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Foreword to deliverable 107

The “EUt+ foundation” aims to straightforwardly assure financial sustainability to the alliance through efficient fundraising, based on the expertise and high-level skills of Riga Technical University. The consortium aims at replicating the previous experience of Riga Technical University by establishing a foundation to attract funding for specific activities of EUt+. This structure involves close interactions with local and global industry, possible subsidiaries, crowd funding instruments, seeking to upscale initiative impacts, size, and outcomes.

This deliverable reports on the activities done to achieve these goals in the first two years of the project including reports at M12 (a) and M24 (b). It introduces a background note on the use of alumni relations and fundraising activities in higher education, the analysis of the EUt+ case, its main outcomes, the agreed strategy, and the activities done in the first two years of the project.

The analysis of the EUt+ case revealed that an attempt to roll out fully a EUt+ Foundation at this stage of the development of the alliance would be counterproductive. Instead, it was found much more effective to dedicate the first two years to perform a proper analysis, build a strategic plan, and do capacity building from the more experienced EUt+ members to the ones with less expertise in this area.

The EUt+ Foundation team was appointed, and the main target groups to be addressed by the Foundation were identified, including all eight partners alumni, employers, R&D heavy companies, technology philanthropists, states, regions, and municipalities.

First results of the activities show the potential of the initiative, not only in the more experienced members, but also in others with a lack of structure to it, including public funds donated by states and regions to support the development of the alliance (such as France, Germany, Romania, and Spain).

Actions like launching the EUT+ AR&D office, the EUT+ alumni IT platform, fundraising projects, will be activated once EUT+ has a separate organization, beyond the scope of this report.

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Introduction

One of the key indicators to measure the relevance of one university is by understanding its relations with external stakeholders. EUt+ aims at building a network of relations with its alumni, philanthropists, and other stakeholders for several reasons:

- + Alumni donations, endowments, and grants from foundations or other donors will contribute significantly to the EUt+ budget. These funds will be used for scholarships, research, infrastructure development, and more, enhancing the overall quality of the alliance.
- + Donations from other supporters will help EUt+ being more accessible to all the students.
- + EUt+ fundraising will help invest in the latest technology for the benefit of students, staff, and researchers. This is particularly relevant since EUt+ focuses on technology.
- + Donations will support the EUt+ European Research Institutes.
- + Building strong alumni relations will foster a sense of European identity and of EUt+ community. Engaged alumni are more likely to support not just financially but also by mentoring current students, offering internships, and contributing to the university's reputation.
- + EUt+ will use its alumni relations to create networking opportunities for their graduates, leading to job placements, partnerships, and collaborations.
- + A strong financial base derived from fundraising efforts will support EUt+'s autonomy and flexibility in decision-making, allowing them to pursue their academic mission and goals more independently.

This deliverable presents the bases of EUt+ first steps to achieve this carried out by the task participants in the first two years. Section 1 introduces an analysis of the

different situations of the EUT+ members. Following, Section 2 introduces the estimated schedule, including achievements and milestones, need for external resources, and the proper timing and costs of a platform for alumni relations, describing the actions in the frame of the global schedule and strategy. Next, main conclusions are depicted, and next steps described. Finally, Annex I shows a global presentation of alumni relations and philanthropy in higher education institutions. The use this material in the task force was found necessary due to the variety of backgrounds, experiences, and legislations among the EUT+ members and countries.

1. Analysis of the Situation in the EUT+ member universities and their countries

The analysis was based on the following elements:

- + Current situation in alumni relations and development in all EUT+ member universities.
- + Analysis of fundraising in similar international educational organizations in the world.
- + Analysis of tax laws and legislation for fundraising.
- + Memorandum of understanding among university foundations about cooperation.

The main outcomes of this situation analysis were:

- + Only three out of eight EUT+ partners have resources (employees, an office) for alumni relations and fundraising, while the other five institutions do not have any experience in the field and do not have dedicated resources to implement development.
- + The different legislation in the EUT+ member states represents a great challenge, diminishing the attractiveness for potential donors to fund cross-border initiatives.
- + The absence of alumni with a EUT+ degree or a degree label brings a lack of identify among the alumni and the students, who identify themselves much more with the HEI brand than with the alliance, as demonstrated by a survey done in Riga Technical University.
- + War in Ukraine changed priorities in Europe, taking away full attention of university alumni and students to current political situation and consequently delaying any response on EUT+ foundation activities. EUT+

actively took part of this, with many partners raising funds and donations to support Ukraine and particularly its Higher Education institutions.

