

Giving to Excellence

Philanthropic Support for Higher Education

Findings from data collected for 2015–16, 2016–17 and 2017–18 for
100 institutions in the United Kingdom and Ireland



ROSS-CASE REPORT 2019



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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 2017–18 committee consisted of:

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- TJ Rawlinson, Director of Development and Alumni Relations, Cardiff University
- Fran Shepherd, Director of Development and Alumni, University of Glasgow
- Tom Smith, Prospect Research and Database Officer, Loughborough University
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First and foremost we would like to thank the institutional staff who gave their time to provide information about the philanthropic income of their institutions and to staff at institutions who submitted case studies to support the publication of this report. 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. In addition we are grateful to the Ross-CASE Editorial Board for their guidance and support and offer sincere thanks to Blackbaud for supporting the interactive infographic.

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ABOUT CASE

CASE believes in advancing education to transform lives and society. As a global nonprofit membership association of educational institutions, CASE helps develop the communities of professional practice that build institutional resilience and success in challenging times. The communities include staff engaged in alumni relations, fundraising, marketing, student recruitment, stakeholder engagement, crisis communications and government relations. CASE is volunteer-led and uses the intellectual capital of senior practitioners to build capacity and capability across the world.

CASE has offices in Washington, D.C., London, Singapore and Mexico City. Member institutions include more than 3,700 colleges and universities, primary and secondary independent and international schools, and nonprofit organizations in 82 countries. CASE serves nearly 91,000 practitioners. For more information about CASE, please visit www.case.org.



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CHAIR'S MESSAGE

As Chair of CASE Europe, I would like to thank institutions for investing their time in completion of the survey. It remains the most authoritative source of information on philanthropy in our sector – an activity which continues to develop in the UK and Ireland where institutions still have very varying experiences.

I hope that whether your institution has a development operation or whether you are taking early steps into this activity, you will find the information in these pages helpful in monitoring and comparing investment in and results from philanthropy.

This is now the third year in which philanthropic funds secured have been around or exceeded the £1bn threshold. This is a significant development, indicating that income from philanthropic sources to the sector may be stabilising about this level as a platform for further growth. While the lion's share of this investment of donors is still directed to Oxford and Cambridge, looking over time, the number of institutions other than Oxbridge now raising in excess of £5m has more than doubled over the last ten years.

This, I think, gives hope to Vice-Chancellors that investing in Development & Alumni Offices will pay dividends, but we have to be prepared to commit for the long haul. If we do so, so will our donors. The income stream provided by philanthropy is welcome of course and is one of the few open to institutions with significant growth potential. But my experience is that the conversations with potential donors – whether they take place in meetings, at lectures, over the telephone or in print – also provide significant benefits in reputational positioning and in the understanding of the value of universities to civic society.

At a time when headlines talk of declining trust in institutions, and when we grapple daily with economic uncertainty, our donors' belief – demonstrated by their investment – that our sector can significantly change our world for the better, is a resounding and most encouraging vote of confidence in our founding missions.

Committing time to the development of these relationships alongside the ever-broadening range of responsibilities in a Vice-Chancellor's portfolio can be challenging but is also rewarding. I wish you luck with your endeavours in this area in the year ahead.

Professor Sir Anton Muscatelli

Vice-Chancellor, University of Glasgow &
Chair of the CASE Europe Board of Trustees

PRESIDENT'S NOTE

Advancement metrics. They offer important context for our institutional leadership and for those engaged in professional advancement activities. They can give us a longitudinal view to orient us toward trends and patterns. They help us contextualise our efforts with respect to our peers; they provide insights into where we may be able to improve and where we may want to pivot for the future.

As an advancement professional in the United Kingdom, I frequently turned to the Ross-CASE Report on generating philanthropic support for higher education to see how philanthropy was growing in the UK, and in what ways. Not only did it help me in my work, it reaffirmed the collective importance of philanthropy in a changing environment for higher education. When I moved to Australia, I was privileged to participate in the creation of the CASE Charitable Giving to Universities in Australia and New Zealand survey, which is based on the Ross-CASE Report, bringing the best insights from philanthropy in education to the effort.

This 2019 report is the first Ross-CASE published as part of CASE's AMAtlas initiative, which launched last summer with the guiding aspiration for CASE to become the global resource for educational advancement metrics, benchmarks, and analytics. Led by an international advisory commission, co-chaired by Lori Houlihan of University College London, and Charlie Phleger of Virginia Polytechnic University, with a team of ten other advancement leaders from Australia, Canada, the UK, and the US, AMAtlas aims to provide insights for advancement professionals across all disciplines. Its explicit intention is to serve institutions by their broad membership type, and also to provide additional resources, support and data to help advancement leaders make the best possible management decisions based on relevant data and comparative metrics. Sometimes these metrics come from the UK; sometimes, data points from institutions outside our regions can provide insights that are invaluable.

The Ross-CASE Report is a fundamental asset within AMAtlas, both on its own and within the broader collection of data as we learn what works across geographies. We have a desire to provide more forward-looking analytics to help achieve whatever goals an institution might set for its advancement enterprise. CASE is well positioned to do just that, and Ross-CASE is an important piece of this effort.

I congratulate the Ross-CASE Editorial Board for its leadership and the CASE research staff for its diligent work. I thank all of the institutions who took part, without whom we would not have such a rich resource, which serves not only those who participated, but the greater CASE membership.

With much gratitude,

Sue Cunningham

President

CASE

FOREWORD

The Ross-CASE Survey continues to document the importance of philanthropy to higher education in the UK and Ireland. Over that time, the growth in fundraising for institutions has been phenomenal: new funds secured has grown from a reported £350m secured by 75 institutions in 2004–05, to around £1bn secured by more than 100 institutions each year for the past three years. The long term trend of linear growth is clear, though as with all growth spread across a diverse sector, there are high and not-so-high performers in given years.

In 2017–18 we celebrate one Elite institution crossing the £300m threshold for new funds secured in a single year. Yet we also sound a brief note of caution that the number of institutions raising more than £10m fell slightly, for the first time in the past five years. And, we note that some institutions at the more Fragile (startup) end of the spectrum remain at very low investment levels in fundraising, and (perhaps unsurprisingly, therefore) raise very little money. There clearly remains, for a significant part of the higher education sector, a real question over whether – and if so how – those institutions will ever seek to fulfil their charitable objectives through active fundraising. CASE and members of the Ross-CASE Editorial Board are on hand to offer advice and support on how to frame the case for fundraising investment. We hope that the data produced by the survey will prove useful in this regard, as it has in past years for institutions whose fundraising programmes are now well established.

A key observation made by all members of the Ross-CASE Editorial Board is that the total philanthropic income secured by non-Elite institutions has remained roughly static for several years now. This prompts us to recall that growth takes time and often happens in spurts – indeed, stop-start growth was a hallmark of the Elite and Established institutions in our data set fifteen, ten and even five years ago.

Given the stresses and uncertainties which our institutions face (changes in data management practice, pressures on staffing levels and staff costs, growing competition for the attention of our alumni and friends from many channels and charities), we can expect fundraising to grow in a lumpy way. Anton Muscatelli (Vice-Chancellor, University of Glasgow) has noted that “we have to be prepared to commit for the long haul”. Certainly, the sector’s willingness to sustain investment in development will be tested again and again. This report, coupled with those published over the past decade, shows that sustaining that willingness pays dividends over time. Philanthropy should be viewed as a vital element of the solution when planning for the long-term financial sustainability and growth of institutions.

We are particularly grateful to those institutions who shared case studies to complement this report for the CASE blog. Your stories help bring to life the hard work which underpins, and extraordinary impact unlocked by, fundraising success in the UK and Ireland. They also offer important roadmaps for other institutions hoping to replicate your successes. This is the best CASE can offer: sharing knowledge and best practice. Most of all, our Ross-CASE Editorial Board is grateful to the institutions which strive to complete the Ross-CASE Survey each year. In the coming year we plan to review our questions and approach in partnership with the sector, ensuring that the questions we ask are the right ones for higher education in the UK and Ireland today as we move onwards, and upwards.

Yours sincerely,

Ross-CASE Editorial Board

EXECUTIVE SUMMARY

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

- 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.
- 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 past years' fundraising activity.

Findings

Overall fundraising results are up – most markedly in new funds secured which has grown 11% since 2016–17. Cash income received is also on the rise, but the rate of change is slightly lower at a 6% increase since 2016–17. The value of largest pledges and largest cash gifts received by institutions increased by 27% and 9% respectively. Donor numbers have increased by 2% over the same time while the number of alumni donors has decreased by 2% since 2016–17. Investments in alumni relations increased over 2016–17 levels, expenditures on fundraising decreased.

NEW FUNDS SECURED GREW BY 11% IN 2017–18

The total amount of philanthropic income secured in new funds increased by 11% per cent since 2016–17 and crossed the £1 billion mark, totalling £1.08bn in 2017–18. Sixty per cent of this income came from organisations (including companies, and trusts and foundations) and 40% from individuals. The number of donors who gave new gifts/pledges of more than £500,000 was 187 (excluding Elite institutions) in 2017–18.

TOTAL CASH INCOME INCREASED BY 6%

Total cash income received increased by 6% since 2016–17 to £929.6m in 2017–18. Total cash income from legacies was £109.6m in 2017–18 from 1,152 legacy donors. Organisations (including companies, and trusts and foundations) contributed 61% towards cash income received while individuals contributed 39%.

THE NUMBER OF DONORS GREW BY 2%

The total number of donors was 244,116, with 88% being individuals and 12% organisations. With 10.7m contactable alumni, 1.3% of alumni donated (182,474 alumni donors). Total donors increased by 2% since 2016–17 and alumni donors decreased by 2% since 2016–17.

INVESTMENTS IN FUNDRAISING DECREASED BY 4%

In 2017–18 the total investment in alumni relations was £51.6m while total investment in fundraising was 2.2 times more at £112.8m. Total fundraising investments decreased by 4% and alumni relations costs increased by 10%. Staff costs accounted for 75% of total fundraising costs and 70% of alumni relations costs. All costs include the costs of operational and administrative staff.

FUNDS SECURED BY DEVELOPING INSTITUTIONS GREW BY 51%

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. There is a significant increase in fundraising levels by Emerging and Developing institutions, which have seen a 15% and 51% increase in new funds secured from 2016–17 to 2017–18, respectively.

