



# TEN YEARS OF FUNDRAISING DATA – AND WHAT IT TAUGHT US

GG+A Webinar

Thursday, 17 October 2019



**Adrian Salmon**  
Vice President



**Chris Begley**  
Senior Vice President

# YOUR WEBINAR HOSTS



**Adrian Salmon**

Vice President

[asalmon@grenzglier.com](mailto:asalmon@grenzglier.com)



**Chris Begley**

Senior Vice President

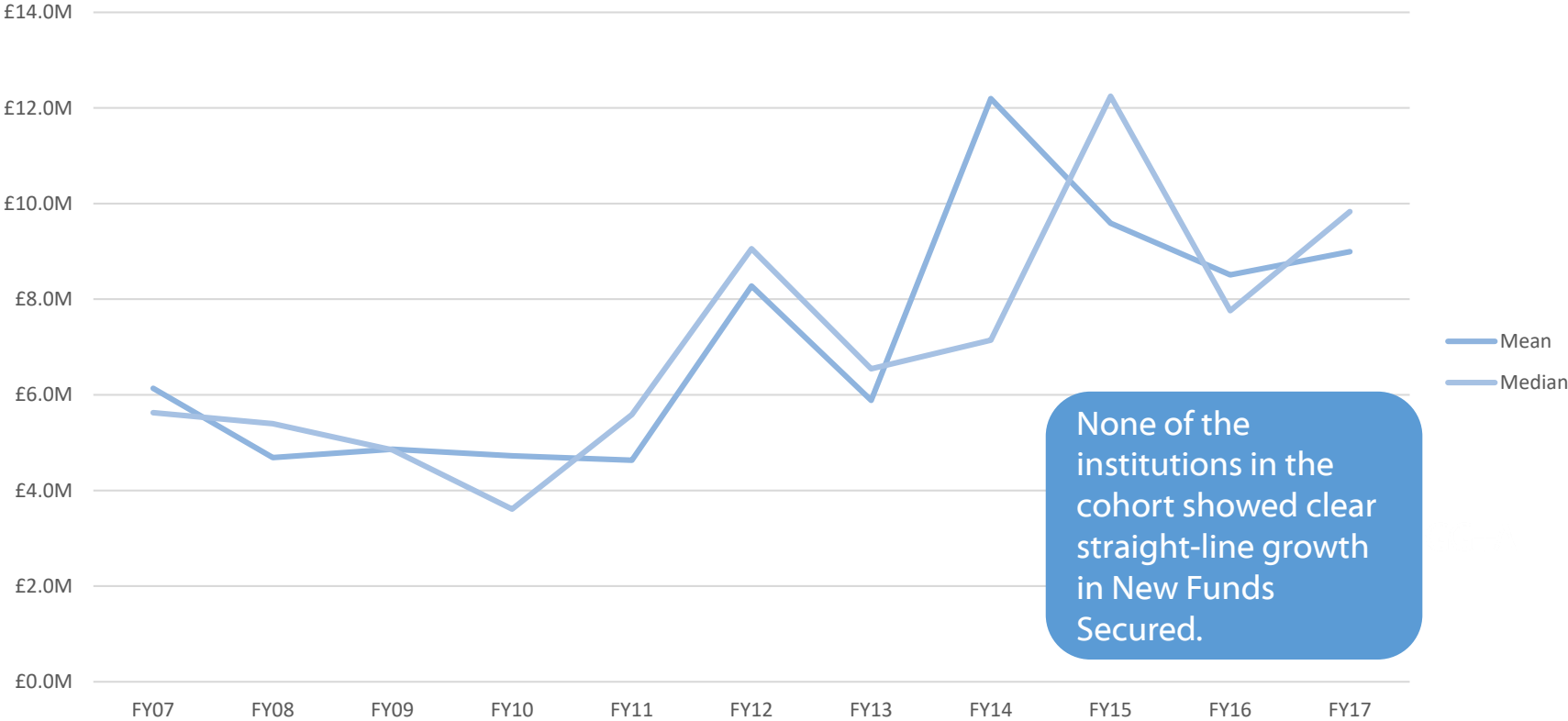
[cbegley@grenzglier.com](mailto:cbegley@grenzglier.com)

