 33%.
- 54% of donors were alumni and 36% were parents and guardians.
- However, parents and guardians account for 61% of cash income received and 86% of new funds secured.
- Fundraising costs accounted for 71% of total development office expenditure (staff and non-staff), alumni and parent relations accounted for 23%, and other activities accounted for 6%.
- Development offices that had been operating for more than 10 years tended to use multiple fundraising methods (face-to-face, direct mail, telephone campaigns) and received higher levels of cash income and new funds secured. While this seems obvious, it supports the view that it takes time to establish higher-achieving fundraising performance.

3. Findings

3.1. Performance of development office

This section presents the key findings and indicators from the UK Schools Philanthropic Giving Survey 2014.

For the purpose of this report, a development office's performance has been measured on the basis of expenditure incurred, cash income received and new funds raised.

Fundraising income is usually reported in two ways:

- Cash income received in a year includes new single cash gifts and cash payments received against pledges secured in previous years.
- New funds secured in a year comprise both new single cash gifts and the full value (up to five years) of new pledges (but excludes any cash payments against pledges secured in previous years).

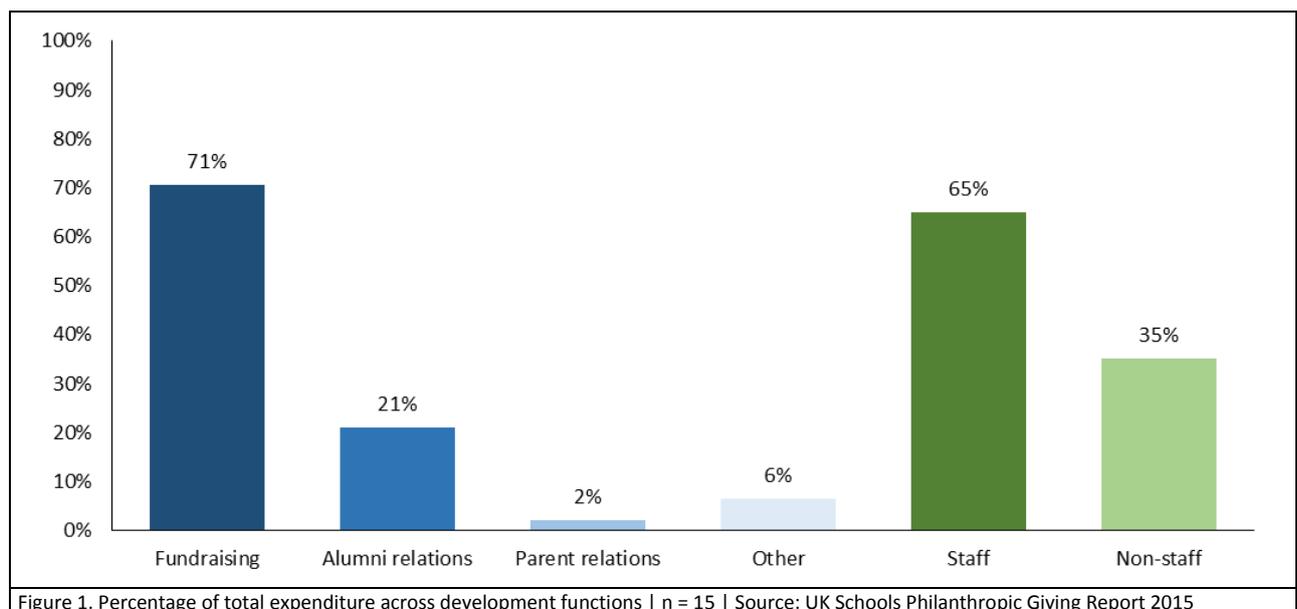
In common with other established benchmarking surveys, such as the Ross-CASE Survey for higher education, both mean and median figures are reported. They provide a snapshot of both the group as a whole and the distribution in performance in the group. Where the mean and median are close together, the group is relatively homogenous and where the mean is significantly different to the median, the group is much more diverse.

The mean and median figures are much closer for expenditure than they are for income received. Running a sustainable development office requires a predictable level of investment, whereas fundraising results can significantly differ owing to a variety of factors.

3.1.1. Expenditure

On average, fundraising costs accounted for 71% of total development office expenditure (staff and non-staff), alumni and parent relations accounted for 23%, and other activities accounted for 6%.

Staff costs accounted for approximately two-thirds of development office expenditure and non-staff costs for the remaining third. (*Figure 1*)

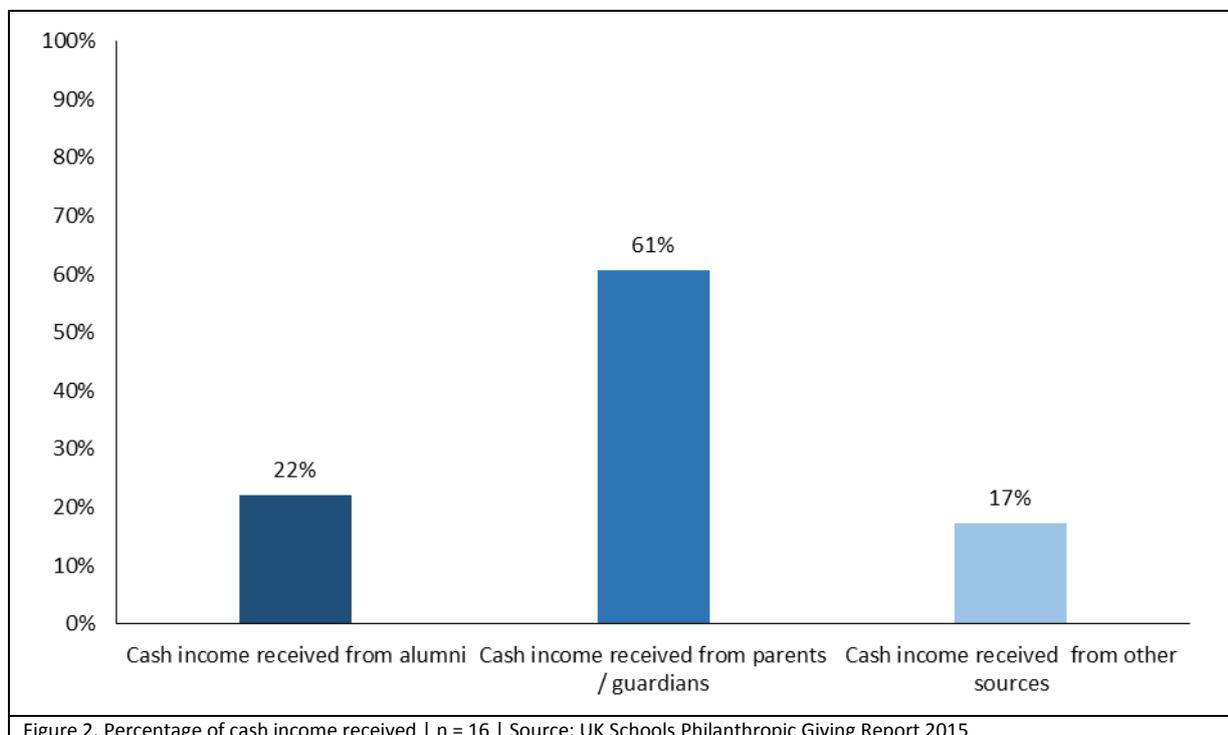


On average each school spent £194k on fundraising activities, £58k on alumni relations and £5.5k on parent relations. (*Table 1*)

Table 1. Development expenditure	Q.	Base	Total	Mean	Median
Total expenditure	C-1	15	£4,137,308	£275,821	£185,000
Fundraising expenditure	C-2-1	15	£2,920,028	£194,669	£113,764
Alumni relations	C-2-2	15	£869,657	£57,977	£60,000
Parent relations	C-2-3	15	£84,250	£5,617	£0
Other	C-2-4	15	£263,373	£17,558	£15,000
Total staff expenditure	C-3	15	£2,683,530	£178,902	£112,000
Total non-staff expenditure	C-4	15	£1,453,778	£96,919	£72,000

3.1.2. Cash income received

Amongst the participating schools in 2013-14, 61% of total cash income came from parents while 22% came from alumni and 17% from other sources. (Figure 2)



83% of cash income came in the form of lifetime gifts with 17% accounted for by legacies.

