

# CASE Advancement Services Survey

Europe, 2021



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#### ACKNOWLEDGEMENTS

We would like to thank all professionals who answered this survey, giving their time to provide information about their development services structures and strategies.

We are grateful to **Charlotte Dewhurst**, Associate Director of Development (Operations), University of Oxford and **Katherine Muller**, Executive Director of Operations and Donor Relations, Advancement, London Business School, our advisory team, for contributing their time and expertise at each stage of the survey and report. They were involved with survey review, survey promotion, analysis, report writing and dissemination.

And finally, a special thanks to **Salesforce**, whose support made this survey possible.

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#### COVER CREDIT

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# FOREWORD

The Council for Advancement and Support of Education (CASE) is proud to launch the report on the findings from the **CASE Advancement Services Survey, Europe, 2021**.

This is the first time this survey has been carried out and our aim was to understand how professionals at higher education institutions across Europe approached digital transformation - at an institutional level, and for fundraising, alumni relations and marketing and communications.

In addition, we wanted to understand the immediate impact the COVID-19 pandemic has had on digital transformation plans and strategies at various HE institutions across the region.

As a global organisation, CASE seeks to support global advancement leaders to make the best data-driven decisions, and we hope that the results of this survey will also contribute to that.

We would like to extend our thanks to the Advancement/Development Services professionals from various Higher Education Institutions and all CASE members who took the time to complete this survey. Your inputs are vital to continue informing the sector.

And finally, our thanks to Salesforce, without whose support this survey and its interactive version would not have been possible.

With much gratitude,

**Bruce Bernstein**

Executive Director, Global Engagement (Europe and Africa)  
Council for Advancement and Support of Education (CASE)

# PARTNER'S PERSPECTIVE

[Salesforce.org](https://www.salesforce.org), alongside CASE, is delighted to present the inaugural 2021 edition of the Advancement Services survey. While this past year has been one of the most challenging in modern history, affecting every institution globally, institutions are now reimagining how to better support alumni, staff and lifelong learners. The goals of this survey were to understand how advancement services teams have been impacted by the events of the past year, as well as to examine the current state of digital transformation in the industry.

Perhaps surprising to some, almost 60.6% of survey respondents did not report knowledge of their respective institutions having an institution-wide digital transformation strategy. And while the results presented in this report shed light on challenges old and new, they also highlight opportunities for the future.

89% respondents agreed that development and alumni relations teams would need to increase their digital risk appetite and become more agile with time. Events, alumni networking, and relationship management ranked as the topmost areas where digital transformation can make an immediate impact.

We are honoured to have partnered with CASE in producing this report and we hope that the findings will prompt conversations and actions on future investment areas, breaking down departmental and data silos, streamlining operations, improving reporting and insights, on personalising engagements and building lifelong relationships with alumni, donors and volunteers. Our thanks and congratulations to all involved.

Sincerely yours,

**Jean Pembleton**

Director Industry Solutions

[Salesforce.org](https://www.salesforce.org)

# SUMMARY OF FINDINGS

## I. DISTRIBUTION OF RESPONDENTS

- 77% respondents were from the UK and 23% respondents were from the rest of Europe.
- Of the 51 respondents from the UK, 78% were from England, 18% from Scotland, and 2% each from Wales and Northern Ireland.
- Of the 15 respondents from the rest of Europe, four were from Hungary, three from France, two Ireland, and one each from Denmark, Finland, The Netherlands, Portugal, Spain and Sweden.
- 41% respondents were Team leads<sup>2</sup>, 39% respondents were at the Director level, and 20% respondents were staff members.
- 70% respondents were a part of small teams<sup>2</sup> with 1 to 10 team members while 30% respondents were a part of large teams<sup>3</sup> with 11 or more team members.
- A higher percentage (54%) of Director level respondents were a part of small teams.
- The average number of job roles for which the respondent has primary responsibility decreases with decreasing team size and from higher to lower seniority levels.

## II. PERCEPTION ABOUT THE SECTOR AT THIS TIME

- On an overall basis, 30% respondents don't know whether their organisation has an institution-wide digital transformation strategy.
- Amongst respondents who don't know whether their organisation has an institution-wide digital transformation strategy, 14% work at a staff member level, and 60% belong to a small team.
- This raises a worrying question about whether advancement shops, especially those with smaller

team sizes, are cut off from their larger institutional digital strategy.

- Teaching and learning, recruitment and admissions, and customer experience were identified the three main areas for institutional digital transformation strategy with the maximum number of respondents at the Director level as well as respondents from both small and large teams choosing these.
- On an overall basis, events, alumni networking, and relationship management were ranked as the topmost areas of digital capability that benefit digital transformation for development and alumni relations (DAR). These areas change slightly when we look at the data with a regional lens – in the UK, alumni networking, business intelligence and insights, and supporter journeys received the top rank while in the rest of Europe, events, alumni networking and relationship management received the top rank.
- Staff resource/headcount, budgets, and the complexity of system integration were identified as the three greatest hurdles facing teams in securing support for digital transformation. Even with a regional lens or team size lens, this trend remains the same.
- Overall, the biggest challenges faced while implementing digital technology were conflicting priorities within the team/department, a lack of institutional alignment among departments' stakeholders, and the lack of appropriate skillset within the department and was true for all sized teams.

The **CASE Advancement Services Survey, Europe** was carried out for the first time in 2021. The survey was open to participants from 7 January 2021 to 14 February 2021. Invitations to participate were sent to registered individuals from all member institutions in the European region. Sixty-six respondents, from at least 29 different institutions<sup>4</sup>, across the European region completed the survey. This report provides a summary of the findings compiled from responses provided by various members of advancement teams across Europe.

<sup>1</sup>The two job role categories of Heads of teams and Managers were combined within Team lead.

<sup>2</sup>The team size categories 1 to 5 and 6 to 10 were combined into Small teams with 1 to 10 team members.

<sup>3</sup>The team size categories 11 to 20 and 20+ were combined into Large teams with 11+ team members.

<sup>4</sup>28 respondents i.e. 42% did not provide their institution names.

- 35% respondents felt that investment in digital transformation yielded a measurable increase in engagement and fund raised. The measurable increase in engagement and funds raised, user satisfaction with available technology, and the impact that is not measured/reported are some of the main ways respondents measure the impact of their investment in digital transformation. In the case of small sized teams, the new technology has on business outcomes is another important measure of their investment in digital transformation.
- Segmentation, surveys, and behaviour tracking in response to communications are just some of the most common tactics used to target the right audience and measure the impact of institutional marketing/ communications activities. This is largely the same for small sized teams while larger sized teams also use a tactics like behaviour tracking in response to online content, and A-B testing too.
- 74% respondents agree that during the pandemic, the priorities of development and alumni relations around digital transformation have changed and digital has moved to a higher priority and more investment is being made towards digital.
- 39% agreed that their Development services/ Operations team was well-positioned in terms of having a digital skill set as well as enough confidence with digital technology to take advantage of an increase in investment if the funding were to become available. However, one-third respondents were non-committal.

### III. THE WAY AHEAD

- Relationship management, events, and business intelligence and insights were identified as the three main areas where the development and alumni relations departments will make significant investment over the next year. This is consistent with what UK respondents felt too, though they also identified supporter journeys, and volunteering, mentoring, other ways of giving time as being equally important. Respondents from the

rest of Europe identified alumni networking as another important area of investment over the next year. Respondents from different levels within their organisation felt the same about this trend.

- Clearer understanding by senior management, institution-wide commitment to digital transformation, and clearly defined benefits and strong business cases were all identified as realistic drivers to remove barriers/challenges in securing support for and implementing digital transformation at an overall level. When looked at by way of a regional lens, technology that is designed to meet the needs of the organisation was the second most important driver to implement digital transformation in the UK.
- 41% respondents were non-committal when asked whether they believed that their organisation was meeting the expectations of its alumni, donors and supporters in terms of their digital offering. 38% respondents, on the other hand, agreed with the statement and felt that their institution was meeting alumni, donor and supporter expectations related to the organisation's digital offering.

### IV. VIEWS ON IMPACT OF COVID

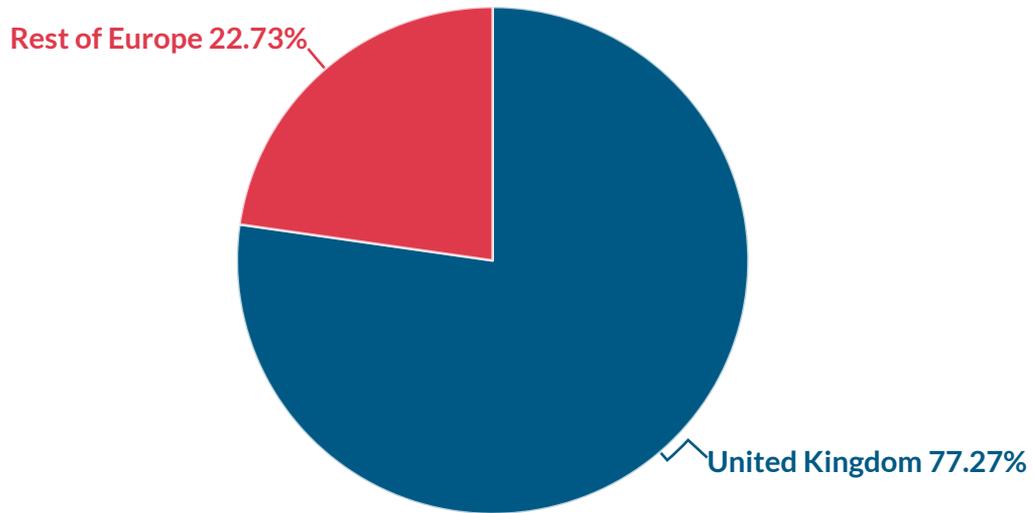
- 86% respondents agreed with the statement that their senior management would continue to recognise the value of digital technology in the future.
- 76% respondents agreed that their senior management would continue to see the potential of digital technology to reaching all donors, not only the younger donors or those making smaller gifts.
- 77% respondents agreed that their senior management would continue to see the potential and leverage that digital technology provided and that it could be utilised for a lot more than just a means of collecting money.
- 56% respondents agreed with the statement that they would see more major gift

solicitations performed virtually with people getting more and more comfortable with video calls. They felt that donors would want to continue to save travel time due to the convenience of virtual meetings. However, 32% respondents were non-committal about the future of continuing with virtual meetings after the pandemic ended.

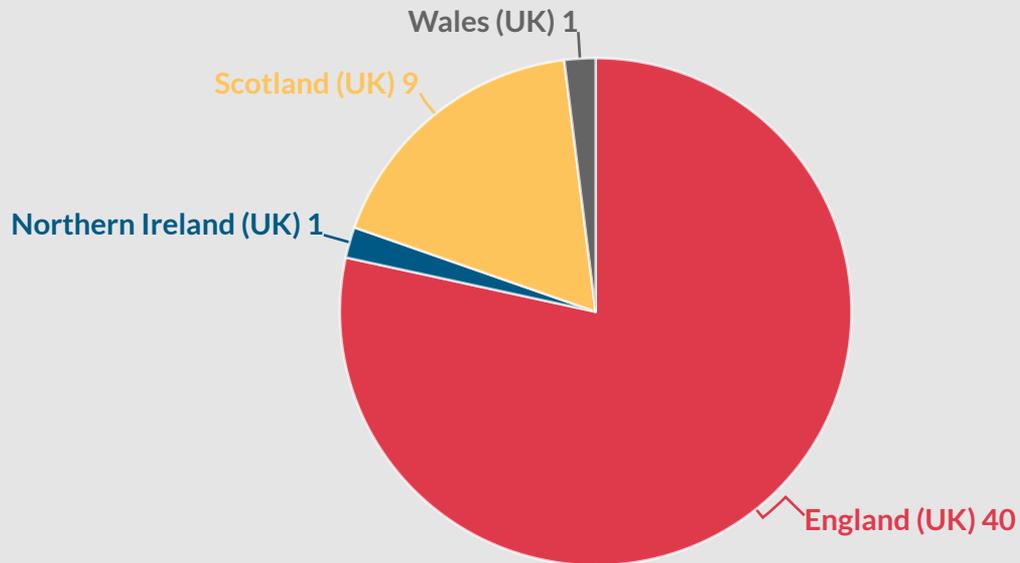
- 88% respondents agreed that virtual events would continue and end up becoming a part of their regular offering to donors and alumni even post pandemic.
- 80% respondents agreed with the statement that there would be an increased focus on stewarding supporters, and it was key now, more than ever, that institutions understood what supporters cared about, which communication channels they preferred, how they wanted to be involved in the institution's work.
- 89% respondents agreed that development and alumni relations teams would need to increase their digital risk appetite and become more agile with time.
- 92% respondents agreed that development and alumni relations teams would need to upskill in order to be able to test and adopt new technologies in the time to come.

