

Benchmarking can guide us toward raising more than £500,000 per year

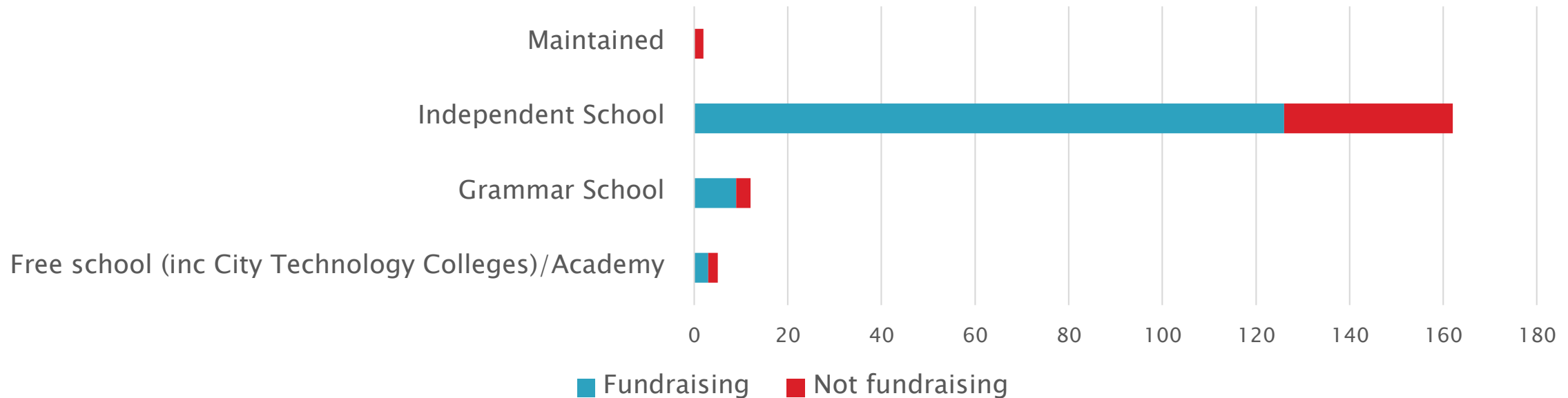


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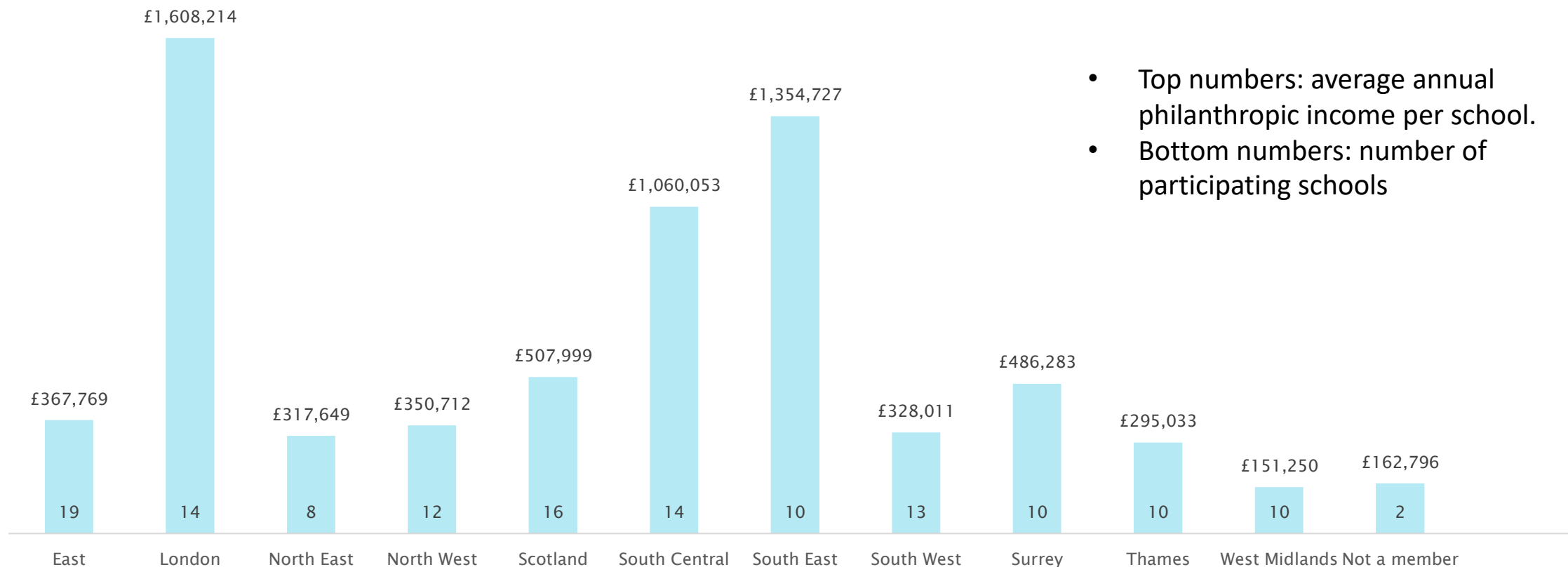
Tuesday 13th June 2017

Highlights

- ▶ 181 schools took part
- ▶ Biggest educational fundraising survey in the UK
- ▶ Responses covered activity and results from September 2014 to August 2016
- ▶ 76% of schools reported philanthropic income