Mean cash income received per school was £1.6m, with one school reporting total cash income received as high as £11.9m while another just under £44k. (Table 2)

Across all 17 schools, a total of 179 donors made gifts worth more than £10k (inclusive of Gift Aid).

55 cash legacies were received, averaging £79k per legacy.

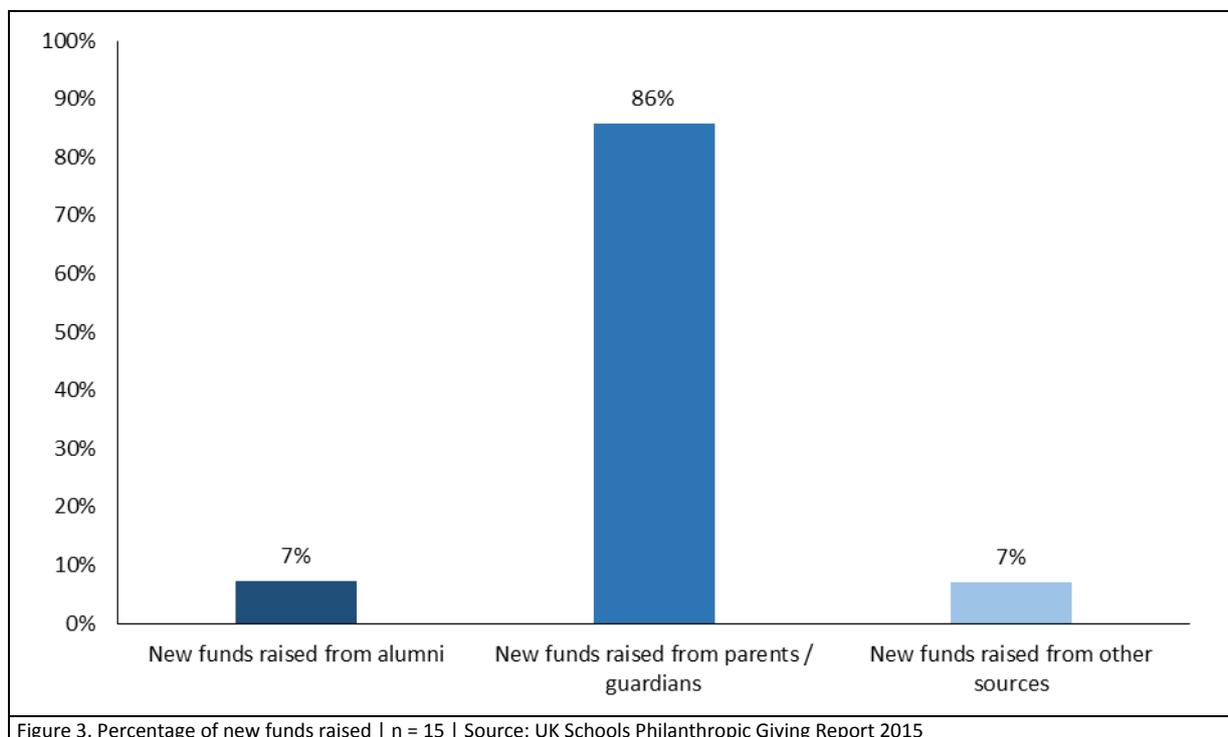
The value of the largest cash donation received was £2.7m; this represents 11% of total cash income received (including legacies and Gift Aid). Total cash income received by participating schools in 2013-14 stood at £25.6m.

Table 2. Cash income received	Q.	Base	Total	Mean	Median
Total cash income received	D-1	16	£25,635,532	£1,602,221	£407,666
Cash income received from alumni	D-2-1-1	16	£5,671,452	£354,466	£129,056
Cash income received from parents / guardians	D-2-2-1	16	£15,549,073	£971,817	£103,724
Cash income received from other sources	D-2-3-1	16	£4,415,007	£275,938	£59,480

Cost per pound of cash income received was 17p (ie total development office expenditure divided by total cash income received based on the base size in *Table 2*). When looking at median figures for the same base size, the cost per pound increases to 45p.

3.1.3. New funds raised

In 2013-14, 86% of new funds came from parents, with the remaining 14% from alumni and others. (*Figure 3*)



Mean new funds raised in 2013-14 among the participating schools was £1.7m, with one participant reporting £18.8m as its total new funds raised on the higher end of the spectrum while another reported just under £42k as its total new funds raised. (*Table 3*)

Among the 17 schools, 412 confirmed legacy pledges were made and 197 donors made cash gifts and confirmed pledges of more than £10k (inclusive of Gift Aid).

The value of the largest new cash donation or confirmed pledge (including Gift Aid) was £2.5m, this was 10% of total new funds raised.

Table 3. New funds raised	Q.	Base	Total	Mean	Median	%
Total new funds raised	D-1	15	£26,048,967	£1,736,598	£258,936	100%
New funds raised from alumni	D-2-1-1	15	£1,882,673	£125,512	£74,325	7%
New funds raised from parents / guardians	D-2-2-1	15	£22,357,260	£1,490,484	£71,883	86%
New funds raised from other sources	D-2-3-1	15	£1,809,034	£120,602	£50,000	7%

The ratio of total cash income to total new funds was 1:1.06, suggesting that the two figures were almost the same with new funds being slightly higher at £26m for 2013-14.

3.2. Contactable constituents

On average there were twice as many alumni in a school's database as there were parents and guardians, with alumni accounting for 67% of constituents and parents and guardians the remaining 33%. (Figure 4)