# I. DISTRIBUTION OF RESPONDENTS

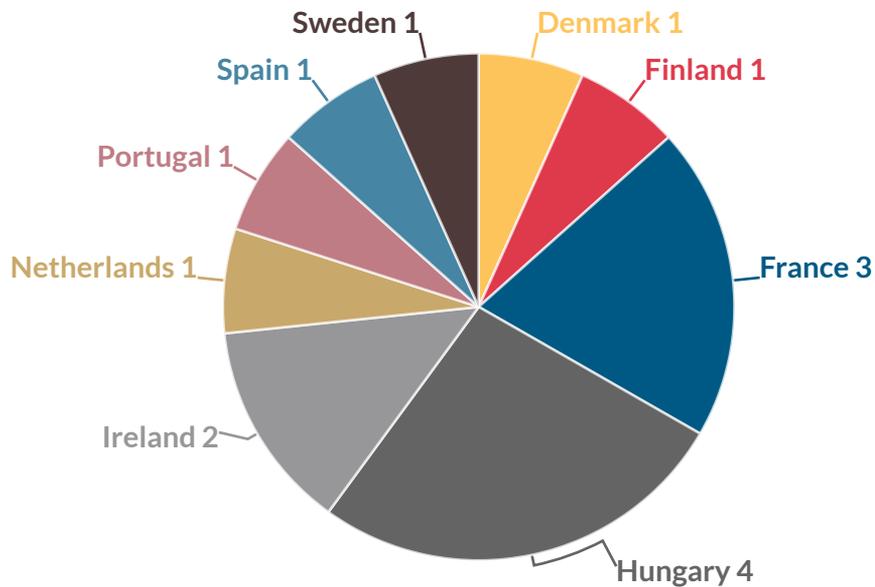
## 1) % Distribution of respondents by region



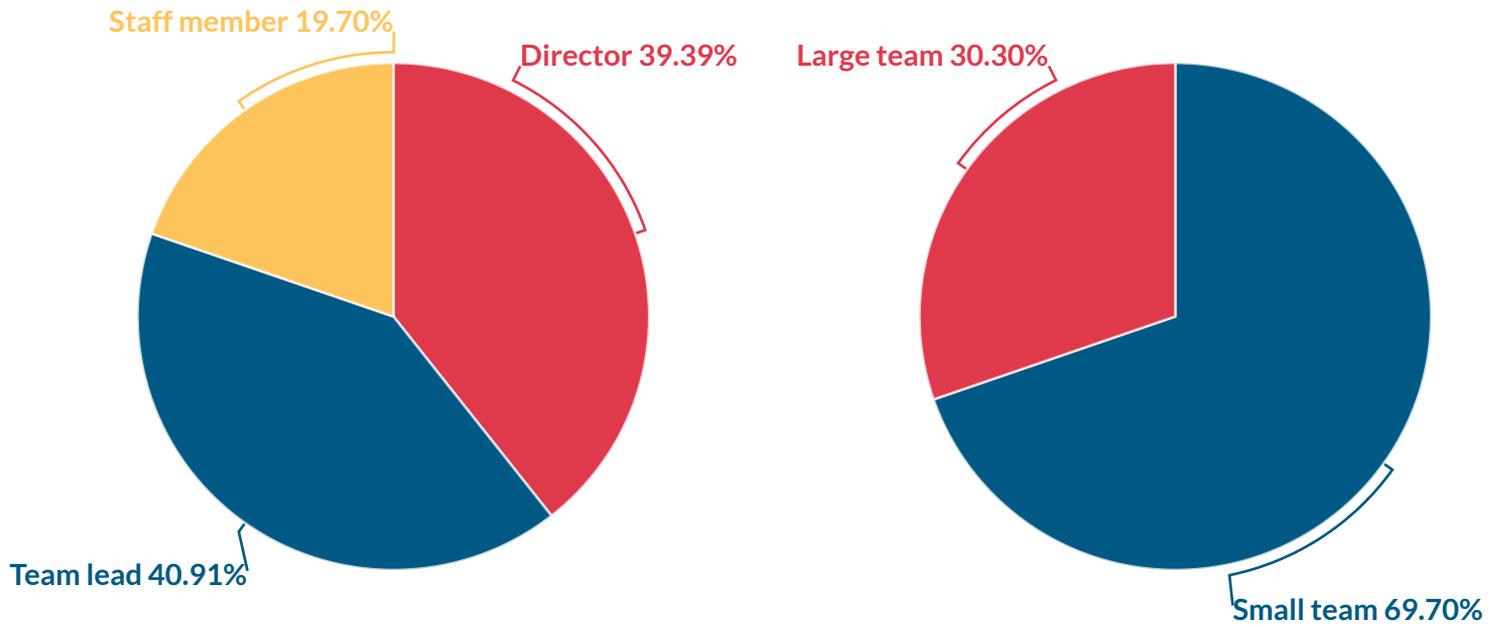
## 2) Distribution of respondents from the UK



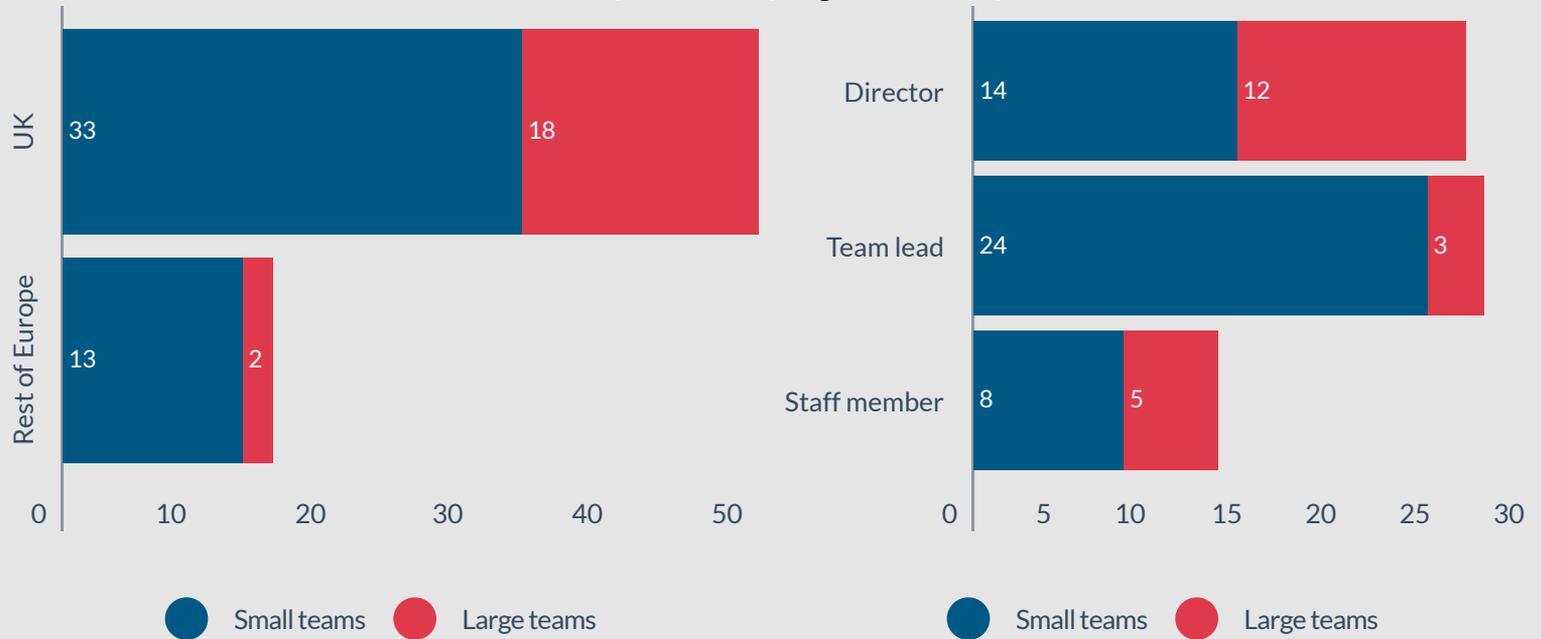
## 3) Distribution of respondents from Europe



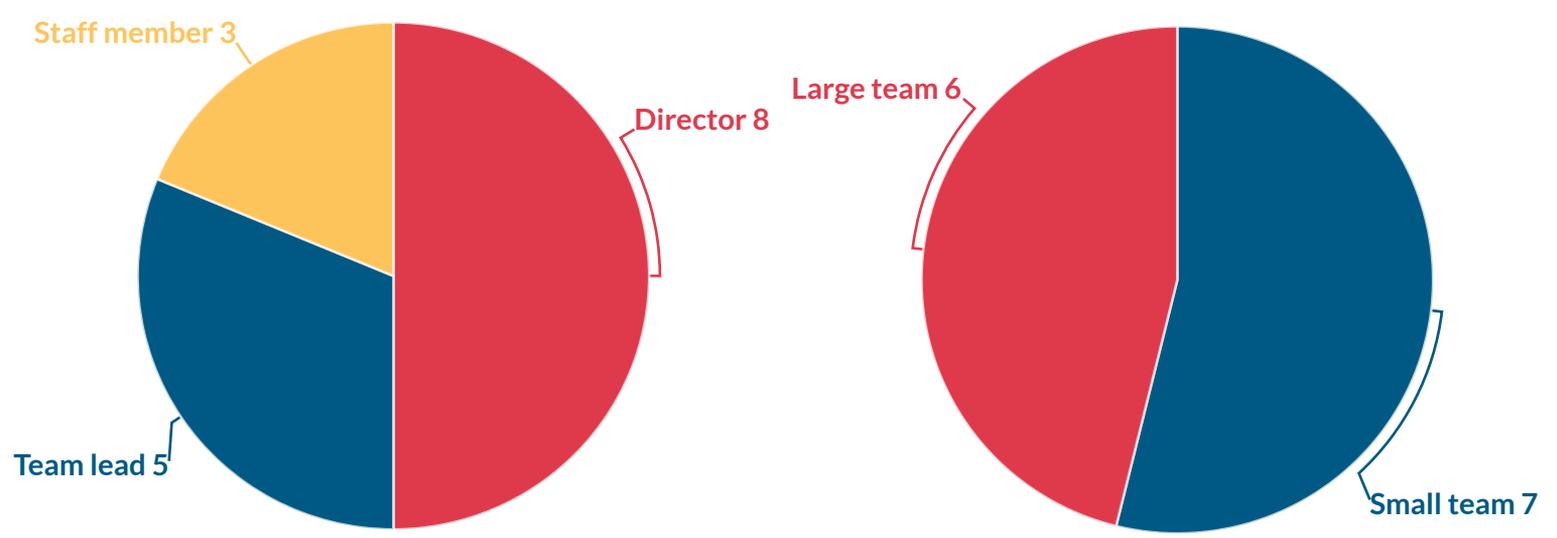
4) % Distribution of respondents by seniority level & team size



