

Schools' Fundraising and Engagement Benchmarking Report 2018





Without continual growth
and progress, such words as
improvement, achievement,
and success have no meaning.

Benjamin Franklin

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disclaimer

The information used in this report was provided by the participating schools during 2018-19 and is believed to be correct at publication date. Every effort has been taken to ensure the accuracy of this report; however, no liability or responsibility (to the extent as permitted by law), including responsibility for negligence, is accepted by the Institute of Development Professionals in Education or Graham-Pelton.

introduction from IDPE

IDPE's vision is to enable all state and independent schools to fundraise effectively so that they can provide the best educational experiences for our young people. Our investment in the fourth benchmarking survey of schools' fundraising and engagement activity demonstrates this commitment to empower all schools to engage their communities in philanthropic giving.

The IDPE and Graham-Pelton Schools' Fundraising and Engagement Benchmarking Report 2018 provides senior leaders and fundraisers in UK schools with insight and analysis into fundraising and alumni relations trends, performance, and best practice, enabling them to:

Compare and evaluate their school's performance

Identify strengths and areas for development in their existing programme

Make informed decisions on how to enhance their fundraising performance

IDPE would like to take this opportunity to thank all of the schools who completed the benchmarking survey and made this report possible. It is thanks to your incredible commitment that we have been able to develop this invaluable resource.

At IDPE we are committed to supporting all schools to develop cultures of giving. The benchmarking report demonstrates once more that all schools can achieve fundraising success. So, whether your school's focus is transforming lives through bursary provision or improving learning environments and resources for pupils, take time to read this report, reflect, plan, and put into place your strategy so that you can make your school's vision a reality.

introduction from Graham-Pelton

This report provides development and alumni professionals, heads, bursars, and governors an insight into what can be achieved and what the data shows are the key ingredients for success. What this report cannot tell you is what you can expect to raise in the next year. There is no such thing as an average school. Each one has its own unique strengths, challenges, and fundraising needs and priorities, but what this year's report has demonstrated is that all schools can fundraise and engage their communities to deliver their missions.

Graham-Pelton is often asked by leadership teams, 'How much can we raise?' and 'Why should we invest in this?' Thanks to the time that the participating schools have invested in completing the survey, we have an increasing body of evidence to inform the answers to these questions. We are particularly grateful to those that complete the survey year on year, and those that have completed it for the first time.

This year, we are pleased to share a different format – one in which you can better apply the findings to your own school. What figures and information did your school provide, and where are there opportunities for growth? Each chapter has an opportunity for you to make your own remarks on the results, as well as a template to present your findings and any new strategies you plan to implement. We hope this usable format will enable the benchmarking report to become an active document rather than just a good read.

Lastly, we would like to thank IDPE and the committee for their partnership on the benchmarking. We know our schools face many challenges for which it can be easy to assume that fundraising is the answer. We hope this report dispels that myth, and at the same time demonstrates what is possible when a school commits to development. After all, what can be more important than advancing the education of young people?

executive summary

school leaders must be involved in fundraising activity

A key metric from this year's report is that heads spending just 5% of their time on fundraising and engagement can make a real difference to fundraising performance. However, how this time is used is equally important. Event attendance may provide an opportunity to meet many constituents, but it doesn't necessarily result in meaningful relationships with potential donors. Heads must be willing to ask, but volunteer leadership (governors, alumni association, and parent committees) can support the cultivation and stewardship process.

partnering with your development director can lead to better results

Most development directors report to the head. This enables a constant dialogue around major gift prospects, the school strategy, and opportunities to build relationships. Schools where the development director sits on the senior leadership team do tend to raise more money, with many citing that the opportunity to engage key staff and also hear about non-fundraising activities was critical to developing fundraising and engagement strategies that align with the school's vision. The report also demonstrates that short tenures can have a direct impact on fundraising; therefore, investing in the right director for your school and partnering with them for success is vital for retention and results.

establishing an office – producing a strong ROI – takes at least four years, so you must be willing to invest consistently in building your programme

Development offices that have been established for 4-6 years have an average return on investment of 4.3 and a yield of almost £500k per annum. This is a result of strategic investments in the office, increased staff, and concentrating more time on major gift fundraising. If a school is going to invest in development, it should do so at a level that provides the office with the right tools – staff and resources – to generate more income than cost. Our analysis suggests that an investment of £100k plus two FTEs on staff is the minimum required to achieve a positive return.

how the development and engagement team spend their time has a real impact on ROI

Major gifts take time and require a proactive approach, so they will inevitably fall to the bottom of the to-do list when there is a calendar of events, communications, and other reactive activities that need to take place. Schools raising more than £1million invest 20% of their time in major gifts and 28% on fundraising overall. Schools raising less than £500k spend less than 10% of their time on major gift fundraising. Schools with a focus on major gifts raise on average £884k per annum, whereas schools spending the most time on alumni relations raise £465k, and schools spending the most time on regular giving raise £230k.

investing in systems and processes makes a difference

Disciplined and measurable prospect (potential donor) management will help you be successful: more schools are embracing the use of a moves management system – 39% in this survey compared with 30% in 2014-16. This also enables leaders to quickly understand activity and encourage others to support the cultivation and stewardship of prospects. The report recognises that most offices have 2.3 staff on average, so research on potential donors empowers focused, strategic fundraising, and yields better results.

legacy fundraising is becoming increasingly important

Legacy gifts at 92 schools generated £28.6 million, or £311k on average per school, representing c. 20% of total philanthropic income received at these schools. Schools with legacy societies attract more pledges, as they demonstrate to donors that the school takes their philanthropy seriously. Many schools are focused on the immediate need and desire for cash in, but bequests can be a vital source of income for the future, even if it means delayed gratification.

engagement goes beyond alumni relations

Whilst there are 17 events a year on average per school, engagement has evolved in recent years, and many offices no longer just support alumni. Constituent engagement has grown to become a two-way activity, and therefore, budgets in this area have increased. 139 schools in the survey run a volunteer programme, either for alumni or parents, and in some cases both. However, only 11 schools are recording volunteer hours. That said, they reported a total of 5,498 volunteer hours, and we should be excited about this impact.





key findings

headlines & highlights

- 152 schools participated
 - 128 independent schools
 - 13 grammar schools
 - 10 free schools/academies
 - One maintained school
- Four out of five schools that completed the survey reported philanthropic income, totalling £157million, of which £28.6million is from legacies.
- Average income per school was £535k from an average of 211 donors.
- 36 schools reported average annual philanthropic income over £500k and, of those, 21 schools reported income over £1million.
- Most schools (53) reported income between £100k and £499k.

philanthropic income by type of school

	number of schools that reported philanthropic income	total philanthropic income	pledged income	legacy gifts received	legacy pledges
free (inc. city, technology colleges/academy)	5	£585,151	£126,442	£19,900	£20,000
grammar	11	£5,137,238	£4,297,010	£1,240,000	£1,367,000
independent boarding - boys	1	£496,671	£4,000,000	£92,399	£12,000
independent day - boys	11	£23,505,804	£4,841,606	£5,068,376	£3,850,000
independent day/boarding - boys	11	£20,881,149	£1,304,939	£4,302,451	£1,340,550
independent boarding - co-ed	9	£12,475,422	£3,719,073	£1,859,266	£491,000
independent day - co-ed	23	£18,364,659	£3,249,228	£7,507,039	£5,237,502
independent day/boarding - co-ed	34	£32,790,629	£7,124,767	£7,522,250	£10,918,101
independent boarding - girls	1	£1,800,000			
independent day - girls	6	£2,833,941	£3,203,979	£77,294	£120,000
independent day/boarding - girls	6	£7,256,724	£6,590,000	£658,083	£15,000

key findings by school type 2016-18

- Co-ed day/boarding schools lead the way for all areas of income and pledges.
- Several boys' schools that have established programmes did not participate in this survey, which explains a drop in overall income in this survey, compared to the 2016 survey.
- Girls' schools are showing significant growth compared to previous benchmarking results, demonstrating greater investment and commitment to fundraising in these schools.
- Boys' independent schools make up 16% of the responses in the survey (25 out of 152), yet they accounted for 35% of total philanthropic income received.
- 17 girls' independent schools participated in this survey, 13 of which reported a total of £11.9million in philanthropic income from 4,441 donors between 2016 and 2018.

key findings by region 2016-18

- The average annual philanthropic income received per school ranged from £141,890 in the North East to £1,297,275 in London.
- Schools in London, South East, East, and North West IDPE regions accounted for 61% of the total philanthropic income reported.
- Schools in Scotland reported the sixth largest amount of philanthropic income, accounting for 7% of the total philanthropic income reported.
- 52% of submissions came from co-ed independent schools. Collectively, they raised £55.4million and attracted 45% of all donors (22,679 out of 50,638).

Scotland

£445,378

Schools participated:10

North East

£141,890

Schools participated:5

North West

£423,209

Schools participated:16

East

£536,729

Schools participated:14

West Midlands

£410,498

Schools participated:9

Thames

£515,508

Schools participated:8

London

£1,297,275

Schools participated:11

Surrey

£340,122

Schools participated:6

South Central

£364,083

Schools participated:9

South East

£786,441

Schools participated:14

South West

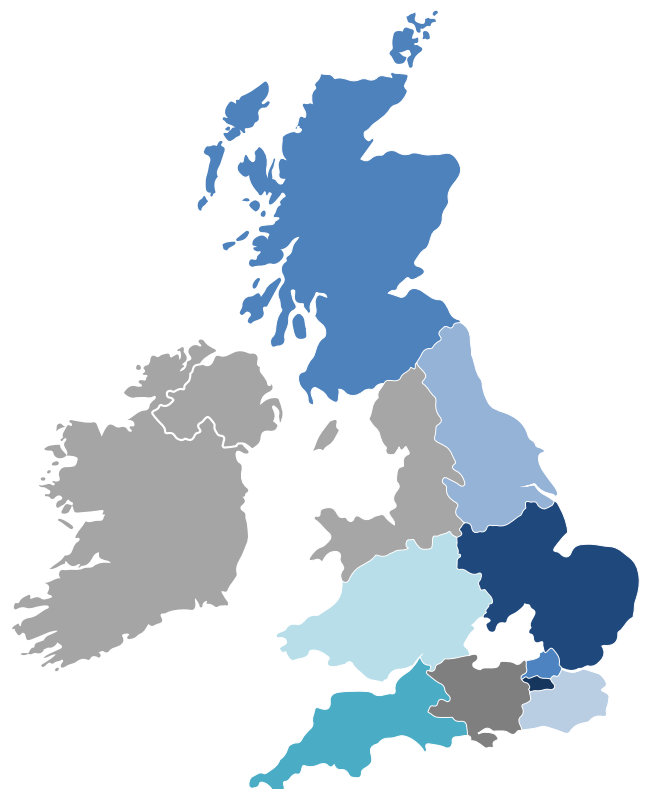
£352,165

Schools participated:17

Not a member

£510,000

Schools participated:1



key findings – 4-year data 2014-18

99 schools participated in both surveys, and the results from these schools paint a promising picture for fundraising in the sector:

- Amongst the 77 schools for which comparable data is available, there was a 59% increase in the number of donors year on year from 192 to 305.
- Just over half increased average annual philanthropic income between 2016 and 2018, and the increase was significant: £254k to £535k.
- Although slightly less than half did not increase income, they still raised £538k on average per school.
- Two schools in this survey grew fundraising income from £200k to over £1million per annum between 2016 and 2018.
- Across the sector we continue to see healthy long-term trends, as funds raised by schools have increased from £100million in 2011 to £157million today.
- However, there was a decrease from the 2016 survey, which reported total income of £211.5million, as several boys' schools with established programmes did not report this year.





senior leadership

headlines & highlights

- At 60% of schools raising more than £500k annually, the development director is on the senior leadership team and, of these, all but two reported that this enabled them to be more involved in the school's strategic direction.
- 70% of development directors report to the head.
- Focused use of the head on development activities is paramount – just 5% of the head's time spent on development can produce significantly better results.
- Utilising other staff and volunteers effectively – not administratively – can expand your fundraising power.
- Train and trust your volunteers (don't just trust).