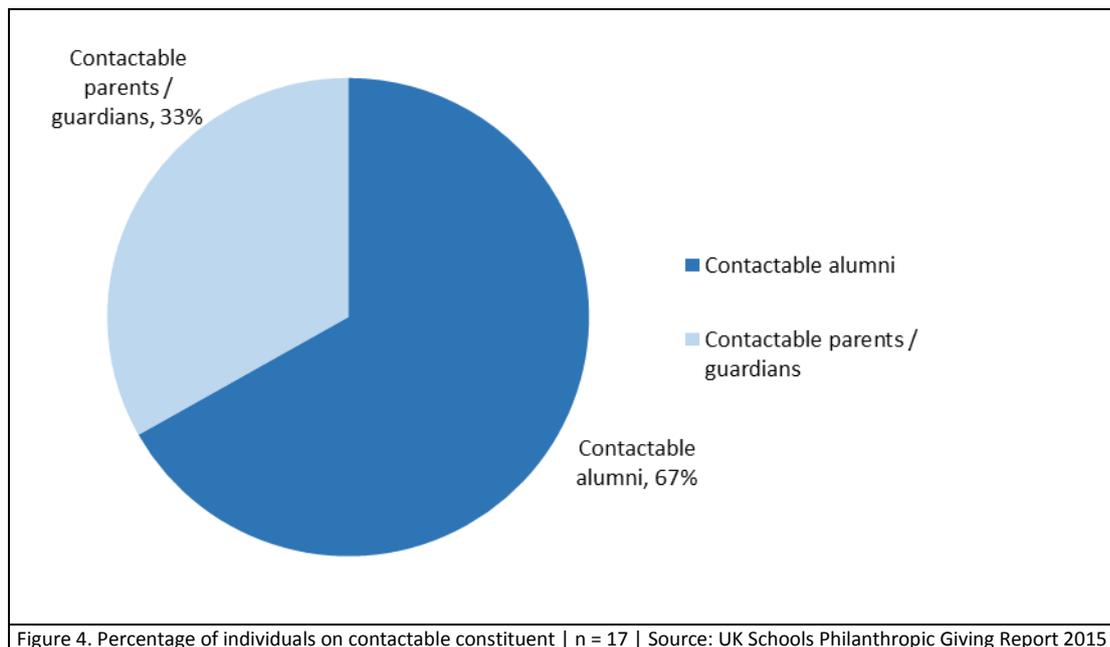


Figure 4. Percentage of individuals on contactable constituent | n = 17 | Source: UK Schools Philanthropic Giving Report 2015

The largest database consisted of 16,908 records. The largest database of alumni contacts stood at 9,455 and the smallest was 2,000 (the figures for parents and guardians were 7,951 and 50, respectively). The mean number of contactable constituents was 8,544, the mean number of contactable alumni was 5,708 and the mean number of contactable parents and guardians was 2,836. (Table 4)

Table 4. Contactable constituents, n = 17			
	Alumni and parents/guardians	Alumni	Parents/guardians
Total	145,254	97,043	48,211
Mean	8,544	5,708	2,836
Median	7,819	5,000	1,841
Max	16,908	9,455	7,951
Min	2,050	2,000	50

2.6% of total contactable constituents, 2.8% of parents and guardians and 2.1% alumni made a gift in 2013-14. Similarly, median donor participation rates are 2.4%, 2% and 1.8% respectively.

3.3. Donors

Fifteen schools reported 3,390 donors who made new cash gifts or confirmed pledges in 2013-14. More than half of these donors were alumni (54%), a third were parents or guardians and 10% were other donors. (Figure 5)

Number of donors does not reflect the amount of donations received from each donor type. As noted above parents came out as top donors, contributing up to 86% of new funds while alumni donated 7% of new funds in 2013-14. (Figure 3)

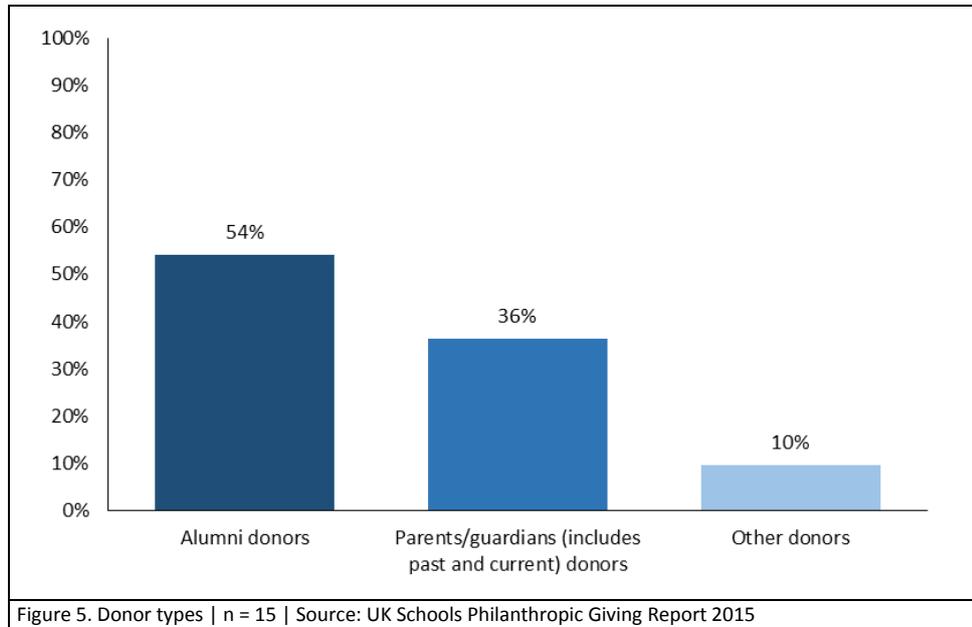


Figure 5. Donor types | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

Although the majority of gifts came from alumni, their giving represented just 7% of new funds raised, with 83% of new funds coming from parents. In other words, parents make fewer gifts than alumni but their average gift size is much higher. (Figure 6)

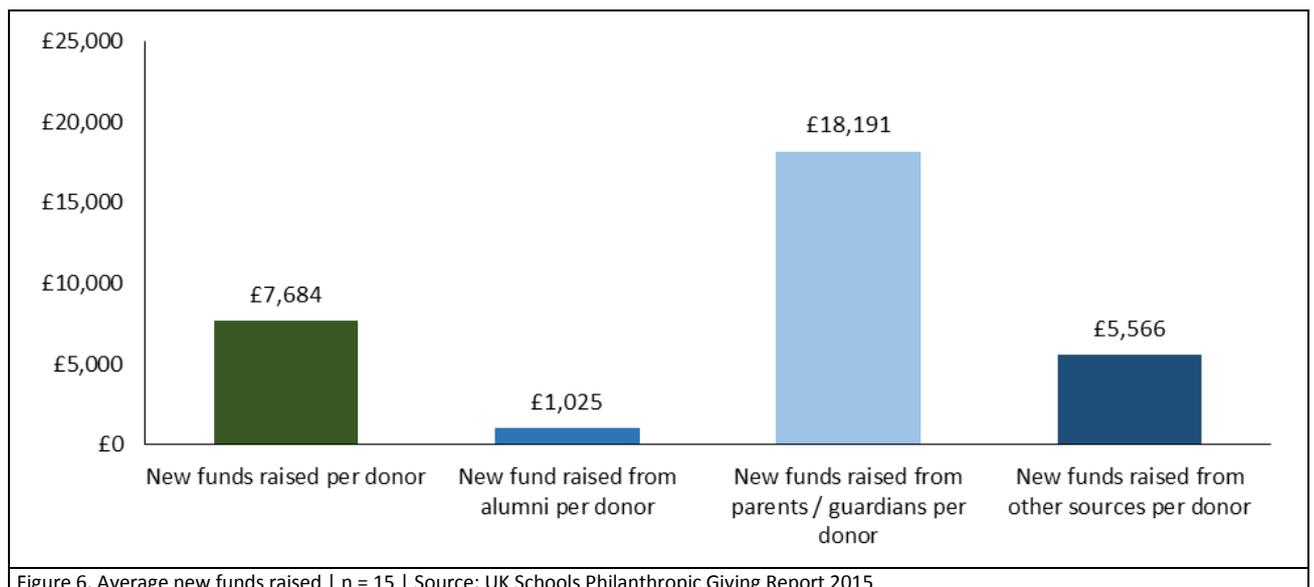


Figure 6. Average new funds raised | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