5) Distribution of respondents by region, seniority level & team size

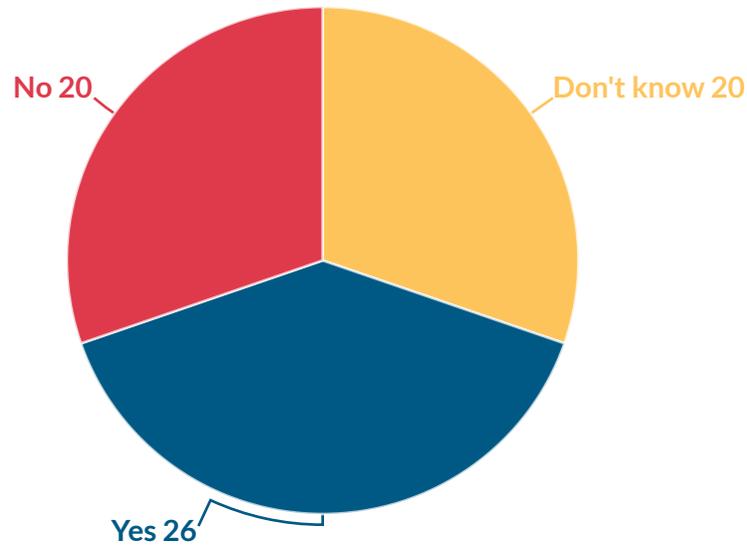


6) Average number of job roles for which respondent has primary responsibility

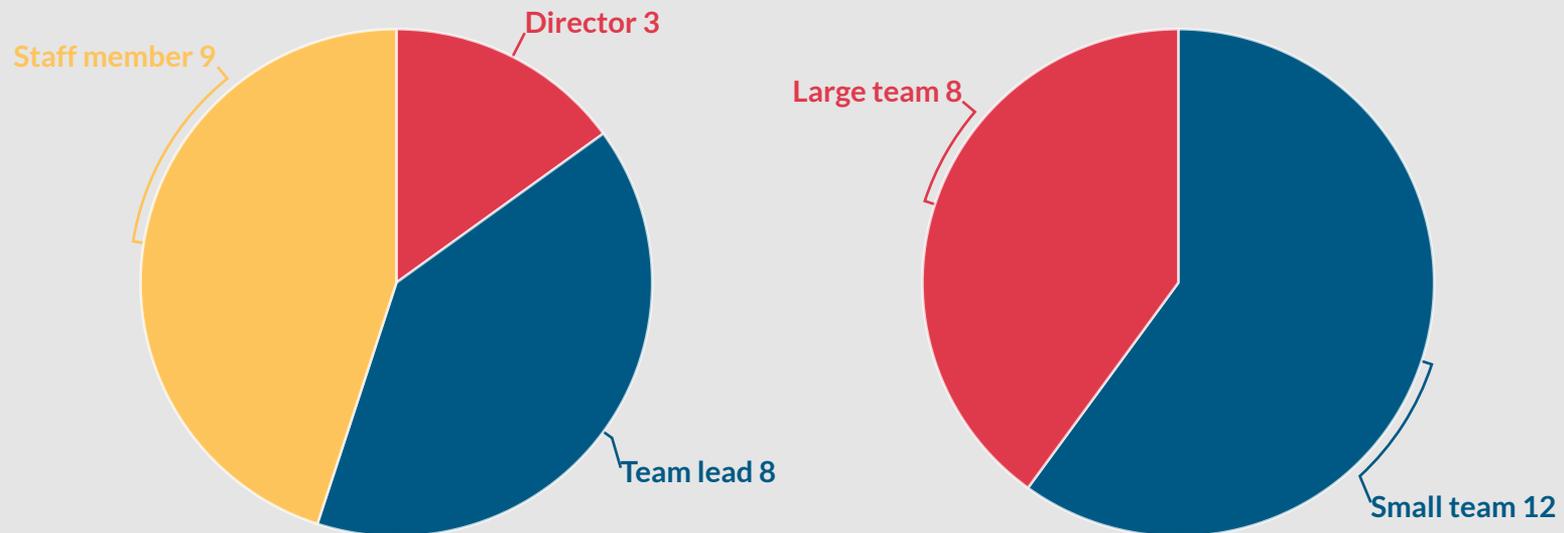


## II. PERCEPTION ABOUT THE SECTOR AT THIS TIME

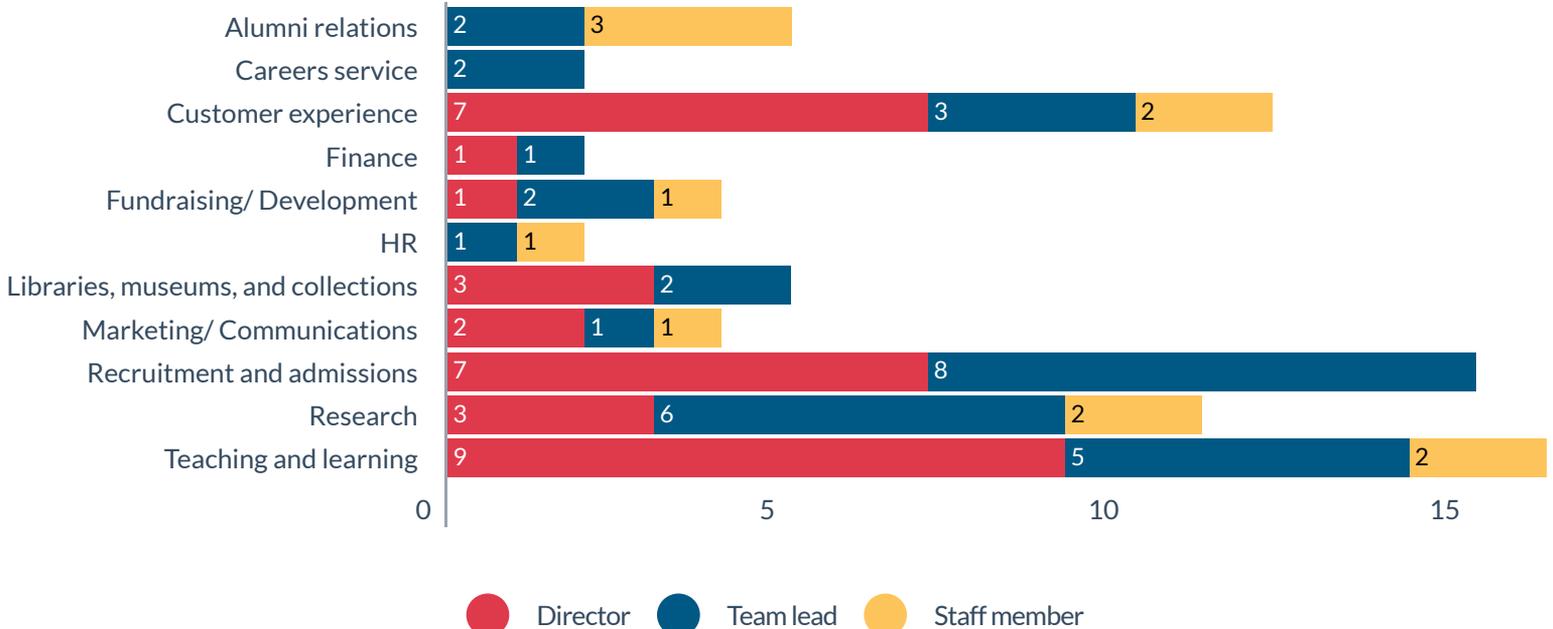
### 7) Existence of an institution-wide digital transformation strategy



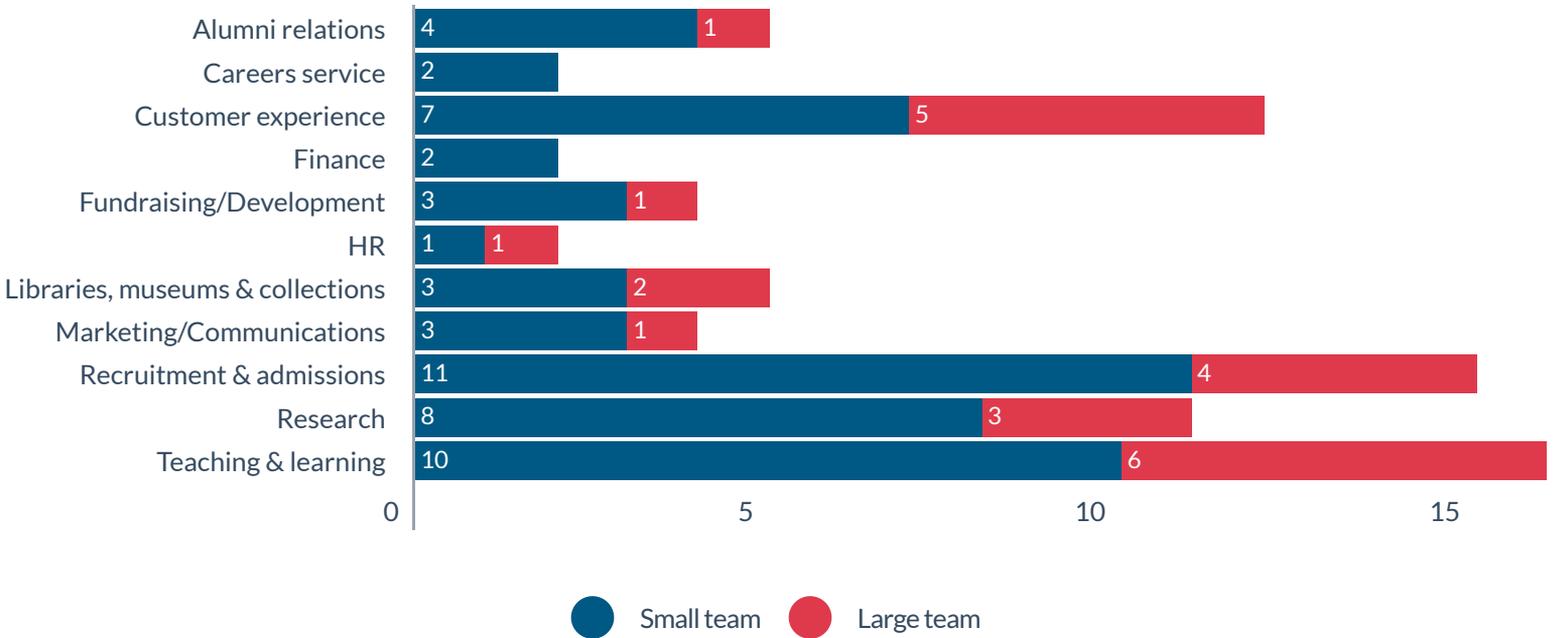
### 8) Respondents unaware about institution-wide digital transformation strategy vs seniority level and team size



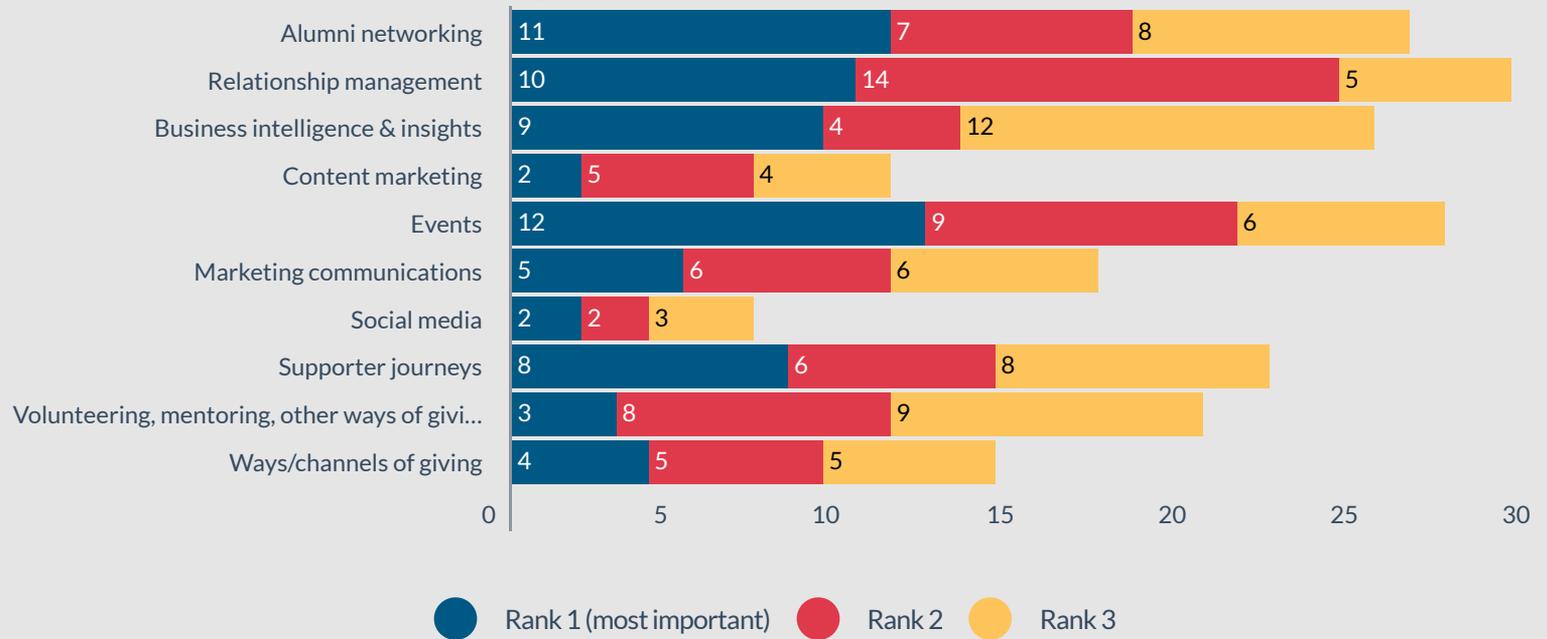
### 9) Key areas for institutional digital transformation strategy vs seniority level



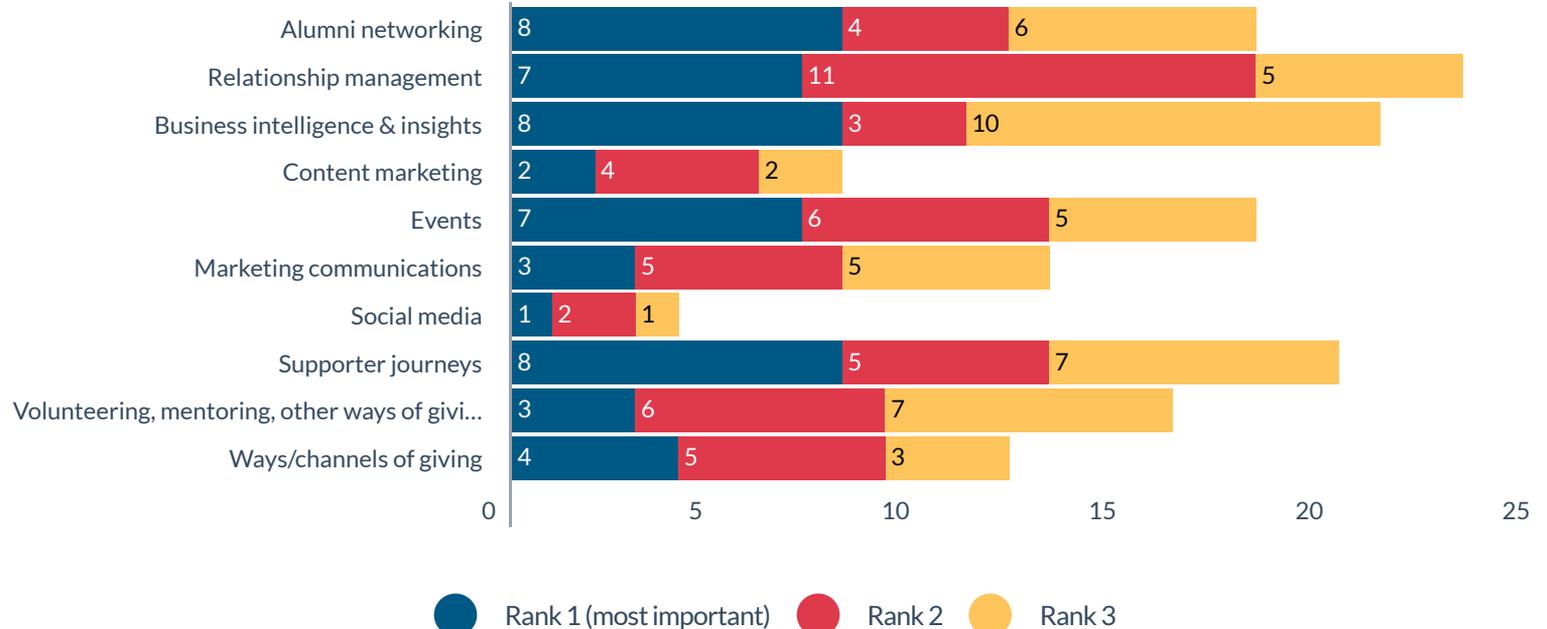
### 10) Key areas for institutional digital transformation strategy vs team size