- + The establishment of a EUt+ Foundation as a separate legal entity must be aligned with the EUt+ strategy. Two years after the project kick-off, EUt+ does not have a legal entity, and creating one for the purpose of the EUt+ Foundation is found premature and does not justify the necessary investment.

Based on these outcomes, the EUt+ members have set the following priorities:

- + Focus on training and capacity building in all partner universities.
- + Organize regular case studies applicable to EUt+.
- + Perform survey on alumni knowledge of EUt+ and preferences and willingness to donate.
- + Set up the strategy on the first years of operation when EUt+ will be founded as a separate legal entity.
- + Actively foster the alignment of local fundraising to the EUt+ vision and mission.
- + Continue local fundraising activities that contributes to partner universities' infrastructure, making this available to all EUt+ partnership students and researchers.

To achieve this, the task participants have identified the next obstacles, perspectives, and next steps:

Obstacles and Perspectives What are the obstacles? What was not done?	What were the next steps for EUT+ partners for alumni relations?
Different tax legislation in all countries	Continue training
No human resources in five partner universities	Continue case studies
No experience in five partner universities	Continue Local fundraising and foster its alignment to EUT+ objectives
No financial resources for operations of potential Foundation	Continue Dissemination of awareness creation
	Development of the strategy

2. Task timeline and actions

2.1. Achievement and milestones

Expected date	Internal milestone, deliverable...	Main content, detail of the implementation...
09.2022	Training	Alumni relations and development training for leaders in all partner universities

09.2023	IT platform	Alumni and development platform (alumni data base, job advertising, mentoring, fundraising, interest groups, etc.) specification
09.2023	Strategy	EUt Alumni relations and development office strategy
As soon as EUt+ is established as a legal entity, including the purpose of the Foundation.		
Same year	EUt alumni relations and development office	Coordinating alumni relations, mentoring, volunteer management
Same year	Alumni and development platform	Alumni and development platform launch
+3Y	EUt foundation	Coordinating EUt fundraising initiatives
+4Y	Fundraising campaign	First regular and annual fundraising campaigns
+5Y	International groups	EUt alumni international groups around the globe

2.2 Major external resources

Potential major external resource requirements for the implementation of the task (legal changes, financial resources, other...)

Expected date	Kind of resource	Detail of the resource or evolution required...
From 2022	1800 EUR per institution yearly	Council of Advancement and Support of Education membership
From 2022	1000 EUR per institution yearly	Training, alumni relations and fundraising conference (ICARe alumni, CASE Europe) participation fees
As soon as EUT+ is established as a legal entity		
Same year	ca 18 000 EUR yearly	Alumni platform (pricing to be specified)
Same year	ca 1800 EUR yearly	Council of Advancement and Support of Education membership (pricing to be specified)
Same year	Financial (amount TBS, 10% of fundraising targets)	EUT alumni relations and development office administration
+3Y	Financial (amount TBS, 10% of fundraising targets)	Fundraising campaigns for EUT people, projects and infrastructure

+5Y	Financial (amount TBS, 10% of fundraising targets)	Staff and alumni mobilities, international alumni engagement
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2.3 Provision for alumni platform

A potential provider for the EUT+ alumni platform is Gravyty. Its package proposal and cost for EUT+ is described below.

Alumni Relations Platform (Graduway)	Digital Fundraising Platform (Advance)
Enterprise Package - with Upgrades Users: Up to 80,000 Premium Groups: Up to 10 Full Mentoring Programmes: Up to 10 Multi-Lingual + Mobile App Other features as per pricing sheet (Engage Package Value: €40k)	Summa Package - with Upgrades Embedded Form Included Landing Pages: 9 Funds per Annual Page: Up to 20 Debit and Credit Giving in EU and GBP Other features as per pricing sheet (Advance Package Value: €40k)

Unique pricing proposal for European universities consortium. Comprehensive alumni and fundraising package: €49,995 per year.

