University Advancement

Professor Anya Hurlbert

11 October 2016
University Advancement

• Context
• Advancement in action
• Goals
• Key functions
• Sector benchmarking
• Progress
• Opportunities and challenges
Context: the landscape

- Core purpose: advancing University priorities
- Not a new concept – most UK universities were founded with a philanthropic gesture, Newcastle included
- Philanthropy to universities increasing by 10%+ annually - £756.7 million in philanthropic donations to universities in 2014-15
- HEIs attract 41% of £1m+ donations to charities in UK
- Many universities embedding philanthropy in strategic planning process in an ever evolving funding environment
- Tightly regulated profession – universities setting the standard for best practice
Context: Why ‘Advancement’

- Professional terminology to describe the strategic, integrated method of managing relationships to increase understanding and support among an educational institution's key constituents, including alumni and friends, government policy makers, the media, members of the community and philanthropic entities of all types (reference: [www.case.org](http://www.case.org))

- Advancement professionals work on behalf of educational institutions to:
  - Secure private financial support from potential donors committed to the mission of the institution
  - Engage alumni in the life of the institution as volunteers, advocates and supporters
  - Promote or market the institution to prospective students, their parents and others
  - Communicate about the institution with those who have a stake in its success, including community members, business leaders, government officials, the press and others
Advancement in action
Advancement goals

- Build lifelong, meaningful relationships between the University and its alumni;
- Support the University’s mission by increasing awareness of giving to Newcastle University and to develop, manage and promote relationships with a range of philanthropic funders.
Key functions

Dean (0.2FTE)
Prof Anya Hurlbert
- Strategy
- Academic liaison
- Principal gifts

Director
Teri Wishart
- Strategy
- Principal gifts
- Management and university liaison

Head of Alumni Engagement
Charlotte Pearson
- Alumni programmes
- Faculty / School / Service liaison

Head of Philanthropy
Katie Harland
- Major gifts, Trusts, Corporates, Legacies
- Donor relations / stewardship

Operations Manager
Tracey Readshaw
- Database & analytics
- Finance
- Planning
- Alumni / donor research
## Sector benchmarking

<table>
<thead>
<tr>
<th>Key indicators (2014-15)</th>
<th>Russell Group (RG)</th>
<th>Russell Group (exc Oxbridge)</th>
<th>Newcastle University</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alumni</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total alumni</td>
<td>216,042</td>
<td>208,328</td>
<td>167,827</td>
</tr>
<tr>
<td><strong>Resources</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total institutional expenditure</td>
<td>£592,943,158</td>
<td>£536,792,491</td>
<td>£428,408,000</td>
</tr>
<tr>
<td>Fundraising staff</td>
<td>38</td>
<td>22</td>
<td>7</td>
</tr>
<tr>
<td>Alumni relations staff</td>
<td>17</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Total fundraising costs</td>
<td>£2,609,724</td>
<td>£1,416,758</td>
<td>£516,791</td>
</tr>
<tr>
<td>Fundraising staff costs</td>
<td>£1,851,080</td>
<td>£1,031,587</td>
<td>£397,917</td>
</tr>
<tr>
<td>Fundraising non-staff costs</td>
<td>£758,645</td>
<td>£385,171</td>
<td>£118,874</td>
</tr>
<tr>
<td>Spend per £ raised (5year average)</td>
<td>£0.10</td>
<td>£0.10</td>
<td>£0.07</td>
</tr>
<tr>
<td>Total alumni relations costs</td>
<td>£969,952</td>
<td>£578,384</td>
<td>£224,646</td>
</tr>
<tr>
<td>Alumni relations staff costs</td>
<td>£634,047</td>
<td>£403,823</td>
<td>£112,551</td>
</tr>
<tr>
<td>Alumni relations non-staff costs</td>
<td>£335,905</td>
<td>£174,561</td>
<td>£112,551</td>
</tr>
<tr>
<td>Spend per graduate</td>
<td>£4.48</td>
<td>£2.7</td>
<td>£1.3</td>
</tr>
<tr>
<td><strong>Philanthropic income</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New funds secured</td>
<td>£29,208,752</td>
<td>£14,450,275</td>
<td>£13,837,921</td>
</tr>
<tr>
<td>Cash income received</td>
<td>£24,720,889</td>
<td>£11,921,739</td>
<td>£6,277,591</td>
</tr>
</tbody>
</table>
Recent Progress

- Alumni engagement
- Fundraising projects
- Forthcoming investment

Founderships

Founderships are an innovative business start-up package offer work space, funding, advice and support. No equity.
Challenges

• Co-ordinating the effort / complex environment
• (Re)building the brand with funders and alumni
• Resources
• Etherington review
• Data management / EU legislation
Summary

• Philanthropy is not a new concept for universities
• Every act of giving makes a difference, it creates a multiplier effect and each donation is a re-affirmation by someone that they university is worthy of support
• Many choose to support universities because they understand that universities are transformational agents for society e.g.

“You are not giving to Harvard. You are giving to all of humanity through Harvard.”

Dr Gerald Chan, philanthropist and entrepreneur
Discussion