KEY INDICATORS

This chapter presents an in-depth analysis of the key indicators for 2017–18 including cash income received, new funds secured, contactable alumni, donors and investment in fundraising and alumni relations activities.

The important figures to note 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 Ireland. Ninety-seven institutions participated in this year's survey out of 161 higher education and specialist institutions in the UK that are involved in some form of fundraising or alumni relations activity (i.e. a response rate of 60 per cent). Three institutions

from Ireland also took part in the survey and their data has been included in the analysis presented in this report. Data has not been reweighted to estimate figures for all 161 institutions and other non-participating institutions from Ireland and total figures account for only a portion of the higher education sector as a whole. Data presented corresponds to annual figures for 12 months from 1 August to 31 July the following year.

The means and medians differ significantly due to the presence of outliers in the sample. This reflects the varied nature of fundraising operations across the higher education sector and differences in the maturity of advancement operations.

Key indicators 2017–18

	Number of Reporting Institutions	Total	Mean	Median
Philanthropic income				
New funds secured	99	£1,082,803,835	£10,937,412	£2,040,401
Cash income received	100	£929,616,449	£9,296,164	£2,144,129
Alumni				
Total alumni	99	15,238,356	153,923	134,571
Contactable alumni	99	10,659,812	107,675	95,139
Alumni donors	98	182,474	1,843	589
Donors				
Total donors	100	244,116	2,441	834
Individual donors	100	238,554	2,386	785
Organisation donors	99	5,857	59	39
Costs				
Fundraising costs	96	£112,811,978	£1,175,125	£544,165
Alumni relations costs	96	£51,588,871	£531,844	£276,279
Alumni magazine cost	64	£6,171,669	£96,432	£67,197
Staff				
Fundraising staff (FTE)	95	1,564	16	9
Alumni relations staff (FTE)	99	761	8	4

Cluster Analysis

Institutions vary widely by their fundraising profile and there is a substantial degree of variation within Mission Groups. Since 2013, the Ross-CASE Survey has deployed Latent Class Analysis methodology to identify groups of similar institutions, and has consistently found clusters of reporting institutions with distinct patterns and similar characteristics.

INSTITUTIONAL CLUSTERS

1. Fragile (one institution)
2. Emerging (32 institutions)
3. Developing (27 institutions)
4. Moderate (26 institutions)
5. Established (12 institutions)
6. Elite (two institutions)

DEFINING VARIABLES

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

NOTE ON METHODOLOGY

Inspired by the Mission Groups, the 2011–12 survey explored the possibility of uncovering ‘communities’ of institutions 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 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.

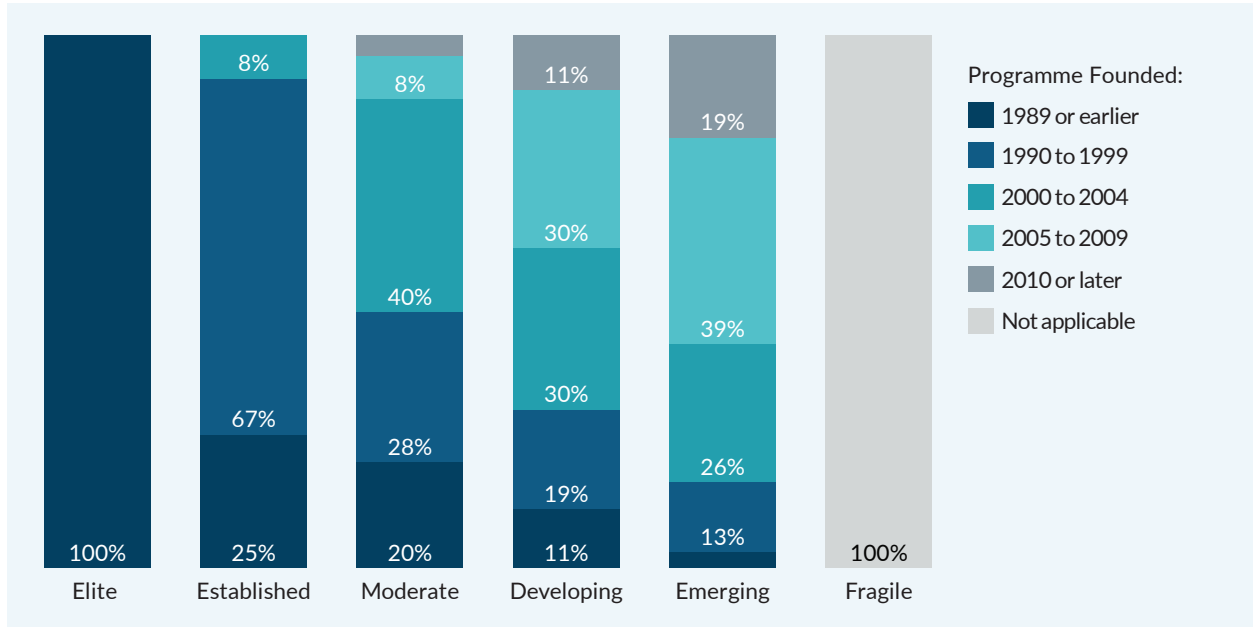
In past years, the resulting five-cluster solution offered both the best statistical fit with the data and made substantive sense. This solution did result in a very small class size for two clusters (one institution in the Fragile cluster and two institutions in the Elite cluster), although this was not surprising due to the nature of the study, the small total sample size or the maturity of the philanthropic giving in the UK and 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 2015–16 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 2017–18 dataset to derive six clusters.

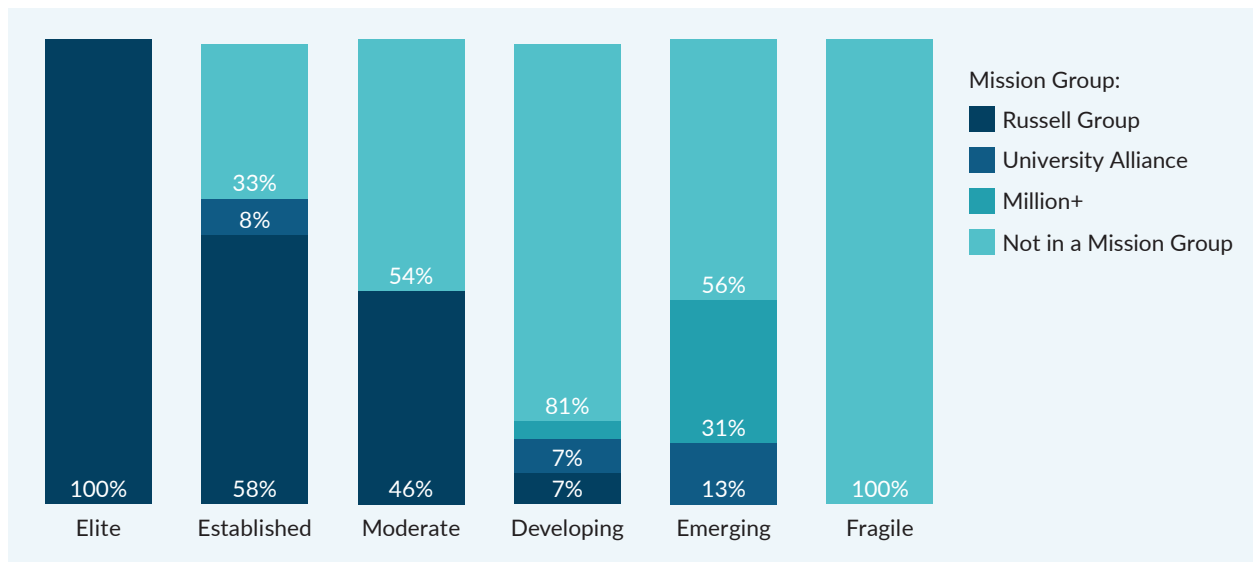
A clear progression of fundraising performance for all key indicators was evident across the six clusters with the Fragile institution being at a very nascent

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

Age of development and alumni relations programme by cluster
(% number of institutions)



Mission groups by cluster
(% number of institutions)



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 a number of years. It can assist in demonstrating the success of an advancement program.

The mean value for new funds secured in 2017–18 was £10.9m. The mean value for new

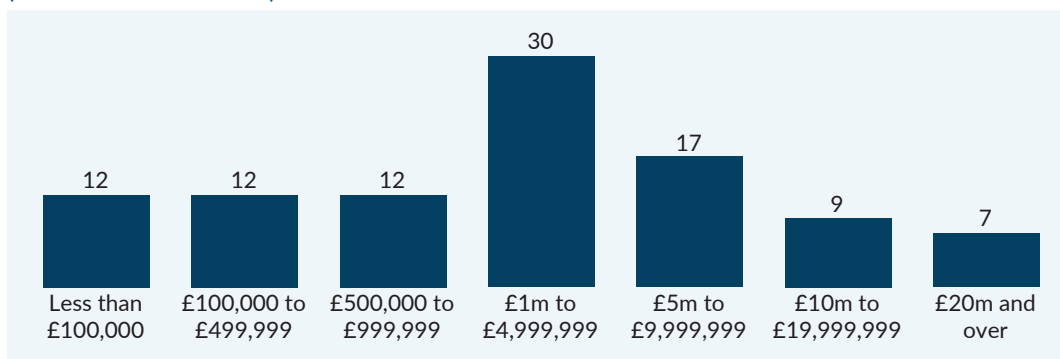
funds secured for Elite institutions was £267.9m while Emerging institutions reported a mean value of £473k.

Participating institutions secured 187 confirmed pledges of more than £500k each (excluding Elite institutions), of which 155 were made to Moderate and Established institutions.