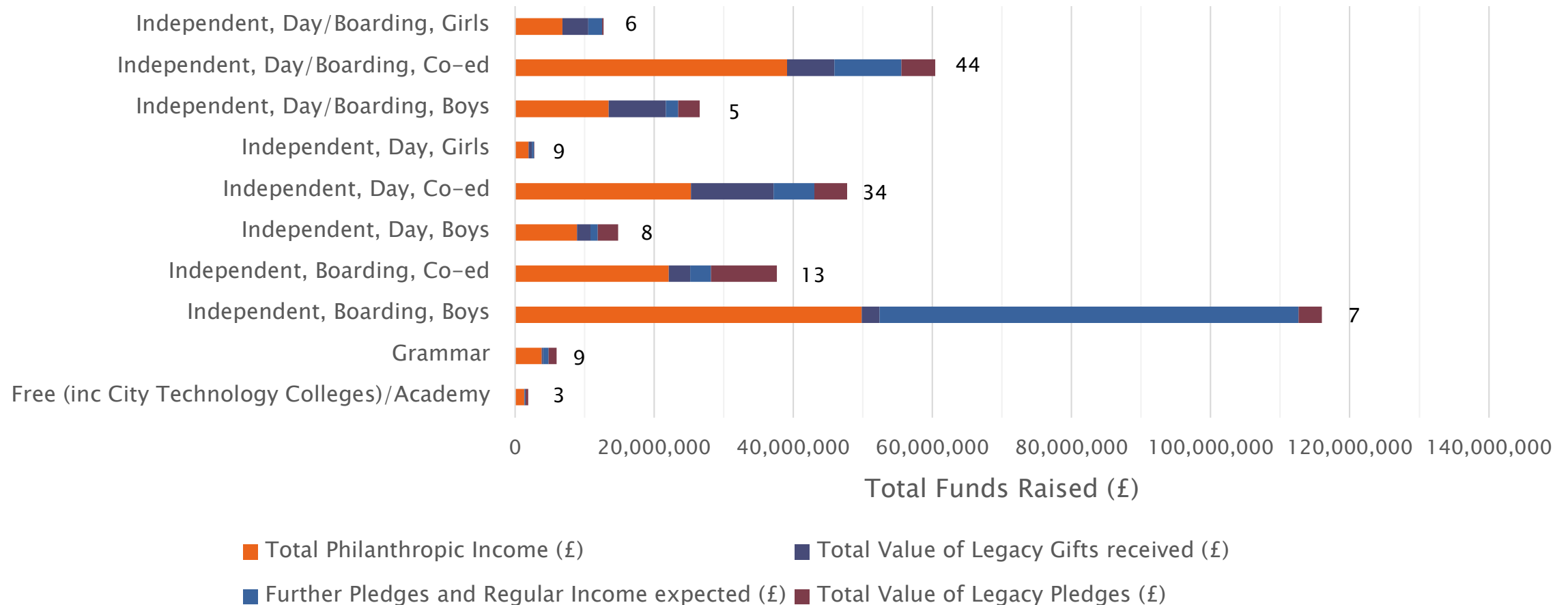
Results by IDPE regions



Fundraising by Type of School



Total Funds Raised by School Type



Distribution of Philanthropic Income by type of school

Type of School	Average Annual Philanthropic Income Band							Average Annual Philanthropic Income per School (£)
	1. <£10k	2. £10k-£99k	3. £100k-£499k	4. £500k-£999k	5. £1m-£4.9m	6. £5m+	Total	
Free (inc City Technology Colleges)/Academy		1	2				3	219,564
Grammar		2	6	1			9	212,353
Independent, Boarding, Boys			1	1	3	2	7	3,559,234
Independent, Boarding, Co-ed		1	5	2	5		13	866,180
Independent, Day, Boys	1	1	2	2	2		8	568,332
Independent, Day, Co-ed	1	8	20	2	3		34	374,267
Independent, Day, Girls	3	3	3				9	107,888
Independent, Day/Boarding, Boys			2		3		5	1,342,776
Independent, Day/Boarding, Co-ed	5	13	18	3	4	1	44	445,052
Independent, Day/Boarding, Girls		3	1		2		6	566,659
Total	10	32	60	11	22	3	138	628,143

Distribution of Schools by Age of Development Office

Type of School	Age of Development Office								Average age of Development Office
	1. <1 year	2. 1-3 years	3. 4-6 years	4. 7-10 years	5. 11-15 years	6. 16-20 years	7. >20 years	Total	
Free (inc City Technology Colleges)/Academy		2				1		3	7
Grammar	2	2	3	1	1			9	5
Independent, Boarding, Boys				2		3	2	7	16
Independent, Boarding, Co-ed		2	1	4	3	3		13	10
Independent, Day, Boys	1		1	2	3		1	8	10
Independent, Day, Co-ed	2	5	7	8	8	2	2	34	9
Independent, Day, Girls		6	2		1			9	4
Independent, Day/Boarding, Boys			1	1	2		1	5	12
Independent, Day/Boarding, Co-ed	2	8	6	9	12	5	2	44	9
Independent, Day/Boarding, Girls		2	2	1	1			6	6
Total	7	27	23	28	31	14	8	138	9

Distribution of Schools by Development Office Expenditure

	Average Annual Expenditure per Development Office											Average Annual Expenditure per School
Type of School	01. <£25k	02. £25k-£49k	03. £50k-£74k	04. £75k-£99k	05. £100k-£124k	06. £125k-£149k	07. £150k-£199k	08. £200k-£249k	09. £250k-£499k	10. £500k-£1m	Total	
Free (inc City Technology Colleges)/Academy		1		1	1						3	75,352
Grammar	2	2	1	2	1						8	54,620
Independent, Boarding, Boys			1						3	3	7	454,883
Independent, Boarding, Co-ed		1	1		1	2	1	3	3	1	13	223,030
Independent, Day, Boys			1	1		1	2	2	1		8	177,066
Independent, Day, Co-ed	3	4	5	4	3	3	4	2	3		31	119,725
Independent, Day, Girls	2	3		2		2					9	66,292
Independent, Day/Boarding, Boys							2	1			3	190,808
Independent, Day/Boarding, Co-ed	5	5	6	3	6	3	5	2	5		40	126,725
Independent, Day/Boarding, Girls		1	1	1			1	1		1	6	203,932
Total	12	17	16	14	12	11	15	11	15	5	128	151,064