The average number of donors per school was 226; one school reported 1,070 donors and another just 20 donors. (Table 5)

Table 5. Number of donors (new funds raised)	Q.	Base	Total	Mean	Median
All donors	E-6	15	3,390	226	190
Alumni donors	E-7-1-1	15	1,836	122	92
Parents/guardians donors	E-7-2-1	15	1,229	82	37
Other donors	E-7-3-1	15	325	22	10

3.4. Fundraising methods

Almost all participating schools (94%) solicited gifts face-to-face. Schools also used direct mail (82%) and email (76%). Only half of the participating schools (53%) used the telephone. (*Figure 7*)

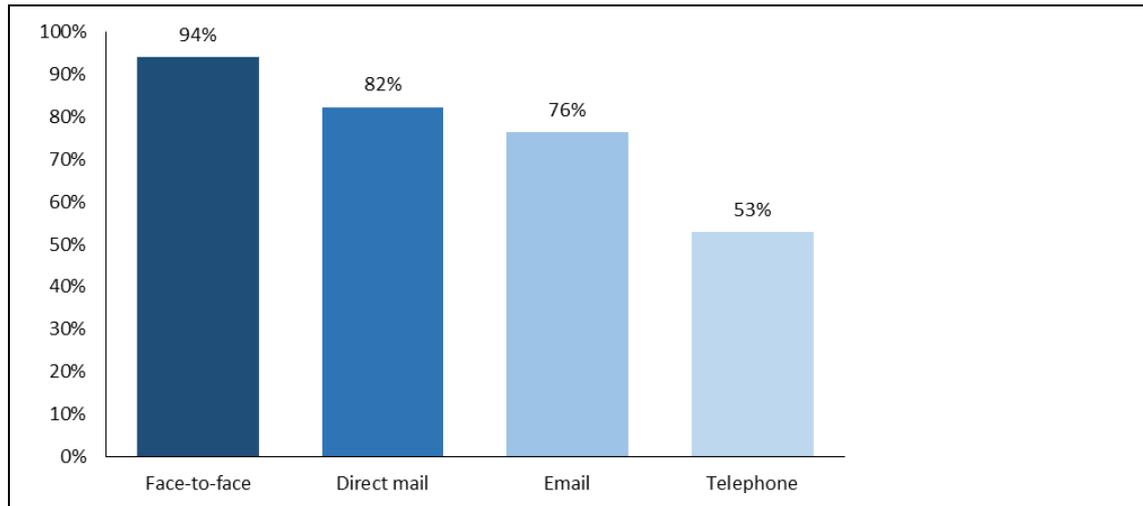


Figure 7. Fundraising methods used to solicit fundraising income | n = 17 | Source: UK Schools Philanthropic Giving Report 2015

3.5. Effects of fundraising methods

This is the first time that CASE has analysed the impact of fundraising methods to solicit donations in UK schools. One school was removed as its figures for new funds raised and cash income received were significantly higher than the other participants and including it in this analysis would skew the findings.

The remaining 16 schools were divided into two groups of 8 schools each – one group of schools had used all four fundraising methods outlined in *Figure 7* and the other group had used some, but not all, fundraising methods. Interestingly, all schools that used telephone fundraising in their campaigns also used the other three methods. It's useful for schools to analyse their fundraising methods and performance side by side to understand what mix of fundraising methods works best for their school. (*Table 6*)

Table 6. Fundraising performance by fundraising methods used n = 16	Did not use all fundraising methods	Used all fundraising methods
Amount	Mean, n=8	Mean, n=8*
<u>Expenditure</u>		
Total expenditure	£242,144	£221,267
Fundraising expenditure	£160,426	£143,535
Alumni relations expenditure	£66,543	£59,612
Parent relations expenditure	£5,393	£5,813
Other expenditure	£23,559	£12,307
Staff costs	£150,124	£138,700
Non-staff costs	£92,020	£89,977
<u>Cash income</u>		
Cash income received	£911,702	£821,528
Cash income received from alumni	£134,543	£585,868
Cash income received from parents/guardians	£659,576	£81,804
Cash income received from others	£117,583	£258,839
Legacy income received at bank	£72,801	£457,127
<u>New funds received</u>		
Total new cash gifts and confirmed pledges (including Gift Aid)	£831,842	£218,660
New cash gifts received from alumni	£89,991	£126,530
New cash gifts received from parents/guardians	£553,752	£67,311
New cash gifts received from others	£147,745	£43,677

*(without outlier)

The key differences in the groups' mean figures were in cash income and new funds received from alumni and parents. Cash income and new funds from alumni were significantly higher for those schools who used all fundraising methods (including telephone fundraising) than they were for schools that used a combination of email, direct mail and face-to-face communications.

On the other hand, cash income received and new funds raised from parents were significantly higher for those schools that did not use telephone fundraising but a combination of email, direct mail and face-to-face communications. This is mostly because telephone fundraising is used when soliciting a broad range of alumni.

3.6. Effects of age of development office

Schools were divided into three groups on the basis of the age of their development offices:

- Established schools : More than 10 years
- Emerging schools : 6 to 10 years
- Beginners schools : 0 to 5 years (*Table 7*)

Table 7. Fundraising income and expenditure by age of development office n = 15	Beginner	Emerging	Established
	<5 years	6-10 years	>10 years
	Mean, n=4	Mean, n=6	Mean, n=5*
Amount			
<u>Expenditure</u>			
Total expenditure	£242,599	£141,708	£335,129
Fundraising expenditure	£143,339	£77,467	£279,777
Alumni relations expenditure	£70,760	£47,828	£71,422
Parent relations expenditure	£4,500	£7,708	£5,000
Other expenditure	£24,000	£8,704	£26,287
Staff costs	£154,667	£86,398	£216,901
Non-staff costs	£112,333	£55,310	£118,228
<u>Cash income received</u>			
From all donors	£218,498	£382,432	£2,061,452
From alumni	£130,845	£160,336	£751,871
From parents/guardians	£56,862	£51,132	£1,023,826
From others	£30,791	£230,120	£285,755
Legacy income received at bank	£1,333	£185,161	£533,466
<u>New funds received (new cash gifts and confirmed pledges including Gift Aid)</u>			
From all donors	£468,926	£105,225	£1,101,392
From alumni	£185,074	£63,121	£110,365
From parents/guardians	£32,126	£28,411	£772,402
From others	£36,597	£17,409	£218,625

*(without outlier)

One school did not indicate the age of their development office and another was taken out of this analysis as it was an outlier.

Established schools performed better on all variables than Emerging and Beginner schools. All Established schools had mature development offices that were 10+ years old. Five schools belonged to this category.

Emerging schools secured fewer new funds but more cash income than Beginner schools but less than Established schools. There were six schools in this group and their development offices were 6 to 10 years old.

Beginner schools secured more new funds but less cash income than Emerging schools. All Beginner schools had development offices that were started in the last 5 years. Four schools were part of this group.

Cash income received gradually increased as the development office matures. The amount of new funds raised rose over the course of the first five years, then dropped during years six to 10 and rose again after 10+ years. Trends in expenditure followed a similar trajectory.

In terms of cash income received, Established schools received more than nine times the cash income received by Beginner schools and over five times more than Emerging schools. In general, Emerging schools seem to perform slightly better than Beginner schools when comparing mean cash income received.