development director



analysis

schools where the development director sits on the senior leadership team raise more

Of the 36 schools that raise more than £500k on average per year, two-thirds have the development director on the senior leadership team. At schools raising less than £500k, 44% have a development director on the senior leadership team. Having direct access to other staff, management information, successes, and challenges from around the school is beneficial to devising strategy to support fundraising and vice-versa.

most development directors report to the head

In 70% of schools, the development director reports to the head. In 13%, they report to the bursar, and at two schools (2%) they report to the chairman of governors. At the remaining schools there is a wide variety of reporting structures, including dual reports to the head, and either the bursar or chairman of governors. In those schools raising more than £1million annually, 86% of development directors report to the head, and meet with the head either weekly or fortnightly.

invest in your senior development professional

The most common salary band for development directors is £50k-£74k. **Chart B** highlights the

relationship between development directors' salaries and average annual philanthropic income. You do need to invest in this role – employing experienced fundraisers who can both raise money and be strategic will mean paying salaries upwards of £50k.

the development director's support of the head is critical

The most common types of support the development director and development team give to the head at all schools is preparing papers and reports, developing prospect briefings, organising dinners, giving clear advice on relevant matters, and inputting into school strategy. At schools raising more than £500k, it also is common to see the development team writing prospect profiles for the head. Notably absent from the top ways the development director and team support the head is devising cultivation plans, paving the way for an ask, and preparing the head to make an ask. Bottom amongst all types of supporting activities is rehearsing asking and training/coaching in asking.

short tenures can negatively impact fundraising

58% of development directors in this survey have been in their current post for 1-3 years, and previous benchmarking has shown that the average tenure of development directors in the

cont...

schools' sector is 2.3 years. This may explain why, as we will see in the next section, development offices of 1-3 years seem to stagnate across a variety of key metrics. A change in leadership, and the potential for a prolonged vacancy in the post, can negatively impact fundraising and staff morale, especially at offices that are still relatively young. Only 21% of development directors have been in their current post for more than seven years.

key facts

- In 70% of schools, the development director reports to the head, rising to 86% in schools raising £1million+.
- Development director salaries reflect increased income – investing in experience (where possible) is key.
- 58% of development directors have been in their current post for 1-3 years.
- 21% of development directors have been in their current post for more than seven years.
- The relationship between the director and senior staff, as well as length of tenure, has an effect on ROI.

the numbers





analysis

heads need to be involved in major gift activity...

When heads spend even a little more time on fundraising, it can lead to significantly improved results. The data shows that when the head spends 5-10% of their time on fundraising, the average gift more than triples compared to where time spent on fundraising is less than 5%. Likewise, in the last survey we observed a similar step change.

...but it needs to be the right kind of activity

There is an encouraging trend towards heads increasingly devoting more time to major gift fundraising and strategy across all schools, but several caveats remain. Whilst there was a slight increase in the number of heads asking, asking itself is bottom amongst the associated major gift fundraising activities. Moreover, at schools where heads are meeting one-on-one with prospects, nearly half the time they are not making the ask, which is where heads are arguably at their most powerful in the fundraising cycle. In other areas, depth of involvement amongst heads seems to have decreased. This year, for example, fewer heads spent time hosting/attending small dinners with prospects and influential alumni.

leaders must be willing to ask...

The impact that a head can have on a school's fundraising when they commit 5-10% of their time to development-related activities is even greater when they are also involved in asking for gifts. In schools where the head spends 5-10% of their time on fundraising, the average gift size more than doubled when the head is also involved in asking.

...but other individuals can ask, too

Most development directors report to the head. The fundraising team can and should extend beyond the development office, and other members of the school community can be involved in asking for donations. Heads are involved in asking at 50 schools and on average make six personal asks per year. Others within the schools' community are increasingly involved in asking prospects and donors for gifts. Twenty-one schools reported

that fundraising board members are involved in asking, and they make five asks per year. At 14 schools, bursars are asking, although the average bursar is making the ask just once a year. There was also a slight increase in the number of other staff and parents asking for donations compared with 2016, with staff making an average of two asks per year and parents on average four times.

fundraising is a team sport

Alongside the head, 38% of schools reported that the chair of governors was "involved" or "very involved" in development. This figure was 42% for the chair of trustees and 17% for the governing body as a whole. Like the head, these senior leaders bring gravitas to development and their support can be used to offset some of the head's time.

small fundraising boards have the greatest success

Schools with a board of fewer than five members reported an average annual philanthropic income of £750k, whereas those schools with no board raise £454k annually. Those with 5-10 members raise £602k, and those with 10-15 members raise £674k. The boards with fewer than five members tend to comprise a mix of alumni, current parents, and governors. Schools may also invite an expert in the field to join the board.

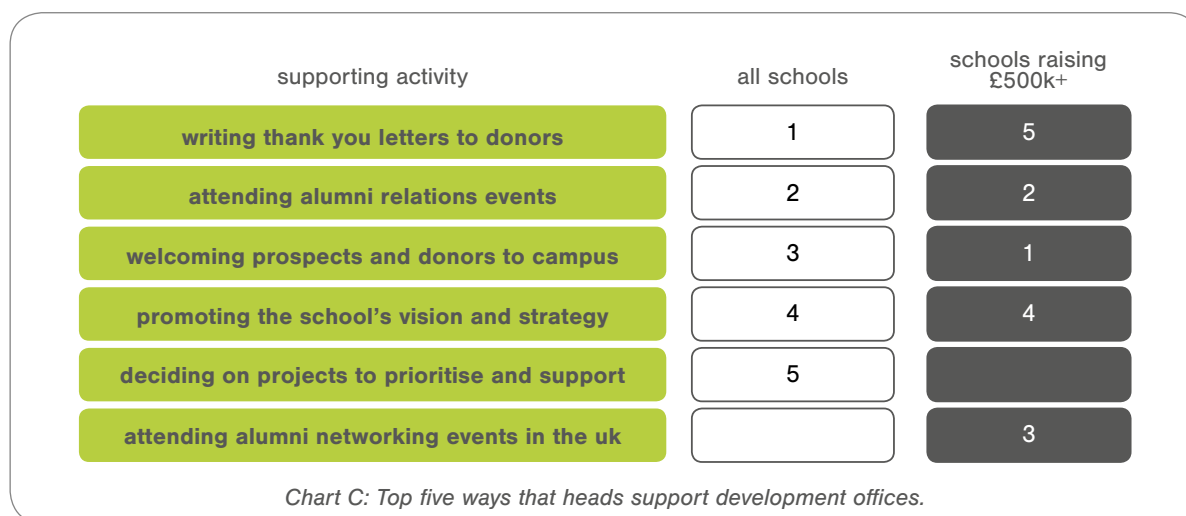
heads can do more to support the senior development professional

As in the last survey, senior development professionals across all schools cited that there were three types of further support they would like to see from the head: direct asking and closing of gifts, discussing cultivation strategies for top prospects, and calling donors to thank them.

key facts

- Among all schools, the head's involvement in development remained consistent – across the two survey periods, 71% of schools reported that the head was either “very involved” (29%) or “involved” (42%) in development.
- In schools raising more than £500k per annum, the kind of activities the head is involved in also remained largely the same, with a focus on alumni events, stewardship, and strategy and leadership.
- Two years ago, one-to-one meetings with prospects was among the top five activities of heads at schools raising more than £500k. This year, one-to-one meetings fell to eighth place.
- The number one activity among heads at schools raising more than £500k was welcoming prospects and donors to campus.
- In schools where the head spends 5-10% of their time on fundraising, the average gift is £3,614, compared with £1,029 where time spent on fundraising is less than 5%.
- The average gift reaches £6,667 in schools where the head spends 5-10% of their time on fundraising and is involved in asking for gifts.

the numbers



major gift fundraising	strategy & leadership	alumni events	communications & stewardship
welcoming prospects/donors to campus hosting/attending small dinners with prospects signing off proposals discussing cultivation strategies for top prospects writing ask letters direct asking/closing gifts one-to-one meetings with prospects	promoting vision and strategy deciding on projects to prioritise and support hosting/attending dinners with influential alumni training/coaching senior leadership meeting development and alumni relations staff meeting telethon calling team attending telethon calling sessions	alumni reunion events alumni networking events in the UK overseas alumni networking events	writing for magazine writing to congratulate alumni calling donors to thank them writing thank you letters

Chart D: Groupings of development activities delivered by the head.



Chart E: Who other than the senior development professional asks for donations by number of schools.



senior leadership at our school



what structures and activities work well?

what should our leadership team look like?

what do we need to change?



the strategy

headlines & highlights

- Apart from offices established for over 20 years, programmes that have been consistently running for 4-10 years are the most successful.
- Continuous and sustained investment in the development office has a positive impact on income.
- Being disciplined about how you spend your time (and that of your head) is critical to fundraising and engagement success. Schools spending the most time on major gifts raise on average £848k per year, whereas schools spending the most time on alumni relations raise £521k, and schools spending the most time on regular giving raise £246k.
- It takes time and investment to build a programme, but ROI significantly increases from year four onwards.
- All the numbers suggest that a minimum £100k budget per annum is required for success.
- Fundraising for bursaries has shown significant growth.
- Around 50% of schools were in a campaign by the end of 2017-18 with an average campaign target of £4million. Collectively, the 60 schools in a campaign seek to raise £246million.

age of development office



analysis

growth happens in years 4-10

There is little difference in the numbers for those schools in the early years of having a programme. Donations are likely to come from individuals that are known to the school and have established relationships. Schools in year 4-10 see the biggest growth, with income reaching £611k in years 4-6 and £704k in years 7-10. This often stems from sustainable, strategic fundraising with consistent staffing, leadership, and quite often, a campaign.

giving is strategic and long-term

Although the number of donors increases slightly in years 11-15, income decreases to £469k. In years 16-20, income does increase once again to £545k, yet it remains below the highest levels reached in the first decade. It is not uncommon to see a drop-off in income in the second decade, as those who are likely to give will have done so already. This is where building a regular giving programme alongside your major gifts and

campaign programme is essential for developing sustainable income. Some may argue that this is also a period of donor fatigue, but results from other sectors suggest that it is about the continued growth and strategic vision rather than donors feeling like they are constantly asked; donors need to be inspired and see the long-term giving strategy, not just the quick wins.

key facts

- 32 schools have started fundraising in the past three years – seven of them within the last year.
- The schools that have been fundraising for less than a year have managed to get nearly the same number of donors as schools that have been fundraising for 1-3 years.
- In schools with development offices that are between 4-6 years old, the results from 19 schools show that the number of donors has nearly tripled to 209, and the philanthropic income received has increased to £611k. The average gift size has also increased to £2,925.
- Among the 33 schools that have had a development office for 7-10 years, the numbers continue to increase, although at a slower pace.
- With development offices that have been established for between 11-15 years, the results from 24 schools show the average number of donors increases to 246, but philanthropic income drops to £469k.
- The average number of donors for the schools with offices aged 16-20 decreases slightly to 233, and whilst philanthropic income increases to £545k, it remains below the level achieved by schools with offices of 7-10 years.
- Finally, in schools which have development offices that have been established for more than 20 years, the number of donors rises to 312 with philanthropic income reaching £836k.

the numbers

age of development office	number of schools	average number of donors	average philanthropic income	average gift size
< 1 year	7	68	£86,995	£1,279
1-3 years	25	70	£137,891	£1,970
4-6 years	19	209	£611,397	£2,925
7-10 years	33	224	£704,287	£3,144
11-15 years	24	246	£469,088	£1,907
16-20 years	23	233	£544,711	£2,338
> 20 years	13	312	£835,529	£2,678

Chart F: Characteristics of development offices based on age of the office.



analysis

more major gift activity = more philanthropic income

£500k schools that devote more time to major gift fundraising raise more philanthropic income. Schools raising £100k-£499k and £500k-£999k spend the same amount of time on regular giving /annual fund activities (6%), but the schools in the higher income band spend 14% of time on major gift fundraising, whereas schools in the income band below spend 9%. Schools raising £1million+ devote even more time – 20% – to major gift fundraising. Conversely, schools raising less than £100k spend considerably more time on alumni relations (10% on average) than they do on major gift fundraising (2.5% on average).

