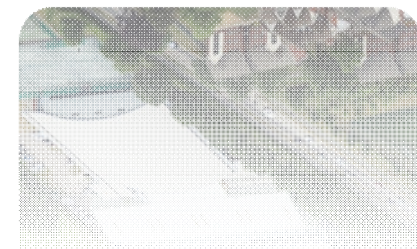


Institutional Leadership—allowing fundraising and philanthropy to flourish

Professor Shirley Pearce
Vice-Chancellor, Loughborough University
17 May 2012

What this presentation will cover

- Why philanthropy?
- The role of institutional leadership in advancement
- Challenges of implementing and growing capacity
- Maintaining momentum
- HEFCE Review Philanthropy in Higher Education



Why Philanthropy?

- Provides support that supplements other funding streams
- Nothing New
- Economic Environment
- HEFCE : encourage growth of philanthropy in HE



Role of institutional leadership:

- Decide its important
- Learn what good fundraising looks like
- Get Senior staff on board
- Invest in skilled staff and training for senior academics
- Determine strategy for the institution ...and the role of philanthropy in its delivery

The Vice-Chancellor's Role in Advancement

- Internal Champion
- External advocate/Chief fundraiser
- Articulate vision
- Events, personal visits, connections to alumni
- Clear expectations of advancement team
- A donor to the institution



Expanding the Reach of Leadership Beyond the Vice-Chancellor

- Involvement of Academic Leadership—specifically Deans, heads of Schools or Departments
- The creation of structures for volunteer involvement
- Working with Student leaders
- Create Advancement committee (council subcommittee)
- Embed advancement in annual development plans



Challenges of Implementing and Growing Capacity

- Development is a long-term initiative
- Changes are needed internally:
 - Creation of Gift Oversight Committee
 - Alignment of institutional priorities with donor communications
 - Create Links between DARO and Schools/Depts
- and externally:
 - Educate alumni about giving
 - Creation of volunteer opportunities and involvement



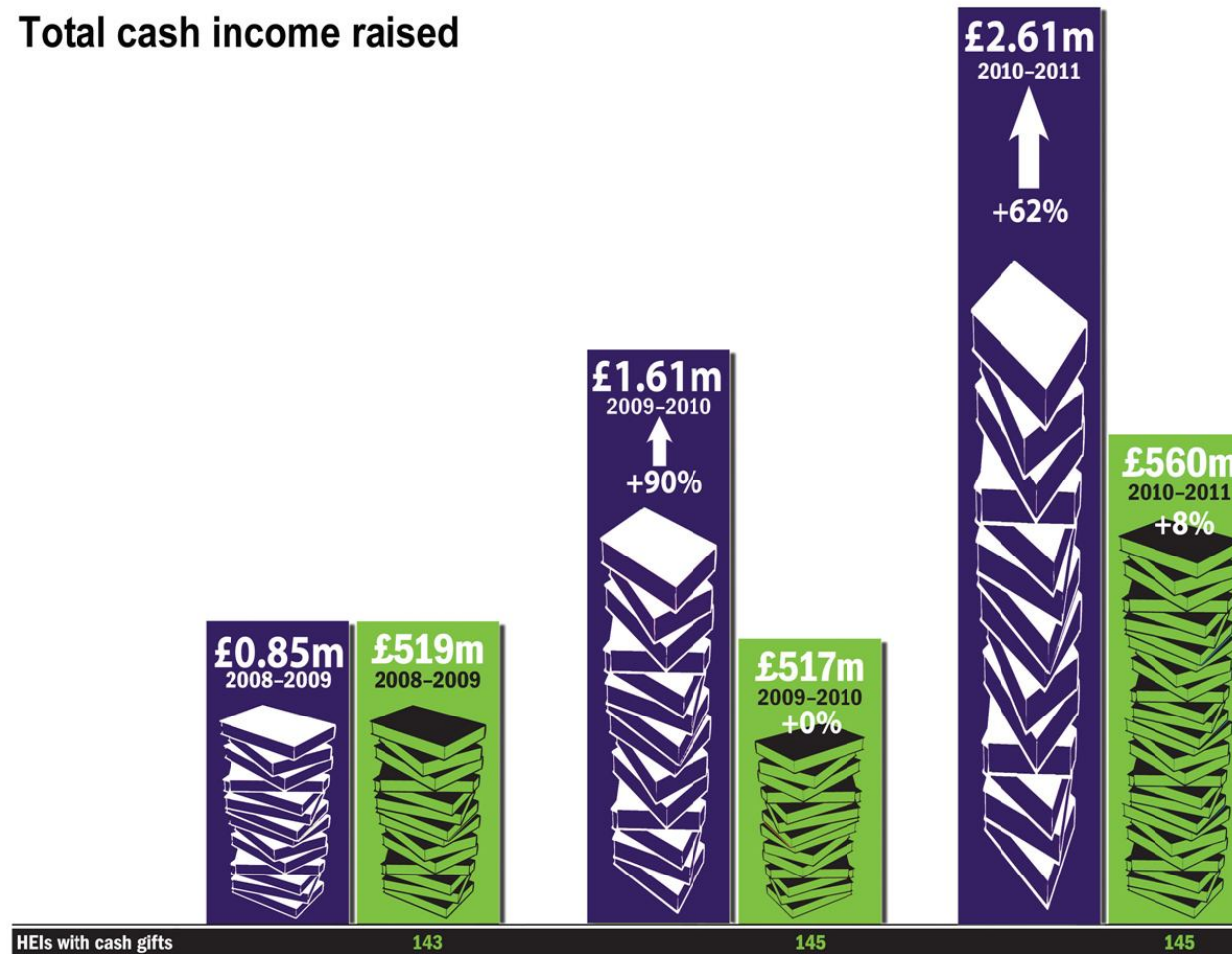
Loughborough Performance of All Institutions