License	h/ mon	EUR/h (gross)	1 year	3 year
System administration (implementation, user service)	80	12	11520	34560
Translation			1000	1000
Content creation	60	10	7200	21600
Project manager, other admin and user training	80	12	11520	34560
License (alumni, donation platforms for 8 universities)			49955	149865
Amount – 241 585				

Conclusion and next steps

The first two years of the task have developed the bases for the construction of the EUT+ Foundation. The starting point was very challenging for multiples reasons, including the very diverse practices, legal frameworks, and experiences among the members. The task development was also strongly influenced by the Covid crisis, that took considerable resources from donors and had a global impact on fundraising, and the war in Ukraine, that attracted full attention of the stakeholders, not only external, but also the EUT+ HEIs.

Despite the complications, task participants completed an action plan and develop an initial strategy for the future of the EUT+ Foundation. First results arrived even in the absence of a EUT+ entity, as individual members aligned their activities with the EUT+ mission and offer their donated facilities and equipment to the rest of the partners participating in the EUT+ European Research Institutes or Academic Clusters. Some members, particularly those coming from France, Romania, Germany and Spain, succeeded in obtaining financial support from their governments.

The strategy for the next steps has a short, mid, and long-term vision.

Initially, all participants with their internal resources must develop an Alumni Relations and Development (AR&D) office containing at least one full time employee. Currently, only Riga Technical University, Université de Technologie de Troyes and Technological University Dublin have such. These employees will be trained within the project. The group will set up the EUT+ foundation strategy, specify requirements and choose a solution for AR&D IT platform.

At the end of EUT+ phase 1 in October 2023 we will have an assessment of our actual readiness to become a European university, we will have concretely completed:

- + Trained EUT+ alumni relations and development leaders from all participating universities who are willing to devote resources to alumni relations and fundraising.
- + EUT+ alumni and fundraising IT platform specification.
- + EUT+ alumni and development office strategy.

Beyond that date, we will work under the assumption that EUT+ has the necessary legal instruments. The EUT+ AR&D office will be launched operating according to EUT+ strategy in strong cooperation with EUT+ top management. In the first years the office will be focusing on alumni relations, working with students to recognize the value of networking and staying in contact with EUT+ after the graduation. EUT+ AR&D will launch fundraising campaigns (ongoing as well as annual) to strengthen the cooperation with the industry as well as to support EUT+ students, alumni, projects and infrastructure. We can identify the following milestones:

- + In 2025, EUT+ Alumni relations and development office are founded building ties among EUT+ alumni and coordinating mentoring and volunteering.
- + In 2030, EUT+ Foundation is founded a mechanism/organization that coordinates fundraising for EUT+ people, projects and infrastructure.

Annex Alumni relations and philanthropy in higher education

Philanthropy in higher education

Philanthropy plays a crucial role in ensuring the sustainability of higher education institutions in several ways:

- + **Funding Scholarships and Financial Aid:** Philanthropic donations can be directed toward creating scholarships and financial aid programs. This helps make higher education more accessible to students from diverse backgrounds, reducing financial barriers and increasing enrollment. Scholarships can also attract talented students who might not otherwise have the means to attend university.
- + **Supporting Endowments:** Donors can establish endowment funds, which are investments whose earnings are used to support various aspects of the institution. Endowments provide a stable source of income for universities, helping them maintain financial stability over the long term.
- + **Funding Research Initiatives:** Philanthropic donations can support research projects and initiatives within higher education institutions. These funds can help advance knowledge in various fields and contribute to the institution's reputation and competitiveness. Research funding can also attract top-notch faculty and students.
- + **Improving Infrastructure and Facilities:** Donors can contribute to the construction and renovation of campus buildings, laboratories, libraries, and other facilities. Upgrading infrastructure enhances the overall learning environment and makes the institution more attractive to students, faculty, and researchers.

- + Enhancing Programs and Curriculum: Philanthropy can help universities develop innovative educational programs and update their. This can include investments in technology, online learning platforms, and experiential learning opportunities.
- + Supporting Faculty Development: Donations can be used to create endowed chairs or professorships, which can attract and retain top faculty members. These positions often come with funding for research and academic initiatives, helping faculty members excel in their fields.
- + Community Engagement and Outreach: Philanthropy can support outreach programs that connect higher education institutions with their communities. This can include partnerships with local schools, community service initiatives, and programs that promote civic engagement and social responsibility.
- + Promoting Diversity and Inclusion: Donors can fund initiatives aimed at increasing diversity and inclusion on campus. This can involve scholarships for underrepresented minority groups, support for diversity-related organizations, and efforts to create an inclusive campus culture.
- + Crisis Management and Resilience: Philanthropy can provide a safety net during times of financial crisis or emergencies. Donors can step in to provide support when budgets are strained, ensuring that the institution can continue to operate effectively.
- + Long-Term Planning and Sustainability: Philanthropic support can be used to develop long-term strategic plans that focus on sustainability, both financial and environmental. This includes investments in renewable energy,

sustainable building practices, and programs that promote environmental responsibility.