The most significant effect noticed was that cash income received from parents in Established schools was up to 18 times greater than that received by Beginner schools and 20 times greater than cash income received by Emerging schools. This trend in parent giving suggests that parents are supportive of fundraising campaigns for the initial few years, followed by a drop in interest for up to 10 years, after which cash income received appears to rise again (*Figure 8*). Apart from the age of development office, internal changes in schools' strategy, stages in a capital campaign and launch of projects that directly benefit the students could also impact parents' propensity to give.

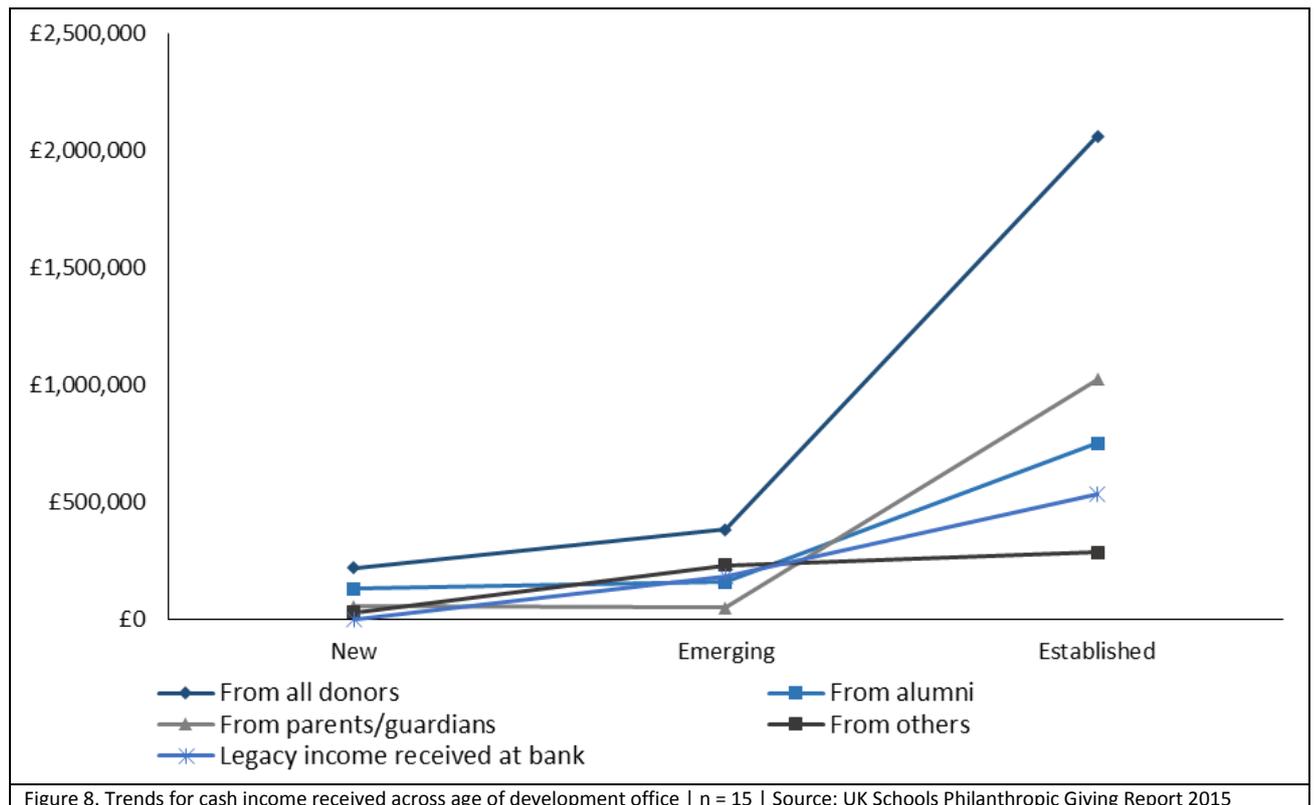


Figure 8. Trends for cash income received across age of development office | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

For new funds secured, total donors and FTE staff numbers employed in fundraising, Established schools took the lead once again followed by Beginner and Emerging schools. (*Figure 9*)

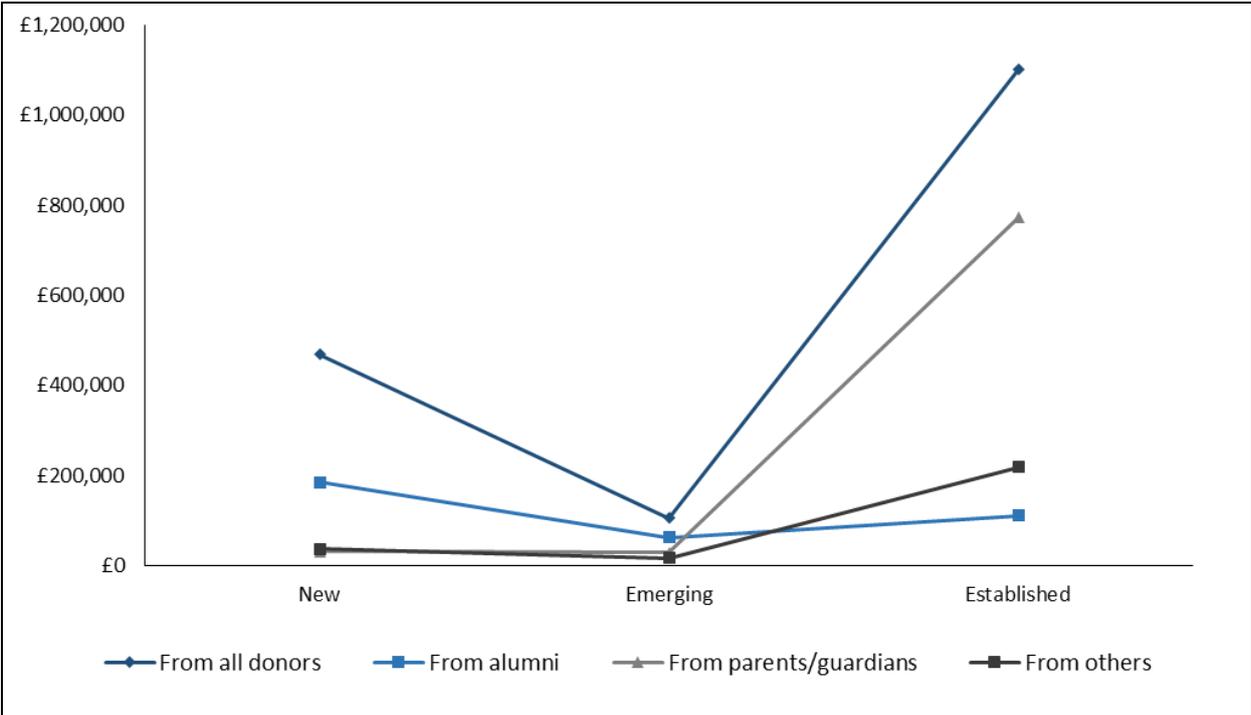


Figure 9. Trends for new funds secured across age of development office | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

In terms of expenditure, Emerging schools spent less than Beginner schools, perhaps a sign of how young fundraising development offices spend large sums of money in their initial years, cutting down on spend in the middle-years and increasing spending after 10+ years of practice. (Figure 10)

