



Directorate of Development and Alumni Engagement
Report up to May 2018

Outcome requested:	Finance and Investment Committee is asked to note this paper
Executive Summary:	<p>This paper is designed to update members of Finance and Investment Committee on activity between October 2016 and May 2018 and to provide an overview of the Directorate's current position. A paper to the September meeting will include more details of the way forward.</p> <p>It should be noted that there was no permanent Director of Development in post between November 2016 and March 2018. In addition, the whole Directorate team underwent significant change and as of May 2018 of the 14 positions (excluding the new Director), five are vacant, six are filled with interims (some on a part time basis), and only three are permanent staff.</p> <p>Activity has therefore been reduced substantially, particularly in respect of fundraising and this paper will reflect that.</p>
QMUL Strategy:	<p>Taken from previous reports to FIC -</p> <p>1.4: Engage increasing numbers of alumni to provide in-kind support</p> <p>6.4: Markedly increase income from philanthropic sources</p>
Internal/External regulatory/statutory reference points:	N/A
Strategic Risks:	Taken from the previous report to FIC – 9. Reputational development and external relations
Equality Impact Assessment:	Not required
Subject to prior and onward consideration by:	Finance and Investment Committee, 5 June 2018
Confidential paper under FOIA/DPA	N0
Timing:	N/A
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Date:	31 May 2018
Senior Management/External Sponsor	Laura Gibbs, COO

Directorate of Development and Alumni Engagement (DDAE) report up to May 2018

Background

The DDAE was established in September 2012 and is responsible for generating philanthropic income to support and enhance QMUL's strategic priorities where appropriate and to engage alumni in delivering in-kind support to relevant strategic activities, such as student recruitment and employability.

The DDAE has not reported to this Committee since October 2016, when the original Director of Development left the University. This paper is designed to update members of the Committee on activity between October 2016 and May 2018 and to provide an overview of the Directorate's current position. A paper to the September meeting will include more details of the way forward.

It should be noted that there was no permanent Director of Development in post between November 2016 and March 2018. There was a deliberate decision to delay recruitment of a new Director of Development pending appointment of the new President and Principal. In addition, the whole Directorate team underwent significant change and as of May 2018 of the 14 positions in the Directorate (excluding the new Director), five are vacant, six are filled with interims (some on a part time basis), and only three are permanent staff.

To represent this as full time equivalents (FTE):

Director	1.0
Fundraising (Major gifts, trusts and foundations and regular giving)	2.6
Alumni Engagement	2.0
Development Services (data management, gift processing, prospect research, governance)	3.0
PA to the Director, Office Manager and Finance Administration	0.6
Total FTEs in the Directorate	9.2

The FTE as at October 2016, when the Directorate last reported, was 12.2 (with a headcount of 14).

Activity has therefore been reduced, not only because FTE resource went down by approximately 25%, but also because that resource is now largely provided by interim appointments, something that means traction and innovation can be lost as staff turn over.

It should also be noted that there were significant issues with the database and other support systems that underpin the work of DDAE. These will have to be resolved before building on the existing position.

This reduction in activity has had an impact on some parts of QMUL in that philanthropically supported projects have and will receive less than in previous years. However, the impact has not been widespread and is reversible, with planning and investment going forward.

Fundraising performance

Target field	2012-2013	2013-2014	2014-15	2015-16	2016-17	2017-18 (to date)
New Funds Raised	£423,089	£1,118,222	£1,207,609	£2,073,463	£1,614,427	£367,016
Income	£374,832	£646,090	£1,186,274	£1,329,706	£405,384	£624,311
Donors	866	1030	1,271	1,069	1011	804
Fundraising costs	£237,000	£206,000	£341,663	£383,579	£480,687	tbc
Income-Expenditure	£137,832	£440,090	£691,084	£946,127	£731,435	tbc
Total raised	£797,921	£1,764,312	£2,393,883	£3,403,169	£2,019,811	£991,327
ROI (raised per £)	£1.79	£5.43	£3.98	£5.41	£1.68	tbc

NB:

New funds raised represents total value of new confirmed pledges and single donations received within year

Income represents total income received by either QMUL or QMUL Foundation in either single donations or instalments of pledges established in previous years

Breakdown of funds raised and income

The following table breaks down the number of pledges and gifts received in 2016/17 and to date for 2017/18 by size and source.

2016-17 Breakdown				
New Funds Raised			Income	
Source	No. of Gifts	Gift Size	No. of Gifts	Source
	0	£1m+	0	
Trust x 2	2	£250k-£1m	0	
	0	£100k-250k	1	Individual
Individual x 3; Company x 2; Trust x 1	6	£25k-£100k	3	Individual x 1; Company x 2
Individual x 3; Trust x 6	9	£5k-£25k	1	Trust
Individual x 35; Trust x 3	38	£1k-£5k	33	Individual x 32; Trust x 1
Individual	345	<£1k	4629	Individual
2017-18 Breakdown (to date)				
New Funds Raised			Income	
Source	No. of Gifts	Gift Size	No. of Gifts	Source
	0	£1m+	0	
	0	£250k-£1m	1	Trust
Trust	1	£100k-250k	1	Trust
Company x 1; Trust x 1	2	£25k-£100k	1	Individual
Trust x13	8	£5k-£25k	6	Individual x 4; Trust x 2
Individual x 16; Trust x 12	28	£1k-£5k	10	Individual x 9; Trust x 1
Individual	194	<£1k	4018	Individual

Alumni volunteer numbers

Year	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18 to date
Total	124	256	321	364	348	162

Summary

Whilst it is evident that fundraising (both major gifts and regular giving) and to a lesser extent alumni engagement and their recruitment into volunteering programmes has reduced, this is a temporary situation. The arrival of the new Director of Development in March 2018 will start a programme of recruitment and the production of a new strategy in line with the University's strategic objectives.

This report is a shortened version, and the Committee will receive a full report in September 2018.

Claire Kilner, Director of Development
May 2018