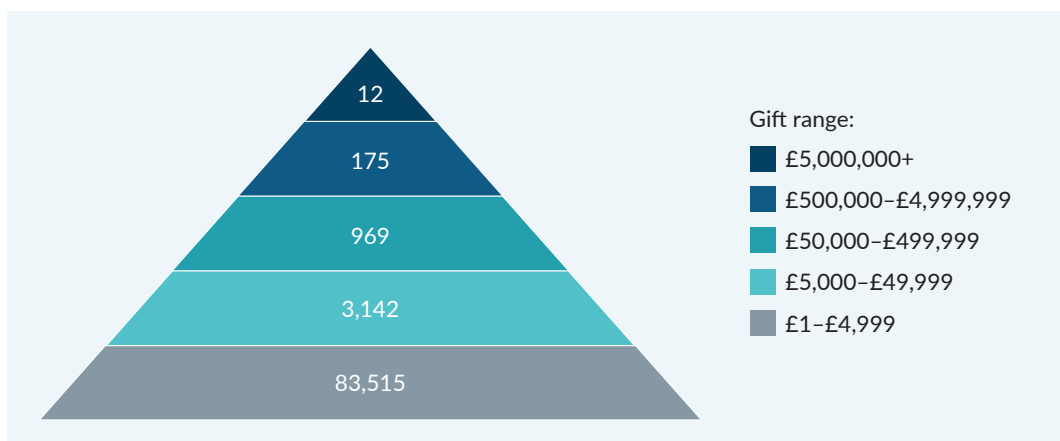
Mean new funds secured 2017–18

	New funds secured	Largest pledge
Elite	£267,880,957	£85,000,000
Established	£24,198,599	£6,610,560
Moderate	£6,481,573	£1,602,886
Developing	£2,721,811	£954,316
Emerging	£472,539	£167,962
Fragile	£240	£240
All	£10,937,412	£2,395,387

Total new funds secured by income levels 2017–18 (number of institutions)



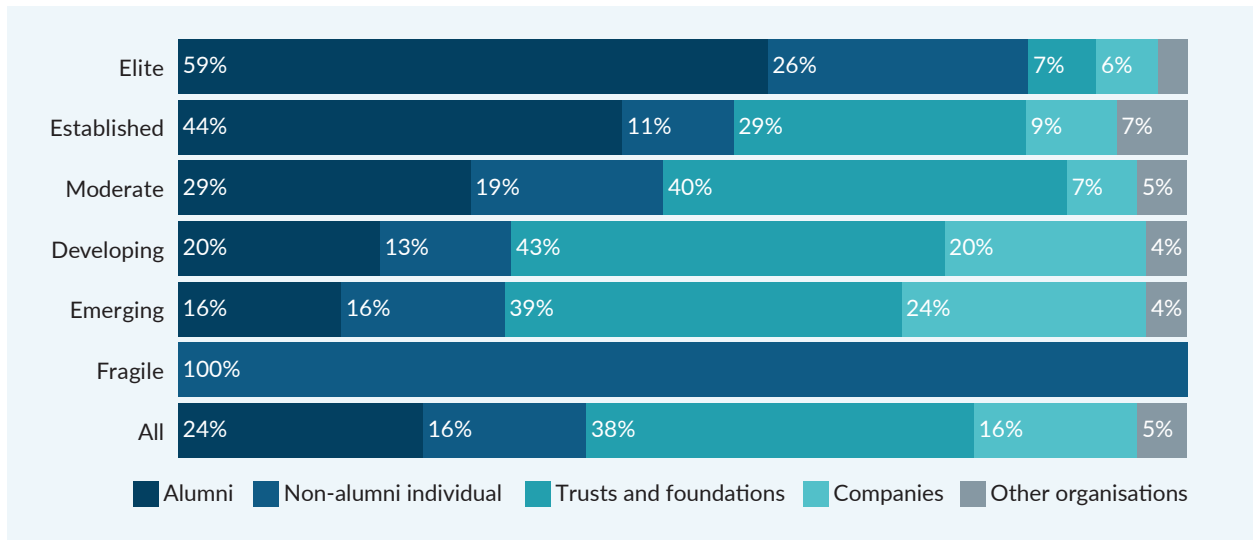
New gifts/pledges secured by gift range 2017–18 (excluding Elite institutions)



Individuals contributed 40% of the total new funds secured and organisations contributed 60%. Elite and Established institutions secured more than half of their new funds from individuals while Developing and Emerging institutions secured more than

half of their new funds secured from organisations. Interestingly Emerging and Developing institutions secured a larger proportion of their new funds from companies compared to the other clusters.

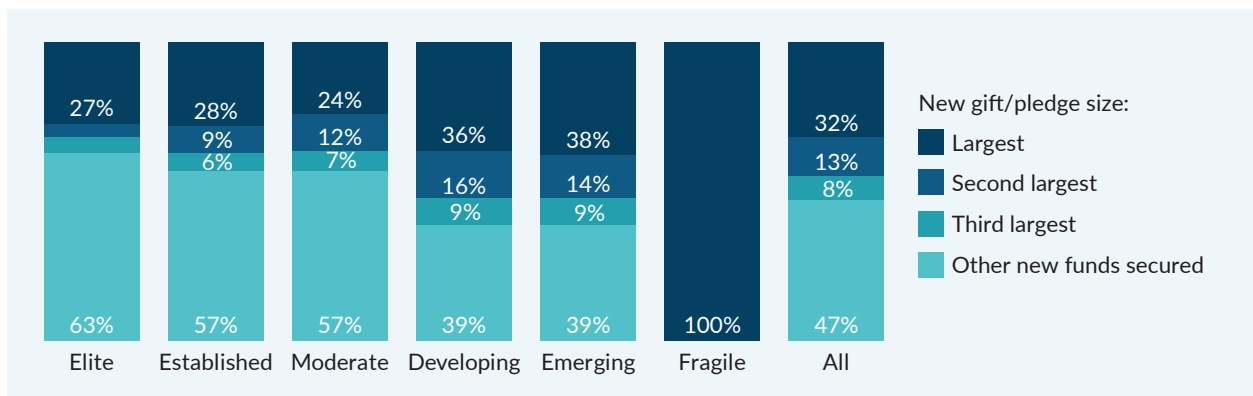
Sources of New Funds Secured 2017-18
(% of income)



On average, the largest single new gift/pledge accounted for 32% of total funds secured by institutions. At Emerging and Developing institutions,

61% of total new funds secured came from their top-three largest new gifts/pledges.

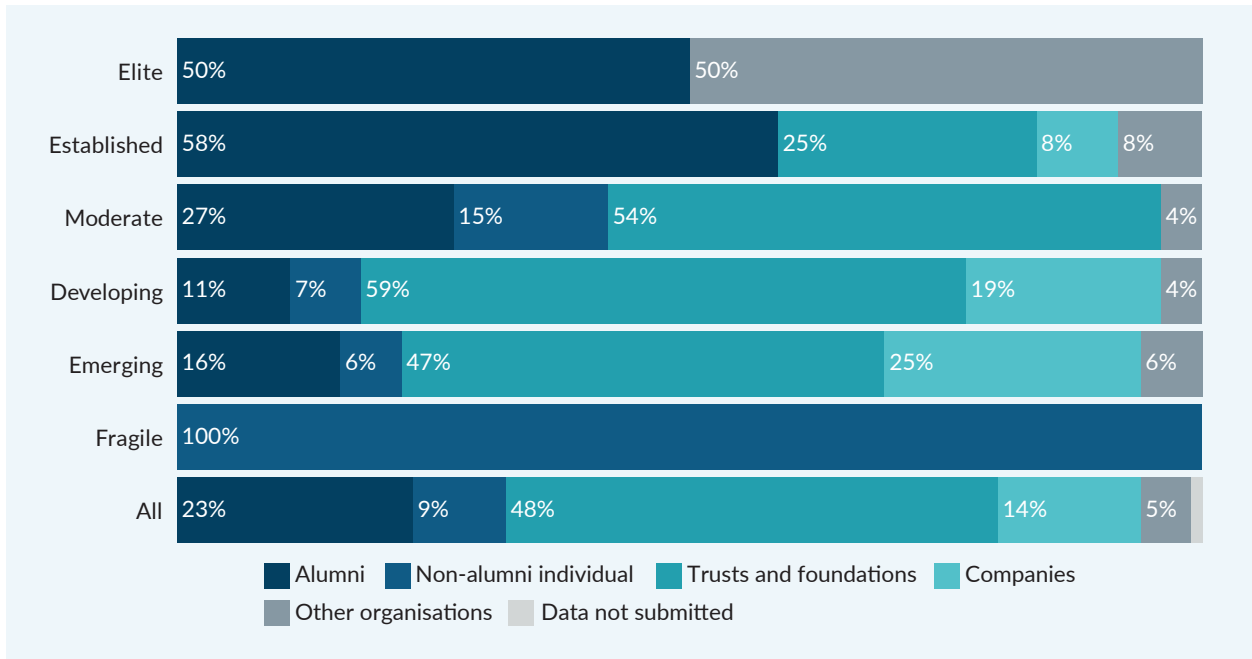
Largest gifts as a percentage of new funds secured 2017-18
(% of income)



Just under half the number of participating institutions (48%) secured their largest new gift/pledge from a trust or foundation. Within the Developing and Moderate clusters more than half of the institu-

tions secured their largest new gift/pledge from trusts and foundations. A higher proportion of Elite (50%) and Established (58%) institutions secured their largest new gift/pledge from alumni.

Sources of largest gift/pledge 2017-18
(% number of institutions)



Cash income received

Cash income received in a year includes all cash which arrives during the year including new single cash gifts, cash payments received against pledges secured in this or previous years and cash from legacies.

The mean value for cash income received in 2017–18 was £9.3m. The mean value for cash

income received for Elite institutions was £214.8m, while Emerging institutions reported a mean value of £416k. Participating institutions received 133 cash gifts of more than £1m each, 64 of which were received by Elite institutions and 42 of which were received by Established institutions.