10% of an office's time on major gifts is a tipping point

Reviewing the time analysis in **chart H** suggests that a minimum of 10% of a development office's time on major gifts is needed to achieve greater fundraising results. Schools raising £500k-£999k per year dedicate 14% of their time to major gifts and 20% of their time to fundraising overall. Schools raising more than £1million invest even more time in these activities – 20% for major gifts and 28% for fundraising overall. Schools raising less than £500k spend less than 10% of their time on major gift fundraising.

major gift activity has to be your focus

Chart I highlights how income can vary considerably depending on how a development office allocates its time, and clearly illustrates the power of major gifts. For offices spending the majority of their time on major gift fundraising, average income is £848k, nearly 60% higher than what the average school raises, and £200k greater than the results obtained when an office spends most of its time on other development office activities.

be disciplined about 'outward-facing' activity

Breaking down the time allocation further, we examined the relationship between the time spent on different activities and fundraising results. The six activities were grouped into two

categories: "outward-facing" and "inward-facing."

- *Outward-facing activities included: major gifts and legacies; regular giving/annual fund fundraising; and alumni relations (including communications, events)*
- *Inward-facing activities included: prospect research, database management, and gift administration; office management and administration; other development activities; and other school activities*

Where schools spend 50% or more of their time on outward-facing activity, the average annual philanthropic income of these schools is £549k compared with £485k for schools that spend 50% or more of their time on inward-facing activities. Breaking it down further still, within this group of schools spending 50% or more of their time on outward-facing activities, schools with a focus on major gifts raise £884k per year, whereas schools spending the most time on alumni relations raise £465k, and schools spending the most time on regular giving raise £230k.

alumni relations matters

53% of all schools spend the most time on alumni relations, and these schools raise £521k. Schools raising more than £1million per year dedicate about the same amount of time to alumni relations (29%) as they do to fundraising overall (28%), demonstrating the potential impact of good engagement.

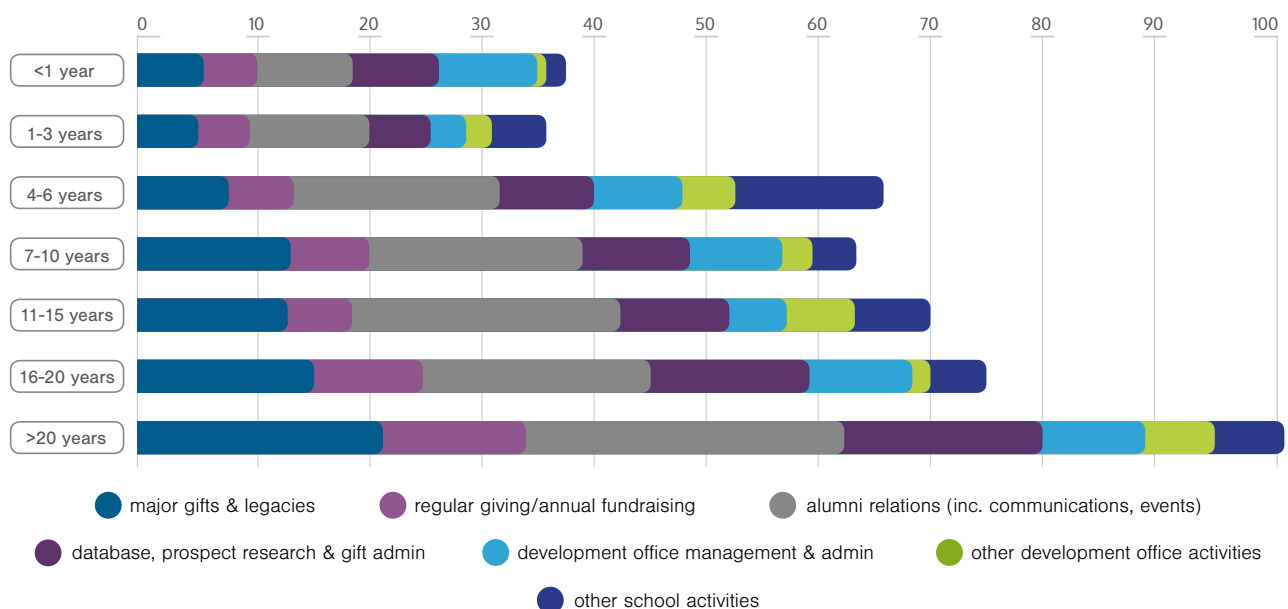
fundraising power grows with age

The proportional amount of time available for fundraising and other core activities becomes greater as the development office matures and additional resources are received. In the absence of significant additional resources being received, development offices should evaluate how they can increase their fundraising power by shifting existing resources toward fundraising activities and away from less productive activities. This is not to devalue core development services and engagement activities, which are absolutely necessary for success, but to take a robust view on other work that is potentially of lower value and where time can be repurposed.

key facts

- Schools in their first year and in years 1-3 are spending the same time on major gifts and about the same time on fundraising overall.
- Schools with development offices aged 4-6 years invested in major gift fundraising and devoted 40% more time to major gifts than schools with offices aged 1-3 years.
- Schools with offices of 7-10 years doubled the time devoted to major gift fundraising compared with offices aged 4-6 years.
- In development offices of all ages, a greater percentage of time is spent on alumni relations and other school activities than fundraising.
- Schools raising more than £1million dedicate 20% of time to major gift fundraising and 28% to fundraising overall. 29% of time is spent on alumni relations.
- Average annual philanthropic income of those schools that spend the most time on major gifts is £848k, nearly 60% higher than the average school raises.

the numbers



*Chart G: Distribution of a development office's time against age of the office.
This chart takes into account the number of staff available and thus total time available to each office compared to the office with the most time available.*

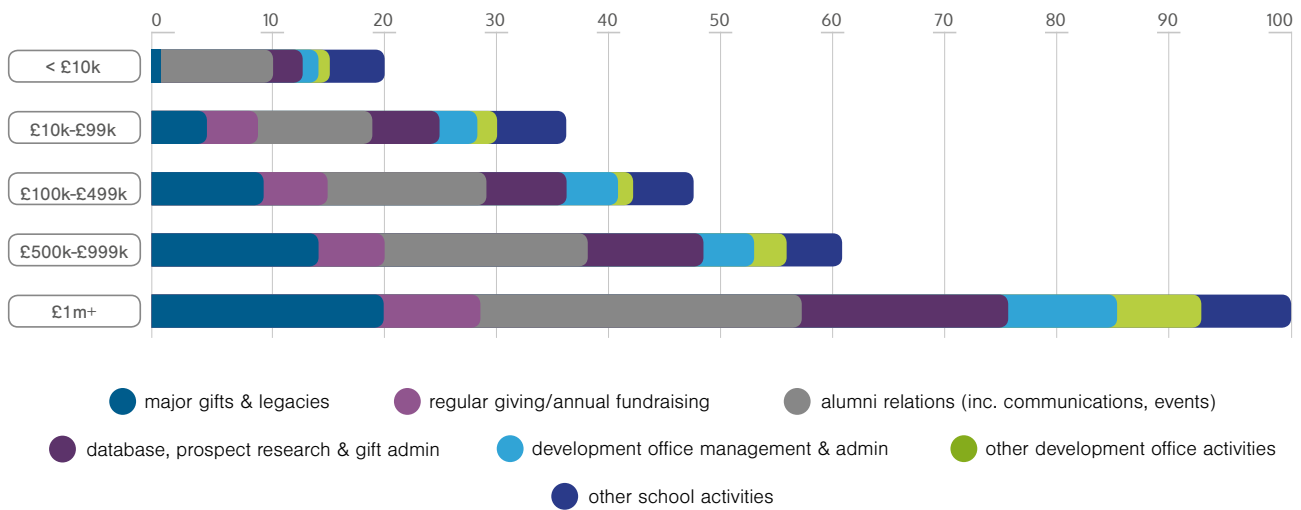


Chart H: Distribution of a development office's time against average annual philanthropic income. This chart takes into account the number of staff and thus total time available to each office compared to the office with the most time available.

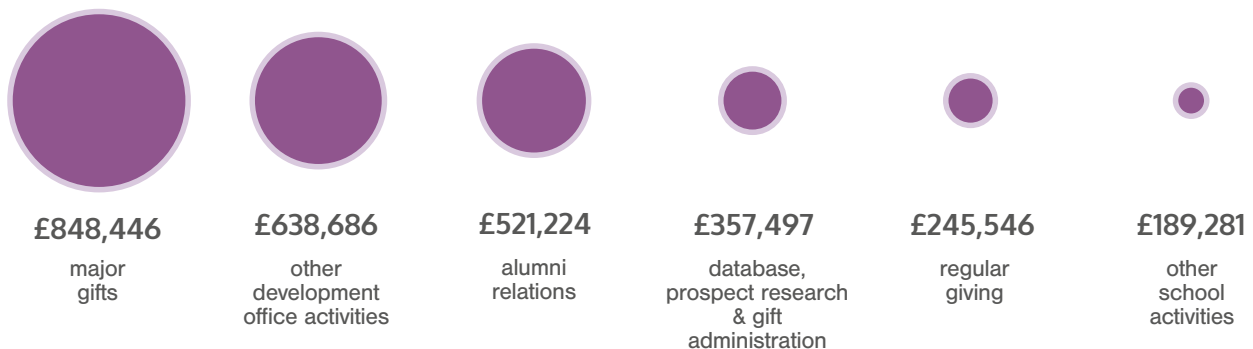


Chart I: Average annual philanthropic income compared to the activity the development office spends the majority of its time on.

staff, budgets, yield & ROI



ROI & yield

Return on Investment (ROI) is a performance measure used to evaluate the efficiency of an investment. ROI tries to directly measure the return on a particular investment relative to the investment cost. To calculate ROI, the investment return (average annual income from fundraising) is divided by the cost of the investment (average annual fundraising budget).

Yield refers to the difference between the return (average annual philanthropic income) and the cost of the investment (average annual fundraising budget). It is the income that remains after subtracting expenditure.

analysis

positive ROI in your first year is possible

It is encouraging that offices that have been in existence for less than one year are returning a positive ROI of 1.2, demonstrating an increase from the last survey where ROI in the first year was 0.4. Four years of data suggest that making a loss in year one is not a given.

years 1-3 can be slow, but sustained budget is crucial

ROI drops to 0.5 for offices aged 1-3 years, yet the yield is the same as it is for offices that have been established for less than one year. Whilst the average gift size tends to be higher for offices aged 1-3 years, the donor pool has not expanded meaningfully. By the time a development office has been established for 4-6 years, ROI makes an impressive leap to 4.3, resulting from strategic investments in the office, increased staff, and concentrating more time on major gift fundraising. For offices aged 7-10 years, although ROI drops, it remains a healthy 3.5, and, importantly, yield continues to grow. At schools that have had development offices for 11-15 years, the lower ROI resulted from a decrease in investment in the office, often as a result of post-campaign activity and changes to leadership. As investment picks up once again in development offices aged 16-20 years, there is a corresponding rise in ROI to 2.7 before reaching 2.9 for the oldest development offices.

professional offices take time, not just great people!

Yield reaches its highest level in development offices that have been established for more than 20 years, where there are well-established systems and processes and a well-developed prospect pool. The oldest development offices have, on average, 370 people in their database that they consider to be major prospects, i.e. a person able to donate at least the minimum value of a major gift – the most amongst development offices of all ages. In addition, these offices are leveraging a wide variety of methods to identify prospects – from personal interactions and institutional knowledge to digital resources.

invest in the professional development of your staff

Investing as little as 1% of your annual budget in the professional development of staff can help

to maintain a healthy fundraising programme. It is encouraging to see schools raising less than £10k per year recognising the importance of investing in professional development. On average, the professional development budget at these schools is £833, which is 3% of their total annual budget. By the time a school is raising more than £1million per year, professional development budgets have increased to £2,910 on average, yet it is only 1% of their total budget.

staff and time needed for major gifts

In the last survey we noted the difference in expenditure of offices raising £100k-£499k and £500k-£999k was only £25k and the number of FTEs was pretty much the same, yet the income results varied considerably. The time analysis showed that the schools raising more, focused more of their time on major gift fundraising rather than regular giving/annual giving activities, and were therefore raising more income per pound spent. This time, similarly, the income results vary considerably between these two groups – £230k compared with £708k. The key factors contributing to this difference appear to be a one-third increase in both budget and FTEs and a 55% increase in time spent on major gift fundraising as well as other meaningful investments in alumni relations, database, prospect research, and gift administration.

time + investment = strong ROI

At the upper income bands, ROI and yield reach impressive levels: schools raising £500k-£999k are raising £3 per £1 spent, with a yield of £538k, and those raising more than £1million are raising £6 for every pound invested and yielding £1.7million. In the last survey, ROI and yield were equally impressive at the upper income bands: schools raising £500k-£999k had an ROI of 4.0 and a yield of £604k. Schools raising £1million – £4.9million produced an ROI of 5.8 and a yield of £1.5million, with these figures reaching 11.1 and £6.8million for schools raising more than £5million.