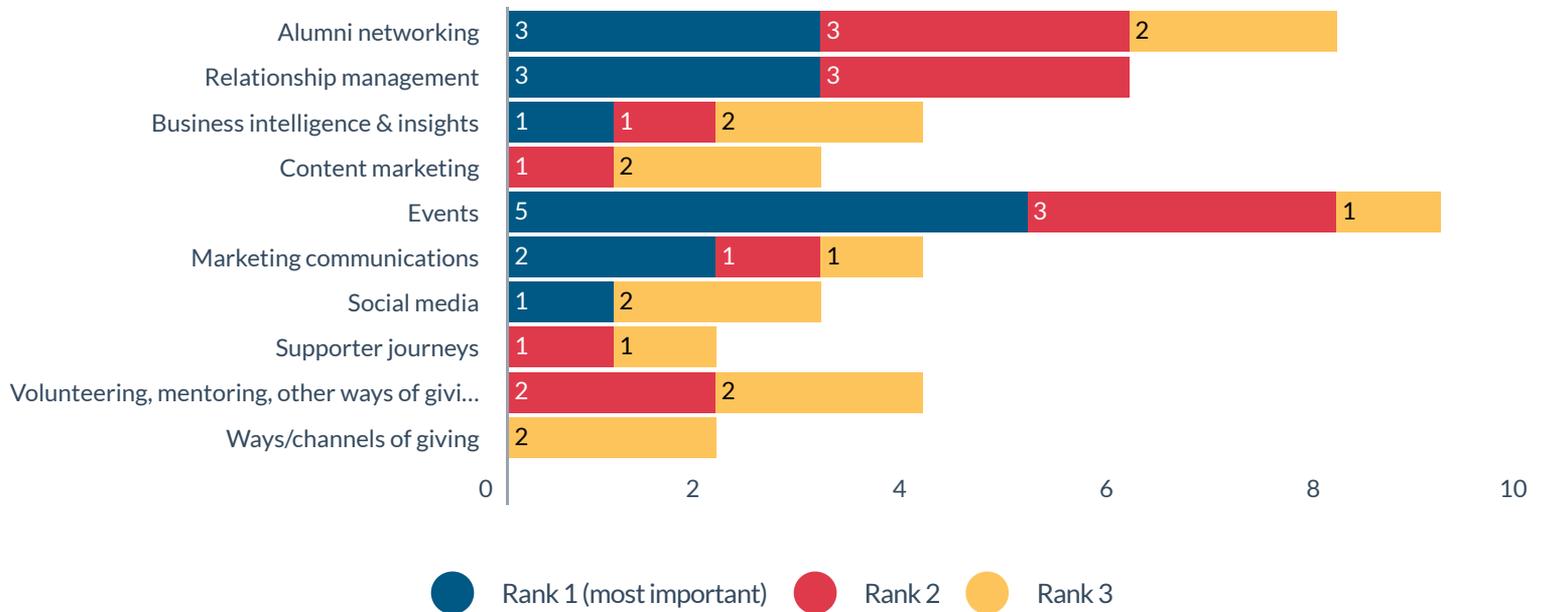
### 11) Top 3 areas of digital capability that benefit digital transformation for DAR



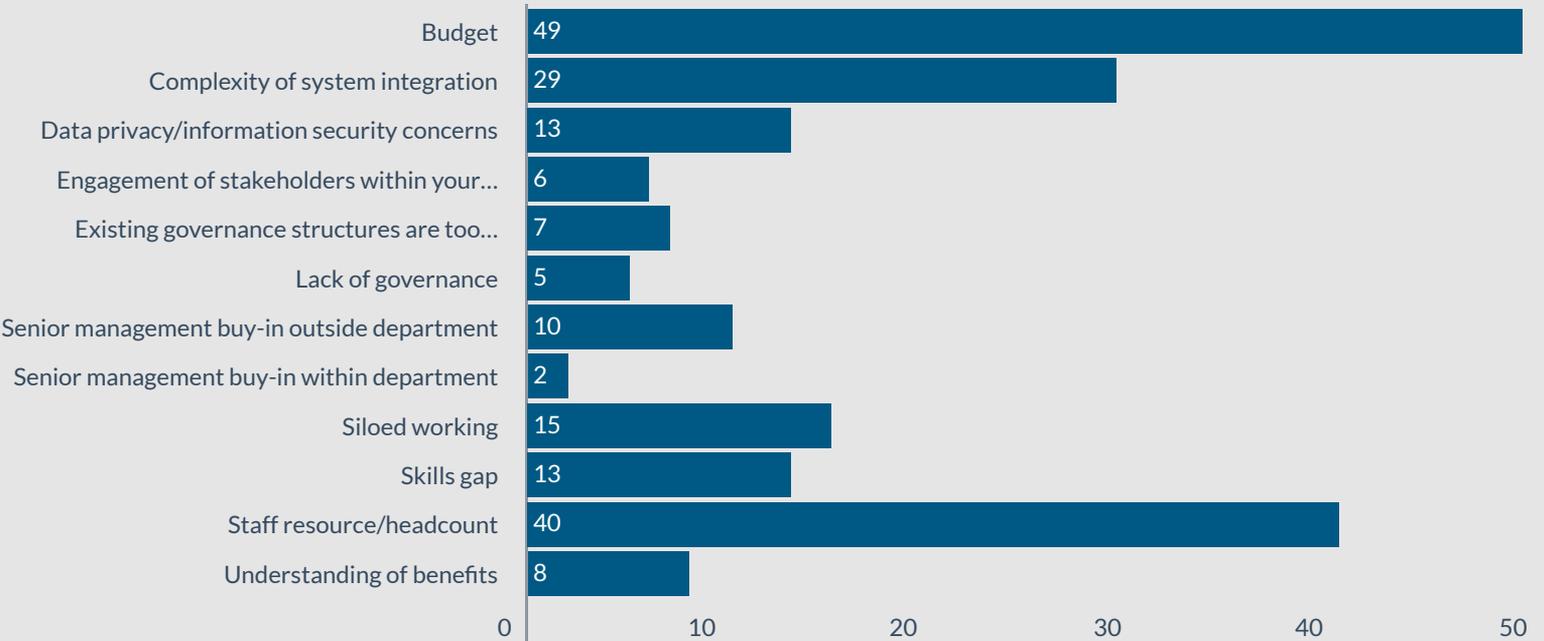
### 12) Top 3 areas of digital capability that benefit digital transformation for DAR in UK



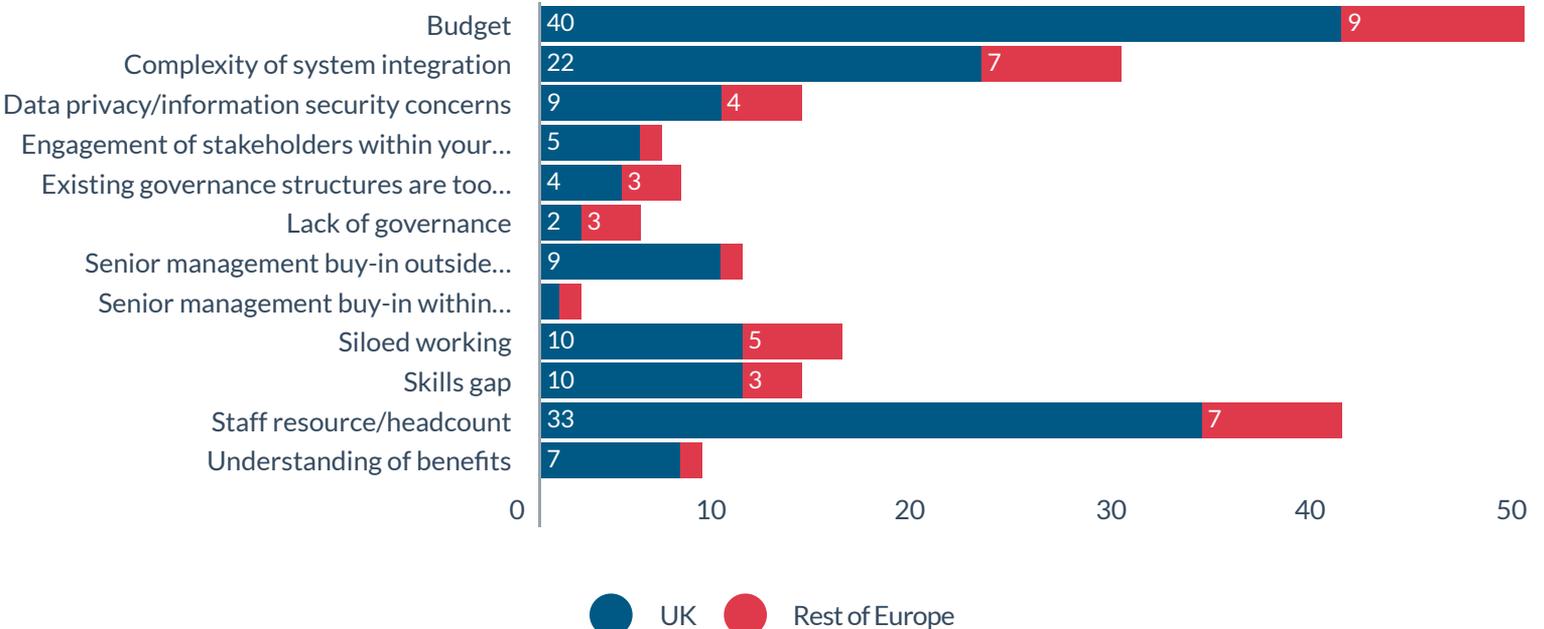
### 13) Top 3 areas of digital capability that benefit digital transformation for DAR in Europe



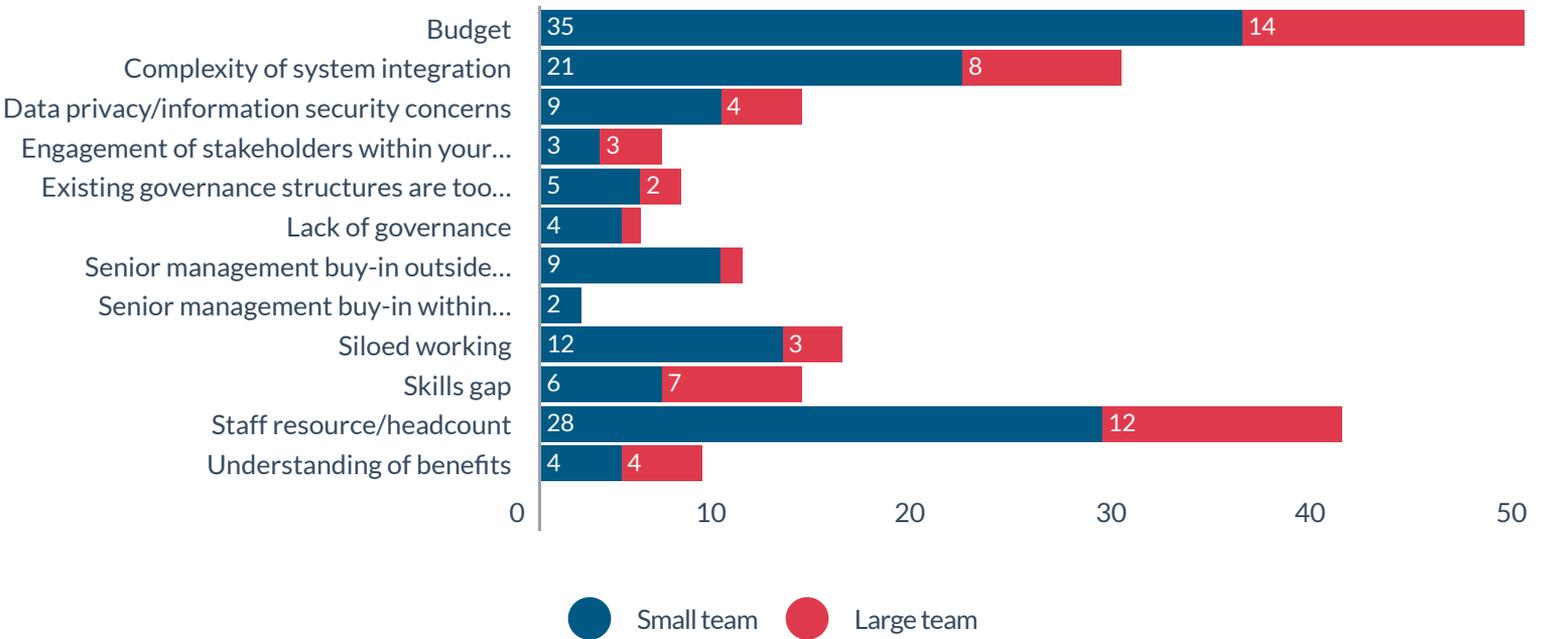
### 14) Greatest hurdles facing your team in securing support for digital transformation