Mean cash income received 2017–18

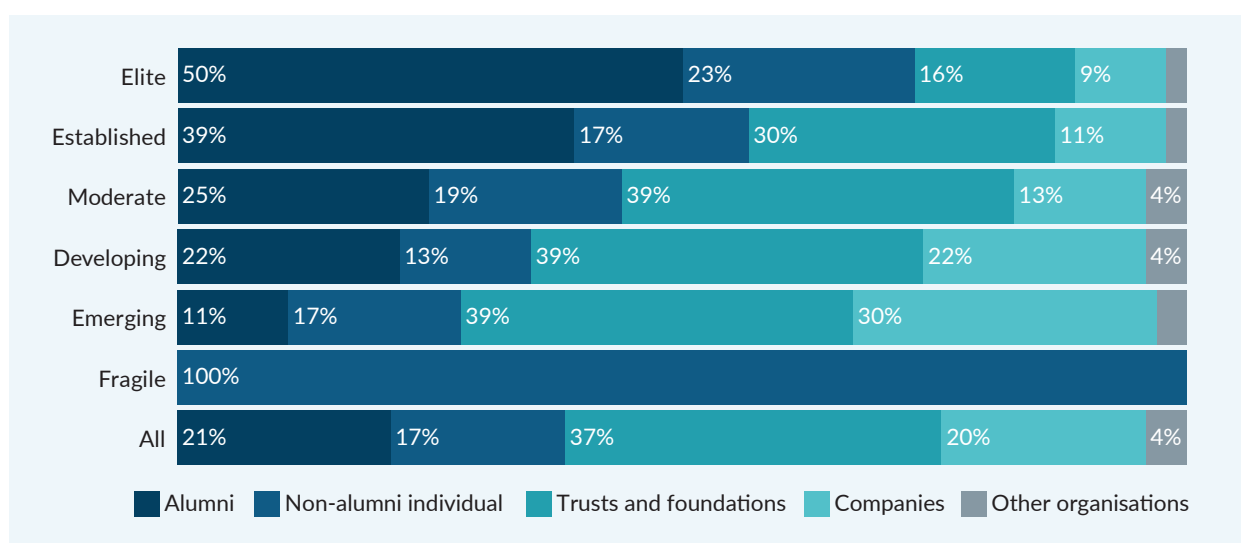
	Cash income received	Largest cash gift	Institutional income*
Elite	£214,746,887	£16,484,259	£2,100,839,500
Established	£21,449,677	£3,563,879	£669,162,182
Moderate	£6,588,735	£1,364,686	£354,093,885
Developing	£2,152,755	£671,627	£208,020,520
Emerging	£415,463	£114,852	£147,664,677
Fragile	£240	£240	£24,151,000
All	£9,296,164	£1,177,192	£318,449,719

*as per HESA (Higher Education Statistics Agency)

Individuals contributed 39% of total cash income received and organisations contributed 61% of total cash income received. Elite institutions received 50% of their cash income from alumni while

Moderate, Developing and Emerging institutions, each received 39% of their cash income from trusts and foundations.

Sources of cash income received 2017–18 (% of income)



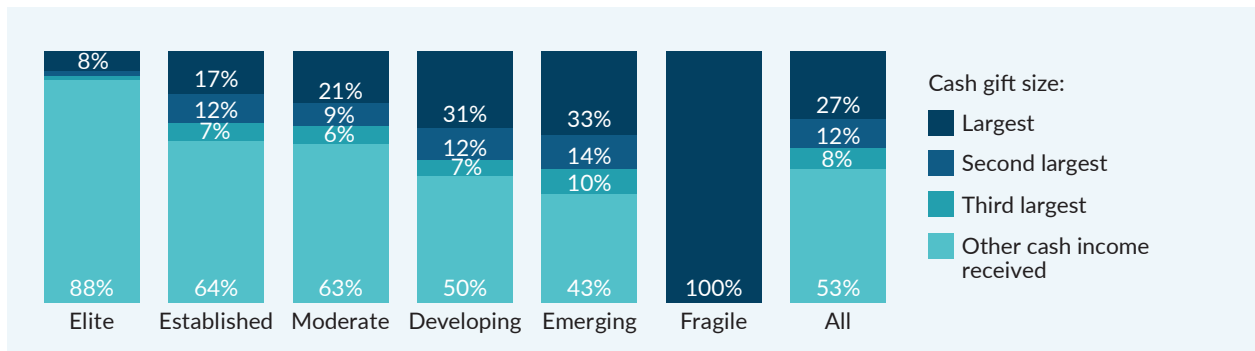
Total cash income received by income levels 2017-18
(number of institutions)



Of the total cash income received by an institution, 27% came from an institution's largest cash gift. At Emerging (57%) and Developing (50%) institu-

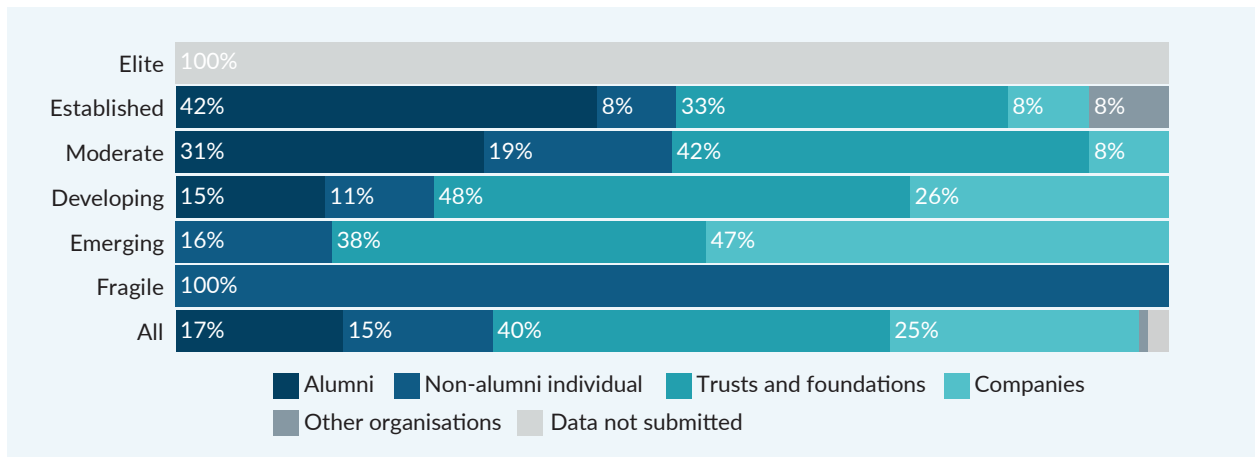
tions a substantial part of their total cash income received came from their top-three largest cash gifts.

Largest gifts as a percentage of cash income 2017-18
(% of income)



Just over 30% of participating institutions received their largest cash gift from an individual.

Sources of largest cash gifts 2017-18
(% number of institutions)



Mean cash income received from legacies was £1.6m across 68 institutions that received legacy gifts. Mean cash income from legacies was £28m for Elite institutions and £69k for Emerging institutions. On average, the value of a legacy gift

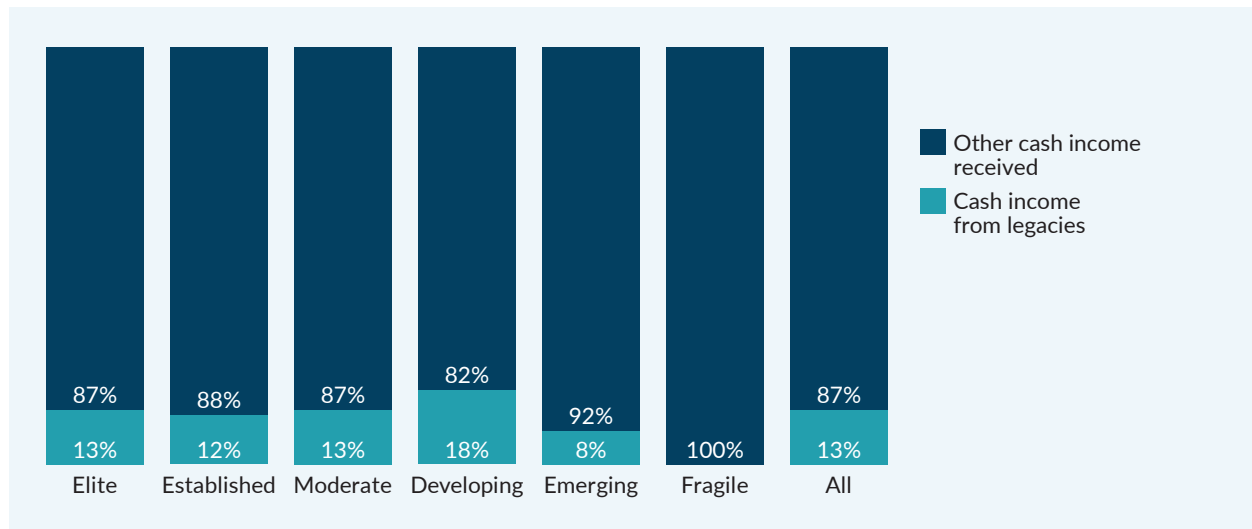
received was £83k. Mean cash income per legacy was between £78k and £94k for Elite, Established, Moderate and Developing clusters. Mean cash income per legacy for Emerging institutions was £31k.

Cash income received from legacies 2017–18

	Cash income from legacies	Cash income per legacy
Elite	£28,143,846	£77,867
Established	£2,189,497	£91,583
Moderate	£858,816	£93,848
Developing	£354,754	£90,306
Emerging	£68,446	£31,226
Fragile	Not applicable	Not applicable
All	£1,612,090	£82,834

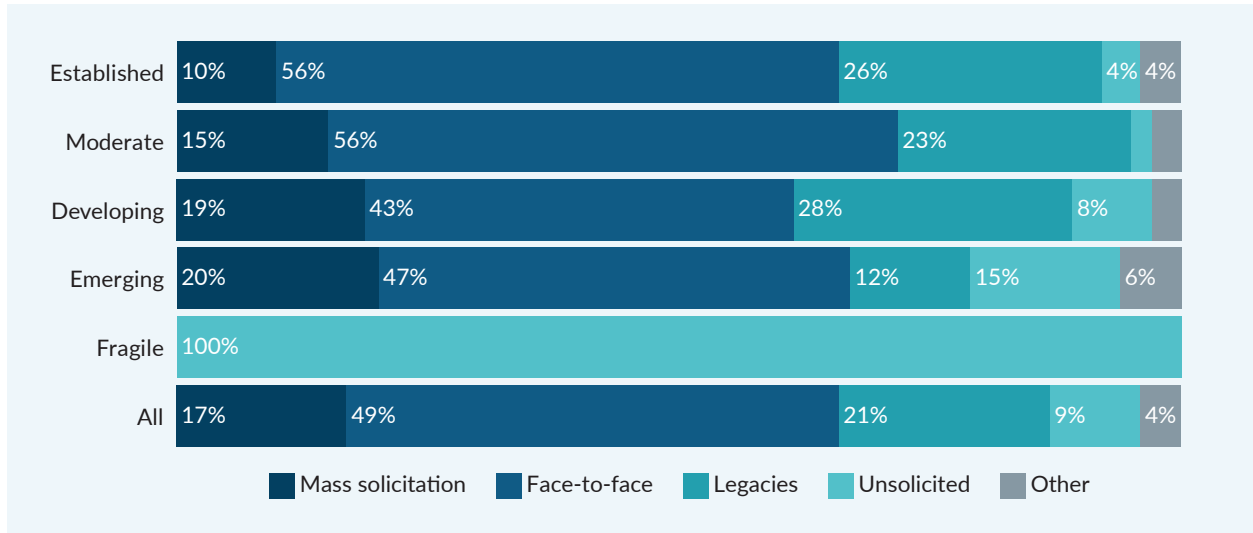
Across the different clusters, less than 20% cash income was received from legacies.