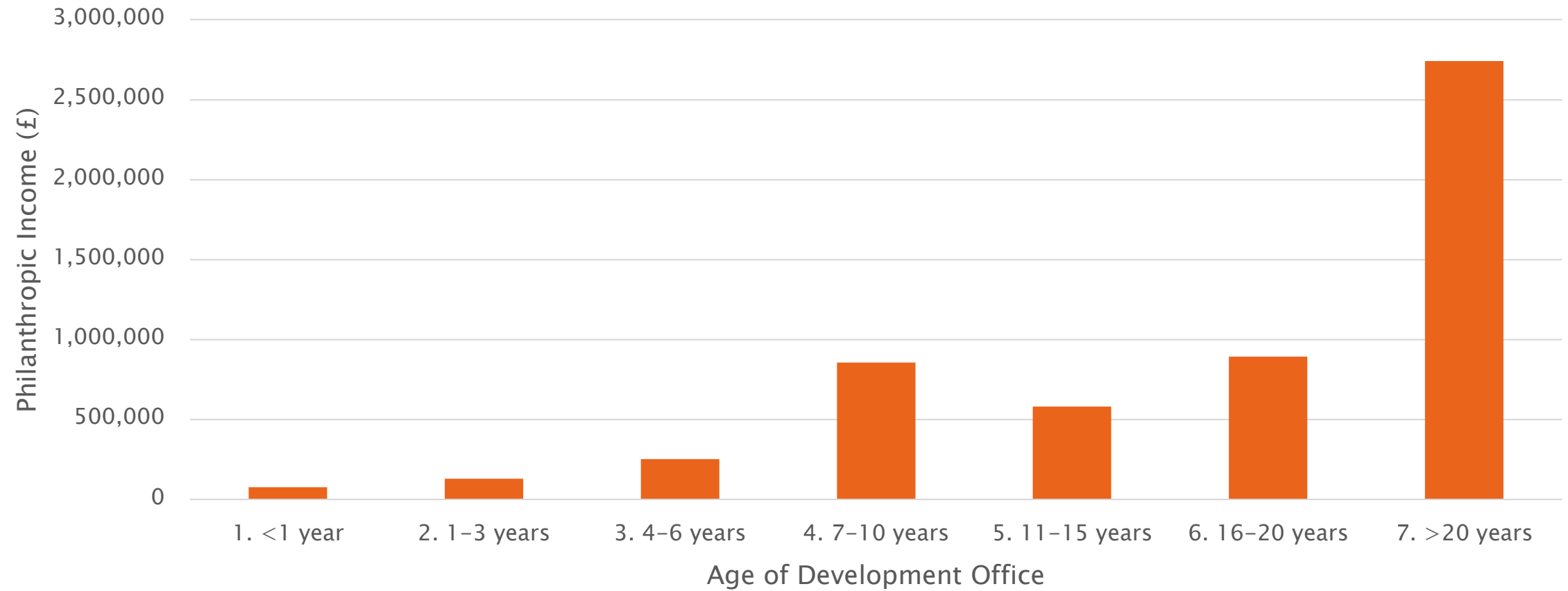
Fundraising in different types of schools

- ▶ Type of school clearly has an impact on fundraising success in absolute terms.
- ▶ BUT breaking the results down by income against age and expenditure show that other important factors to consider.
- ▶ Most types have one or more school performing significantly beyond the average for that band, demonstrating that school type is not necessarily a barrier to success.