£100k budget required for positive ROI and yield

As depicted in **Chart K**, at schools raising less than £100k, their budgets exceed their philanthropic income, resulting in a negative ROI and a negative yield. It is only after schools cross the £100k

cont...

threshold in terms of budget that we observe a positive ROI and a positive yield. This finding has been consistent across the four-year data. If a school is going to invest in development, it should do so at a level that provides the office with the right tools to staff and resources – to generate

more income than the cost. Our analysis suggests that an investment of £100k and two FTEs on staff is the minimum required to achieve a positive return.

key facts

- Offices that have been in existence for less than one year are returning a positive ROI of 1.2. These offices produce a similar yield as offices aged 1-3, yet they do so much more efficiently.
- For offices aged 1-3 years, ROI drops to 0.5, but increases to 4.3 for offices aged 4-6 years. ROI decreases in years 11-15 but rises again in years 16 onwards.
- Despite the fact that the ROI of the oldest offices does not get back to the level seen in years 4-10, these offices achieve a substantially higher yield.
- Yield reaches its highest level in offices of 20+ years.
- Between 2016 and 2018, budgets grew at schools across all income levels.
- Development teams on average grew in size by 7% from 2.15 FTEs to 2.31 FTEs.
- The average FTE time spent on major gift fundraising between 2016 and 2018 increased from 15% to 17%. The 13% increase in time overall devoted to major gifts could be explained in part by the modest decreases in time spent on other activities, namely, alumni relations, other development activities, and other school activities.
- At the schools that increased the average FTE time on major gift fundraising, philanthropic income rose modestly between 2016 and 2018.
- The schools with greater FTE time focused on major gifts raised £692k, 29% above what the average school raised.

the numbers

age of development office	number of schools	average philanthropic income	average annual budget	yield	ROI	average number FTEs
< 1 year	7	£86,995	£40,352	£46,643	1.2	1.4
1-3 years	25	£137,891	£92,273	£45,618	0.5	1.3
4-6 years	19	£611,397	£114,815	£496,582	4.3	2.4
7-10 years	33	£704,287	£156,829	£547,458	3.5	2.3
11-15 years	24	£469,088	£145,211	£323,877	2.2	2.5
16-20 years	23	£544,711	£148,575	£396,136	2.7	2.7
> 20 years	13	£835,529	£215,120	£620,409	2.9	3.6

Chart J: Characteristics of development offices based on age of the office.

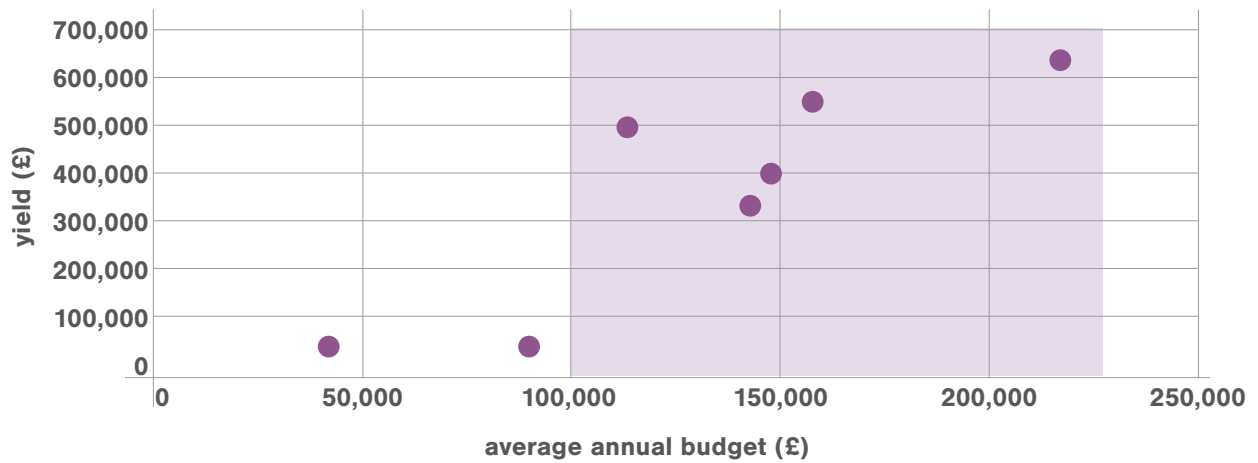


Chart K: Relationship between yield and average annual budget by age of development office.

2018

average annual philanthropic income	number of schools	average philanthropic income	average annual budget	yield	ROI	average number FTEs
<£10k	7	£4,798	£49,929	-£45,131	-0.9	0.9
£10k-£99k	24	£53,495	£89,510	-£36,015	-0.4	1.6
£100k-£499k	53	£229,906	£130,254	£99,652	0.77	2.1
£500k-£999k	15	£708,031	£170,311	£537,720	3.16	2.8
£1m+	21	£1,916,135	£262,348	£1,653,787	6.3	4.5

Chart L: Characteristics of development offices based on average annual philanthropic income levels (2018).

2016

average annual philanthropic income	number of schools	average philanthropic income	average annual budget	yield	ROI	average number FTEs
<£10k	10	£4,970	£42,921	-£37,951	-0.9	1.2
£10k-£99k	32	£47,909	£70,378	-£22,469	-0.3	1.6
£100k-£499k	60	£270,787	£125,314	£145,473	1.2	2.4
£500k-£999k	11	£755,362	£150,934	£604,428	4.0	2.4
£1m-£4.9m	22	£1,729,763	£255,285	£1,474,478	5.8	4.6
£5m+	3	£7,469,658	£619,827	£6,849,831	11.1	6.4

Chart M: Characteristics of development offices based on average annual philanthropic income levels (2016).

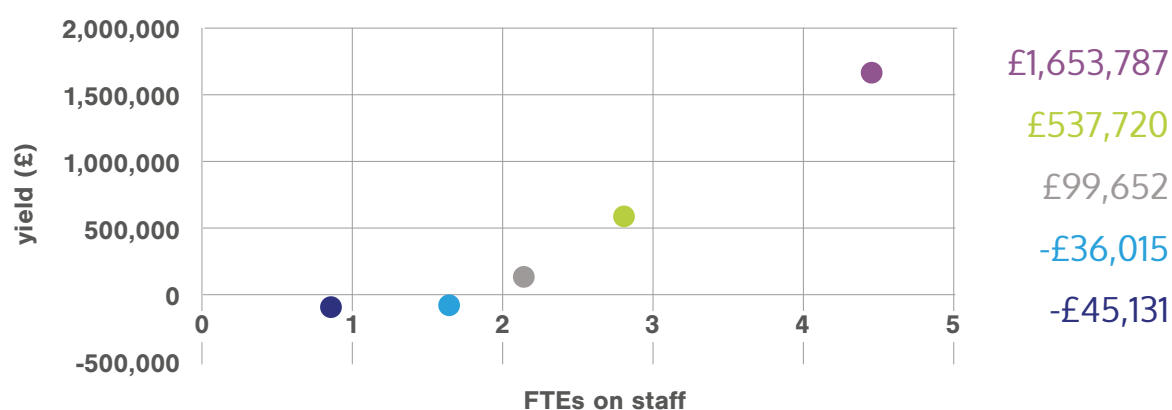


Chart N: Relationship between yield and average number of FTEs on staff by income band (2018).

fundraising priorities



analysis

student support and capital projects remain the highest priorities...

Bursaries/scholarships and capital projects remain the most popular areas donors choose to support across all schools, regardless of the level of income raised. With the exception of the schools at the lowest income level, where virtually

all funds raised were allocated to unspecified projects, more than 80% of philanthropic income was designated to these two areas.

...but bursaries are the top priority

Funds raised for bursaries have increased across almost all income levels. In addition, the mix of

cont...

funds raised for bursaries and capital projects has also shifted in favour of bursaries. Two years ago, it was more common to see an even split between bursaries and capital projects, in particular at schools raising more than £1million. At schools raising less than £1million, whilst the norm was for bursaries to attract more funds, schools in the £500k-£999k income level brought in more for capital projects. This year, bursaries have become the undisputed centre of fundraising programmes. The exceptions, still, are the schools at the £1million+ income level, where slightly more than half of funds were raised for capital projects with about a third of funds supporting bursaries.

capital projects on the decline in some schools

The most dramatic shift occurred at schools at the £500k-£999k income level. In contrast to 2016, where these schools raised twice as much for capital projects as for bursaries, in 2018 these schools brought in twice as much for bursaries as they did for capital projects.

bursaries can attract major gifts

We looked at high-performing schools in bursary fundraising, defined as schools whose total funds raised for bursaries exceeds 50% of total philanthropic income. There were five such schools in the £500k-£999k income level, and at three of them bursary income accounted for 75% or more of their total philanthropic income. Among the schools in the £1million+ income band, three schools had income from bursaries representing more than 65% of total income raised.

most schools are now fundraising for bursaries

As philanthropic income increases, the percentage of schools fundraising for bursaries also increases. With the exception of schools raising less than £10k per year, where all revenue for bursaries comes from fees and endowment income, more than half of all the schools in each income band raise money for bursaries, beginning with 58% of schools in the £10k-£99k band. This figure rises to 68% at schools in the £100k-£499k group and 80% at schools raising £500k-£999k, reaching 95% at schools raising more than £1million per year.

four-year data: being specific about your needs is critical

Schools are embracing the notion of being more specific when asking donors for gifts. When analysing four-year data from the schools that participated in both surveys, we observe a similar trend among schools in the £10k-£99k and £100k-£499k income bands with respect to unspecified projects: funds raised for unspecified projects dropped by half between 2016 and 2018. Whilst some of these funds seemed to have increased support for academic projects, overwhelmingly these schools focused their efforts on, and raised more money for, bursaries and capital projects.