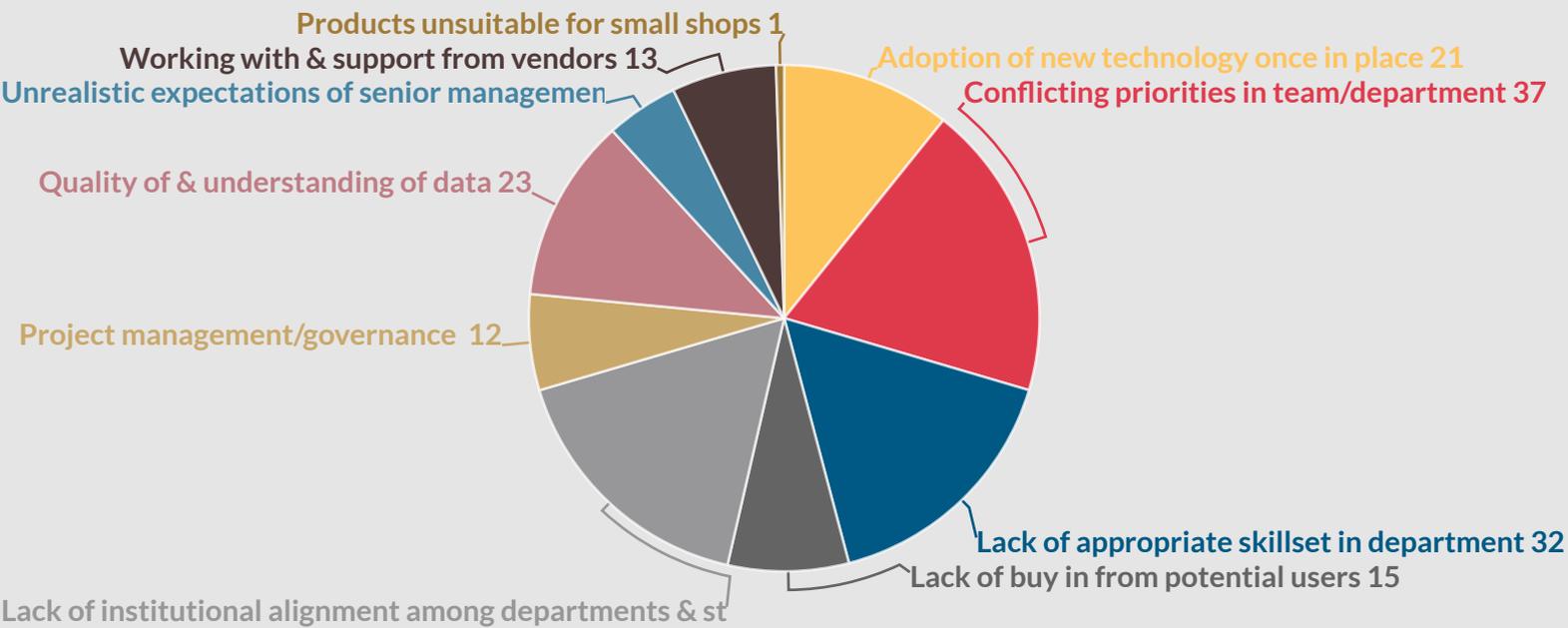
### 15) Greatest hurdles facing your team in securing support for digital transformation vs region



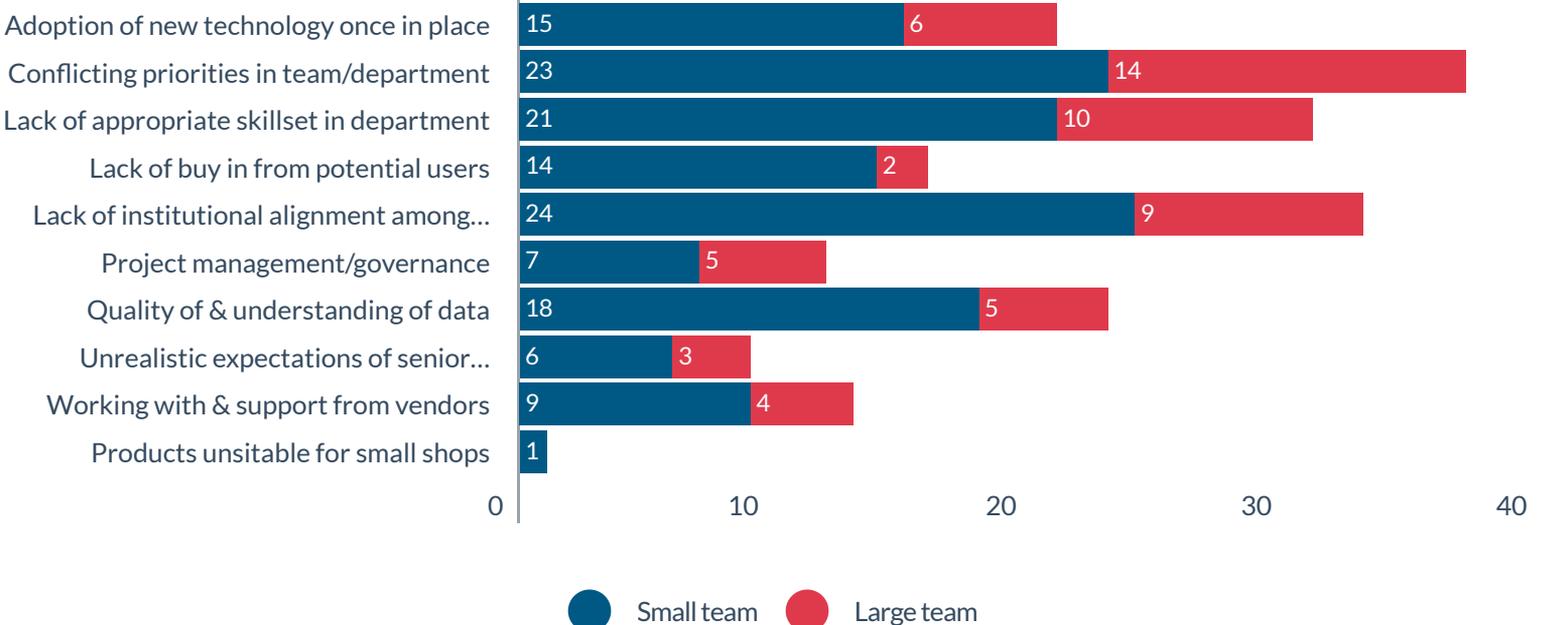
### 16) Greatest hurdles facing your team in securing support for digital transformation vs team size



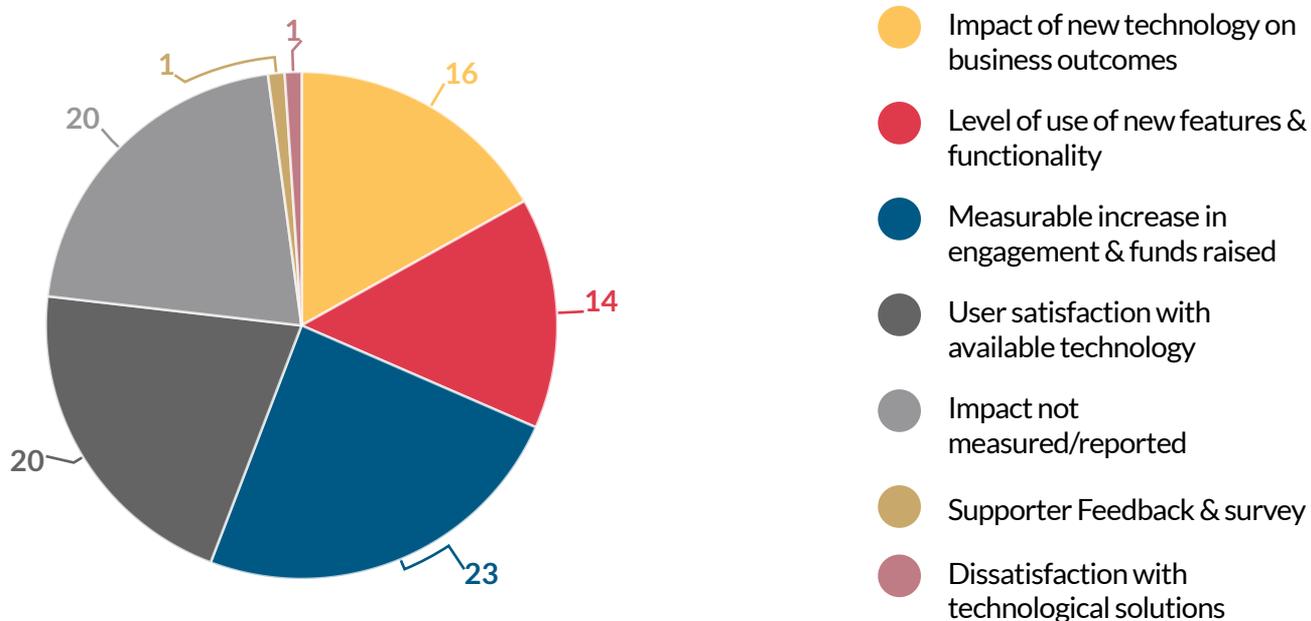
### 17) Biggest challenges faced when implementing digital technology



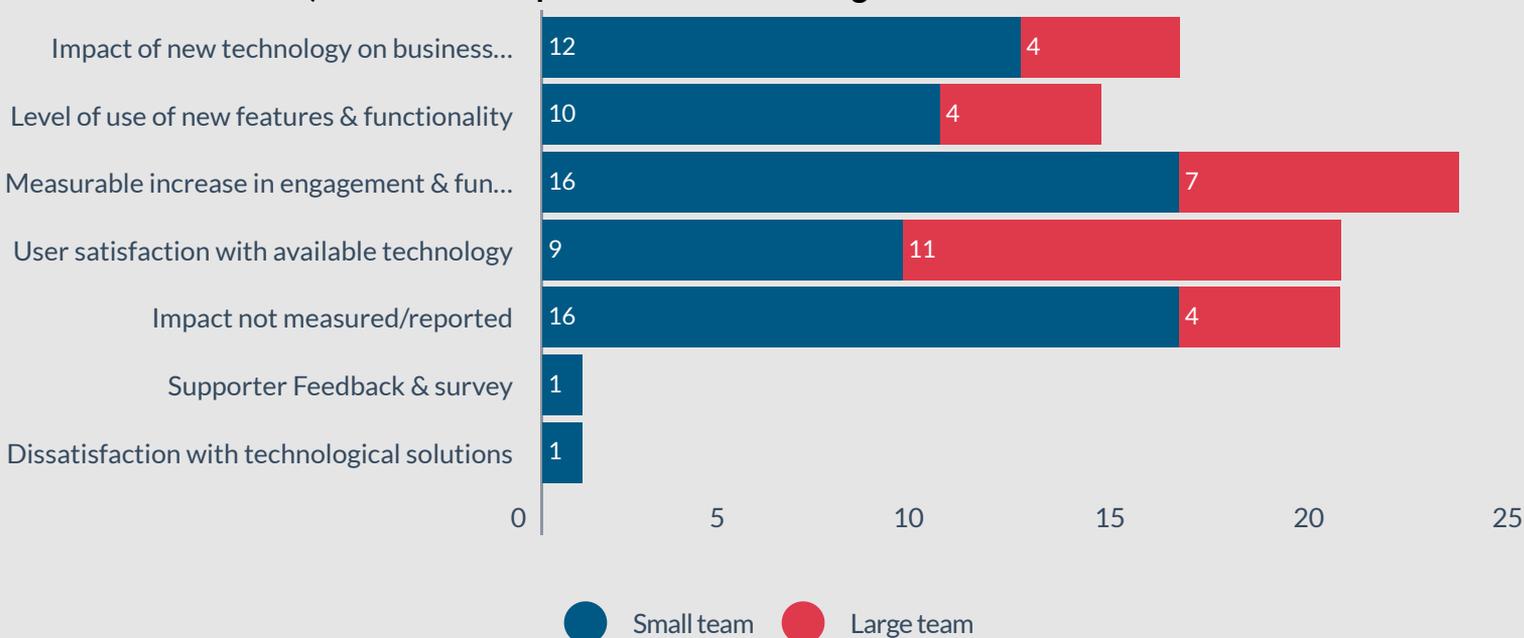
### 18) Biggest challenges faced when implementing digital technology vs team size