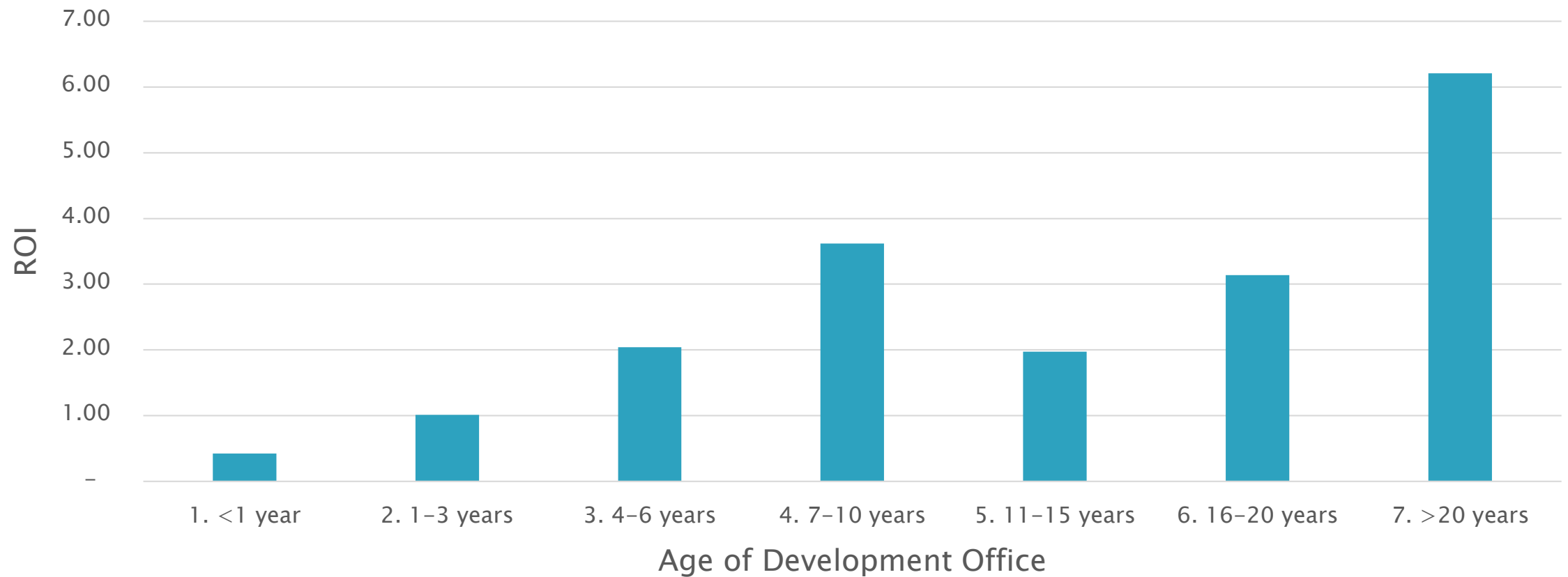
Investment produces return over time



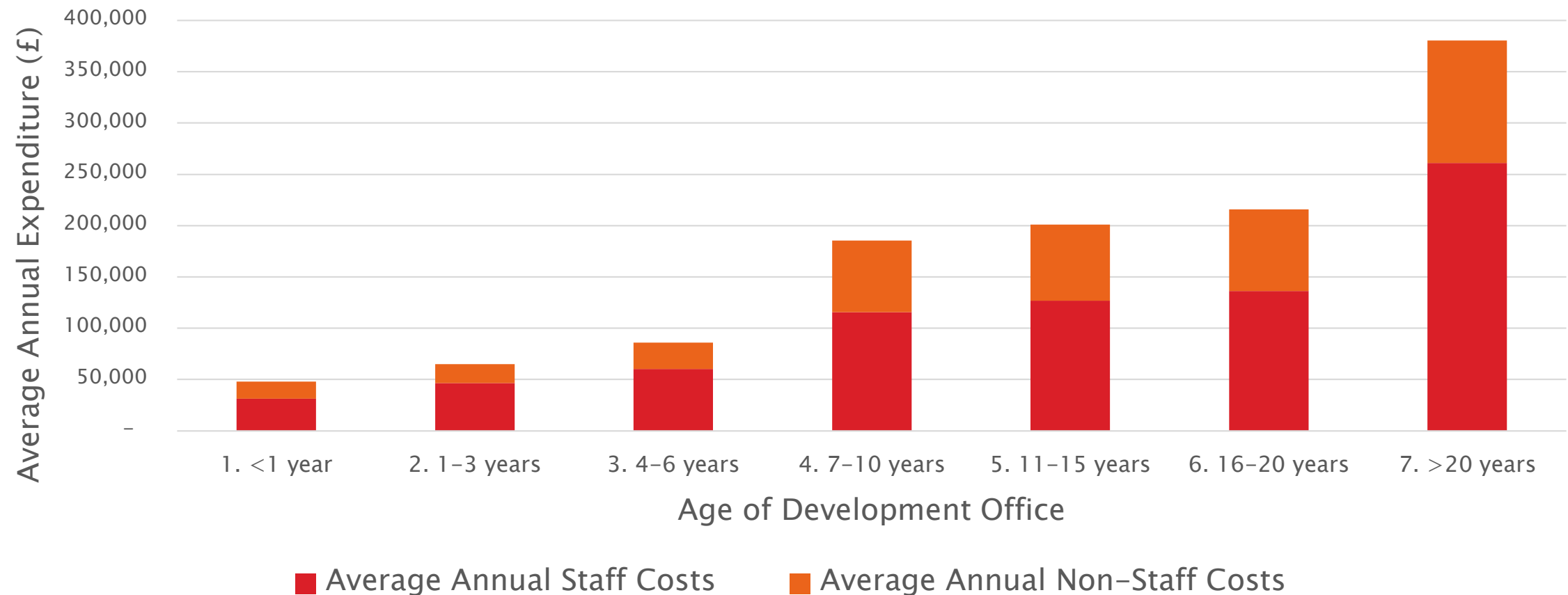
Average Philanthropic Income per School by age of Development Office



Return on Investment



Development Office Expenditure per School per Year



Increased Expenditure over time



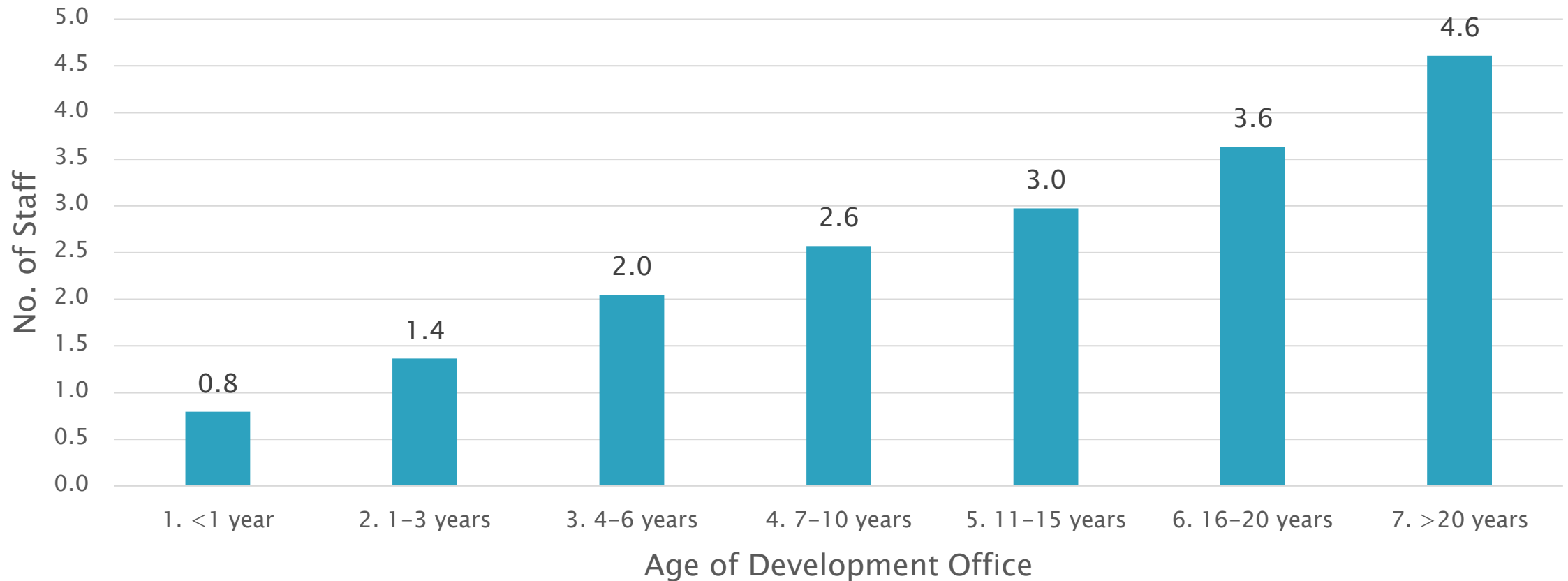
Development Office age and expenditure have an effect on income across all school types

- ▶ There is a correlation between increased fundraising and expenditure over time.
- ▶ The biggest expenditure item is staff cost (on average 65%).
- ▶ How is your time used to best effect?