# WHAT WE DID

- Bespoke benchmarking survey for a Russell Group university
- Looked at ten years of Ross-CASE data for that university and five peer institutions
- Followed up the data analysis with in-depth qualitative interviews with the Directors of Development at each peer institution

# NEW FUNDS SECURED

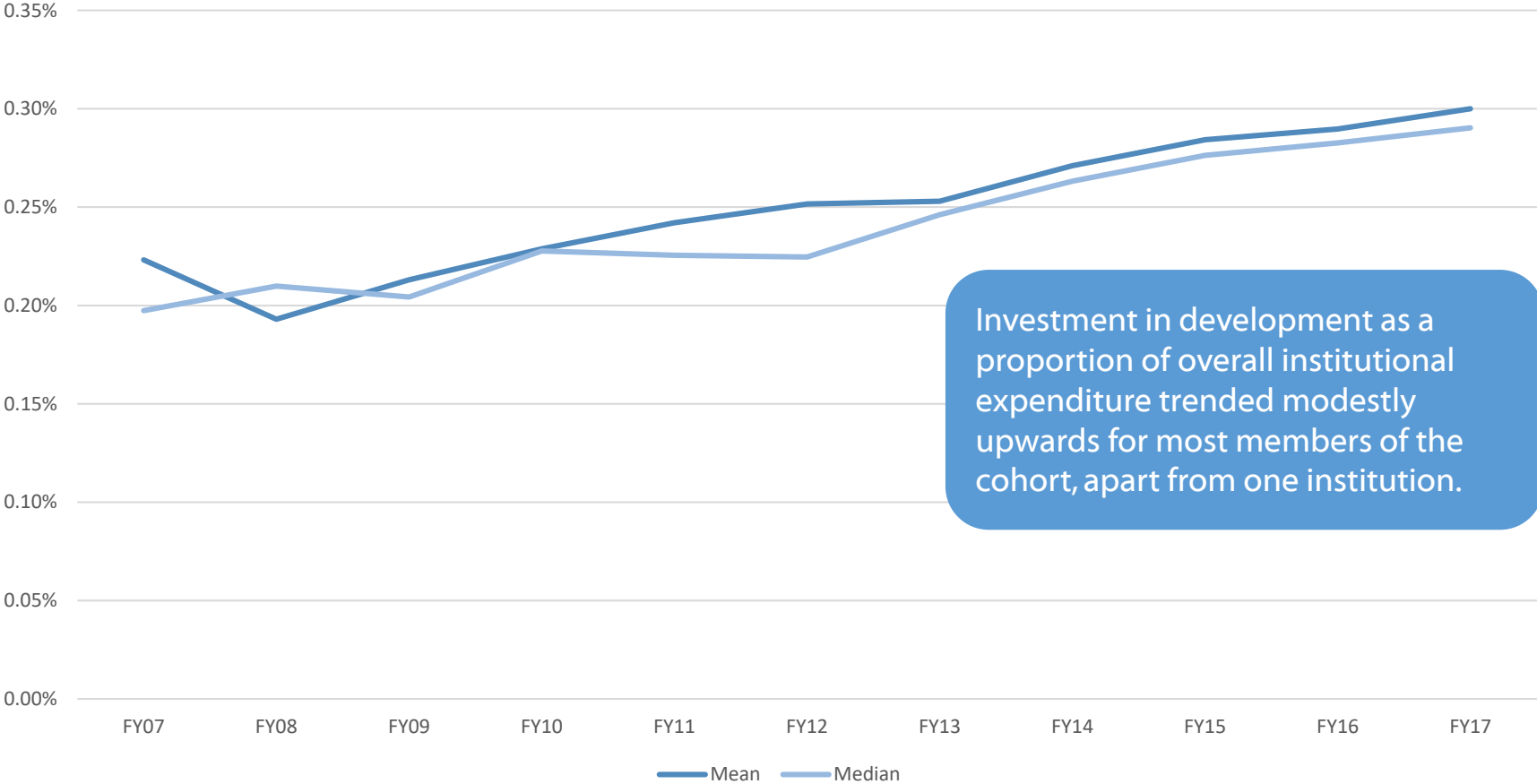
New Funds Secured, FY07 - 17



None of the institutions in the cohort showed clear straight-line growth in New Funds Secured.