Cash from legacies as a percentage of total cash income 2017–18
(% of income)



Based on data submitted by 86 participating institutions, 49% of cash income from individuals was received as a result of face-to-face meetings.

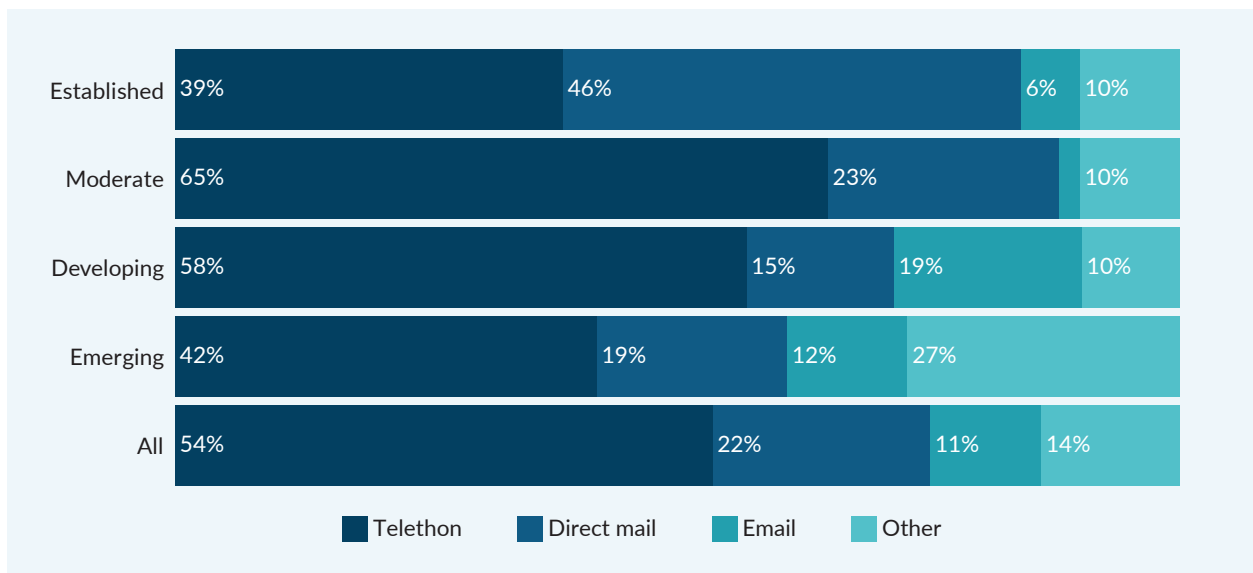
Cash income received from individuals by communication trigger 2017-18
(% of income)



Telethon campaigns accounted for 54% of all cash income secured from individuals via mass solici-

tions, more than twice the amount secured via direct mail appeals.

Cash income received from individuals by mass solicitation 2017-18
(% of income)



Alumni and donors

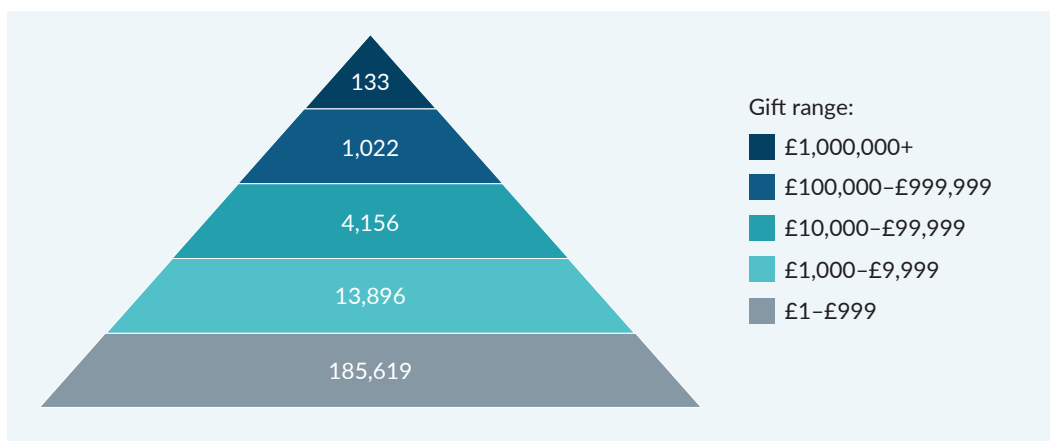
Participating institutions reported 15.2m total alumni, 10.7m of whom were contactable. Of the

10.7m contactable alumni, 182,474 alumni made donations. The mean number of donors across all participating institutions was 2,441.

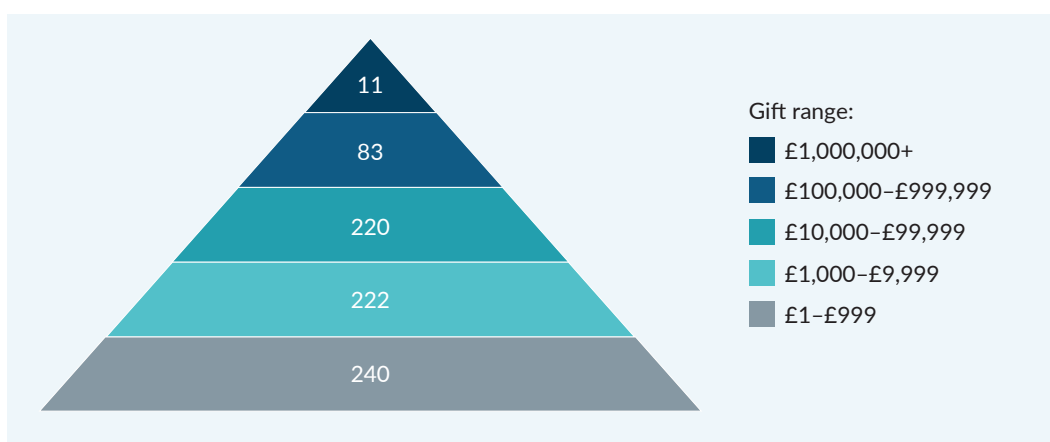
Mean number of alumni and donors 2017-18

	Total alumni	Contactable alumni	Donors	Alumni donors	Number of legacies
Elite	314,258	248,726	42,868	36,581	309
Established	241,974	191,495	6,065	4,251	47
Moderate	169,341	127,304	2,242	1,663	9
Developing	147,540	85,784	778	580	5
Emerging	110,554	75,185	197	114	2
Fragile	23,952	23,952	1	0	0
All	153,923	107,675	2,441	1,843	17

Number of cash gifts received by gift range 2017-18

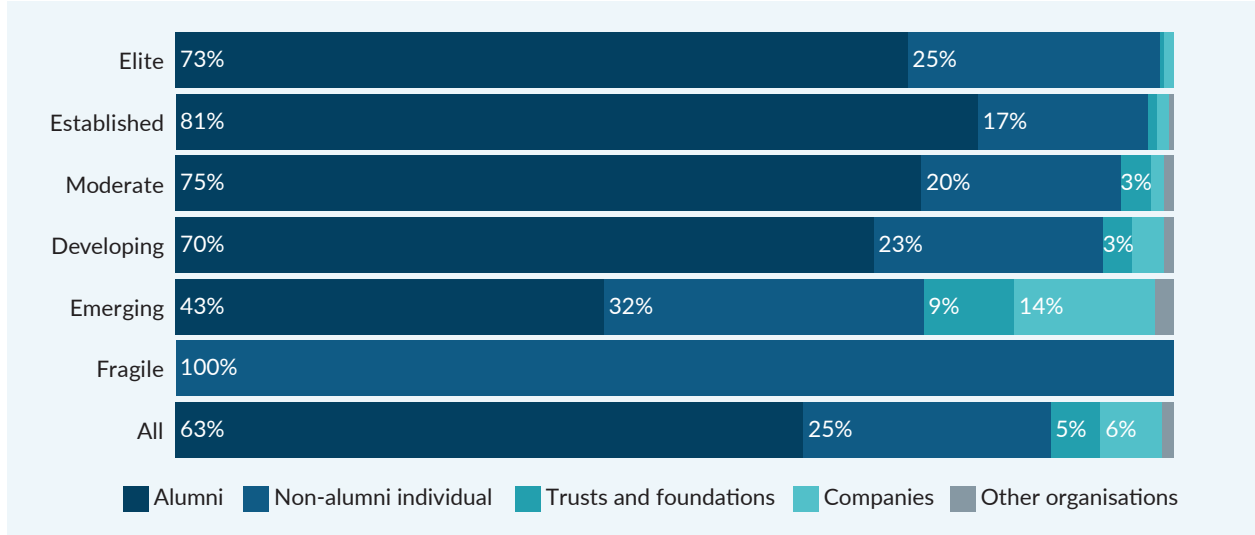


Number of legacies received by gift range 2017-18



Individuals accounted for 88% of all donors.