By contrast, schools raising £500k-£999k and £1million+ annually raised more for unspecified projects this year than they did two years ago. The increase may be attributed to a smaller percentage of funds being directed to capital projects as bursary fundraising grew, to varying degrees, at these schools.

key facts

- In 2016-18, 127 schools awarded bursaries to pupils, and 106 schools awarded scholarships.
- On average, 85 bursaries were awarded, and 11% of pupils received bursaries per school.
- On average, 122 scholarships were awarded, and 15% of pupils received scholarships per school.
- The average expenditure of all means-tested bursaries was £927k.
- 93 schools (66%) fundraised for bursaries, yet no school relied on fundraising alone. All schools raising money for bursaries supplemented it with cross-subsidy from fees and endowment income and, in some cases, other sources of revenue such as external grants, a separate college charitable trust, or commercial activities.

the numbers

average annual philanthropic income	bursaries/scholarships	capital projects	academic	sports	arts	unspecified
<£10k						100%
£10k-£99k	43%	31%	7%	3%	2%	12%
£100k-£499k	56%	23%	9%	1%		10%
£500k-£999k	56%	27%	1%	1%		15%
£1m+	37%	51%	1%			11%

Chart O: Fundraising priorities (2018).

average income	capital projects (2014-16)	capital projects (2016-18)	bursaries/scholarships (2014-16)	bursaries/scholarships (2016-18)
<£10k	7%		69%	
£10k-£99k	23%	31%	37%	43%
£100k-£499k	28%	23%	44%	56%
£500k-£999k	63%	27%	32%	56%
£1m+	45%	51%	45%	37%

Chart P: Four-year trend of bursary and capital fundraising per income band.

average income	bursaries/scholarships (2014-16)	bursaries/scholarships (2016-18)
<£10k	69%	
£10k-£99k	37%	43%
£100k-£499k	44%	56%
£500k-£999k	32%	56%
£1m+	45%	37%

Chart Q: Four-year trend of bursary fundraising per income band.

average annual philanthropic income	bursaries/scholarships	capital projects	academic	sports	arts	unspecified
<£10k						100%
£10k-£99k	48%	30%	3%	3%	2%	13%
£100k-£499k	59%	20%	10%	1%	1%	10%
£500k-£999k	60%	21%	1%	1%	1%	16%
£1m+	35%	55%	1%		1%	8%

Chart R: Fundraising priorities (2018), based on schools that completed both surveys.

average annual philanthropic income	bursaries/scholarships	capital projects	academic	sports	arts	unspecified
<£10k	56%	6%		2%		36%
£10k-£99k	35%	24%	1%	6%	8%	26%
£100k-£499k	45%	27%	5%			22%
£500k-£999k	42%	52%		1%		5%
£1m-£4.9m	34%	60%				5%
£5m+	28%	63%	4%		1%	5%

Chart S: Fundraising priorities (2016), based on schools that completed both surveys.





analysis

all schools can run a campaign

There are schools running campaigns within all philanthropic income bands, except for those schools raising less than £10k, and around half are in the public phase. Likewise, schools with development offices of all ages are running campaigns, although campaigns tend to be concentrated amongst development offices that have been established for more than three years.

a post-campaign is key for sustainability

Comparing the results from schools that participated in both surveys, we examined the impact campaigns are having on philanthropic income and donor participation. The 12 schools that were in a campaign in 2014-16 on average raised £751k from 341 donors; when these schools were no longer in a campaign in 2016-18, average philanthropic income fell to £641k and the number of donors dropped to 267. 11 of the 12 schools reported a decline in average philanthropic income. This is likely because there are not long-term cultivation strategies in place for major donors.

campaigns increase income and donor numbers

A similar trend was observed when analysing the 20 schools that embarked on campaigns in the last two years. These schools raised on average £420k from 263 donors compared with £331k from 236 donors in 2014-16 when they were not in a campaign. Noteworthy from these results is that both the average gift size and the value of the two largest gifts were essentially the same in 2016 and 2018, suggesting that the increased donor participation accounted for the

rise in philanthropic income raised, rather than an increase in the 'stretch' lead gifts you might expect in the early stages of a campaign.

major gifts can come at all stages of a campaign

Schools that were in campaigns over the last four years demonstrated remarkably consistent results across the four-year period. Between 2014 and 2018, at 27 schools that were in a campaign, the average philanthropic income was c. £850k, and the average number of donors was c. 300 in each two-year period. The average value of the two largest gifts increased as the campaign continued, rising to £373k in 2018 from £304k in 2016. Although some schools saw a decline in the average value of the two largest gifts, which may be a result of their major donors having already made major commitments during the quiet phase of the campaign, the average value of the top two gifts at most schools increased in the public phase. At seven schools, the average value of the top two gifts increased by more than £100k, and at one school the increase was nearly £1million.

investment in campaigns

58% of the schools in a campaign used consultants at some point during their campaigns. The schools that employed consultants to undertake a feasibility study, provide wealth profiling, and run telephone appeals displayed better average annual philanthropic income than those that did not employ consultants. The average philanthropic income where consultants were used to provide strategy services or run direct mail appeals was lower.

key facts

- Around 50% of schools were in a campaign by the end of 2018, compared with 45% by the end of 2016.
- Most campaigns had multiple funding priorities, but bursaries were the most popular project supported by campaigns, followed by capital projects.
- Around three-quarters of the schools raising £500k-£999k and more than £1million are in campaigns.
- The average campaign target is £4million.
- Collectively, the 60 schools in a campaign seek to raise £246million.

the numbers

average annual philanthropic income	planning	feasibility study	quiet phase	public phase	extended	completed	in campaign	not in campaign	% in campaigns	average overall duration of campaign (in years)
<£10k								7		
£10k-£99k			1	4		2	7	17	29%	2
£100k-£499k	2	1	4	13	3	4	27	26	51%	3
£500k-£999k			1	6		4	11	3	73%	4
£1m+	1		2	6	1	5	15	6	71%	3
average	3	1	8	29	4	15	60	59	50%	2
	stage in campaign						totals			

Chart T: Distribution of schools in campaigns by campaign stage compared to average annual philanthropic income.

	no. of schools	average annual philanthropic income with consultants	average annual philanthropic income without consultants
feasibility study	13	£825,095	£641,932
wealth profiling	14	£692,557	£674,695
strategy	14	£440,534	£738,073
direct mail appeals	2	£155,536	£696,600
telephone appeals	8	£922,766	£640,995

Chart U: Average annual philanthropic income per school with and without the use of consultants to assist with a fundraising campaign.

strategy at our school

what strategies and activities work well?

what is our ambition?

what do we need to change?





fundraising

headlines & highlights

- Schools raise most of their income from alumni and current parents, accounting for 70% of income raised (compared with 54% in 2014-16).
- Schools that devote more time to major gift fundraising raise more philanthropic income. Decide what a major gift is for your school based on the potential of your audiences. Focus time on this – this is high-value work.
- Fundraising is a team sport: 80% of schools that have identified prospects have done so through building institutional knowledge, and 97% of schools through personal interactions.
- Disciplined and measurable prospect management will help you be successful: more schools are embracing the use of a moves management system – 39% in this survey compared with 30% in 2014-16.
- Legacy gifts at 92 schools generated £28.6million, representing c. 20% of total philanthropic income received at these schools. The average legacy gift of £311k is high due to a handful of outlier gifts – eight legacies over £1million. The median value of legacy gifts was £74k. 61 schools are also expecting future legacies worth an additional £23.4million.
- The number of legacies received and pledged does increase the more a school raises and increases dramatically for those schools raising more than £500k.

fundraising methods



analysis

embrace a variety of fundraising methods

As schools raise more, they embrace more fundraising methods. This ‘multi-channel’ strategy allows schools to engage with their supporters in a variety of ways and continually test the effectiveness of each activity. **Chart V** shows that all schools raising more than £500k use personal asks, and that direct mail by email and direct mail by post remain among the most popular fundraising methods.

diverse programmes raise awareness

Whilst direct mail and events might seem to be less effective as a means of securing major gifts, they do raise awareness and plant the idea of giving. These activities can act as cultivation and information points, and often help to identify new major gift prospects.

key facts

- Personal asks are the most popular activity, with 82% of the schools that fundraise using them to solicit alumni and 63% using them to ask current parents.
- Direct mail by post and events are the second most popular, followed by email.
- Schools raising more than £1million per year embrace multiple activities.
- All schools raising more than £500k annually use personal asks.

the numbers

	<£10k	£10k-£99k	£100k-£499k	£500-£999k	£1m+
personal asks (1-1)	29%	71%	89%	100%	100%
direct mail - post	57%	67%	79%	80%	81%
direct mail - email	14%	63%	58%	87%	76%
social media		33%	28%	60%	19%
telephone appeal		17%	23%	7%	48%
events	57%	63%	68%	100%	76%
crowd-funding		4%	8%		10%
fundraising events (e.g. sponsored walks)	14%	8%	34%	53%	43%
auctions/raffles	14%	58%	42%	60%	43%

Chart V: Percentage of schools that use a variety of fundraising methods by income bands.

	alumni	current parents	former parents	current pupils	staff	trusts, foundations	corporates	local community	governors, trustees & board
personal asks (1-1)	82%	63%	40%	3%	13%	38%	31%	10%	53%
direct mail - post	71%	57%	32%	3%	9%	20%	10%	4%	29%
direct mail - email	59%	44%	31%	2%	18%	8%	9%	3%	26%
social media	31%	17%	13%	4%	7%		4%	5%	4%
telephone appeal	22%	12%	8%		2%		1%		6%
events	71%	58%	48%	13%	23%	8%	9%	13%	33%
crowd-funding	4%	3%	3%	2%	3%	1%	2%	1%	3%
fundraising events (e.g. sponsored walks)	24%	28%	13%	16%	15%	2%	7%	9%	11%
auctions/raffles	33%	43%	23%	8%	20%	2%	9%	9%	18%

Chart W: Percentage of schools employing a variety of fundraising methods to raise money from different constituent groups, as identified by 120 schools which reported philanthropic income.



analysis

outlier gifts vs. major gifts

As development offices mature, the value of the top two gifts increases. We have seen that in years 4-6, development offices begin to hit their stride, and this is further demonstrated by the fact that the average annual value of the two largest gifts received by these offices is £376k compared with only £48k for offices aged 1-3 years. By the time an office has been established for more than 20 years, the average annual value of the top two gifts is £426k.

When comparing the value of the two largest gifts against totals raised (**Chart X**), as more income is received, the relative impact of the top two gifts diminishes (down from 57% to 38%). This is a common feature of high-performing schools – they rely less on big gifts as there are many more gifts similar in size to the two largest gifts.

secure income for the future, even if it means delayed gratification

Many major gifts are fulfilled by donors over a defined period of time, usually multiple years. Obtaining multi-year commitments from donors can assist with financial planning and allow fundraisers to secure gifts from new prospects. **Chart Y** shows the average amount expected by schools between 2018 and 2022 from pledges and regular gifts. It is not surprising to see that as with income already received, there is a steady increase in future income across the groups. What is noteworthy, however, is that as schools raise more, this future income decreases as a percentage of current annual income. This can highlight how fundraisers are spending their time. At those schools raising more than £500k, fundraisers are concentrating more on securing immediate income rather than future income.

know your prospects

Knowing which prospects to include in the major gift fundraising process is critical to ensure that resources are effectively allocated for maximum return. Alumni relations, individual giving programmes, and prospect research can play a vital role in helping fundraisers identify which prospects to include.

prospect research empowers focused, strategic fundraising

Prospect research is vital in major gift fundraising. As the results of this survey demonstrate, major gifts are the most effective use of a fundraiser's time to create a step change in your fundraising programme, and a minimal level of resource is necessary to realise the potential of major gifts. By reviewing publicly available information about organisations and individuals in your database, a fundraiser is able to devote their time to those with the greatest capacity and inclination to give. Prospect research is also necessary to ensure your school undertakes appropriate solicitations. Understanding the sources of income for the gift you wish to ask for or accept, along with understanding any broader reputational risks, will ensure your school is protected from adverse publicity and its many consequences. 84% of schools have used a variety of research methods to help identify prospects.

investment in strategic management of prospects helps everyone

Increased spending on database and prospect research can also lead to the use of a "moves management" system, a system that allows fundraisers to prioritise prospects and monitor which stage of a relationship a prospect is at. Future actions can be scheduled to allow the value of timing of large gifts to be estimated. This helps with financial forecasting as well as ensuring that the correct prospects are given attention at the right time. Such a system can also demonstrate fundraising progress to school leadership beyond simply pounds raised.

moves management systems increase philanthropic income

Chart Z shows that the percentage of schools with a moves management system increases with philanthropic income. Once schools raise more than £1million per year, 57% of them have a moves management system. This also means that schools raising more than £1million per year who are not using a moves management system may not be managing prospect relationships as effectively as possible, and there is a greater risk of diminished or lost prospect relationships in the event of staff turnover.

key facts

- Throughout the report, we have seen that time and investment in major gift fundraising is critical to both fundraising income and long-term success.
- In schools raising £500k-£999k, the value of the top two gifts accounted for 38% of total philanthropic income in 2018, compared with 68% of total philanthropic income in 2016.
- 48 schools increased the size of their two largest gifts, which resulted in £15.2million more in total philanthropic income at those schools.
- 128 schools in this report stated that they have a defined prospect pool.
- 80% of schools identify prospects through building institutional knowledge and 97% of schools do so through personal interactions.
- More schools are embracing the use of a moves management system to track prospect relationships – 39% in this survey compared with 30% in 2014-16.

the numbers

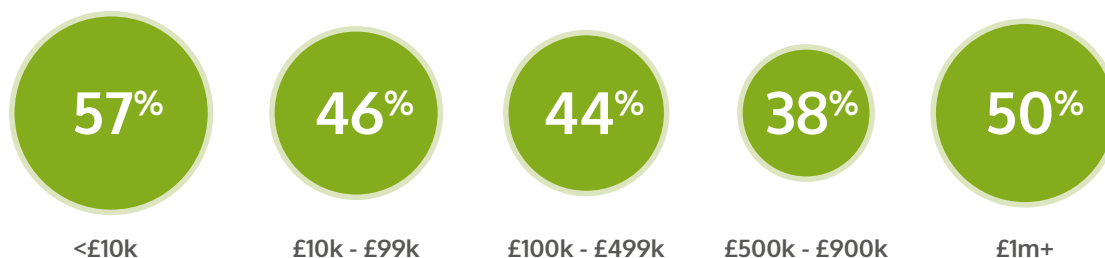


Chart X: Value of the two largest gifts as a percentage of total philanthropic income by income band.

average annual philanthropic income	average pledge and regular gift income expected between 2018 and 2022	percentage of current annual philanthropic income secured per year for the next four years
<£10k	£20,000	82%
£10k-£99k	£126,085	70%
£100k-£499k	£508,113	55%
£500k-£999k	£504,831	20%
£1m+	£1,288,684	16%

Chart Y: Future secured income pledged to schools compared to their current average annual philanthropic income.