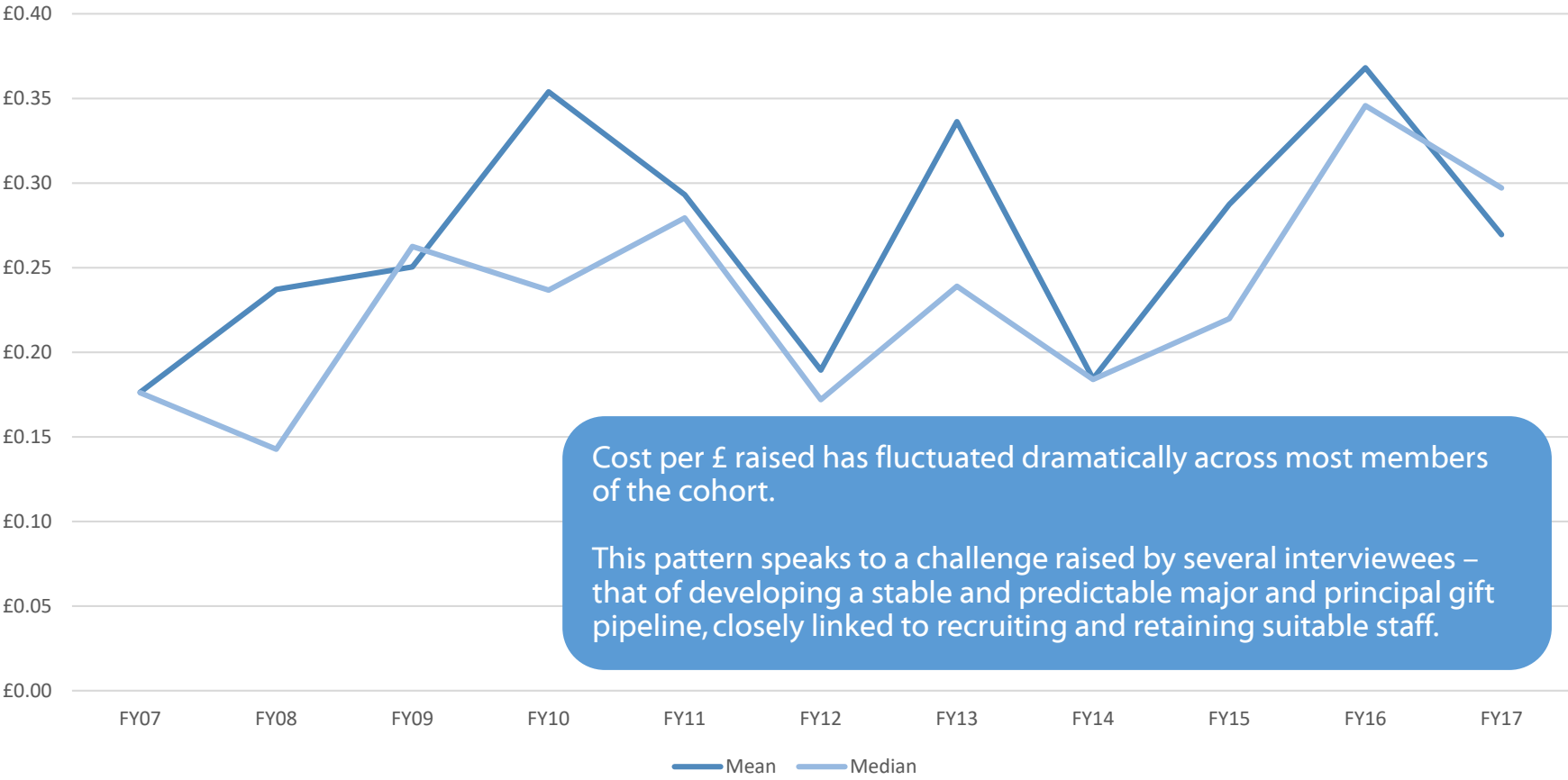
# INVESTMENT

Investment in Development as % of Institutional Expenditure



# COST

Cost to Raise a £

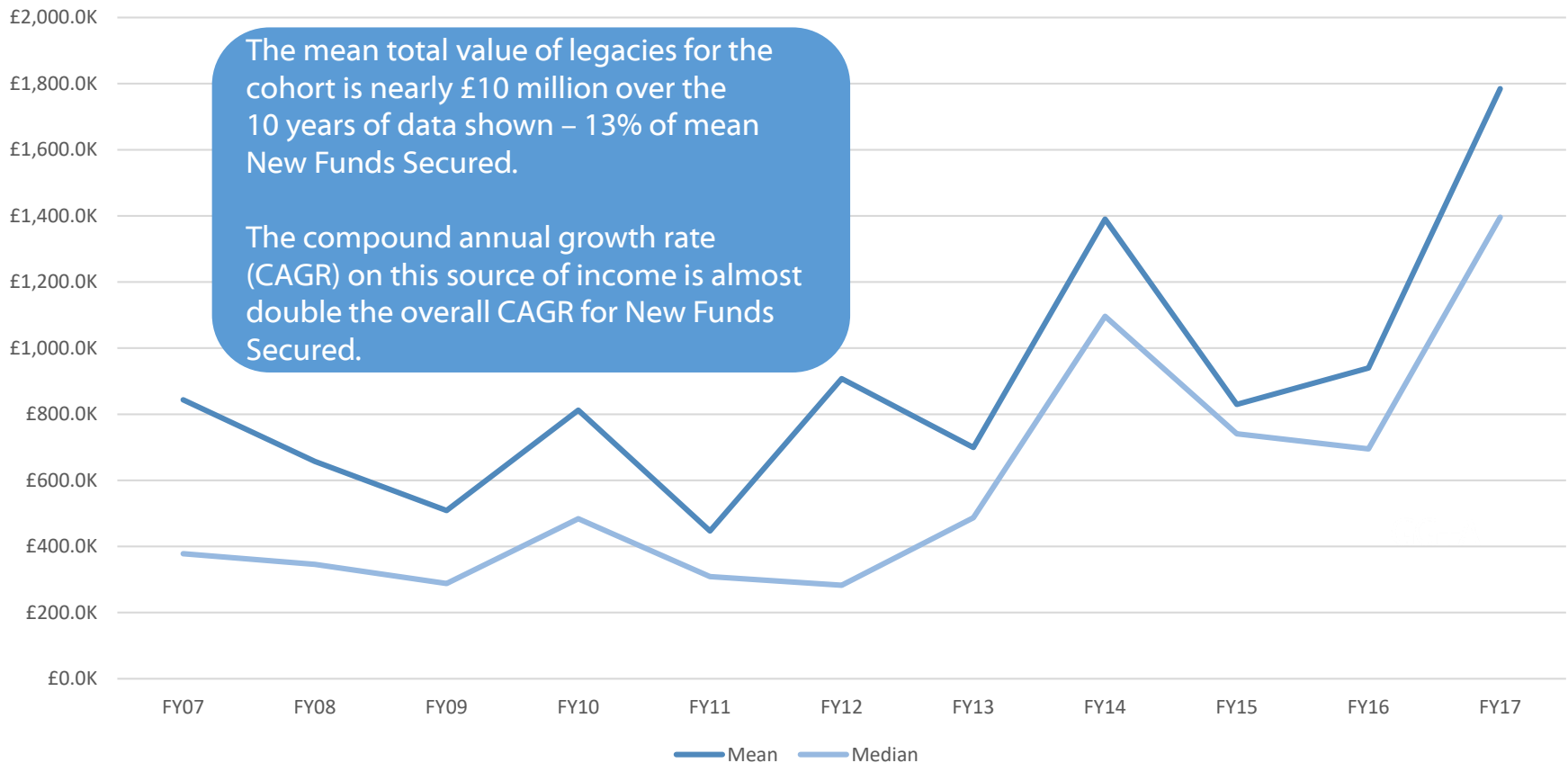


Cost per £ raised has fluctuated dramatically across most members of the cohort.

This pattern speaks to a challenge raised by several interviewees – that of developing a stable and predictable major and principal gift pipeline, closely linked to recruiting and retaining suitable staff.