Fundraising challenges

Attracting donations for higher education institutions can be challenging due to various factors and obstacles. Some of the key challenges include:

- + **Competition for Limited Resources:** Higher education institutions often compete with other nonprofit organizations and causes for donor support. Donors have a finite amount of money to give, and universities must effectively distinguish themselves from other worthy causes.
- + **Economic Conditions:** Economic downturns and uncertain financial markets can make donors hesitant to give, as they may prioritize immediate needs or become more risk-averse with their investments.
- + **Changing Demographics:** The donor pool is evolving, with younger generations having different giving patterns and priorities than older generations. We must adapt university fundraising strategies to appeal to a diverse range of donors.
- + **Cost of Education:** Rising tuition costs and concerns about student debt can discourage potential donors who question the affordability and value of higher education.
- + **Tax and Legal Changes:** Changes in tax laws and regulations can affect the tax benefits associated with charitable giving, potentially influencing donors' decisions.

- + Donor Fatigue: Some donors may feel overwhelmed by the sheer number of appeals for donations, leading to donor fatigue. Institutions need to maintain a strong and ongoing relationship with donors to keep them engaged and interested.
- + Prioritization of Causes: Donors often have specific causes or interests they want to support. Convincing them to allocate funds to higher education can be a challenge if their passion lies elsewhere.
- + Fundraising Costs: The cost of fundraising can sometimes be high, particularly for major gift campaigns or large-scale events. Institutions need to balance the expenses associated with fundraising efforts with the revenue generated.
- + Alumni Engagement: Engaging alumni and building a strong alumni network can be challenging, especially for institutions with a large and dispersed alumni base. Effective alumni engagement is often crucial for fundraising success.
- + Stewardship and Recognition: Donors often want to see the impact of their contributions. Failing to effectively steward and recognize donors can lead to a decline in future support.
- + Institutional Reputation: The reputation of the institution, including academic rankings can impact donors' willingness to give.

Alumni relations in higher education

Alumni relations in higher education refers to the activities, programs, and initiatives that educational institutions, such as colleges and universities, undertake to engage and maintain connections with their former students. The primary goal of alumni relations is to foster a sense of community and loyalty among alumni and

encourage their ongoing involvement and support for the institution. Alumni relations encompass a wide range of activities and strategies, including:

- + **Alumni Outreach:** This involves reaching out to alumni through various channels, such as email, social media, newsletters, and direct mail, to keep them informed about the university's developments, achievements, and upcoming events.
- + **Alumni Associations:** Many universities have alumni associations or alumni clubs that provide a structured way for alumni to connect with each other and with the university. These associations often organize events, reunions, and networking opportunities.
- + **Reunions:** Reunion events are a common way to bring alumni back to campus to reconnect with their alma mater and fellow graduates. These events are often held on milestone anniversaries, such as the 10th, 25th, or 50th reunion.
- + **Networking Opportunities:** Alumni relations programs facilitate networking opportunities among alumni. This can include career networking events, mentorship programs, and alumni career services to help graduates in their professional endeavours.
- + **Giving and Fundraising:** Encouraging alumni to give back to the university through donations and fundraising campaigns is a significant aspect of alumni relations. Alumni relations professionals work to cultivate relationships with potential donors and engage alumni in supporting various university initiatives.
- + **Volunteer Engagement:** Many alumni want to give back to their alma mater by volunteering their time and expertise. Alumni relations programs can provide

opportunities for alumni to serve as mentors, guest speakers, or volunteers for university events and programs.

- + **Student Engagement:** Alumni often play a role in supporting current students. This can involve participating in career panels, offering internships, or providing scholarships and financial assistance.
- + **Alumni Benefits:** Universities may offer benefits and services exclusively for alumni, such as library access, continued education opportunities, discounts on campus facilities, and access to alumni-exclusive events.
- + **Data and Communication:** Alumni relations teams maintain databases of alumni information and use this data to personalize communication and engagement efforts. They keep alumni updated on relevant university news and achievements.
- + **Feedback and Surveys:** Alumni relations programs may seek feedback from alumni through surveys and focus groups to assess alumni satisfaction and gather input on ways to improve their experiences.