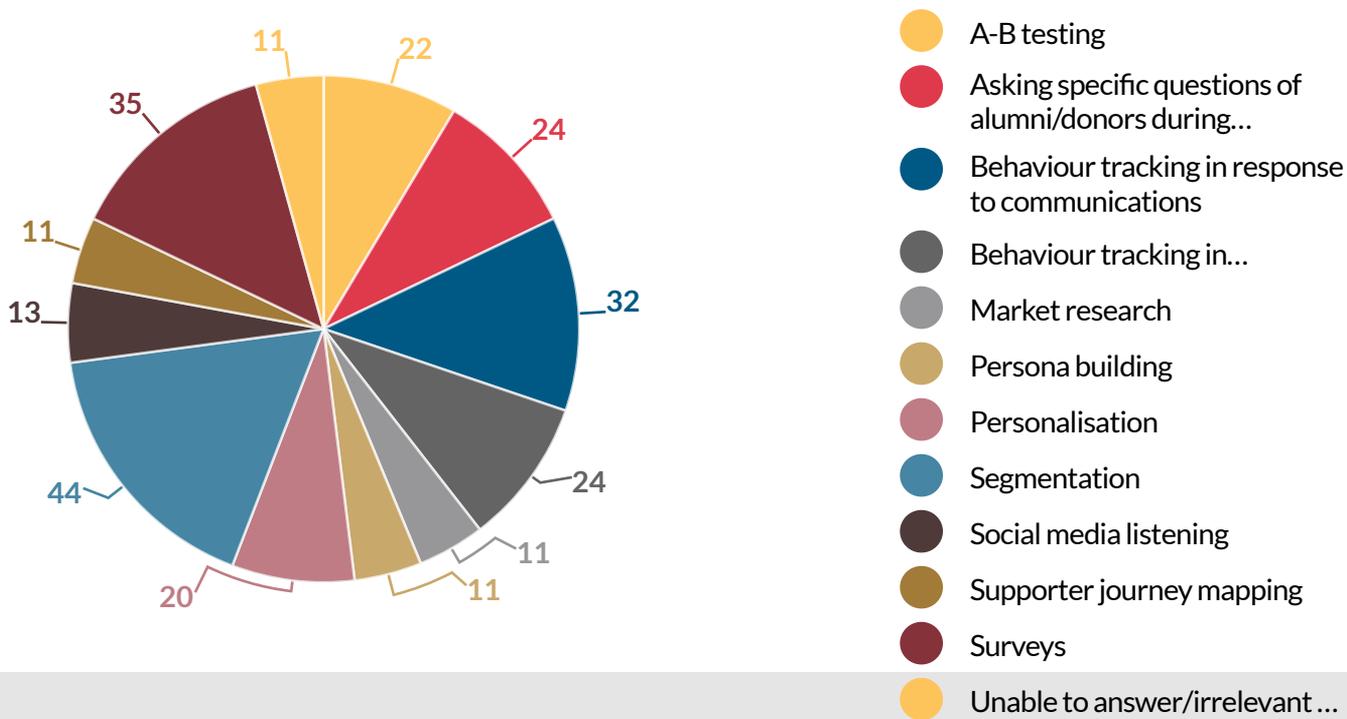
### 19) Measure the impact of investment in digital transformation



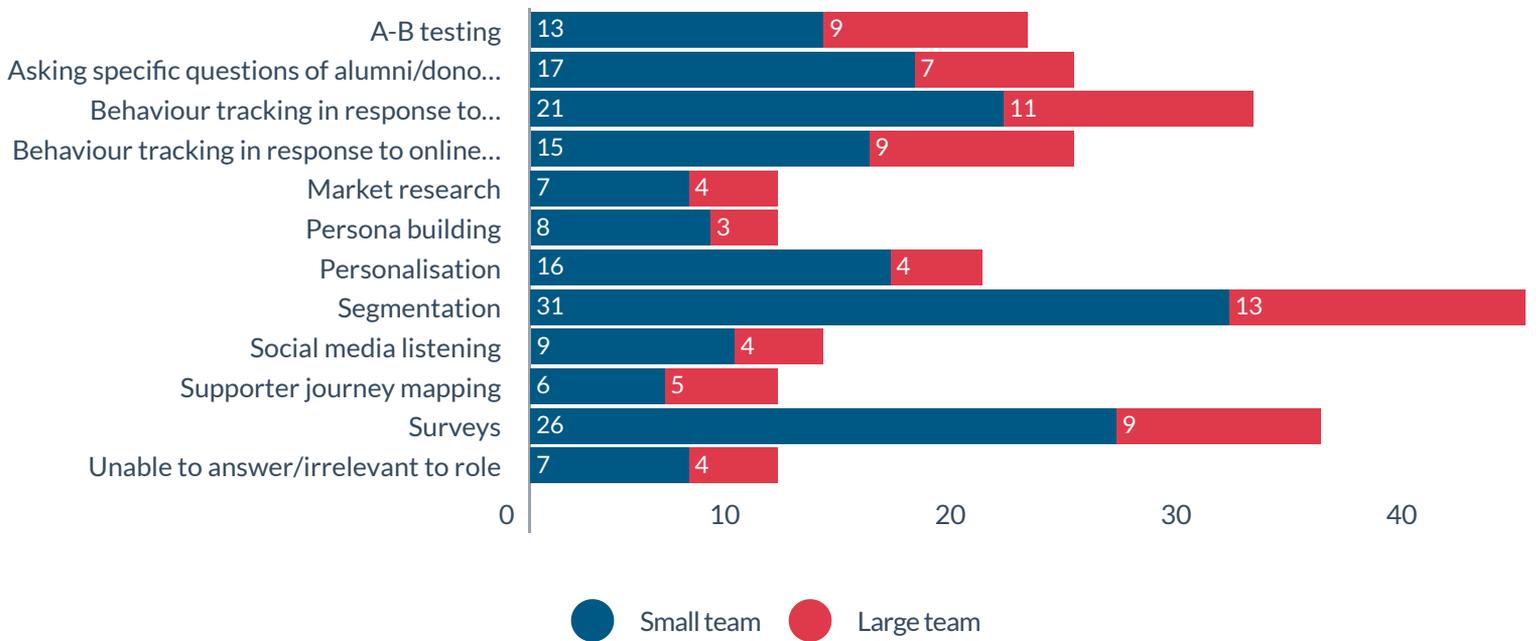
### 20) Measure the impact of investment in digital transformation vs team size



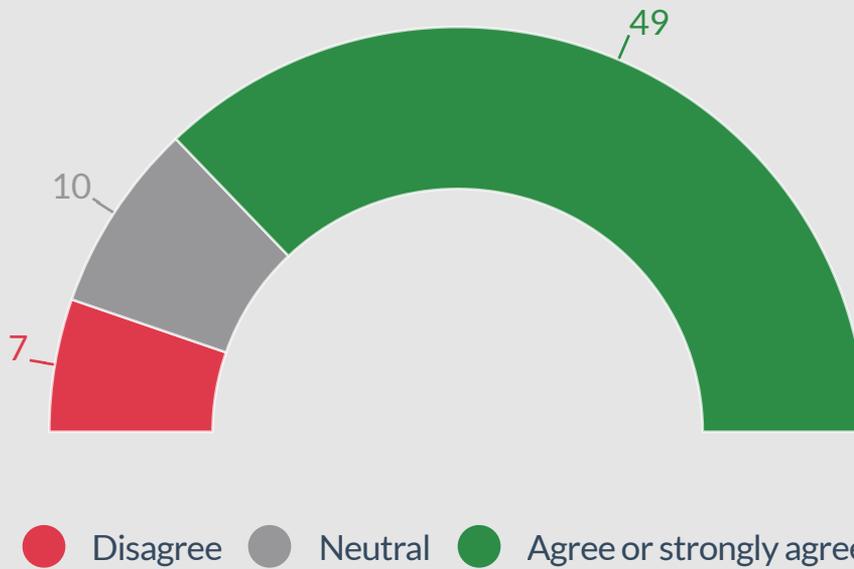
### 21) Tactics used to target audience & measure impact of marketing/communications activities



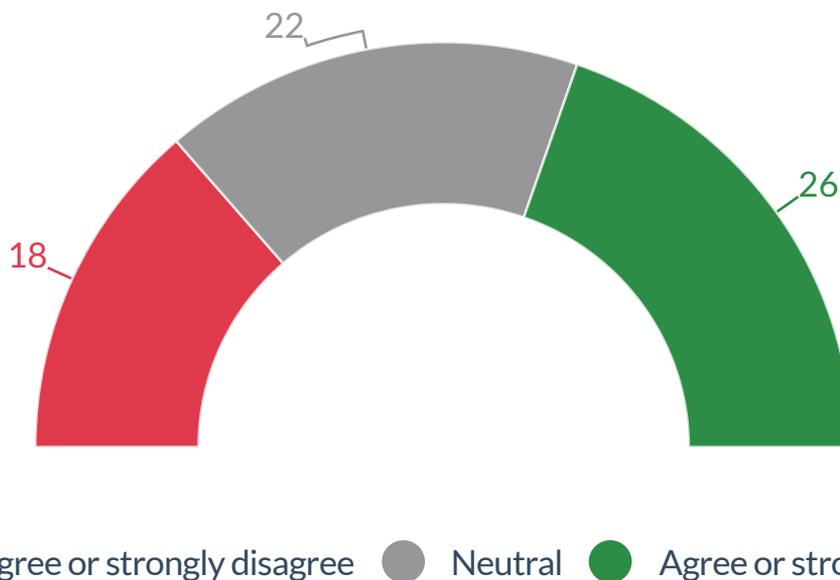
22) Tactics used to target audience & measure impact of marketing/communications activities vs team size



23) During the pandemic, the priorities of DAR around digital transformation have changed, with digital moving to a higher priority, i.e. seeing more investment

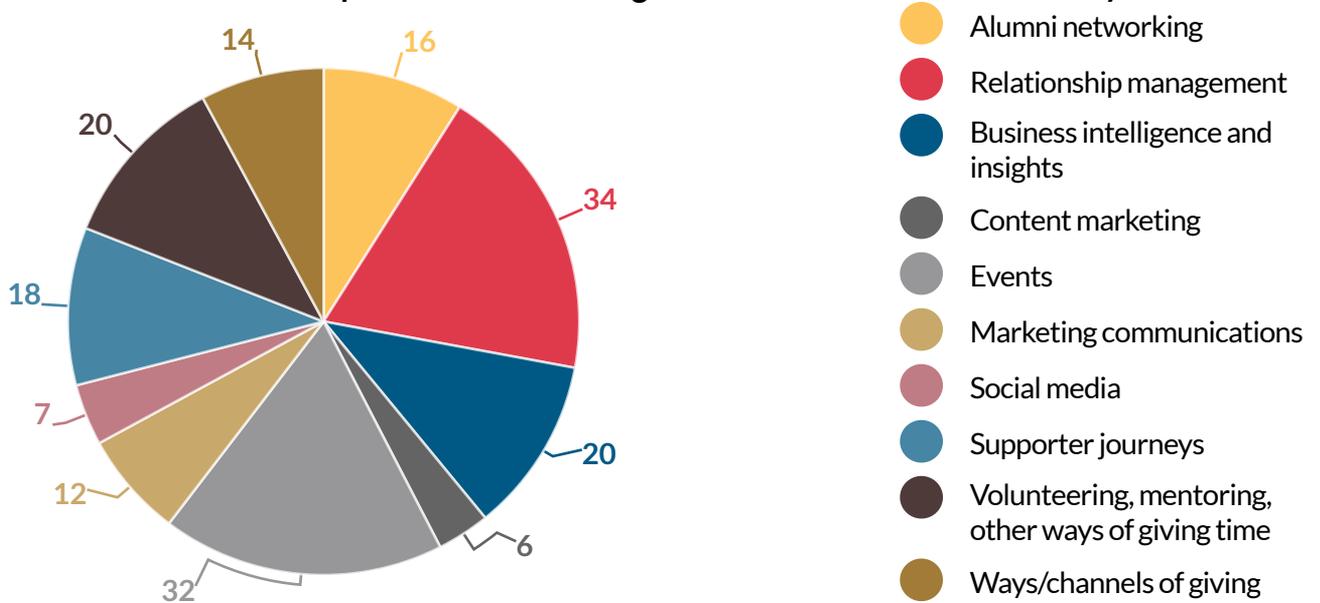


24) Our DS/Operations team is well-positioned in terms of digital skill set & confidence with digital technology, to take advantage of an increase in investment should funding become available