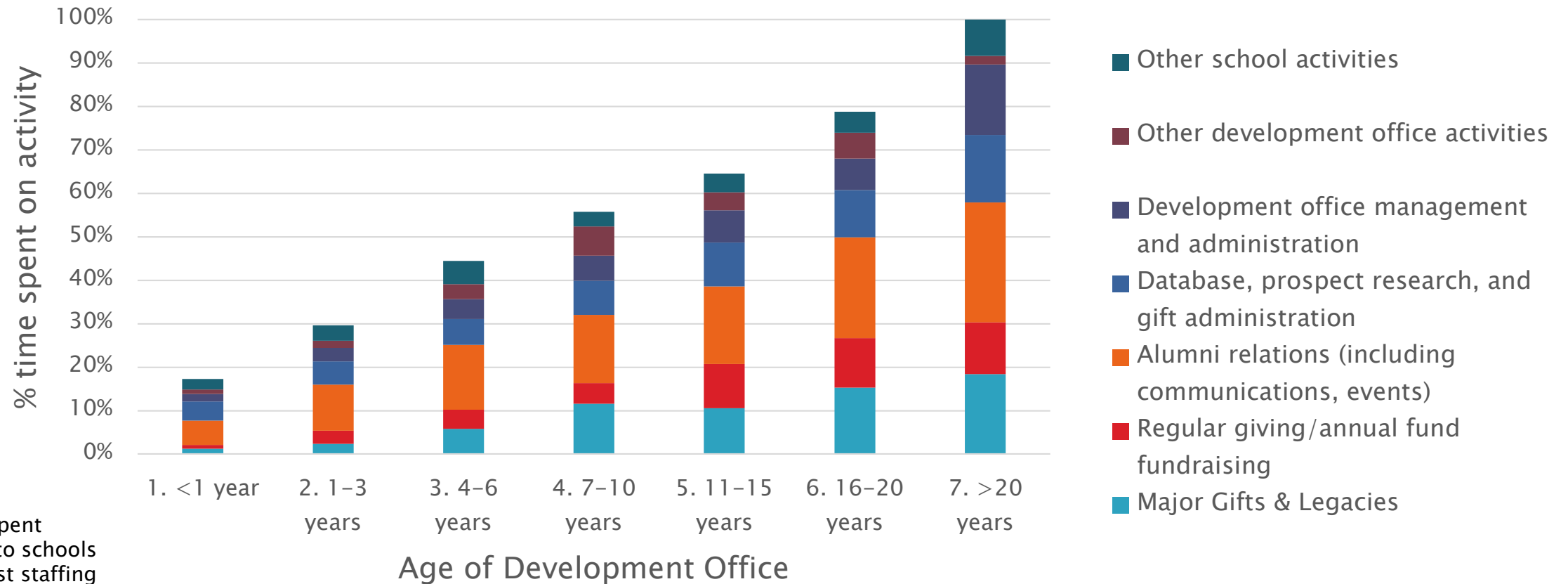
How do Development Offices spend their time?



Translating expenditure into size of team



Distribution of Development Office activities by its age and size



% time spent relative to schools with most staffing resource (100%)

Key Development Activities

- ▶ Development Office teams increase in size with age.
- ▶ Time spent on fundraising (major gifts and regular giving) increases as Development Offices get older.
- ▶ Alumni relations activities continue to take up a lot of time and continue to be vital as a vehicle to engage with alumni.
- ▶ Investment in alumni data and prospect research also increase in importance.
- ▶ Other Development & School activities still make up 25% of activity in the oldest Development Offices.

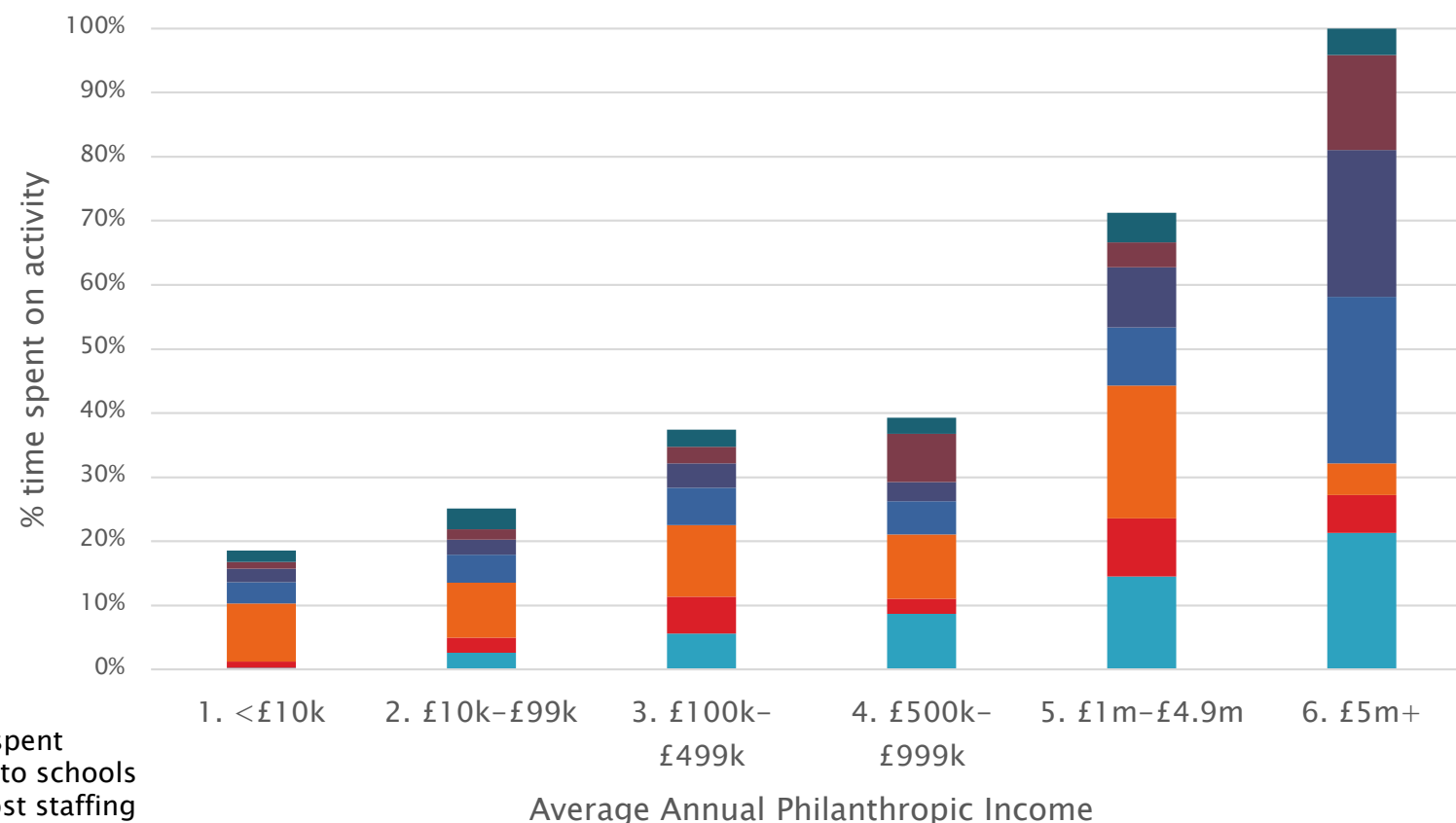
What do those raising the most do?