Alumni relations impact on philanthropy in higher education

Alumni relations can have a significant impact on philanthropy in higher education. Alumni are an essential stakeholder group for universities, and their engagement can lead to increased financial support. Here's how alumni relations can influence philanthropy in higher education:

- + **Building a Strong Alumni Network:** This network can serve as a valuable source of potential donors, volunteers, and advocates for the institution.

- + Cultivating Donors: Alumni relations teams often work to identify potential donors among the alumni base
- + Donations and Financial Support: Alumni who have positive experiences with their alma mater are more likely to donate money to support the institution. These donations can take the form of annual giving, major gifts, or even planned gifts in their wills. Effective alumni relations programs can help identify potential donors, cultivate their relationships, and encourage them to contribute financially.
- + Scholarship Funding: Alumni who benefited from scholarships during their time at the university are often more inclined to contribute to scholarship funds for future students. Alumni relations can connect donors with scholarship opportunities and help them establish their own scholarship programs.
- + Endowment Growth: Strong alumni relationships can lead to larger endowments for universities. Alumni may choose to donate funds to establish endowed chairs, professorships, or research programs, ensuring the long-term financial stability of the institution.
- + Engagement and Involvement: Engaged alumni are more likely to volunteer their time and expertise to support their alma mater. They may serve on advisory boards, mentor students, or participate in career networking events. Such involvement can enhance the overall reputation and success of the institution, indirectly impacting philanthropy.
- + Leveraging Alumni Success Stories: Alumni who have achieved significant success in their careers can serve as inspirational role models. Their stories of achievement can be used to motivate other alumni to give back to the

university, whether financially or by getting involved in mentoring and career development programs.

- + Peer-to-Peer Fundraising: Alumni relations can facilitate peer-to-peer fundraising efforts, where alumni encourage their fellow graduates to contribute. Peer recommendations and connections can be powerful motivators for giving.
- + Reunion and Homecoming Events: Alumni reunions and homecoming events provide opportunities for alumni to reconnect with their alma mater and each other. These events can be strategically used to encourage giving, as alumni may feel a stronger emotional attachment and nostalgia for their university during these times.
- + Stewardship and Recognition: Recognizing and appreciating alumni contributions is essential for fostering a culture of philanthropy. Alumni relations can ensure that donors are appropriately acknowledged and thanked, which can encourage continued support.
- + Data and Donor Analytics: Alumni relations can provide valuable data and insights on alumni preferences, interests, and giving behaviors. This data can be used to tailor fundraising strategies and communication to maximize philanthropic outcomes.

Alumni relations impact on industry donations to universities

Alumni relations play a significant role in influencing industry donations in higher education:

- + Alumni Engagement: Universities with active and engaged alumni networks are more likely to receive industry donations. Alumni who feel a strong

connection to their university are more inclined to give back, especially if they have positive memories of their time there.

- + **Networking Opportunities:** Alumni relations often facilitate networking events and opportunities for graduates to connect with each other and with current students. These interactions can lead to collaborations, partnerships, and eventually, industry donations.
- + **Alumni Success Stories:** Universities can showcase successful alumni who have made significant contributions to their industries. These success stories can inspire industry leaders to donate to their alma mater in the hopes of supporting the next generation of professionals.
- + **Career Development:** Alumni relations often offer career development services, including mentorship programs and job placement assistance. When alumni perceive that their university is helping graduates succeed in their careers, they may be more willing to contribute financially.
- + **Research Collaborations:** Universities often collaborate with industries on research projects, and alumni who work in these industries may be more likely to donate to support such collaborations. They understand the value of research in advancing their field and may want to contribute to these efforts.
- + **Corporate Giving Programs:** Some companies have corporate giving programs that encourage employees to donate to their alma maters. Active alumni relations can make it easier for employees to participate in these programs, which can lead to increased industry donations.
- + **Matching Gifts:** Companies may offer matching gift programs where they match their employees' donations to universities. Alumni relations can

promote these programs to alumni, effectively doubling their impact on industry donations.

- + **Special Events:** Alumni relations often organize fundraising events, such as galas, reunions, and campaigns. These events can attract industry leaders and alumni who are more likely to donate when attending such functions.