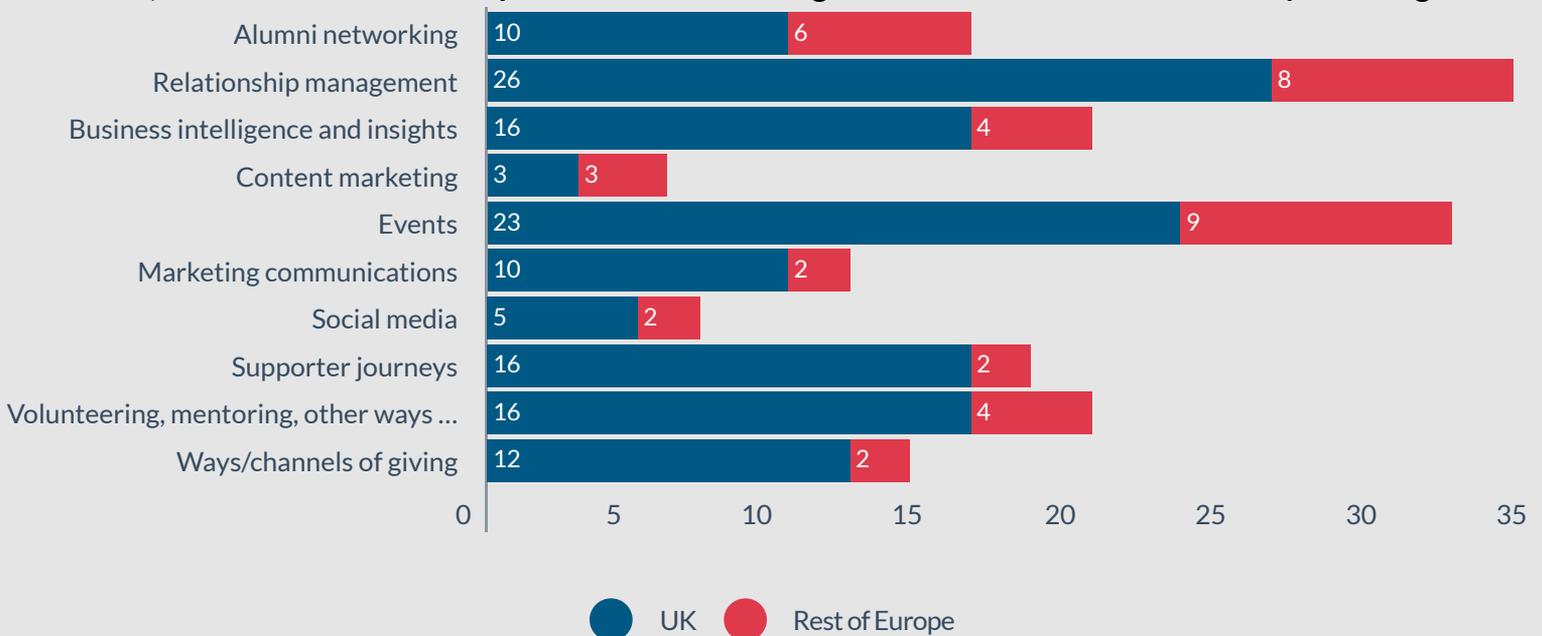


### III. THE WAY AHEAD

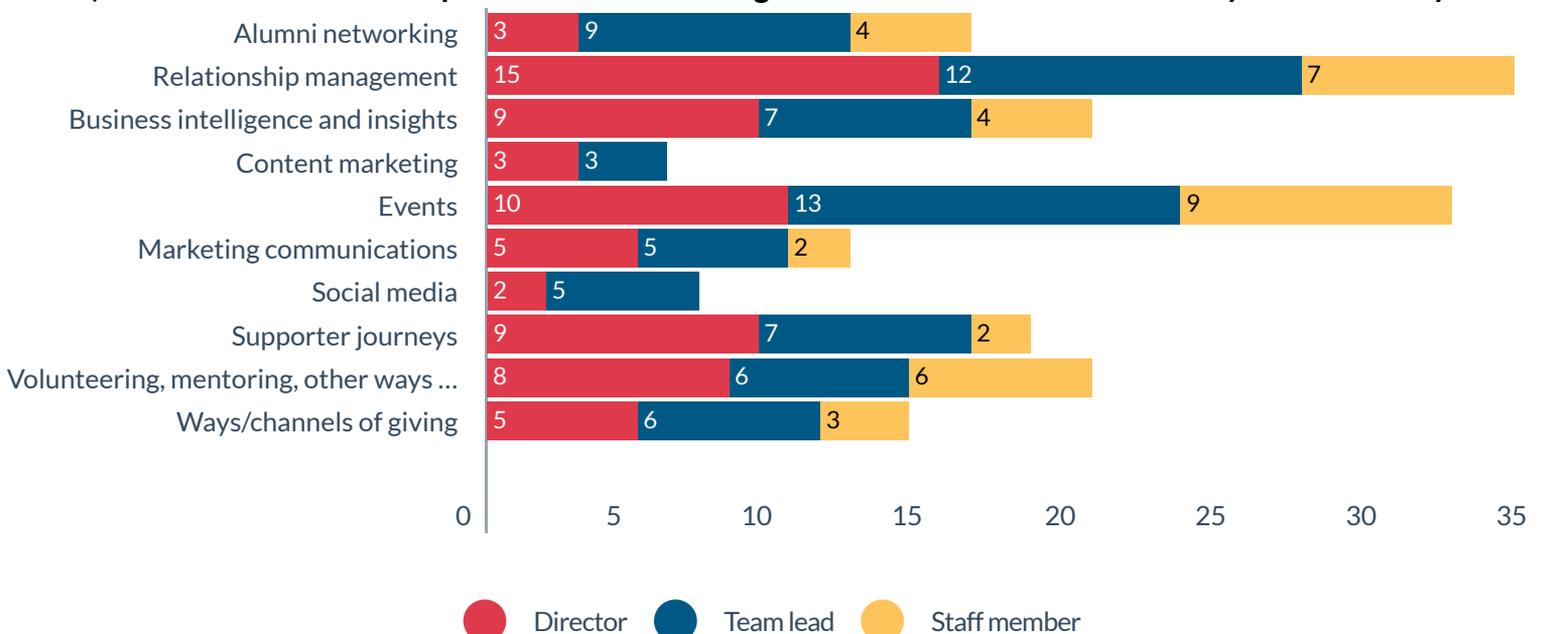
25) Areas where the DAR department will make significant investment over the next year



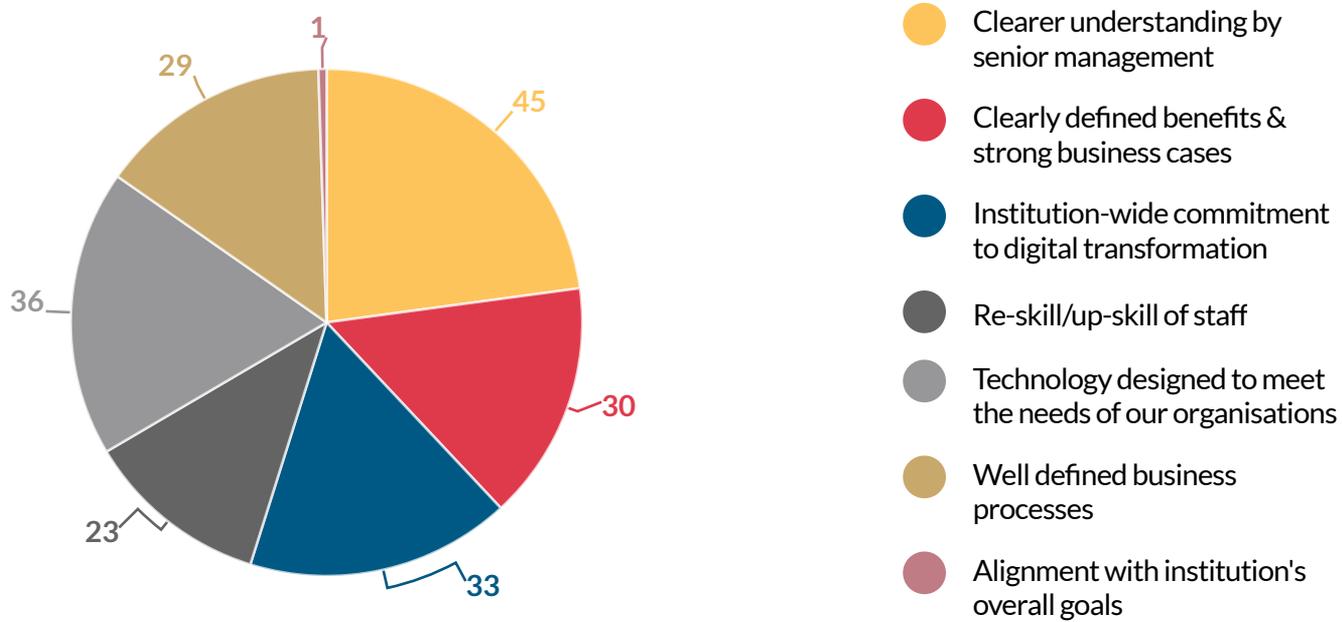
26) Areas where the DAR department will make a significant investment over the next year vs region



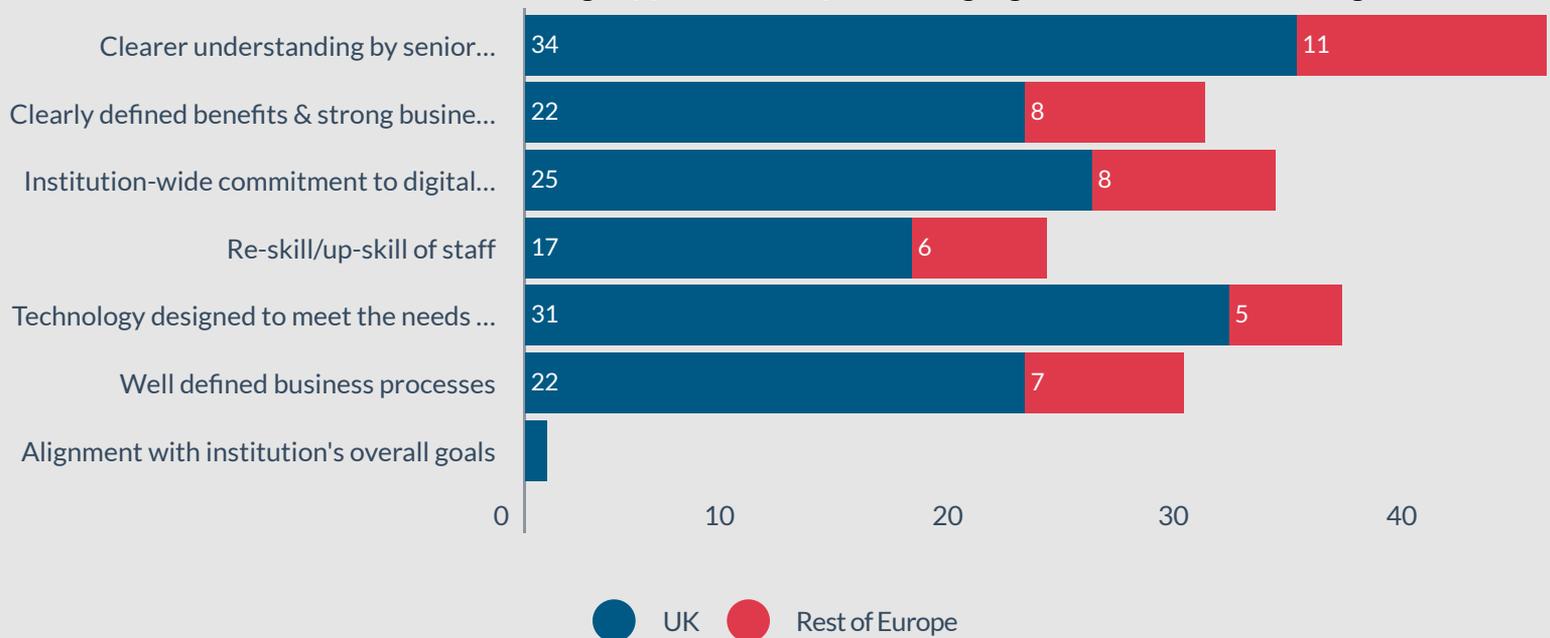
27) Areas where the DAR department will make a significant investment over the next year vs seniority level