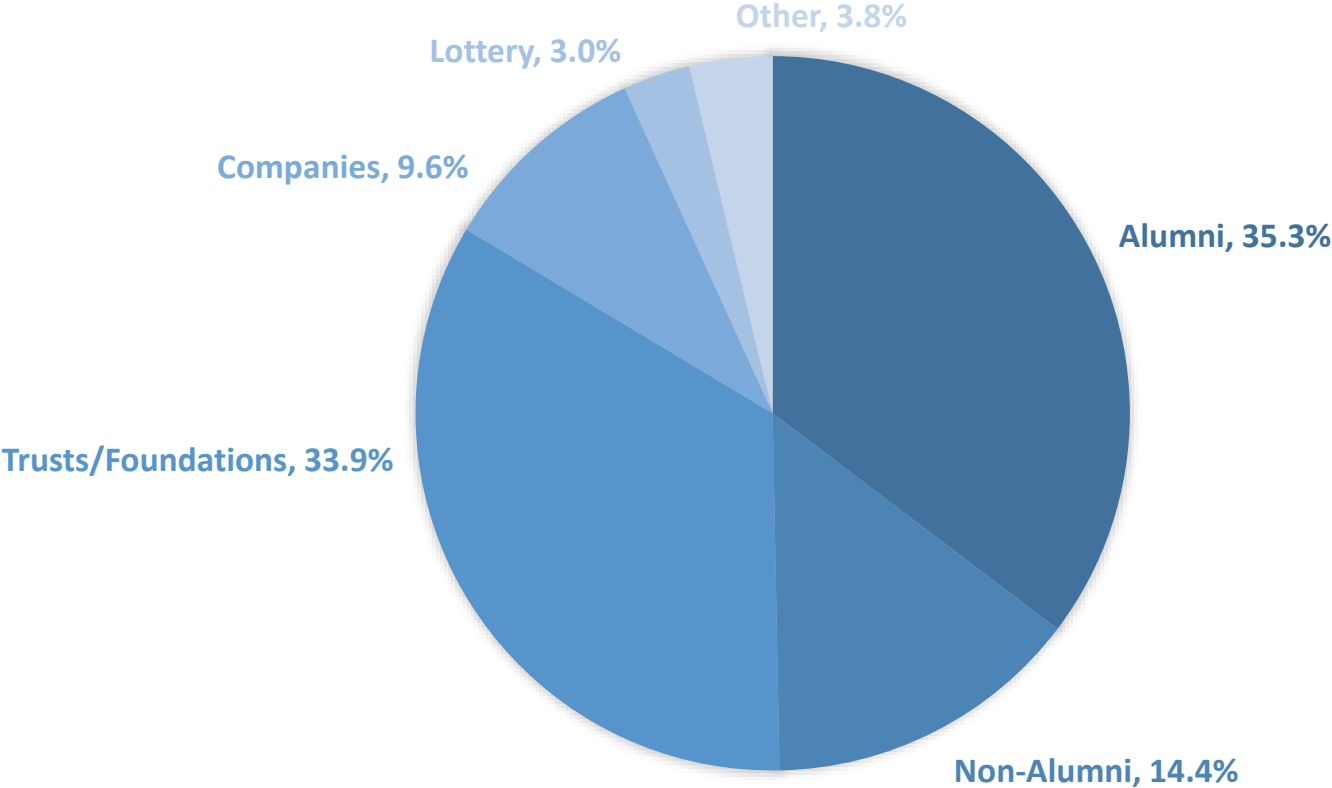
# DRAMATIC GROWTH IN LEGACY GIVING

Cash Income from Legacies FY07 - FY17



# GIVING SOURCES

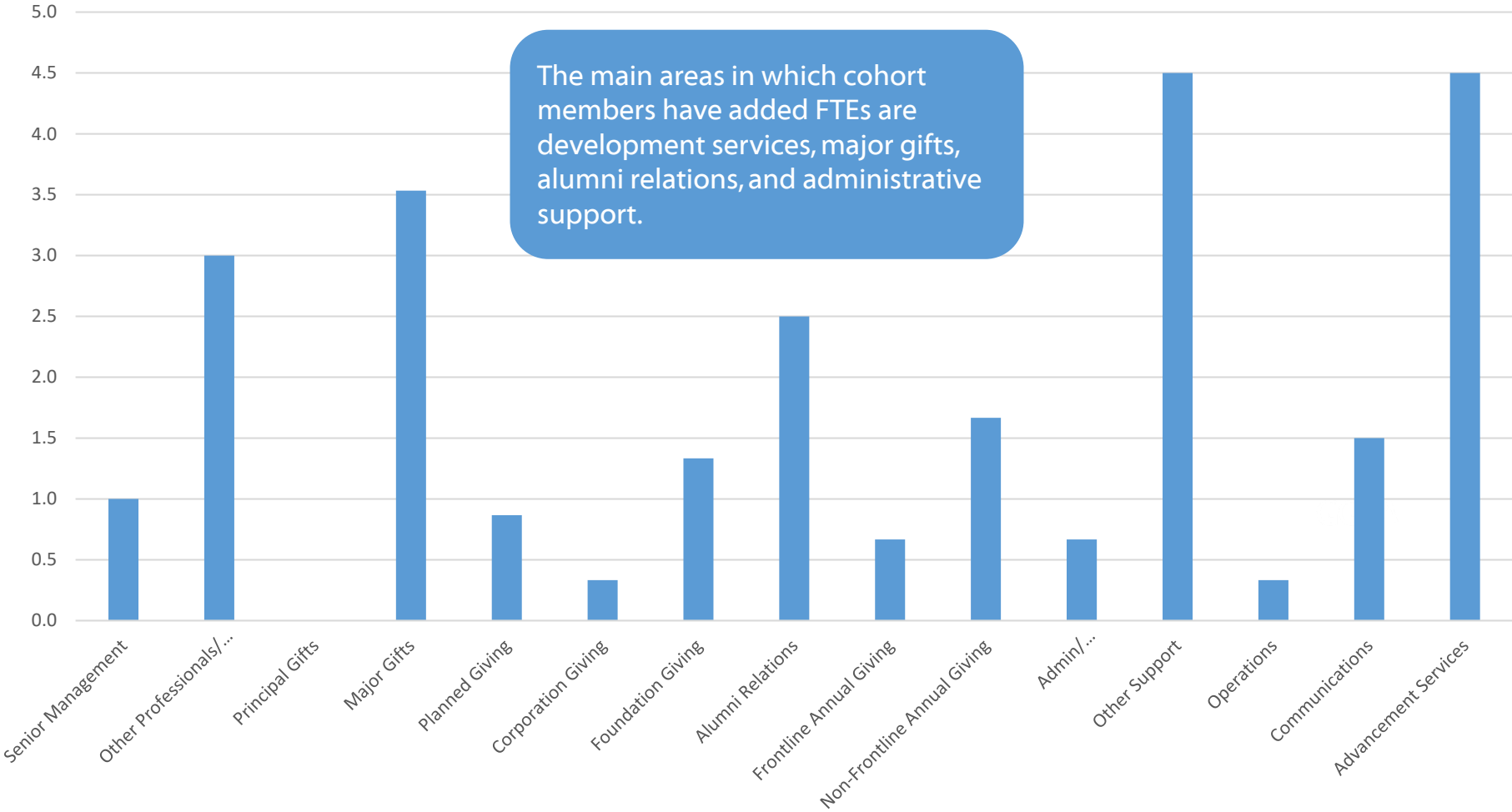
## GIVING SOURCES BY 5-YEAR MEAN



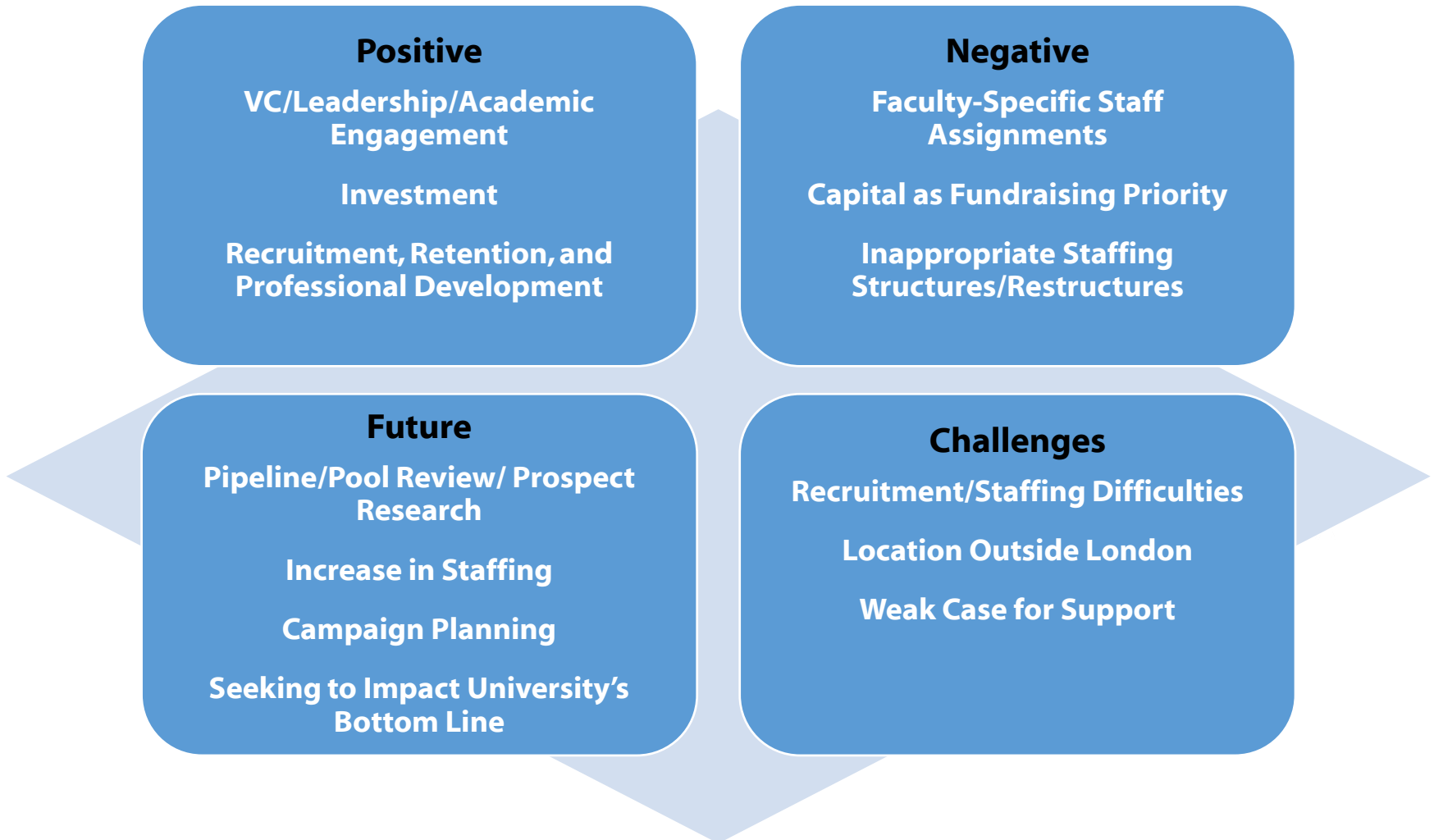


# STAFFING

Average change in FTE 2008 - 2018



# KEY TOPICS RAISED IN INTERVIEWS





# Positives

# COMMITMENT FROM VICE CHANCELLORS

“We’re lucky that the VC really likes what we do...getting this latest investment through was hard, but the reason it came through at all was because of the VC.”

“[The Vice-Chancellor] said, ‘Some of the results may not happen in my tenure as VC. They might be for my successor or even my successor’s successor, but as a university we should be wise enough to do that.’”

# RIGHT PEOPLE IN RIGHT ROLES

“[On transformational/principal gifts] If you don’t get that right...when we had our Director in that position leave, you could see the difference.”

“We used to just do the usual standard university job application, interview, presentation, but now we do an assessment centre where we ... test everything from the ability to evaluate an opportunity to face-to-face engagement.

It gives the candidate a much more honest sense of what the job is, but also gives us a much more rounded view of whether the person is the right fit for the role.”

## THE 'RULE OF THIRDS' FOR NEW MAJOR GIFTS STAFF

"I based my investment case in thirds. So I said, if you are going to invest in this gift officer, their target will be £X, and in year one you'll see one-third of that, and in the second year two-thirds of that. You won't see their max until year three."