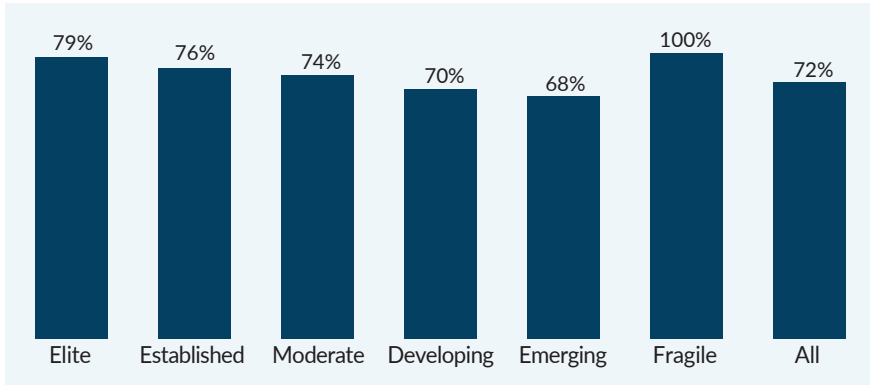
Composition of donor population 2017–18
(% number of donors)



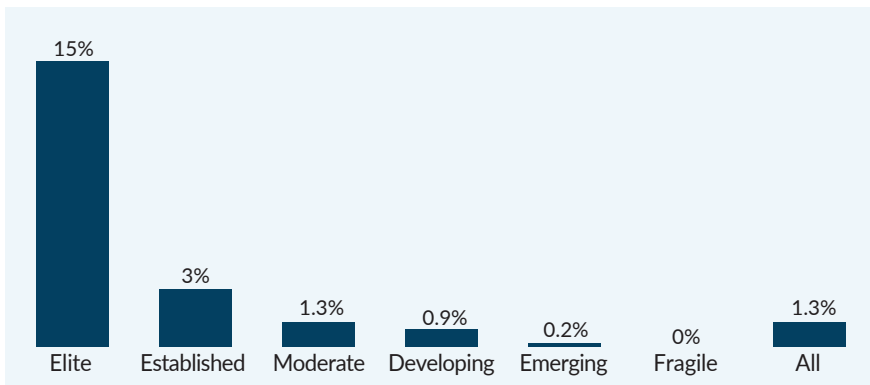
On average, across all participating institutions, 1.3% of contactable alumni made a gift and institutions reported that they could contact 72% of their

alumni via at least one of two contact mediums – email or post.

Percentage of alumni contactable 2017–18



Percentage of alumni donating 2017–18



Fundraising and alumni relations staff

A total of 2,325 staff (full-time equivalent) were employed in fundraising and alumni relations roles across the sector. Half of these staff members were employed in Elite and Established institutions.

The ratio of alumni relations staff to fundraising staff was 1:2.3 across all participating institutions. This figure was highest for Established institutions where the ratio was 1:3.5. The AR:FR staff ratio is calculated by first calculating the AR:FR ratio for each institution and then taking the average of those ratios to determine a ratio for each cluster.

Mean fundraising and alumni relations staff 2017–18

	Alumni relations staff	Fundraising staff	AR:FR staff ratio
Elite	89.4	229.5	2.6
Established	15.2	34.2	3.5
Moderate	7.9	15.6	3.1
Developing	4.8	7.5	1.9
Emerging	2.5	3.3	1.5
Fragile	0.5	0.5	1
All	7.7	16.5	2.3

Fundraising and alumni relations investments

The return on investment in fundraising and alumni relations could, in theory, be calculated based on total advancement costs and total funds secured. Numerous factors, however, influence charitable giving decisions and impact an institution's ability to secure philanthropic support. As an example, the value of institutional leadership and other academic time invested in fundraising can be substantial, particularly at higher performing institutions, and the cost of this time is outside

the scope of this report. Similarly, advancement activities benefit institutions in multiple ways and advancement activities yield returns in the form of alumni engagement, annual and major giving, and legacies over the course of years or decades.

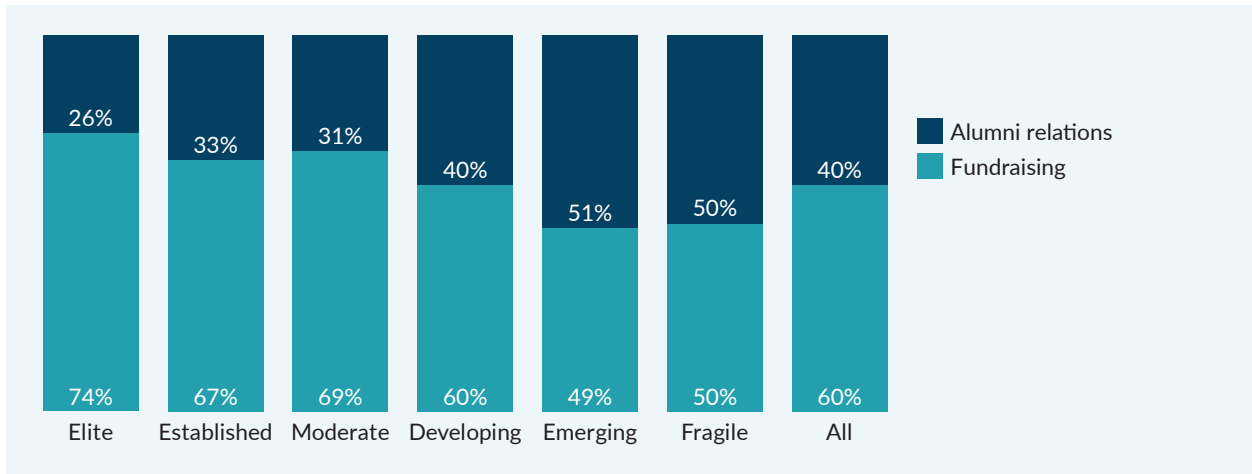
Overall, a sum total of £164m was spent on fundraising and alumni relations. Mean fundraising and alumni relations cost was £1.7m. Sixty per cent of this was spent on fundraising and 40% on alumni relations. Emerging and Fragile institutions spent 50% or more of their costs on alumni relations. Institutions spent, on average, approximately £96k on alumni magazines annually.

Mean fundraising and alumni relations investments 2017–18

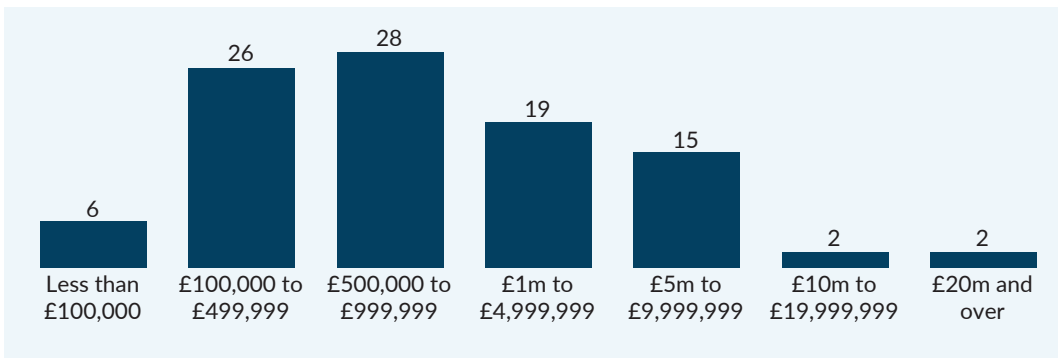
	Fundraising investments	Alumni relations investments	Fundraising and alumni relations investments	Alumni magazine investments	Mean institutional expenditure*
Elite	£18,667,648	£6,461,031	£25,128,678	£727,563	£2,045,794,500
Established	£2,689,070	£1,290,489	£3,981,338	£187,140	£637,535,091
Moderate	£1,010,094	£469,703	£1,479,797	£107,100	£341,150,538
Developing	£467,354	£295,167	£762,521	£42,332	£204,090,280
Emerging	£182,981	£152,544	£339,615	£39,026	£147,093,935
Fragile	£30,475	£30,475	£60,950	Not applicable	£23,613,000
All	£1,175,125	£531,844	£1,700,472	£96,432	£308,960,115

*as per HESA

Fundraising and alumni relations investments by cluster 2017-18
(% of costs)



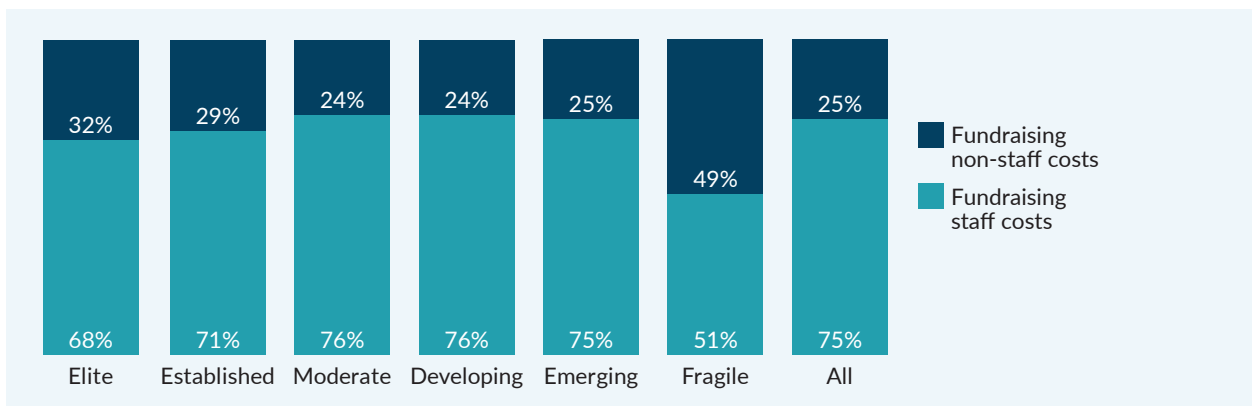
Total fundraising and alumni relations investments 2017-18
(number of institutions)



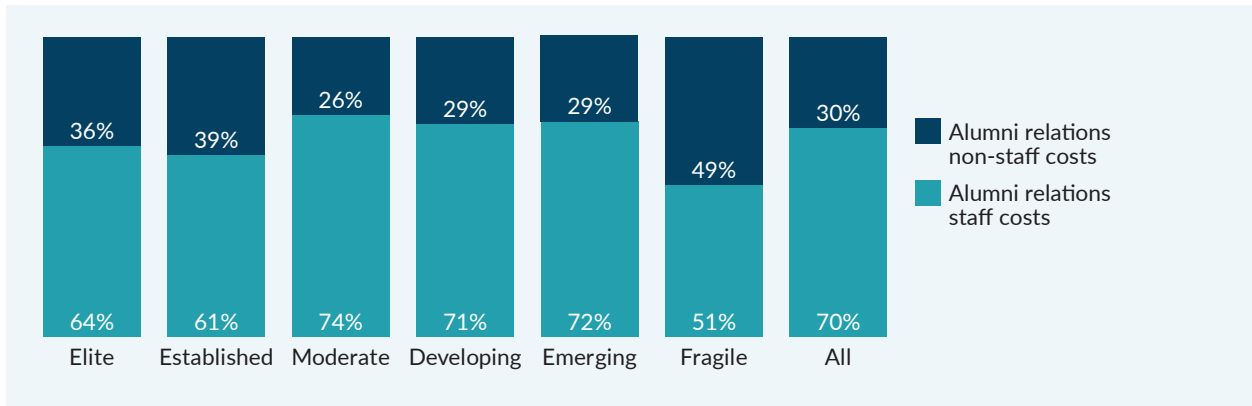
Twenty-five per cent of total spend on fundraising was for non-staff purposes while 75% was spent on

staff costs. Of the total alumni relations costs, 30% was spent on non-staff costs and 70% on staff costs.