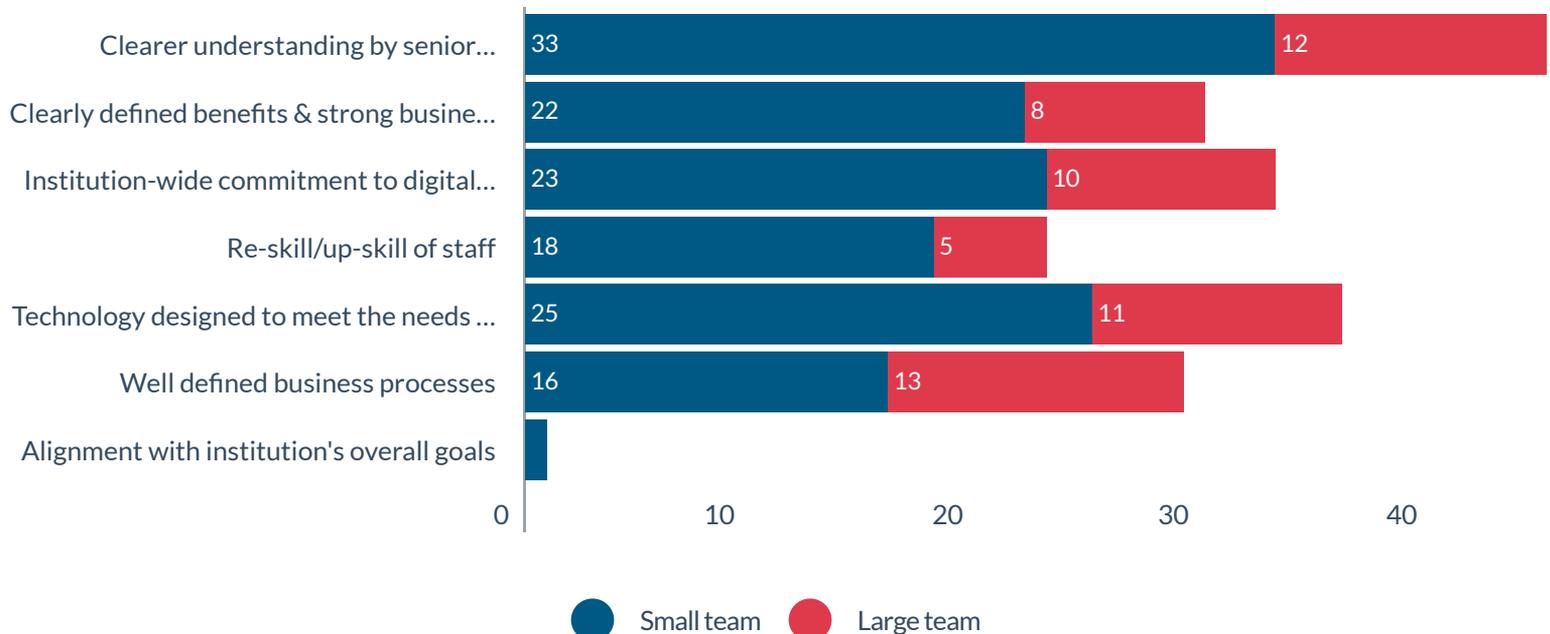
## 28) Realistic drivers to remove barriers/challenges in securing support for & implementing digital transformation



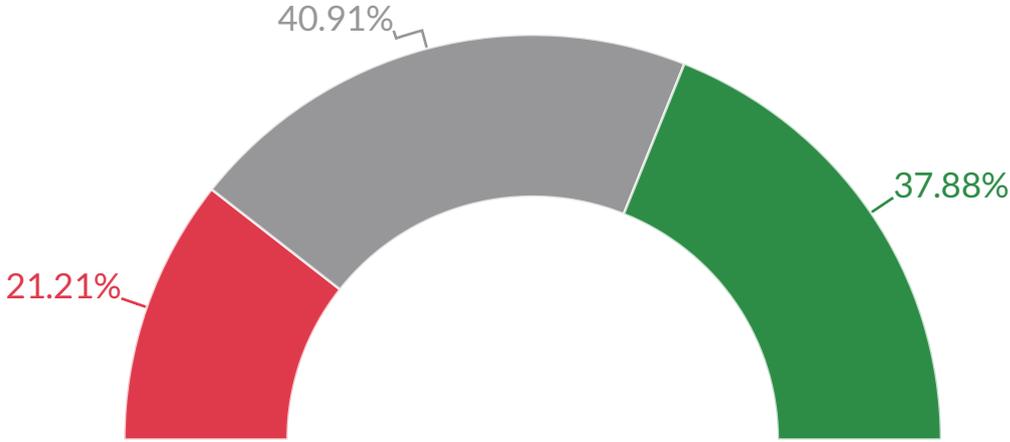
## 29) Realistic drivers to securing support for & implementing digital transformation vs region



## 30) Realistic drivers to securing support for & implementing digital transformation vs team size



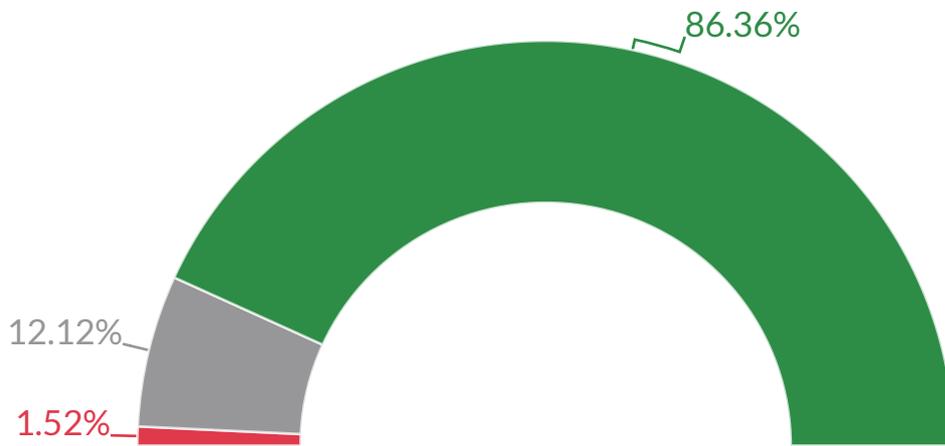
31) I believe my organisation is meeting the expectations of our Alumni, Donors & Supporters in terms of our digital offering



● Disagree or strongly disagree    ● Neutral    ● Agree or strongly agree

## IV. VIEWS ON IMPACT OF COVID

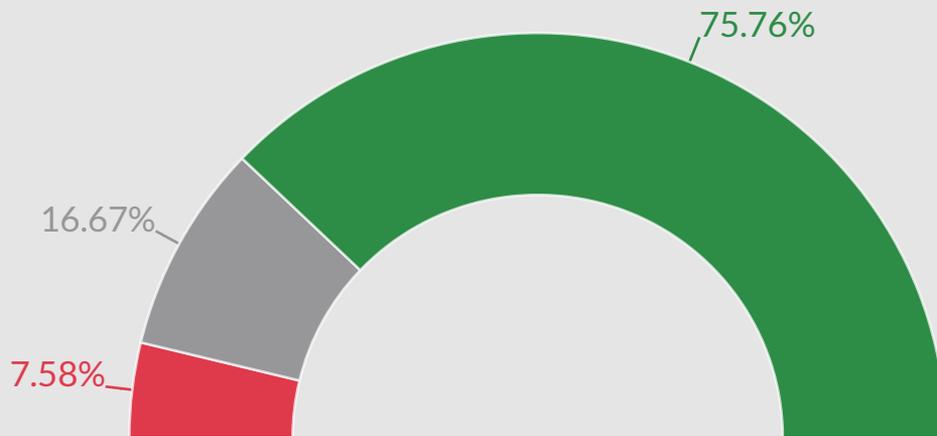
32) Senior management will continue to recognise the value of digital technology.



● Disagree ● Neutral ● Agree or strongly agree

0% strongly disagree

33) Senior management will continue to see the potential of digital technology for reaching all donors, not just younger donors or those making smaller gifts.



● Disagree ● Neutral ● Agree or strongly agree

0% strongly disagree

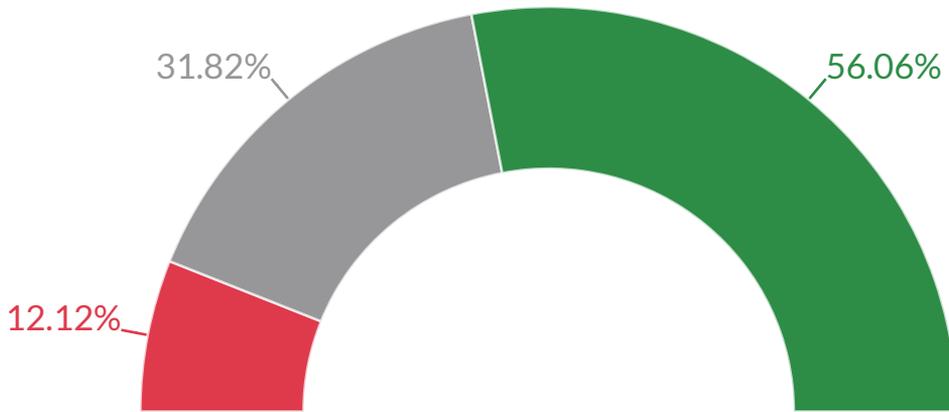
34) Senior management will continue to see the potential of digital technology for more than just collecting money.



● Disagree ● Neutral ● Agree or strongly agree

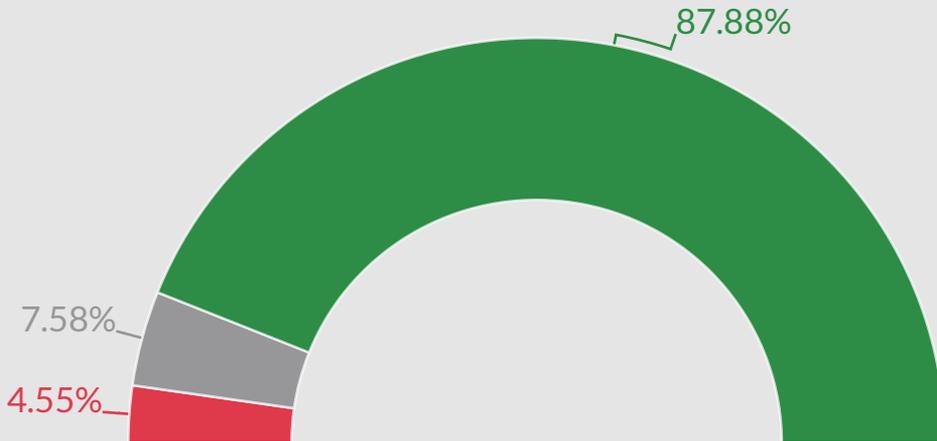
0% strongly disagree

35) We will see more major gift solicitations performed virtually – people are more comfortable with video calls now & donors want to continue to save travel time & to continue with the convenience of virtual meetings.



● Disagree or strongly disagree ● Neutral ● Agree or strongly agree

36) Virtual events will continue & become a part of our regular offering to donors & alumni.



● Disagree ● Neutral ● Agree or strongly agree

0% strongly disagree

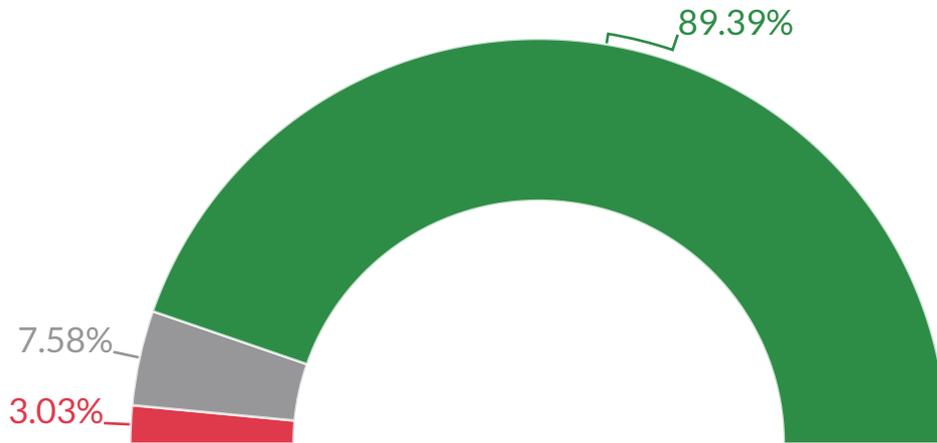
37) There will be an increased focus on stewarding supporters - more than ever it is key that we understand what they care about, which communication channels they prefer, how they want to be involved in our work.



● Disagree ● Neutral ● Agree or strongly agree

0% strongly disagree

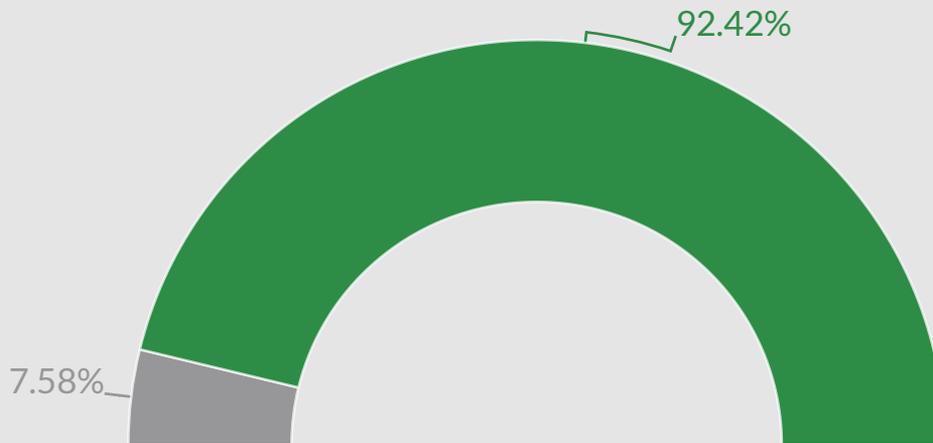
38) DAR teams will need to increase their digital risk appetite & become more agile.



● Disagree ● Neutral ● Agree or strongly agree

0% strongly disagree

39) DAR teams will need to upskill in order to be able test & adopt new technologies.



● Neutral ● Agree or strongly agree

0% strongly disagree and 0% disagree

**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 nearly 3,400 colleges, universities, and independent elementary and secondary schools in more than 82 countries. This makes CASE one of the largest nonprofit education associations in the world in terms of institutional membership. CASE serves more than 94,000 advancement professionals on the staffs of member institutions.

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 in performing more effectively and serving their institutions.

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