Development Office characteristics

Average Annual Philanthropic Income	Number in group	Average age of Development Office	Average annual expenditure (£)	Average number of FTEs
1. <£10k	10	1-3	42,921	1.2
2. £10k-£99k	32	4-6	70,378	1.6
3. £100k-£499k	60	7-10	125,314	2.4
4. £500k-£999k	11	7-10	150,934	2.5
5. £1m-£4.9m	22	11-15	255,285	4.6
6. £5m+	3	11-15	619,827	6.4

Distribution of Development Office activities by average annual philanthropic income



% time spent relative to schools with most staffing resource (100%)

School's raising more than £500k spend more time on Major Gifts & Legacies

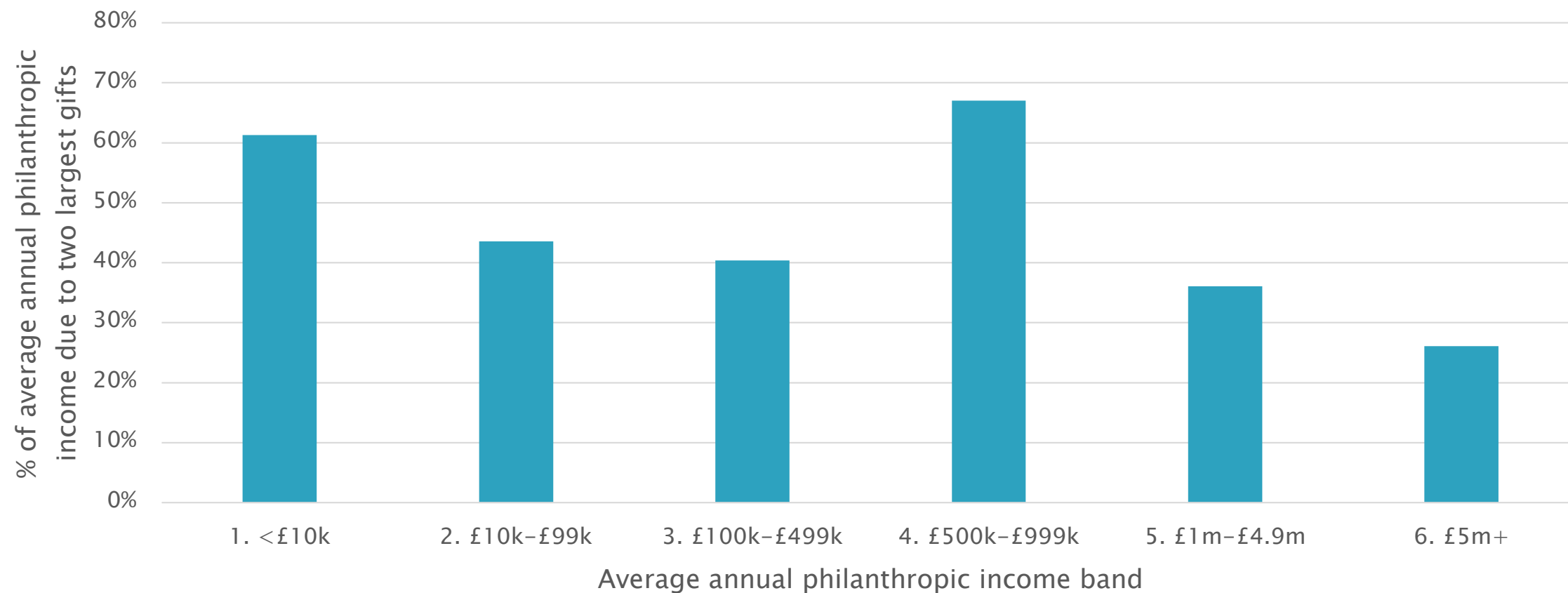


- Other school activities
- Other development office activities
- Development office management and administration
- Database, prospect research, and gift administration
- Alumni relations (including communications, events)
- Regular giving/annual fund fundraising
- Major Gifts & Legacies