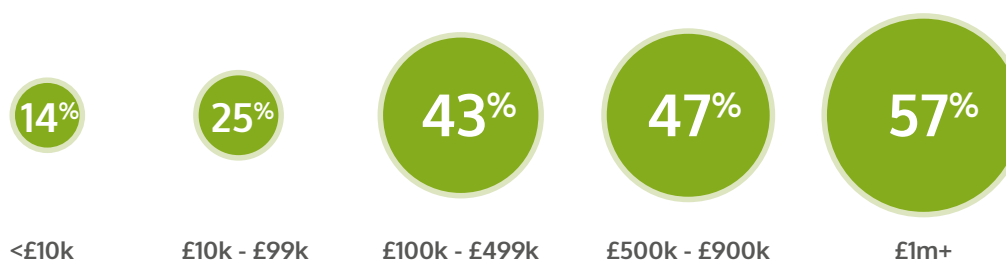


Chart Z: Percentage of schools with a moves management system compared to philanthropic income.



analysis

schools with legacy societies attract more pledges

Schools with an established legacy society report an average of 10 legacies worth £246k per school. This is much higher than those without a society, where the average is two legacies worth £26k per school.

legacy societies take time to establish

Legacy societies attract more legators over time. As shown in **Chart AA**, legacy societies that have been established for less than a year attracted an average of 16 members, while those in existence for 1-3 years nearly doubled the number of members to 29. Although the rate of increase appears to moderate for societies 4-6 years old and 7-10 years old, by the time a legacy society has been established for more than 10 years, it has on average over 100 members.

don't wait to establish your fundraising programme before thinking about legacies

While a legacy society will grow with time, the results show that legacies can be a lucrative proposition even for schools that are just beginning a legacy fundraising programme. Schools whose legacy societies have been running for less than a year secured an average of four legacy pledges worth £347k per school (median value: £27,500). For schools whose legacy society have been running for 1-3 years, these schools secured an average of 14 pledges worth £654k per school (median value: £625k). Major legacies can impact average figures, as can be seen in the schools with brand new legacy societies, yet in the case of schools with legacy societies of 1-3 years, the mean and median figures are fairly close, which speaks to consistency of results. In this survey, 17 schools reported receiving legacy pledges totalling £500k or more. Of these, nine schools received legacy pledges worth more than £1million, five of which were received by schools whose legacy societies are less than three years old.

all schools can secure legacies

Chart AB shows that all schools can secure legacy gifts and pledges. Like philanthropic income, however, the number of legacies

received and pledged does increase the more a school raises. Likewise, **Chart AC** shows that the value of the legacies increases dramatically for schools raising more than £500k.

direct mail combined with a personal approach is key to unlocking legacies

Among the different approaches used by schools to stimulate legacy giving – including direct mail, personal asks, advertising, events, the school's website, and newsletters – direct mail remains the most popular. The 68 schools that use direct mail reported an average of 11 legacies worth £240k per school. 39 of these schools also used a personal ask strategy and performed better than the average, reporting an average of 14 legacies worth £269k per school. Schools relying on personal asks and no direct mail strategy performed better still, securing legacy pledges worth £373k from six legacies. The school securing the most in legacy pledges – £3million during the two-year period – did so through personal asks alone.

girls' schools have an opportunity to grow in this area

In both number and percentage of total philanthropic income, girls' schools are lagging behind their male and co-ed counterparts in legacy fundraising. This represents an under-exploited opportunity. The strong recent performance in major gift fundraising among girls' schools across the sector should serve as a strong foundation from which to launch a more robust, lucrative, and impactful legacy fundraising effort.

don't be shy about talking about legacies

Leaving a gift in a will is one of the most powerful gifts someone can make – they are trusting you with their money after their death. We know from experience across the sector that nothing is sadder than receiving a legacy gift and knowing nothing about it or being able to thank someone. No matter how new you are to fundraising, it is vital that you have key information available and be prepared for open conversations.

key facts

- Legacy gifts realised in 2016-18 at 92 schools generated £28.6million, representing c. 20% of total philanthropic income received at these schools.
- 61 schools are also expecting future legacies worth an additional £23.4million.
- Legacy societies take time to grow, but large legacy pledges can be secured within the first year.
- Schools raising £10k-£99k received £1million in income from legacies and an additional £1.9million from legacy pledges.
- The number of legacies received and pledged increases the more a school raises and increases dramatically for those schools raising more than £500k per year.

the numbers

age of legacy society	average number of legacy society members	average value of legacy pledges
<1 year	16	£347k
1-3 years	29	£654k
4-6 years	37	£52k
7-10 years	44	£212k
>10 years	109	£194k
No legacy society		£26k

Chart AA: Characteristics of legacy societies by age of the society.

average annual philanthropic income	average number of legacy gifts received	average number of legacy pledges
<£10k	1.0	0.6
£10k-£99k	2.5	2.9
£100k-£499k	3.1	4.6
£500k-£999k	5.7	6.9
£1m+	8.1	20.5

Chart AB: The number of legacy donors, both received and pledged, per school per income band.

Average annual philanthropic income	average of legacy gifts received	average of legacy pledges
<£10k	£3,571	£17,857
£10k-£99k	£42,979	£79,521
£100k-£499k	£99,014	£168,977
£500k-£999k	£373,389	£443,300
£1m+	£774,333	£271,064

Chart AC: The value of legacies, received and pledged, per school per income band.

other types of fundraising



regular giving

Individual giving programmes allow fundraisers to see who is responsive to appeals, gain additional information about donors, analyse giving patterns, and identify potential major gift prospects. However, regular giving activity can be incredibly time consuming with a low return – schools spending the most time on regular giving raise £246k compared with £848k at the schools spending the most time on major gifts. Managing your time and investment is critical, and being selective about low-level giving activities is crucial.

crowdfunding

Of the 132 schools responding to this question, 10 schools indicated that they use crowdfunding to raise money. Some schools use crowdfunding to raise money from all of their constituent groups, while other schools target only one constituent group. Crowdfunding is employed by schools with development offices of all ages, but mainly it is used by offices less than four years old. In terms of average annual philanthropic income, crowdfunding is most common among schools raising £100k-£499k, with two schools raising £1million+ also using crowdfunding to raise money from their supporters.

demographics



analysis

demographics should inform your programme

Your alumni will have different pressures throughout their lives – both financially and in terms of their time. Understanding who your best prospects are for engagement and fundraising is critical in the early phases of an office, and understanding

alumni journeys is vital in long-term programming. For example, prospects with the capacity to make a large donation are usually approaching the later stages of their careers or lives when they are likely to have greater disposable income and assets.

cont...

focus on alumni and current parents

The focus on alumni and current parents is clearly paying dividends for development offices as the contribution to overall philanthropic income from these groups grew year on year to 70% from 54%.

but do consider your whole community

Governors, trustees, and boards continue to be approached at the same level, and their contribution to overall philanthropic income remained about the same at 7%. Former parents, too, continue to be approached by a majority of schools, yet the percentage of philanthropic income received from this group fell by half to 5% from 10%. There still is a slight bias towards activity with former parents, most notably with respect to events where 48% of schools use events to engage former parents.

don't be afraid to ask current parents

At schools raising more than £1million per year, the largest percentage of philanthropic income is received from current parents (30%), followed by alumni (27%). We know that many schools feel nervous about asking current parents given the growth in fees over the last decade, but the data is clear: paying school fees does not necessarily put parents off donating to schools. Both in number and percentage contribution, parents still donate despite having to pay school fees. At the most expensive schools, parents' contributions account for 55% of total philanthropic income.

The three main methods employed by these schools to approach parents were direct mail by post, personal asks, and events. Not being open about your needs and asking this community means you are not making it easy for those who can give to self-identify. Building a culture of asking parents is the only way to build a culture of giving amongst them.

involve your students!

It is encouraging that schools continue to take a long-term approach to fundraising and nurturing the idea of philanthropy in their current student body, even though donations from current pupils make up less than 1% of philanthropic income. One in five schools approach current pupils for fundraising, with most schools using alumni relations and fundraising events, as well as auctions and raffles, although a small handful of schools use personal asks, direct mail by post and by email, social media, and crowdfunding. To turn these students into long-term – and potentially major – donors, a school needs to invest in educating this group about the importance of philanthropy whilst they are at the school.

key facts

- The average age of alumni populations across all schools is 45 years old.
- Schools raising less than £10k have a prospect pool with an average age of 49 years, slightly higher than the overall average.
- 80% of development databases are composed of more than 55% men. Schools raising more than £500k have predominantly more men in their prospect pool.
- Schools raise most of their income from alumni and current parents, accounting for 70% of income raised compared with 54% in the last survey.
- In 2016-18, the percentage of income received from alumni rose to 39% compared with 32% in 2014-16.
- The percentage of income received from current parents rose to 31% from 22%.
- Even at the most expensive schools, contributions from parents are significant both in number and as a percentage of total philanthropic income.

the numbers

average annual philanthropic income	very young (<30)	young (30-39)	middle aged (40-49)	maturing (50+)	average age
<£10k		1		2	49
£10k-£99k	1	4	13	1	41
£100k-£499k		4	22	4	44
£500k-£999k		2	6	2	45
£1m+		1	16	2	45
total	1	12	57	11	45

Chart AD: Distribution of schools by the average age bracket of their alumni (data from 81 schools).

average annual philanthropic income	100% female	90%+ female	55%+ female	mixed	55%+ male	90%+ male	100% male
<£10k			2	1	4		
£10k-£99k	2	1	2	1	12	1	4
£100k-£499k	6	1	1		26	5	5
£500k-£999k	2	1			7	4	1
£1m+	2				12	3	4
total	12	3	5	2	61	13	14

Chart AE: Distribution of schools by the gender mix of their alumni (data from 110 schools).

average annual philanthropic income	no. of schools in group	alumni	current parents	former parents	current pupils	governors, trustees, boards	staff	foundations, trust, or livery company with a current or historic link to the school	other charitable trusts or foundations	corporates	local community
<£10k	3	41%	59%								
£10k-£99k	17	32%	31%	2%		8%	1%	7%	14%	4%	1%
£100k-£499k	26	42%	27%	8%		10%	1%	3%	7%	2%	1%
£500k-£999k	8	53%	6%	5%		11%		3%	14%	3%	7%
£1m+	11	27%	30%	8%		6%		22%	5%		1%
average	65	39%	31%	5%		7%		7%	8%	2%	2%

Chart AF: Percentage of total income received from the various types of constituent groups by philanthropic income group (data from 65 schools).

free range	% of total philanthropic income	total contribution from current parents
<£10k	25%	£296,128
£10k-£14.9k	9%	£319,908
£15k-£19.9k	15%	£439,437
£20k-£24.9k	54%	£1,161,891
£25k-£29.9k	13%	£1,787,035
£30k-£38k	55%	£4,064,977

Chart AG: Donations by parents compared to school fees.

fundraising at our school



what fundraising activity are we doing well?

what is our ambition for fundraising?

what do we need to change?



engagement

headlines & highlights

- Alumni relations expenditure steadily increases from £20k to £82k as a development office matures, although expenditure moderates after year 15.
- Offices have between 1.1 and 2.3 alumni relations staff.
- 139 schools reported that they organise events. In total, 2,305 events are held for alumni each year (17 events on average per school).
- 139 schools in the survey run a volunteer programme either for alumni or parents, and in some cases both, but only 11 schools demonstrate the contribution of volunteers through recording volunteer hours.
- On average, schools send out two printed publications per year and five electronic communiques per year.
- The majority of fundraising and alumni websites remain integrated with the school website.

investment & metrics



analysis

how do you measure ROI when it comes to engagement?