# ANNUAL FUND AS LEGACY GIFT PIPELINE

“We’ve started to get legacy gifts from... people who don’t have the lifetime capacity to be a major donor — there’s going to be a lot more of them than there are that have the capacity to be major gifts donors.”

“A lot of the people from whom we've had very big gifts, legacy gifts, were quite low-level donors. We got notified of one of several million...no one thought she had that kind of money. But...there were lots of stories about how she would write to us every year and send a Christmas card, and we would respond. And it's that personal touch.

Sometimes I’ve wondered whether we've been over-stewarding some of these folks. But then when you start getting these great big gifts, 10, 20 years later, can you really afford not to do it?”



# Negatives



## OVER-EMPHASIS ON CAPITAL PROJECTS

“At the end of the last campaign there was a huge capital focus –the team found it very, very hard. They did a great job in trying to personalise asks, but it severed some relationships.

I try to push back on capital quite a lot as a focus. It will be in there but can't be the focus.”

# GIFT OFFICERS EMBEDDED IN FACULTIES GET BOGGED DOWN

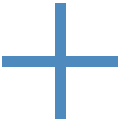
“What didn’t work well with the faculty-specific fundraising model was that those individuals were seen as everything to do with alumni relations and fundraising.

So we had major gift officers who were spending 80% of their time on alumni events and communications, and everything in between.”

# INAPPROPRIATE STAFFING STRUCTURES / FAILED RESTRUCTURES

Finding the right structure is hard. Two main issues:

- Staffing structures that had arisen opportunistically to make use of available budget
- Restructures that pushed certain team members beyond competencies



# Challenges

## KEY ROLES ARE HARD TO RECRUIT

“We don’t have [a transformational gifts person] because we’ve struggled to recruit for it. We’ve been out twice now for that role and we’ve interviewed only two people, one each time. It’s a real problem. We try to find people with transferable skills, but that’s difficult too, and I’m not sure we’re paying enough.”

# MORE CAPITAL CHALLENGES

“The donor in Hong Kong who wants their name on a building doesn’t necessarily want it in (non-London location).”

“...who's getting a building isn't necessarily decided along strength lines. A good proportion of it is decided by whose building is falling down fastest. Capital projects don't necessarily line up neatly against the story that you would ideally want to tell about your institution. So there's a conflict there.”



# Looking to the future

# POOL MAINTENANCE

“We only have two people on the research team so that’s way understaffed. Looking to double that.”

“We have started to clear our pool out radically. It is fine in terms of identification. Fine in terms of warmth, not so much in terms of progress towards what we might actually get in the campaign lifetime.”



# GROW YOUR OWN GIFT OFFICERS

“Leadership annual giving officers get lots of practice. They’re doing 20 meetings a month, whereas major gift officers are having maybe 10. So they’re learning really quickly what works and what doesn’t. We’ve just promoted a couple to MGO.”

# JOINING UP DEVELOPMENT AND INSTITUTIONAL STRATEGIES

“We’re working on a thought piece about alumni and development beyond 202x which will then feed into our strategy.

In the latter part of that process we’ll be clear about what the University strategy is, and we will then look at what the vision for this team needs to be in order to help deliver that.

That would be the moment at which we would set our aim - going from £X average per year, to wanting £Y, and investing accordingly.”

# KEY TOPICS RAISED IN INTERVIEWS

## Positive

VC/Leadership/Academic  
Engagement

Investment

Recruitment, Retention, and  
Professional Development

## Negative

Faculty-Specific Staff  
Assignments

Capital as Fundraising Priority

Inappropriate Staffing  
Structures/Restructures

## Future

Pipeline/Pool Review/ Prospect  
Research

Increase in Staffing

Campaign Planning

Seeking to Impact University's  
Bottom Line

## Challenges

Recruitment/Staffing Difficulties

Location Outside London

Weak Case for Support

# QUESTIONS?

- + Submit questions via chat function at the top of your screen
- + Thank you!



**Adrian Salmon**  
Vice President  
[asalmon@grenzglier.com](mailto:asalmon@grenzglier.com)  
+44 (0)77 3013 3339  
 @adriansalmon



**Chris Begley**  
Senior Vice President  
[cbegley@grenzglier.com](mailto:cbegley@grenzglier.com)  
+1 646 552 6507