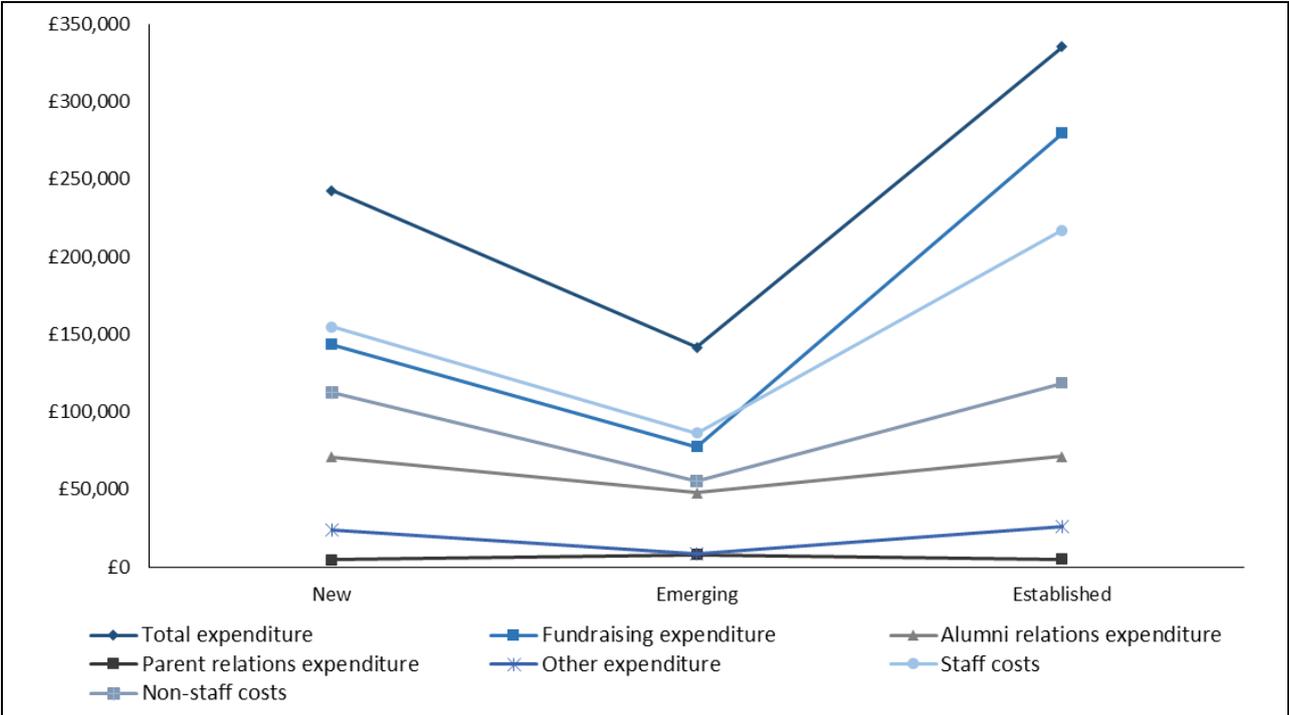


Figure 10. Trends for expenditure across age of development office | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

	Beginner	Emerging	Established
Table 8. Fundraising donors, staff and gifts by age of development office n = 15	<5 years	6-10 years	>10 years
Number	Mean, n=4	Mean, n=6	Mean, n=5*
<u>Contactable constituents</u>			
Contactable alumni and parents/guardians	6005	8,506	10,327
Contactable alumni	4966	4,859	6,843
Contactable parents/guardians	1039	3,647	3,484
<u>Donors represented by the new cash gifts and confirmed pledges</u>			
All donors	128	140	379
Alumni donors	94	85	171
Parent/guardian donors	19	47	161
Other donors	5	8	47
<u>FTE Staff engaged in</u>			
In fundraising and alumni & parent relations in full-time equivalents (FTEs)	4	2	5
In fundraising	1	1	2
In alumni relations	1	1	1
In parent relations	0.1	0.2	0.2
In other activities	1	1	2
<u>Number of gifts</u>			
Number of cash legacies received	0	2	6
Number of confirmed legacy pledges	40	9	30
<u>Donors who gave £10K+(inclusive of Gift Aid)</u>			
In cash payments	5	4	16
In cash gifts or confirmed pledges	7	4	18
<u>Tenure of development director</u>			
Number of years the Director of Development has been in post.	3	3	4

*without outlier

The number of contactable individuals and donors gradually increased as a development office ages and progressed from Beginner to Established. (Figure 11 and 12)

Four FTE staff were employed, on average, in each Beginner school, which then dropped to two and finally grew to a team of five FTE staff in Established schools. (Figure 13 and Table 8) This reflects the maturing nature of the schools' development industry and the growing appreciation from head of schools and senior management teams who are recognising that development teams must be experienced, skilled and knowledgeable.

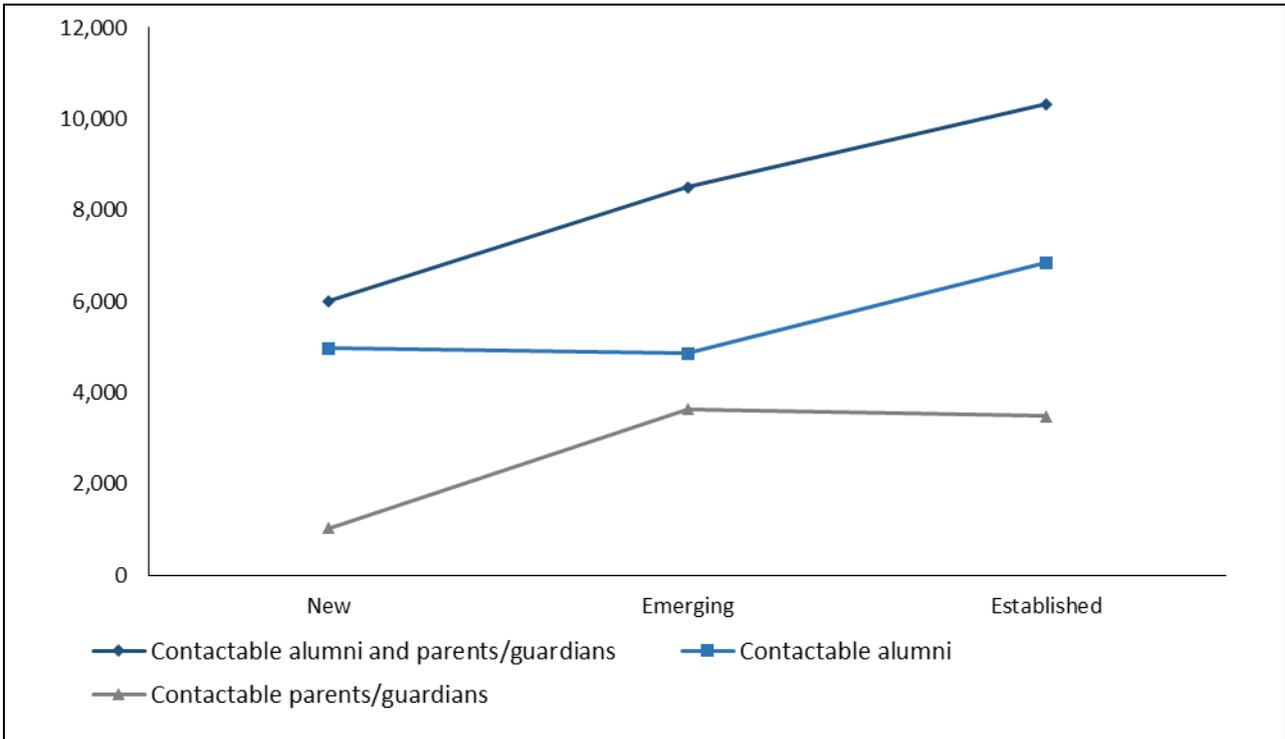


Figure 11. Trends for contactable constituents across age of development office | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