We know a critical question from leadership is how do you measure ROI when there isn't always a pound sign next to it in the annual report. It is vital you think strategically about how your engagement programme is supporting the school strategy, whether that be opportunities for work experience, support with university applications, careers talks, or being advocates for your school. We know most schools are not set up to manage or measure these metrics, but it will help you make a case for investment in this area.

strategic engagement programmes can help fundraising efforts

Inevitably, alumni and constituent engagement programmes are designed for just that – engagement. But you can be strategic about it. Ensure your engagement programme supports

fundraising through attracting those that can give; it should speak proudly about the impact of fundraising, and act as a fundamental tool for stewardship.

investment in engagement must be consistent

Compared with philanthropic income, the percentage spent on alumni relations decreases rapidly the more that is raised (from 584% at schools raising less than £10k, where the alumni relations expenditure exceeds philanthropic income, down to 6%). This connection between increased spend and increased fundraising results suggests that time and money spent on alumni relations, including investing in alumni relations staff, should not be reduced as fundraising becomes more successful. Compared to the income generated from fundraising over time, the expenditure is minimal.

key facts

- Alumni relations expenditure steadily increases from £20k to £82k as a development office matures, although expenditure moderates after year 15.
- This is consistent with the time spent on alumni relations, which begins at 8% of time for the youngest development offices and reaches 29% for the offices that have been established for more than 20 years.
- Offices under seven years old have between 1.1 and 1.3 staff working in alumni relations.
- Offices more than seven years old have on average anywhere from 1.5 to 2.3 alumni relations staff.

the numbers

		average size of alumni relations staff (FTE)	average alumni relations expenditure	average annual budget	proportional spend on alumni relations	alumni relations spend as a percentage of philanthropic income
age of development office	<1 year	1.2	£20,000	£40,352	50%	23%
	1-3 years	1.1	£29,299	£92,273	32%	21%
	4-6 years	1.3	£34,507	£114,815	30%	6%
	7-10 years	2.0	£79,790	£156,829	51%	11%
	11-15 years	2.1	£82,013	£145,211	56%	17%
	16-20 years	1.5	£77,885	£148,575	52%	14%
	>20 years	2.3	£76,701	£215,120	36%	9%

Chart AH: Alumni relations expenditures by age of development office.

		average size of alumni relations staff (FTE)	average alumni relations expenditure	average annual budget	proportional spend on alumni relations	alumni relations spend as a percentage of philanthropic income
average annual philanthropic income	<£10k	0.9	£28,000	£49,929	56%	584%
	£10k-£99k	1.6	£38,127	£89,510	43%	71%
	£100k-£499k	1.6	£60,825	£130,254	47%	26%
	£500k-£999k	1.9	£55,954	£170,311	33%	8%
	£1m +	2.1	£119,125	£262,348	45%	6%

Chart AI: Alumni relations expenditures by average annual philanthropic income.



analysis

engagement helps with fundraising

Schools that have most success in fundraising have more than the average number of events per year, with those raising more than £1million running 27 events on average. Events run by schools raising £500k-£999k and more than £1million are larger and have more attendees per year than the others.

alumni and current parents remain the focus

There is clearly a focus on inviting alumni and current parents to events; on average, these two groups account for 75% to 99% of event attendees, coming from a wide variety of constituent groups, including former parents, current and former staff, current pupils, governors, local community, and others.

events must be innovative and strategic, not business as usual

Events allow the development team to include

donors as part of their stewardship activities and to help identify future prospects, but event planning can be time consuming and expensive. In this survey, development offices organised 65% of all alumni events each year, which is consistent with the fact that around three-quarters of development offices are responsible for alumni relations at their school. The average number of events organised by development offices per year is 12, and as schools raise more, their development offices tend to organise more events than this average. As a percentage of all alumni events, events organised by the development office ranges from 50% at schools raising less than £10k to 71% at schools raising more than £1million, which is consistent with time spent on alumni relations. Although only 12% of schools listed events as the largest single non-salary expenditure, the average cost of events (£23,216) tends to be among the highest non-salary expenditures of the office.

key facts

- 139 schools reported that they organise events.
- In total, 2,305 events are held for alumni each year (17 events on average per school).
- Of these:
 - 65% were organised by the development office*
 - 20% were organised by the alumni association*
 - 9% were organised by alumni*
 - 6% were organised by other areas of the school.*
- Only 12% of schools listed events as the largest single non-salary expenditure, yet the average cost of events (£23,216) tends to be among the highest non-salary expenditures.

the numbers

		no. of schools	average # events per school	alumni	current parents	former parents	staff	former staff	current pupils	governors	local community	others
average annual philanthropic income	<£10k	7	7	141	54	6	14	6	56	3	3	
	£10k-£99k	24	15	277	106	32	24	12	45	12	17	12
	£100k-£499k	53	15	427	102	28	26	16	79	5	47	64
	£500k-£999k	15	26	584	86	24	32	17	42	12	24	11
	£1m +	21	27	650	152	65	36	21	52	10	9	166
	fundraising results not reported	18	8	159	34	13	7	4	35	2	1	

Chart AJ: Number of events held and average number of attendees compared to average philanthropic income.

volunteers & alumni associations



analysis

record your volunteer hours

When we see just 11 schools recording 5,498 volunteer hours, we should be excited about the impact. We know around half of the schools that participated have a volunteer programme, and with an average of 500 hours per school, this would equate to over 37,000 volunteering hours. This would be a great news story for any school and makes a real case for participation, which in turn increases engagement.

volunteering often leads to philanthropy

We know people give when they are engaged and involved. Volunteer programmes clearly demonstrate this. Schools with volunteer programmes for alumni raise £597k while those that do not have such programmes raise £455k. Schools with volunteer programmes for parents raise £660k while those that do not have such programmes raise £421k. Schools with volunteer programmes for both alumni and parents raise £656k. Under any such scheme, the philanthropic income raised is greater than that raised by the average school.

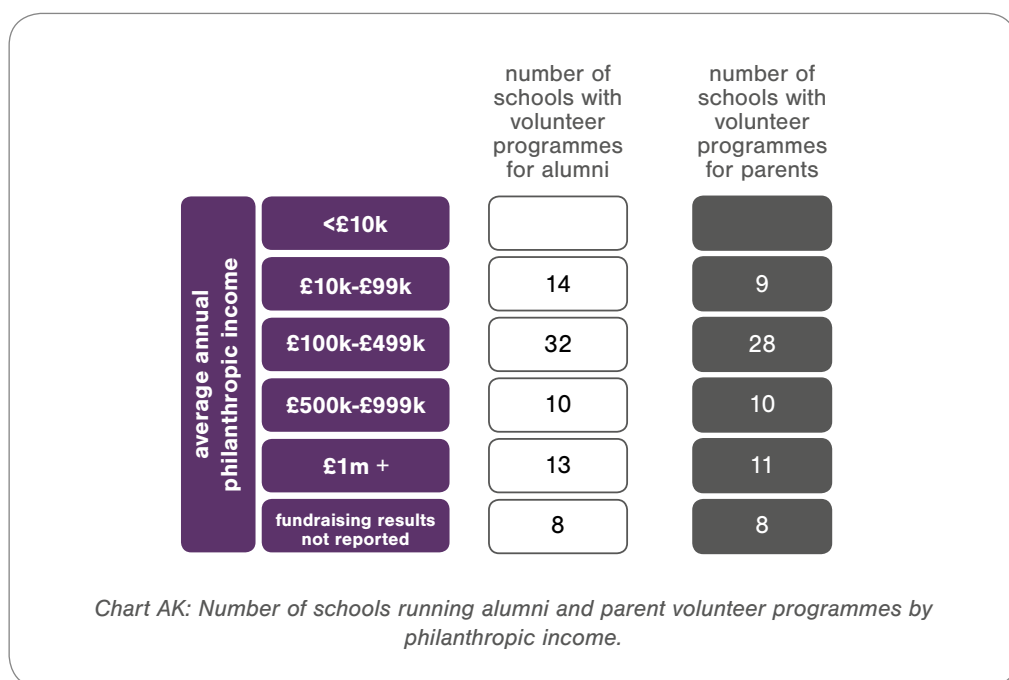
a note on alumni associations

Of all schools responding, 11 have a separate alumni association and five have a separate alumni office within the school (compared with 17 schools that had a separate alumni association and four that had a separate department within the school in the last survey). These tend to be co-ed independent schools but include two boys' day/boarding schools and one girls' day/boarding school. Although separate alumni associations and departments have the benefit of allowing the development office to focus on fundraising, it is generally considered preferable for an integrated fundraising and engagement team, as this ensures that the alumni relations strategy aligns with the needs of the school and has a positive impact on fundraising. Where there is a separate alumni association, it is vital that all parties proactively work together to ensure the experience of alumni is not only positive, but cohesive. Having agreed, complementary strategies will support collaboration.

key facts

- 139 schools in the survey run a volunteer programme either for alumni or parents, and in some cases both.
- 77 schools ask alumni to volunteer.
- 66 schools ask parents to volunteer.
- Only 11 schools demonstrate the contribution of volunteers through recording volunteer hours.
- Among them, they recorded a total of 5,498 hours of volunteer activity per year (500 hours on average per school).

the numbers



communications: website, social media & publications



analysis

is your website and social media enhancing your programme?

Most schools reported that they update their website on an 'ad hoc' basis, rather than 'daily' or 'weekly,' which were the second most common responses. Around two-thirds of schools have a secure online engagement facility, allowing alumni to review and update their details to more interactive activity, and only a third of schools have a discussion forum on their alumni website. It is important to remember that websites and social media are often an immediate way for people to engage and make an action, so opportunities for interaction are important to support building relationships.

is LinkedIn a missed opportunity?

LinkedIn saw the lowest growth in social media, as many schools are adopting their own platforms and asking alumni to join these. Whilst there are benefits to this, LinkedIn can act as a ready-made tool for engagement, updates, and prospect research. Schools should consider carefully the time needed to manage separate platforms and carefully measure and monitor the user experience. LinkedIn often is a low-cost, low-time, low-maintenance way of connecting with alumni.

cont...

print isn't dead

The alumni magazine was the second most cited largest single non-salary expenditure of the development office, yet in terms of average expenditure (£15,124), it was third from the bottom, behind strategic investment in support such as consultants, telephone campaigns, events, and travel. Around a third of schools use the alumni

magazine or other school publication as part of their strategy to promote and stimulate legacies. We also know that at more than half the schools in this survey, the head is involved in writing for the alumni magazine, and one in five schools indicated that they would like the head to be more involved in writing for the magazine to help the reader understand the priorities within the school.

