

## Top 10 tips to help you fill in the IDPE and Graham-Pelton Consulting Benchmarking Survey 2016

Please note that all responses to the survey will be treated confidentially and anonymously.

### 1. Data collection period

The survey will ask you for *two years* of data so you will need to present figures for both the 2014-2015 and 2015-16 academic years, which means 1 August 2014-31 July 2015 and 1 August 2015-31 July 2016 for some school – or your nearest fiscal year dates for others; the key point is that you report two full academic years.

### 2. Your expenditure

You will need to have details of your staff and non-staff expenditure for these two years. Please speak to your bursar/business manager **now** so that they are aware this is coming.

### 3. Total amount raised by your school

We will ask you how much money has been raised by the school in those two academic years.

### 4. Definition of fundraising income

When talking about fundraising, we will use the words:

- ‘income’, which means *actual* (not pledged) donations received in cash by the school
- ‘funds raised’ is any income received within the period as well as the total value of new pledges secured (even if those pledges may not be received until a future period).

### 5. Regular giving

When reporting on funds raised, we would like the total value of a regular gift over a number of years (up to a five-year maximum) for any new regular gifts started.

### 6. Fundraising details

To get the most value from the survey, we will be asking questions about how your funds were raised (e.g. mailing, telethon, personal visits), what type of projects were supported (e.g. bursaries, buildings, teaching) and which of your constituent groups gave (e.g. alumni, current parents, staff).

## 7. Your database

Your database can help you report on your income and funds raised. Contact your software provider to make them aware that this is coming up. We are starting to speak to a number of suppliers and will make them aware of the questions being asked. In addition, IDPE regional groups are starting to form a network of database super-users who will be on standby to help answer questions from those schools which require assistance.

## 8. Your team

Some questions will be about your team's make-up, size and salaries (e.g. what functions your team is responsible for and how many staff there are). We appreciate that teams change over a two-year period and questions will take into account changing circumstances.

## 9. Engagement tools

There will be questions on how you use engagement tools such as events, publications, social media and the impact they have on your community. We will also be asking questions about your audience demographics to help us group together similar institutions for more specific analysis.

## 10. Schools which are starting out in fundraising and the ROI

For schools which do not fundraise yet the benchmarking report will highlight the level of investment required to set up a fundraising operation.

### 10.1 Alumni relations only

If you are working for a school with an established alumni relations programme however have yet to start fundraising, we would still love you to complete the survey as much as possible and tell us what is stopping you from fundraising or why you have decided not to fundraise.

### 10.2 State schools

For state schools which do fundraise the report will highlight their achievements and investment in this area. As the report contains questions about the type of school and demographic of its alumni, state schools may also find they can compare themselves against independent schools of a similar profile.