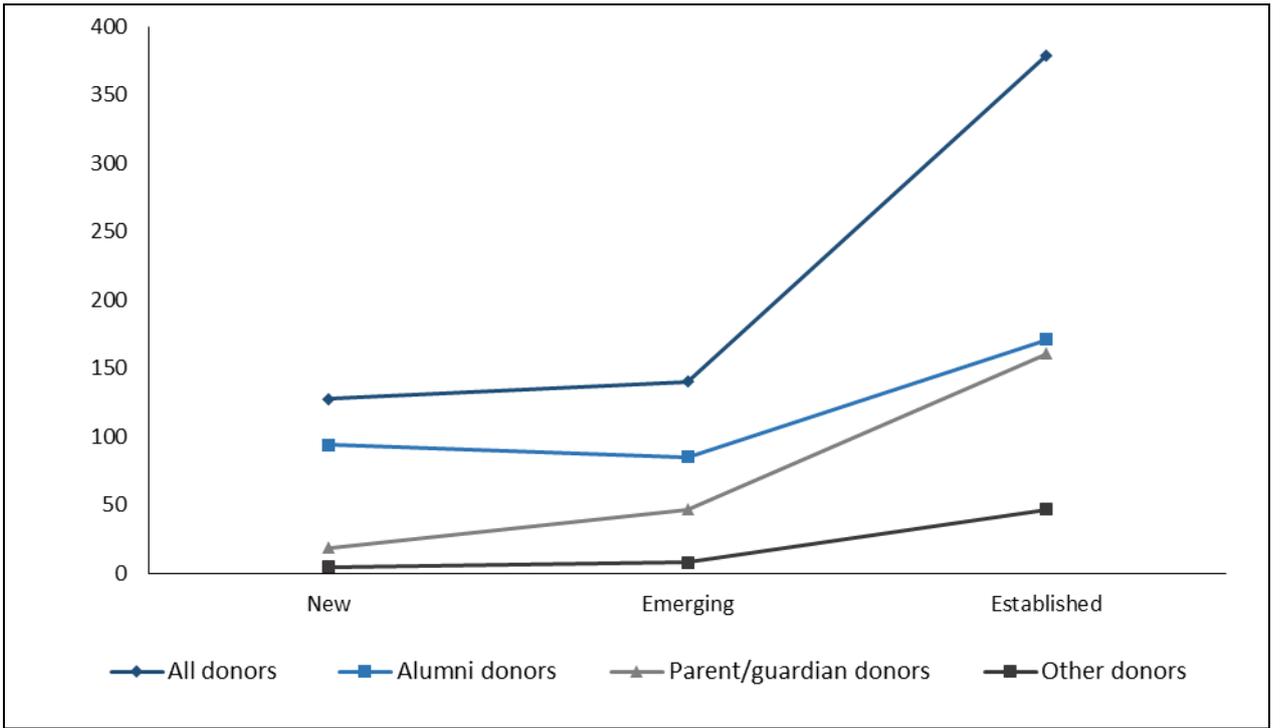


Figure 12. Trends for donor types across age of development office | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

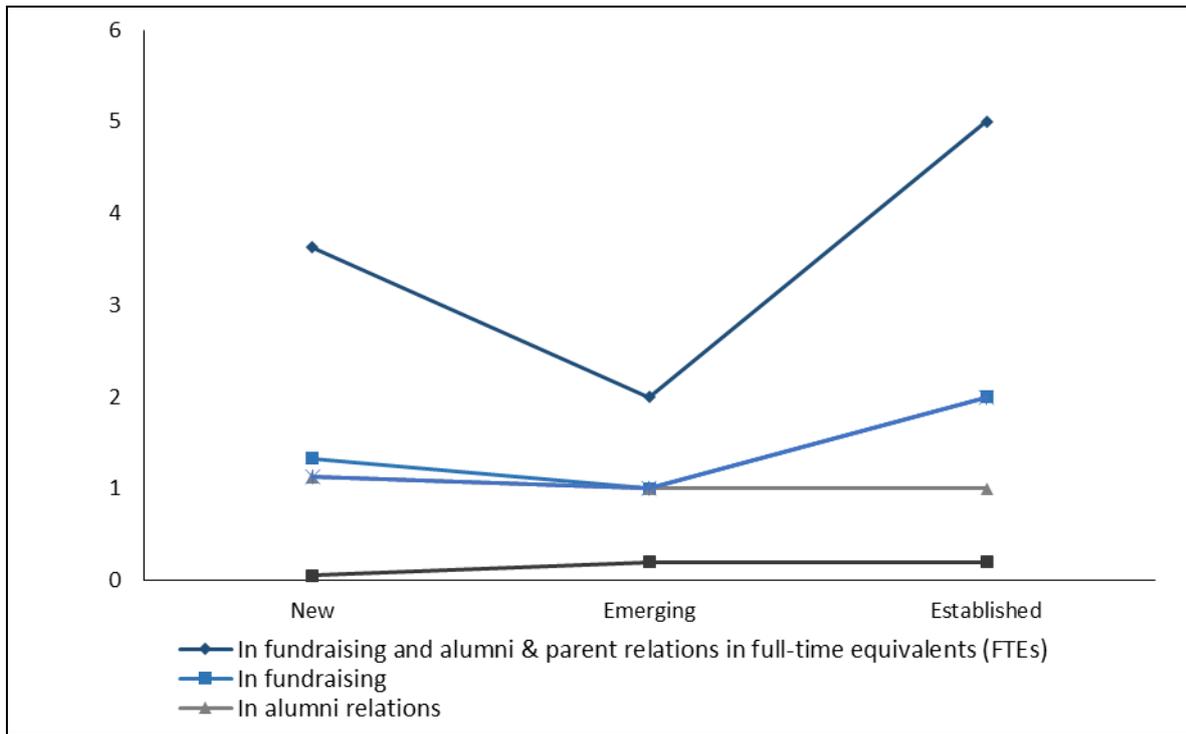


Figure 13. Trends for FTE staff across age of development office | n = 15 | Source: UK Schools Philanthropic Giving Report 2015

3.7. Characteristics of the participating schools

17 UK schools participated in the survey for 2013-14. 64% were mixed schools (both female and male pupils less than 85%) while 18% of schools had mainly female pupils and 18% had mainly male pupils. One school was a preparatory school and all the others were senior schools.

All participating schools were independent (fee-paying schools rather than government-funded).

41% were day schools, 35% were mixed and 24% were boarding schools.