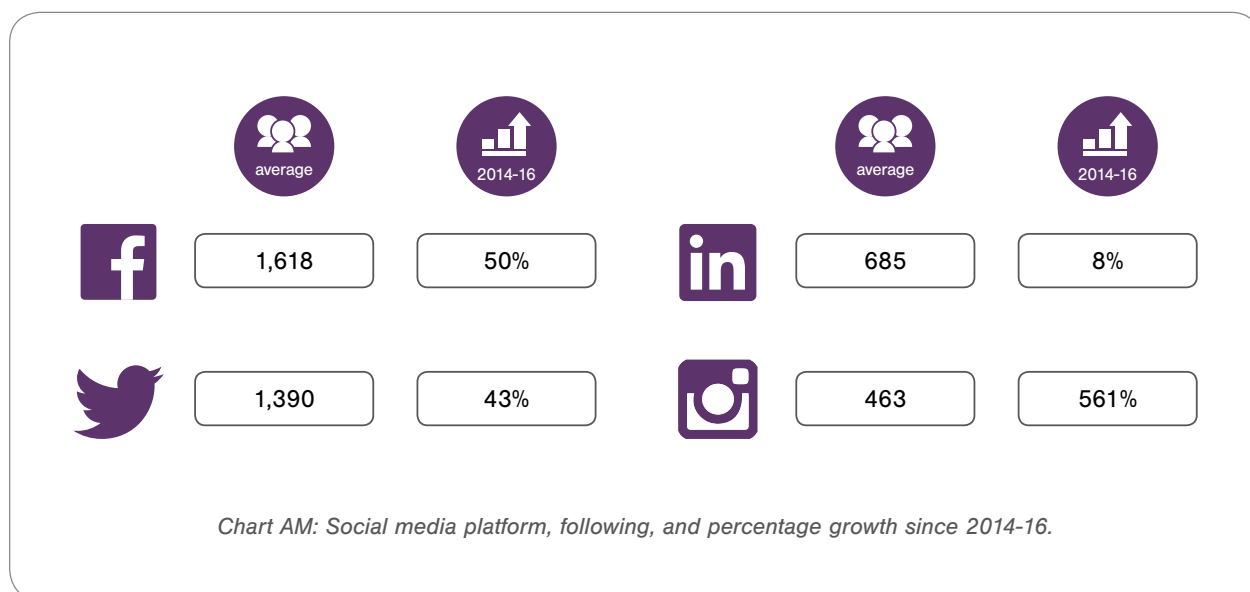
key facts

- The majority of fundraising and alumni websites remain integrated with the school website.
- One-third of schools have a separate alumni site.
- The main four social media platforms saw an increase in average following, with Instagram registering the most significant growth at 561%.
- 25% of schools use all four social media platforms.
- Schools, on average, send out two printed publications per year and five electronic communiques per year.
- This is a reduction from the 2014-16 survey, which reported an average of three printed publications and 10 electronic communiques per year.
- Most printed publications are sent annually, indicating that schools send out more than one type of publication.
- Electronic communiques are mainly sent out either ad hoc or termly, again suggesting that schools have more than one electronic publication.
- 76% of development offices edit their own publications.

the numbers

alumni relations website				fundraising website			
	part of school website	separate from school website	don't have website	part of school website	separate from school website	don't have website	
free (inc. city, technology colleges/academy)	6	2		6	2		
grammar	8	4		9	2	1	
independent boarding - boys	1			1			
independent day - boys	7	5		6	4	1	
independent day/boarding - boys	8	4		10	1	1	
independent boarding - co-ed	3	6		5	2	1	
independent day - co-ed	22	6		23	3	1	
independent day/boarding - co-ed	24	12		29	5	1	
independent boarding - girls	1						
independent day - girls	4	2		5	1	1	
independent day/boarding - girls	4	3		5	2		
total	88	44		99	22	7	

Chart AL: Location of alumni relations and fundraising websites by type of school (132 schools).



engagement at our school

what activities engage our community?

what should engagement look like and how will we measure it?

what do we need to change?





can we achieve success? what is our plan?

can all schools achieve fundraising success?



analysis

all schools can fundraise, but you must invest consistently

With time (age of office) and investment (budget of £100k), any school can achieve fundraising success. The analysis of growth in some sectors, most notably the girls' schools, demonstrates that with leadership buy-in and engagement, combined with a clear strategy and consistency, you can grow a fundraising programme. Given the evidence of the age of office, it is vital that budgets are set for a minimum of six years to ensure programmes have time to establish and grow.

set metrics across your entire programme, not just fundraising

We can see the evidence for a strategic programme for your entire constituent engagement and fundraising programme. It is no longer acceptable to have 'nice events' and two publications without solid evidence that they are making a difference to engagement, cultivation, and action (both through time and donations).

key facts

- A majority of schools (45%) fall into the £100k-£499k income group. This is a trend across both the 2014-16 survey and the 2016-18 survey.
- 25% of schools raise £1million+ per annum. This is an increase from 18%.
- Of the 11 different types of schools, six of them grew average annual philanthropic income between 2014-16 and 2016-18. Growth ranged from 7% at co-ed day schools to over 100% at girls' day schools.
- Schools that have been fundraising for the longest time are also producing higher average philanthropic income (boys' day, boys' day/boarding, and girls' boarding schools).
- More mature offices that are raising higher levels of income see an average annual expenditure above the average (boys' day and boys day/boarding schools).
- Conversely, schools with younger offices that are raising less philanthropic income have a below-average annual expenditure (grammar schools).
- It is interesting to note that although the average annual expenditure is £141k for all schools, almost half (46%) are investing less than £100k, which was the level of investment we identified as the minimum needed to achieve a positive return.

facts by school

- The only school to bring in more than £5million in average annual philanthropic income was a boys' school. Two boys' schools which raised more than £5million per annum in the last survey period did not report this year.
- In the case of girls' day schools, the 120% increase in philanthropic income can be explained in part by the 133% increase in time devoted to major gifts. Girls' boarding schools did not have comparable data available, but they raised the third highest in average annual philanthropic income among all types of schools in 2016-18.
- In this survey, the philanthropic income of boys' boarding schools is low relative to the age of their respective development offices, but this can be explained by the small sample size. In the previous survey, boys' boarding schools had the longest-running development offices (16 years on average) and raised £3.6million, substantially more than the other types of schools.
- Similarly, those schools raising lower values (girls' day schools) have been fundraising for a shorter time.

the numbers

	<£10k	£10k - £99k	£100k - £499k	£500k - £999k	£1m+	total number of schools	average annual philanthropic income per school
free <small>(inc. city, technology colleges/academy)</small>		3	2			5	£68,958
grammar	2	1	6	2		11	£233,511
independent <small>boarding - boys</small>			1			1	£248,336
independent <small>day - boys</small>		2	2	1	6	11	£1,068,446
independent <small>day/boarding - boys</small>		5	2	1	3	11	£949,143
independent <small>boarding - co-ed</small>	1	1	3	1	3	9	£693,079
independent <small>day - co-ed</small>	1	2	13	5	2	23	£399,232
independent <small>day/boarding - co-ed</small>	2	8	17	3	4	34	£484,627
independent <small>boarding - girls</small>				1		1	£900,000
independent <small>day - girls</small>		1	5			6	£237,475
independent <small>day/boarding - girls</small>		1	2	1	2	6	£604,727
total	6	24	53	15	20	118	£535,230

Chart AN: The number of schools per average annual philanthropic income band by types of school and the average annual philanthropic income per school.

	<1	1-3	4-6	7-10	11-15	16-20	>20	total number of schools	average age of development office
free (inc. city, technology colleges/academy)	1	3	1					5	2.3
grammar		3	3	2	2	1		11	7.5
independent boarding - boys							1	1	20+
independent day - boys		1		4	3	1	2	11	12.2
independent day/boarding - boys			2	1	4	2	2	11	13.5
independent boarding - co-ed	1			2	3	2	1	9	12.6
independent day - co-ed		2	5	5	3	5	3	23	11.5
independent day/boarding - co-ed		5	3	12	6	6	2	34	10.4
independent boarding - girls						1		1	18
Independent Day - Girls	1	1	1	1	1	1		6	7.8
independent day/boarding - girls		1	1	1		2	1	6	12.1
total	3	16	16	28	22	21	12	118	10.8

Chart AO: The number of types of school per development office age bracket and the average age.

	<£100k	£100k - £199k	£200k - £299k	£300k - £399k	£400k - £499k	£500k	total number of schools	average annual philanthropic income per school
free (inc. city, technology colleges/academy)	4	2					6	£69,260
grammar	11	1	1				13	£66,607
independent boarding - boys		1					1	£188,086
independent day - boys	4	3	1	3			11	£165,219
independent day/boarding - boys	1	3	2	2			8	£203,756
independent boarding - co-ed		3	3	2			8	£225,182
independent day - co-ed	11	11	2	1	1	1	27	£149,190
Independent Day/Boarding - Co-ed	19	9	6	3			37	£130,685
independent boarding - girls	1						1	£84,070
independent day - girls	5	1	2				8	£117,570
independent day/boarding - girls	2	3	1				6	£151,903
total	58	37	18	11	1	1	126	£141,048

Chart AP: The number of types of school per development office budget and the average annual budget.

applying the benchmarking to your school



six critical success factors

leadership

visionary | strategic | involved

what can we learn from the benchmarking?

what do we need to do differently?

engagement

strategic | measurable | innovative

what elements of our engagement programme are working well?

what do we need to do differently?

strategy/plan

tailored | realistic | measurable

what is our current strategy?

do we need to do anything differently as a result of the benchmarking findings?

case for support

compelling | resonates | impactful

what is our current case for support?

what else can we fundraise for?

prospects/potential donors

engaged | identified | researched

what does our current major gift activity look like?

what do we need to do differently based on the benchmarking?

resources

budget | staff | investment

what are our current resources?

what do we need to achieve our goals?



glossary

2016-17 & 2017-18 - years being reported on

This survey collates data from two academic years: 2016/17 and 2017/18. Where four-year data is analysed, this refers to data collected from 2014/15 and 2015/16. Answers were provided with each year starting on the 1st September and ending on 31 August, wherever possible.

alumni relations and constituent engagement on

Although we refer to alumni (former pupils), increasingly this type of activity also includes managing relations with other members of the school community, such as current and former parents, staff, members of the local community, governors, trustees, etc.

bursaries

Money awards given to pupils based on their financial needs.

campaign

An intensive fundraising effort to raise a pre-agreed amount within a certain period of time to meet a specific need of an organisation. Campaigns tend to raise money for capital projects (i.e. raising money for the acquisition/construction/renovation/expansion of facilities or equipment) or provide broader funding to assist with the long-term needs and direction of an organisation.

Gifts solicited towards a campaign tend to be larger and/or payment is split over a number of years. Some organisations also count income that is not purely philanthropic towards their campaign goal (for example, sponsorship payment or an in-kind gift).

Shorter-term fundraising approaches, such as calling people in a telethon or asking people in a direct mail, are often referred to as campaigns, but typically the more appropriate term for these are appeals.

crowdfunding

The practice of funding a project or venture by raising monetary contributions from a large number of people, usually employing an online platform where donations can be made. Often, the cause message is spread by the donors, which results in new donors being introduced to the school.

development office

A development office refers to the team that is responsible for fundraising and/or alumni relations. In the absence of a development office, please replace the term with alumni relations office or fundraising team (including parent/teacher associations that are active in raising funds for the school).

FTE

A full-time equivalent employee. This could be one full-timer, or two part-timers working 50% of the time each.

major prospects

Individuals or organisations whom you suspect may be able to make a substantial donation to the school.

moves management system

A moves management system allows you to record how likely a major prospect is to donate and how close to donating they are.

philanthropic income

When reporting on income received, the philanthropic income is considered to be towards the school's philanthropic priorities and may have been prompted by fundraising activities. For income to be considered philanthropic, the donor does not receive any benefit from the donation, except recognition for the donation (including naming rights). This excludes activities such as sponsorship by companies, for example, where the company logo is displayed alongside the funded project.

This includes donations by:

- ☐ Cash, cheque, credit card.
- ☐ Direct debit and standing order payments.
- ☐ Gifts in kind to which a financial value can/has been attributed.
- ☐ The value of any new shares received within the year. The shares can still be held by the school (in which case, report value when the shares were given) or sold by the school (in which case, report the sold value).

cont...



glossary

- The value of any property donated within the year. The property can still be held by the school (in which case, report the property value when the property was given) or sold by the school (in which case, report the sold value).

scholarships

Money awards pupils receive for their academic performance (high grades) or other achievements. These tend to be competitive.

senior development professional

The person leading fundraising and/or alumni relations activities at a school. This position is typically called development director or is the most senior member of staff involved in this area. Sometimes such a person is referred to as director of external relations or marketing and is responsible for a wider remit.

Schools' Fundraising and Engagement Benchmarking Report 2018



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