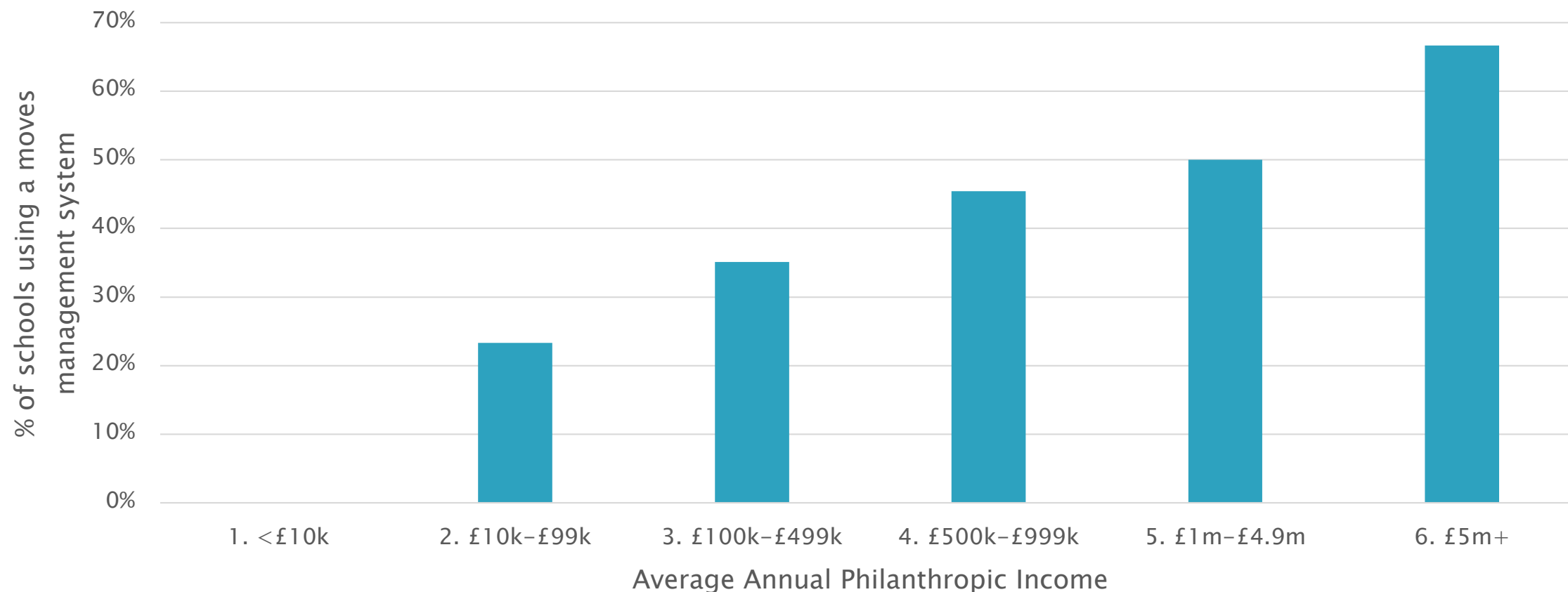
Fundraising activities

Average Annual Philanthropic Income per School	1. <£10k	2. £10k-£99k	3. £100k-£499k	4. £500k-£999k	5. £1m-£4.9m	6. £5m+
Personal Asks	20%	72%	82%	91%	100%	100%
Direct Mail - post	30%	75%	80%	73%	86%	100%
Events	40%	59%	73%	82%	73%	100%
Direct mail - email	40%	63%	68%	55%	77%	100%
Auctions/raffles	30%	59%	50%	55%	59%	67%
Fundraising events (e.g. sponsored walks)	20%	53%	55%	18%	59%	100%
Telephone appeal	20%	47%	47%	45%	64%	67%
Social media	20%	44%	47%	27%	36%	67%
Crowd-funding	20%	34%	22%	18%	27%	67%

Impact of Major Gifts



Recording moves management



Development Activities with Impact

- ▶ Be aware of your risks associated with major giving.
- ▶ Moves management provides leadership and the team with reports beyond just income raised.
- ▶ Measuring prospect interactions, movement, and income forecasts are key to ensuring development is on the right track.

How can your leadership support you?



Leadership involvement

71% / 70%

Very involved/
involved

Spend less than 10% of
time on development

Top 5 ways Heads can support Development

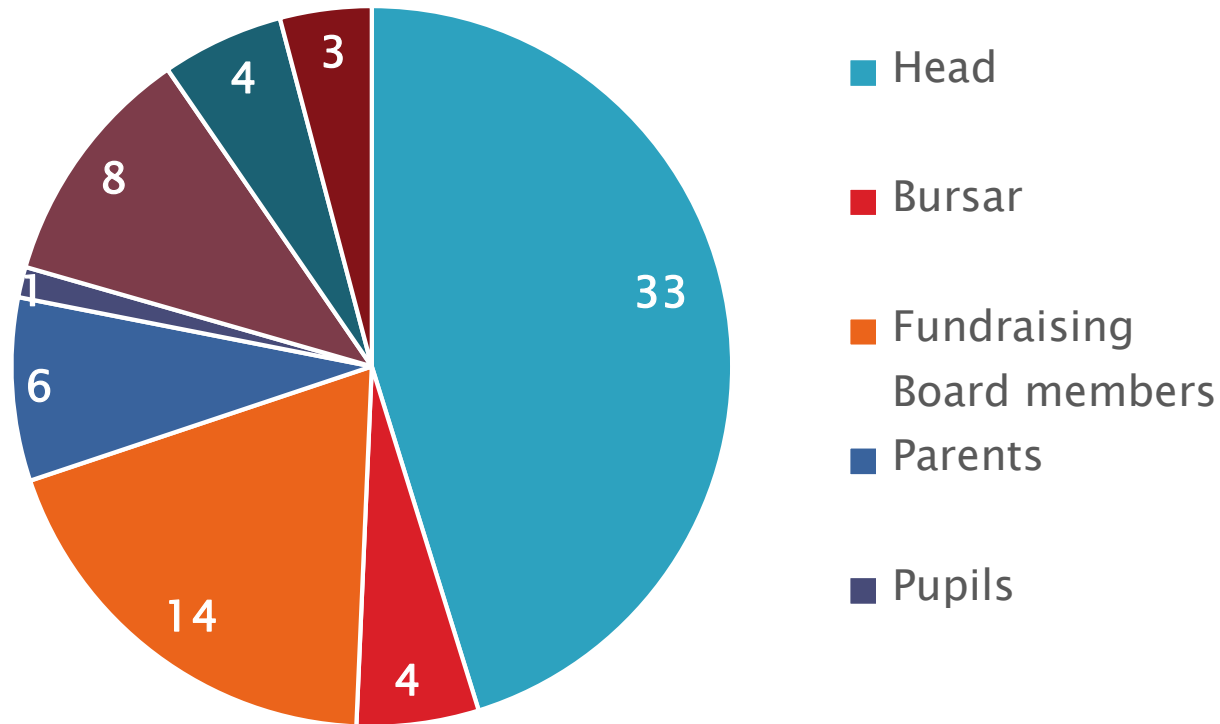
Responses from all schools

- Writing thank-you letters to donors
- Calling donors to thank them
- Writing ask letters to prospects
- Writing congratulatory letters to alumni
- Hosting/attending small prospect dinners

Responses from schools raising £0.5m+

- Promoting the school's vision and strategy
- Writing thank-you letters to donors
- Attending alumni reunion events
- Prioritising projects for support
- One-to-one meetings with prospects

Asking beyond the Development Team



Fundraising boards

- <5 members: £820k
- 5-10 members: £915k
- >10 members: £523k
- No board: £512k

Expanding the fundraising team

- ▶ Empower your head and board to work as extensions of your team.
- ▶ Concentrate their fundraising activities on meeting the most important prospects (wealth, warmth, inclination).
- ▶ Be clear about their role.