Growth in donor numbers



Loughborough Performance of All Institutions

Total cash income raised



Maintaining Momentum

- Remember staff change
- Educate new members of academic leadership
- Keep staff informed of alumni and other events
- Communicate successes both internally and externally
- Communication is never complete!



Purpose of the HEFCE Review

To improve our understanding of :

- **Donors** to Higher Education
- The **impact of philanthropy** on HE
- How **government** can incentivise giving to HE
- What **HE institutions** need to do better



Philanthropic support for HE in UK: 2012 Status Report and Challenges for next decade

Review Group members:

Sir Richard Trainor, King's College, London

Martin Williams, BIS

Nick Blinco, University of Birmingham

Rory Brooks, MML Capital Partners LLP

Shirley Pearce, Loughborough University

Understanding Donors

The review will:

- Consider what motivates donors to give to HE
- Reveal the barriers and incentives to giving to HE
- Help us to understand the impact of economic changes on donors to HE
- Recommend initiatives to remove barriers to increase philanthropic support to HE

Government initiated incentives to giving to HE

The review will

- Analyse the learning from the matched funding scheme, has it achieved objectives?
- Analyse the role of tax incentives in encouraging gifts to HE, what else can be done to incentivise giving?
- Consider the Green Paper on Giving in relation to HE, can we learn lessons from other sectors?

The impact of Philanthropy on HE

The review will:

- Demonstrate the beneficial impact of philanthropy on HEI's , their staff and students, showcasing examples at all levels of giving and within all types of institutions
- Uncover the pitfalls and examine how these can be avoided

Changes required by HEIs

The review will:

- What are the critical factors that lead to sustained success in development programmes?
- Address how philanthropic culture is organised and embedded in institutions
- Review the capacity building programmes delivered by CASE Europe
- Consider workforce implications ...insufficient fundraising staff in HE?
- Identify other areas of good practice

Review Process

- Open consultation managed through More Partnership, with responses encouraged from all UK HEIs, now live
- A series of in depth interviews with selected institutions of different backgrounds and experience in philanthropy
- Interviews with donors and other stakeholders (UUK, CASE Europe, Government)

Timeline for the Review

- On line consultation open now at

www.morepartnership.com/news/hefcereview

- Interviews being scheduled
- Final report to review group end July
- Formal presentations planned at:
 - CASE Europe Annual Conference, August
 - UUK Annual Conference, September

Engage with the HEFCE Review

- Input is essential, confidentiality respected
- On-line survey available at the following URL:

www.surveymonkey.net/s/HEPhilanthropy
- Closing Date 31 May 2012