Only a third of participating schools in 2013-14 stated they had a separate charitable foundation to which it directed the proceeds of its fundraising activities. (Table 9)

Table 9. Characteristics of the participating schools					
	Q.	Base	Female	Male	Mixed
Student body	A-6	17	18%	18%	64%
	Q.	Base	Day	Boarding	Mixed
School type	A-8	17	41%	24%	35%
	Q.	Base	Yes	No	
Charitable foundation	A-5	17	35%	65%	

3.8. Staffing and support

76% of participating schools in 2013-14 first established a permanent full-time member of staff, whose main responsibility was the raising of funds from alumni and/or parents, before 2006. (*Table 10*)

62% of participating schools in 2013-14 had relatively young development offices which were started less than 11 years ago. On the other hand, 38% of schools had development offices that were more mature. (*Table 10*)

94% of participating schools employed a full-time (all year round) director of development. 64% of these development directors were in their post for up to five years, 27% were in their post between six to 10 years and 9% for more than 10 years. (*Table 10*)

59% of these development directors were part of the schools senior management while the remaining 41% were not.

Table 10. Development office	Q.	Base	<2000	2001-2005	2006-2010	>2010
Establishment of FTE fundraising staff	A-9	16	12%	64%	12%	12%
	Q.	Base	0 - 5 years	6 - 10 years	11 - 15 years	>15 years
Age of development office	A-10	16	25%	37%	19%	19%
	Q.	Base	0 - 5 years	6 - 10 years	>10 years	
Experience of FTE (all year round) directors of development	G-2	11	64%	27%	9%	

The median full-time equivalent (FTE) staff in development in 2013-14 among participants was three. Development staff play many roles in support of their school's advancement. Of the 54 (FTE) development staff across all the participating schools, 20 (36%) were focussed on fundraising, 18 (33%) in alumni relations and parent relations, and the remaining 17 (31%) in other activities. (*Table 11*)

Table 11. Development staff	Q.	Base	Total	Mean	Median	%
Total FTE staff in fundraising and alumni relations	H-99	15	54	3.6	3	100%
FTE fundraising staff	H-99-1-1	15	20	1.3	1.3	36%
FTE alumni relations staff	H-99-2-1	15	16	1.1	1	29%
FTE parent relations staff	H-99-3-1	15	2	0.2	0	4%
FTE other staff	H-99-4-1	15	17	1.1	0.8	31%

4. Participating schools

17 schools participated in the 2013/14 benchmarking study and completed the survey.

The schools in bold also completed the 2012-13 survey.

1. **Charterhouse School**
2. Cheadle Hulme School
3. Christ's Hospital
4. Dragon School
5. **Erskine Stewart's Melville Schools**
6. Glenalmond College
7. **Harrow School**
8. Headington School Oxford
9. **Kingston Grammar School**
10. **Latymer Upper School**
11. Sevenoaks School Foundation
12. Solihull School
13. St. Catherine's School, Bramley
14. St. John's School
15. **University College School**
16. Warwick School
17. Withington Girls' School

5. About the survey

Buffalo Fundraising Consultants began work on this project in 2008 following research confirming that an absence of credible benchmarking data was a key concern of development directors at schools in the United Kingdom. In 2009, Tom Beckett, Ed Lang, Marc Whitmore, and Iain More began to develop key benchmarking questions for this survey. At the same time, a Working Committee of Development Directors (now the UK Schools Philanthropic Giving Survey Committee) was formed. They met on several occasions to ensure that the survey addressed the most important questions to the sector. All Working Committee members then engaged in the first year of benchmarking by completing the survey in 2010. In 2011 CASE Europe formally agreed to partner with Buffalo Fundraising Consultants and in 2014 were handed full control over the survey's management and execution.

This is the fourth report to be launched since its inception. This is a biennial survey.

Aims of benchmarking

Development Directors, Heads, Governors and Bursars know that getting development right requires sensible investment. Get it right, and the results can be impressive; get it wrong and schools can embark on an expensive project that diverts valuable resources and tests the goodwill of parents, staff and alumni alike.

The ability to see how one school's activities compare with others at similar stages can be extremely useful. This survey has been designed to support schools who would like to assess their performance in this way. The survey aims to:

- provide development professionals with statistics and key information that assists planning and forecasting
- provide schools with data to illustrate how successful fundraising operations are structured, operated, and delivered against target

- provide heads, bursars and governors with comparative information about investment and return and associated impacting factors.

We anticipate over the coming years that benchmarks will be established in these fundraising areas so that schools can better evaluate their performance. The data contained in this report can only ever act as a guide. However, over time we hope that it may shed further light on those factors schools can alter to improve their fundraising performance, as well as the parameters within which they operate.

In addition to assisting individual schools, we want the survey to capture an accurate picture of philanthropy across the entire school sector. This survey therefore aims to provide an authoritative and trusted source of information on philanthropy at that wider level.

6. Methodology

The UK Schools Philanthropic Giving Survey Committee reviewed the 2011-12 survey and approved a final version for 2013-14. The survey was placed in the CASE Benchmarking Toolkit. This fourth year of benchmarking invited 108 schools from the CASE database to participate in the online survey in autumn 2014. The link was also circulated via social media and it could be that more than 108 schools received invitations to participate through other sources. The survey was closed on 18 December 2014. 17 schools completed the survey with all results being finalised for the report. All the data submitted to the survey is self-reported data; it is not audited.

Not all participating schools provided usable responses to every question in the survey. The base size mentioned in the tables and figures refers to the number of schools 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 reported.

Data processing was carried out by CASE. Data checks were included in the online survey. A further data management procedure was carried out to check outliers and to resolve observable errors. Where possible, missing or inconsistent data was queried with the schools to check that they were correct before analysis was performed.

Some institutions may have found it difficult to collect the appropriate data for submission or may have misinterpreted some of the guidelines for completion. Therefore, CASE made calls to schools whose data raised some issues and in many cases the data returns were improved. A systematic and multi-stage checking process was also implemented in an effort to improve the quality of the data.

There was a large variation in fundraising results between the schools. This meant that the mean figures were usually much higher than the median figures. Median figures should be used as the preferred benchmarking measure, but we have also retained mean figures in our findings for reference purposes.

Further analysis across questions helped get a better understanding of fundraising performance. It must be noted that this analysis was done by using answers submitted in the survey, and thus it suffers from the same bias that might be present in the original answers. The sample size of 17 schools is not robust enough to make any conclusions when analysing data across sub-groups and any figures reported in this manner should only be used as a guide.

CASE Europe compiled this overview report (this document) which was disseminated in July 2015. Individual reports were also available to participating schools from March 2015. These reports allow each school to benchmark their results against other similarly-structured schools using the [online CASE Benchmarking Toolkit](#).

7. Acknowledgements

Firstly we would like to thank all the schools and development staff who gave up their time to complete the *UK Schools Philanthropic Giving Survey 2014*.

We would also like to thank members of the UK Schools Philanthropic Giving Survey Committee, who have been involved in the development of the survey from the very beginning. Between them they have helped chair committee meetings, provided design advice for the online survey, contributed content for this overview report and gave moral support, wisdom and guidance throughout.

8. About CASE

The Council for Advancement and Support of Education (CASE) is the professional organization for advancement professionals at all levels who work in alumni relations, communications and marketing, development and advancement services.

CASE's membership includes more than 3,600 colleges, universities and independent and secondary schools in more than 80 countries. This makes CASE one of the largest non-profit education associations in the world in terms of institutional membership. CASE also serves more than 60,000 advancement professionals on staffs of member institutions and has more than 22,500 individual "premier-level members" and more than 230 Educational Partner corporate members.

CASE has offices in Washington, D.C., London, Singapore and Mexico City. The association produces high-quality and timely content, publications, conferences, institutes and workshops that assist advancement professionals perform more effectively and serve their institutions.