Staff and non-staff fundraising investments 2017-18
(% of costs)



Staff and non-staff alumni relations investments 2017-18
(% of costs)



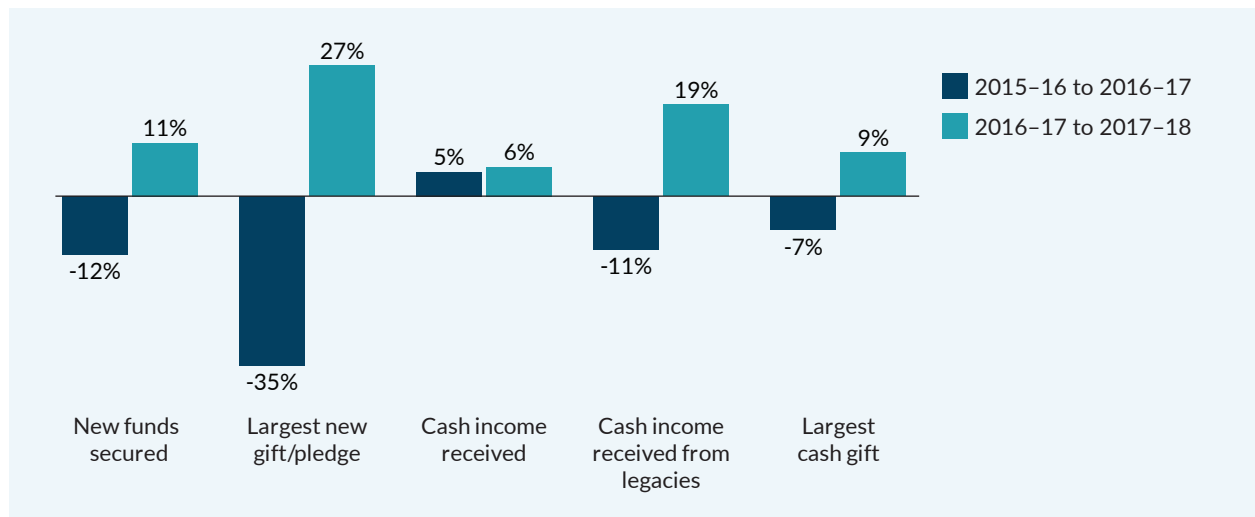
TRENDS IN KEY INDICATORS

Trends are calculated using data from institutions that participated and provided information for a key set of variables for three years – 2015–16, 2016–17 and 2017–18.

Philanthropic income

- New funds secured increased by 11% over 2016–17 after a 12% decrease from 2015–16 to 2016–17
- Cash income received showed a year-on-year increase since 2015–16
- Income from largest new gift/pledge increased by 27% since 2016–17
- Income from largest cash gift increased by 9% since 2016–17
- Cash income from legacies increased by 19% since 2016–17 after a decrease of 11% from 2015–16 to 2016–17

Percentage change in philanthropic income 2015-16, 2016-17 and 2017-18

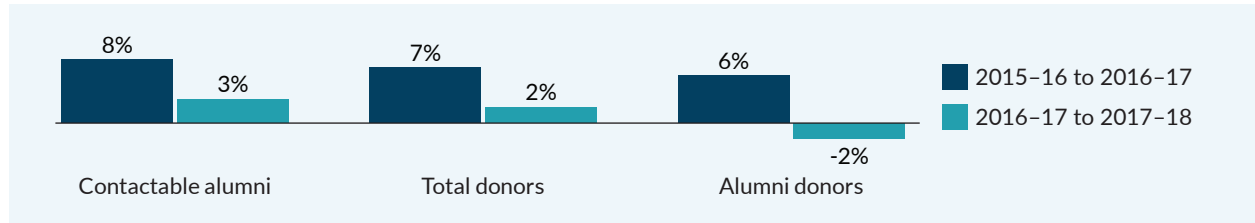


Alumni and donors

- Number of contactable alumni increased by 3% since 2016–17
- Number of total donors increased from 2015–16 to 2016–17 by 7% and from 2016–17 to 2017–18 by 2%

- Number of alumni donors decreased by 2% since 2016–17 after an increase of 6% from 2015–16 to 2016–17.

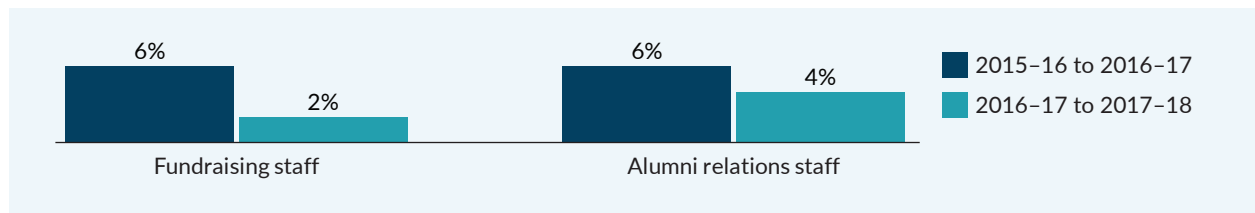
Percentage change in alumni and donors 2015–16, 2016–17 and 2017–18



Fundraising and alumni relations staff

- Fundraising and alumni relations staff increased year-on-year since 2015–16

Percentage change in fundraising and alumni relations staff 2015–16, 2016–17 and 2017–18



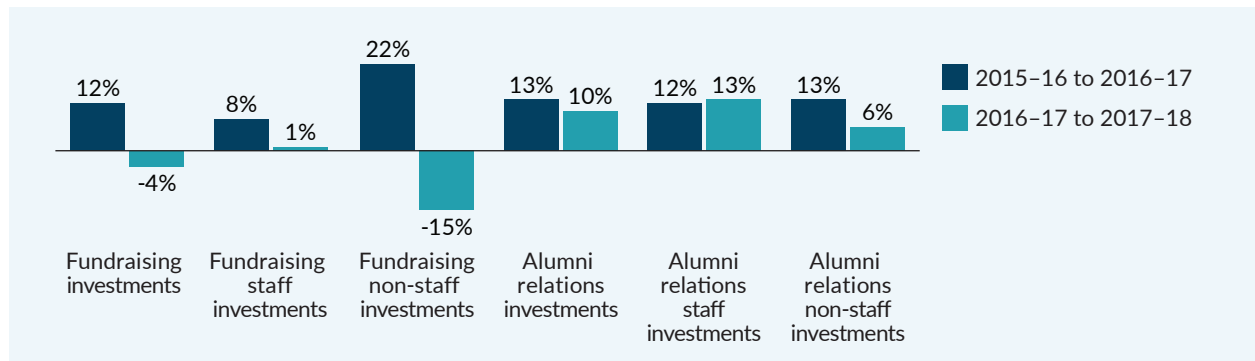
Fundraising and alumni relations investments

- Number of fundraising and alumni relations staff investments increased by 1% and fundraising

non-staff investments decreased by 15% since 2016-17

- Alumni relations staff and non-staff investments increased by 13% and 6% respectively since 2016-17

Percentage change in fundraising and alumni relations investments 2015–16, 2016–17 and 2017–18



Trends by cluster

Trends across clusters can be affected by a number of factors.

Institutions can move to a higher or lower cluster due to changes in their performance and/or changes in the performance of other participating institutions in a given year. Therefore an institution can perform better from one year to another and still move from a higher to a lower cluster from one year to another or vice-versa. This movement can affect the year-on-year trends for each cluster. Furthermore, as three-year average data is used for cluster analysis, there is a two-year overlap when

doing trend analysis for clusters, which suggests that institutional figures will only be influenced by extreme figures.

The composition of participating institutions is different for 2014–15, 2015–16, 2016–17 and 2017–18 as not all institutions take part in the survey each year. To overcome the effects of this change in composition on yearly trends, data reported below is based on a cohort of 76 institutions that have taken part in the survey each year since 2014–15.

With this in mind comparisons can be made between years qualitatively.