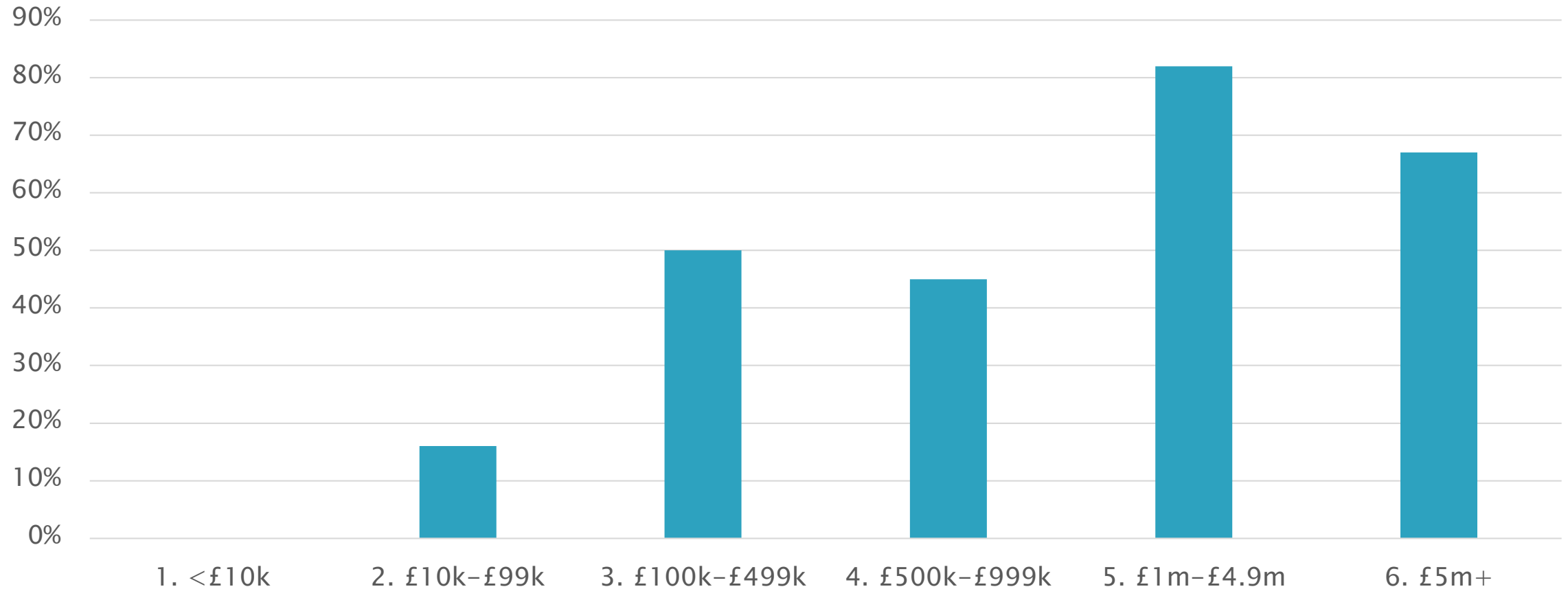
Other factors affecting giving



Your projects

Average Philanthropic Income Received	Bursaries/ Scholarships	Capital projects	Academic (non-capital)	Sports (non-capital)	Arts (non-capital)	Unspecified
1. <£10k	69%	7%	0%	1%	0%	22%
2. £10k-£99k	37%	23%	1%	6%	7%	25%
3. £100k-£499k	44%	28%	5%	1%	3%	20%
4. £500k-£999k	32%	63%	0%	0%	0%	4%
5. £1m-£4.9m	45%	45%	0%	0%	0%	9%
6. Top 3 (£5m+)	42%	44%	2%	2%	2%	8%

Running a campaign?



Who should you focus on?

Philanthropic Income Group	Alumni	Current Parents	Former Parents	Current Pupils	Governors/Trustees/ Board	Staff	Foundation, Trust, or Livery Company with a current or historic link to the school	Other charitable trusts and foundations	Corporates	Local community	Other
1. <£10k	45%	8%	18%	23%	0%	2%	0%	3%	0%	0%	0%
2. £10k-£99k	37%	22%	3%	0%	6%	1%	13%	3%	7%	1%	7%
3. £100k-£499k	45%	14%	6%	0%	2%	0%	5%	11%	5%	3%	8%
4. £500k-£999k	20%	20%	3%	0%	1%	0%	2%	22%	0%	0%	32%
5. £1m-£4.9m	34%	22%	10%	0%	10%	0%	10%	8%	0%	2%	4%
6. £5m+	19%	28%	15%	0%	3%	0%	5%	24%	0%	5%	1%

Parents and school fees

Average Annual School Fees	% average annual philanthropic income per school from parents
1. <£10,000	10%
2. £10,000–£14,999	13%
3. £15,000–£19,999	26%
4. £20,000–£24,999	9%
5. £25,000–£29,999	10%
6. £30,000–£36,000	29%

Consider your available prospects

- ▶ Understand the makeup of your various communities to ascertain how much could be raised.
- ▶ Strategically engage your groups.
- ▶ Be aware of audiences beyond parents and alumni on a project by project basis.

What next?

- ▶ Create a culture of asking
- ▶ Increase focus on personal asks.
- ▶ Consider how a development board can work for you.
- ▶ Scope your projects and consider how they match the interests of your potential donors.
- ▶ Understand the capacity of your prospects.
- ▶ Use KPIs to manage your programme and expectations.
- ▶ Be aware of external influences on your programme.

Your Questions?

Thank you!



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