Percentage change in philanthropic income by cluster 2014–15, 2015–16, 2016–17 and 2017–18

Variable	Year	Elite	Established	Moderate	Developing	Emerging
New funds secured	2014–2015 to 2015–16	27%	42%	9%	-14%	13%
	2015–2016 to 2016–2017	-12%	-23%	11%	11%	-15%
	2016–2017 to 2017–2018	25%	7%	-26%	51%	15%
Cash income received	2014–2015 to 2015–16	18%	15%	3%	-16%	-9%
	2015–2016 to 2016–2017	7%	3%	3%	-3%	5%
	2016–2017 to 2017–2018	3%	9%	-0.6%	38%	2%

Percentage change in donors by cluster 2014–15, 2015–16, 2016–17 and 2017–18

Variable	Year	Elite	Established	Moderate	Developing	Emerging
Total donors	2014–2015 to 2015–16	3%	-4%	-4%	1.2%	61%
	2015–2016 to 2016–2017	4%	6%	16%	5%	-13%
	2016–2017 to 2017–2018	7%	8%	-8%	-5%	-19%
Alumni donors	2014–2015 to 2015–16	-8%	-5%	-5%	0.6%	7%
	2015–2016 to 2016–2017	11%	0.3%	7%	0.6%	6%
	2016–2017 to 2017–2018	2%	-4%	-5%	-0.4%	-14%

Percentage change in fundraising and alumni relations costs by cluster 2014–15, 2015–16, 2016–17 and 2017–18

Variable	Year	Elite	Established	Moderate	Developing	Emerging
Fundraising costs	2014–2015 to 2015–16	15%	18%	6%	7%	16%
	2015–2016 to 2016–2017	6%	21%	6%	13%	-4%
	2016–2017 to 2017–2018	1%	-13%	0.1%	3%	0.5%
Alumni relations costs	2014–2015 to 2015–16	4%	12%	9%	-2%	15%
	2015–2016 to 2016–2017	15%	10%	17%	10%	-9%
	2016–2017 to 2017–2018	2%	12%	8%	11%	9%

Percentage change in fundraising and alumni relations staff by cluster 2014-15, 2015-16, 2016-17 and 2017-18

Variable	Year	Elite	Established	Moderate	Developing	Emerging
Fundraising staff	2014-2015 to 2015-16	3%	12%	9%	-0.7%	1.1%
	2015-2016 to 2016-2017	4%	4%	4%	20%	-5%
	2016-2017 to 2017-2018	4%	2%	0.4%	12%	-0.5%
Alumni relations staff	2014-2015 to 2015-16	-5%	8%	2%	0.1%	11%
	2015-2016 to 2016-2017	9%	2%	10%	12%	-13%
	2016-2017 to 2017-2018	0.9%	3%	7%	15%	3%

FINDINGS BY MISSION GROUPS

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

Mean figures by Mission Groups 2017-18

	Russell Group (n=23)	Russell Group excluding Oxbridge (n=21)	University Alliance (n=7)	Million Plus (n=11)
New funds secured	£37,913,860	£16,012,232	£1,474,698	£513,954
New funds secured from individuals	£18,970,884	£7,233,061	£474,482	£213,558
New funds secured from organisations	£10,599,866	£8,779,171	£1,000,216	£300,396
Largest new gift/pledge	£7,724,557	£4,044,774	£372,210	£273,159
Cash income received	£31,208,581	£13,728,742	£1,063,017	£390,267
Cash income received from individuals	£13,314,495	£6,763,818	£432,609	£63,554
Cash income received from organisations	£9,190,299	£6,964,924	£630,408	£326,713
Cash income from legacies	£3,743,680	£1,419,855	£274,444	£18,136
Largest cash gift	£2,955,062	£2,310,815	£131,123	£152,534
Total alumni	242,538	235,708	253,637	96,611
Contactable alumni	186,532	180,609	189,114	68,336
Total donors	7,410	4,033	2,003	133
Individual donors	7,294	3,934	1,979	111
Alumni donors	5,780	2,846	1,828	66
Organisation donors	134	113	24	21
Number of legacy gifts	28	15	9	1
Fundraising staff	44	26	10	4
Alumni relations staff	20	3	5	2
Fundraising costs	£3,295,379	£1,831,353	£571,431	£179,565
Alumni relations costs	£1,349,762	£862,974	£288,151	£110,237
Non-staff production and distribution costs alumni magazine	£197,766	£166,601	£111,671	£49,229

FINDINGS BY OTHER GROUPS

Mean figures by other groups 2017–18

	Arts (n=9)	Medical (n=4)	Specialist (n=16)*	GuildHE (n=10)
New funds secured	£5,848,640	£5,129,371	£6,273,771	£430,574
New funds secured from individuals	£2,337,563	£2,559,477	£3,036,875	£91,431
New funds secured from organisations	£3,511,077	£2,569,895	£3,236,896	£339,143
Largest new gift/pledge	£1,746,630	£1,213,250	£2,128,174	£229,764
Cash income received	£4,407,148	£4,685,642	£5,857,080	£244,768
Cash income received from individuals	£2,048,891	£2,130,200	£3,446,707	£33,266
Cash income received from organisations	£2,358,258	£2,555,442	£2,410,373	£211,502
Cash income from legacies	£779,816	£1,488,981	£882,324	£33,496
Largest cash gift	£1,315,185	£902,421	£1,531,647	£107,704
Total alumni	38,624	21,708	43,840	33,774
Contactable alumni	21,462	17,297	28,438	27,319
Total donors	519	2,882	1,397	112
Individual donors	471	2,831	1,348	101
Alumni donors	67	328	474	37
Organisation donors	48	51	49	11
Number of legacy gifts	7	101	31	1
Fundraising staff	6	11	10	2
Alumni Relations staff	1	3	3	1
Fundraising costs	£406,814	£998,718	£870,115	£93,655
Alumni relations costs	£77,386	£286,619	£269,951	£64,078
Non-staff production and distribution costs alumni magazine	£19,192	£57,602	£42,367	£40,482

*including institutions grouped under Arts and Medical

FINDINGS BY PEARCE REVIEW GROUPS

The 2012 HEFCE Pearce Review of Philanthropy in UK higher education looked at how fundraising changed over the past 10 years, and how the sector responded to the Thomas Report on Voluntary

Giving to UK Universities 2004. It was chaired by Professor Shirley Pearce, former Vice-Chancellor of Loughborough University.

Mean figures by Pearce Review groups* 2017-18

	Pre-1960s (n=32)	1960s (n=20)	1990s (n=18)	2000s (n=9)
New funds secured	£11,715,551	£3,733,769	£588,986	£208,903
New funds secured from individuals	£5,577,414	£918,692	£205,241	£26,308
New funds secured from organisations	£6,138,137	£2,816,662	£383,745	£182,595
Largest new gift/pledge	£3,018,397	£910,480	£209,869	£86,636
Cash income received	£10,469,219	£3,836,032	£439,520	£152,796
Cash income received from individuals	£5,202,812	£1,081,979	£106,455	£21,632
Cash income received from organisations	£5,266,408	£2,752,669	£333,065	£131,164
Cash income from legacies	£1,222,399	£367,684	£6,605	Not applicable
Largest cash gift	£1,825,832	£860,460	£125,350	£54,568
Total alumni	222,889	165,966	163,925	46,709
Contactable alumni	149,318	126,757	109,345	5,029
Total donors	2,936	1,831	369	47
Individual donors	2,847	1,792	345	39
Alumni donors	2,178	1,467	273	14
Organisation donors	89	54	24	7
Number of legacy gifts	13	5	2	Not applicable
Fundraising staff	21	11	5	1
Alumni Relations staff	11	5	4	1
Fundraising costs	£1,467,811	£649,648	£297,387	£39,194
Alumni relations costs	£756,397	£320,945	£218,095	£67,652
Non-staff production and distribution costs alumni magazine	£132,662	£76,321	£49,852	£14,285

*Review of Philanthropy in UK Higher Education: 2012

APPENDIX

About the survey

This report presents findings from the Ross-CASE Survey of Philanthropic Giving 2017–18. 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 each year before launching the survey to eligible institutions in UK and Ireland. This report compiles findings from institutions based in the UK and Ireland.

The survey methodology has been adapted into survey instruments to collect data on philanthropic giving to education in South Africa, Australia, New Zealand and Canada. Moreover, CASE's fundraising survey for non-UK institutions in Europe and the CASE Advancement in Schools survey are also based on the methodology of the Ross-CASE Survey.

The 2017–18 survey was launched on the CASE Benchmarking Toolkit on 10 September 2018 and closed on 16 November 2018. 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 reconfirming that data submitted was correct. 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), were used to analyse the data and key indicators were reported on this basis. Latent Class Analysis was conducted on 100 participating institutions using seven computed variables using Latent Gold v 5.0. Benchmarking data was made available to participating institutions on 4 January 2019.

Sector results are published by the medium of this report on 30 April 2019, accompanied by an interactive infographic that is made possible thanks to financial support from Blackbaud.

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

Reporting conventions

I) TREND DATA

Trend data are presented on a like-for-like basis for each variable reported. Trend analysis for clusters is based on 76 institutions that took part in the survey since 2014–15.

II) BASE SIZE

For a few of the questions the results are presented as a percentage or proportion comparing two or more variables. Not all participants provided usable responses to every question in the survey. The number of institutions given as the base in 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 highest 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. A homogenous group will have a mean and median close together. Differences in mean and median figures could also be due to the presence of outliers in a sample. Given that the sample size covers a diverse range of institutions, there is a 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 calculating the mean from these figures rather than computing it by using the total figure for largest cash gifts and dividing it by total cash income received.

Response rate

Response rates for UK institutions 2013 to 2018*

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

*Three institutions from Ireland also took part in the 2017-18 survey

Participating institutions

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

Glossary

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

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

Contactable alumni: This refers to addressable alumni (former students of the institution) – those who have reliable postal or email addresses anywhere in the world.

Fundraising costs: The costs associated with the efforts to gather new funds secured and cash income received. 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 nonstaff expenditure is combined this equals the total fundraising expenditure.

Gifts-in-kind: This includes other goods donated that are not a monetary contribution.

GuildHE: GuildHE is an officially recognised representative body for UK Higher Education. Member institutions include some major providers in professional subject areas including art, design and media, music and the performing arts; agriculture and food; education; maritime; health and sports.

HEFCE Pearce Review of Philanthropy in UK higher education: This 2012 review looked at how fundraising changed over the past 10 years, and how the sector responded to the Thomas Report on Voluntary Giving to UK Universities 2004. It was chaired by Professor Shirley Pearce, former Vice-Chancellor of Loughborough University.

Legacies: A commitment (pledge) that a transfer of wealth will occur upon a donor's death. Within the survey legacy gifts are only counted in either new funds secured or cash income received (depending on the type of gift) when it is received. Committed legacies are not counted in the survey.

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

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

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

New funds secured: New funding secured by the institution, including new donations received and new confirmed pledges (counting multi-year value for up to five years) not yet received but excluding payments of pledges made in previous years. This does not include legacy pledges but includes legacies received.

Organisations: Includes trusts, foundations, companies and other organisations.

Philanthropic income: This is defined in the Supporting Document and includes gifts/donations or grants that meet two criteria – source of funds should be eligible and the nature of funds should meet the survey's definition of philanthropic intent. The survey reports 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 survey and how that funding is recorded. It also contains general guidance on completing the survey.

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

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

University Alliance: University Alliance represents institutions in the UK who are leaders in technical education; professional training; research and development; enterprise; and innovation.

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