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Strategic cultures of philanthropy: English universities and the changing geographies of giving

Abstract

UK universities are receiving record amounts of funding from private philanthropists. In 2013, it was reported that, for the first time, UK Higher Education Institutions (HEIs) obtained more major donations from philanthropic sources than any other cause. Three decades of increased neoliberalism and internationalisation of the Higher Education (HE) sector, together with a decline in state funding, have heightened the imperative for English universities in particular to intensify engagement with potential private donors. The UK government, via its Matched Funding Scheme (MFS) 2008–2011, sought to incentivise giving to HEIs in England. Universities have thus been encouraged to grow a 'culture' of philanthropy. Yet, there has been limited investigation by geographers into the impact of private donations on UK HEIs.

In this paper, we undertake a critical examination of the official publications of 17 diverse English HEIs which participated in the MFS 2008–2011. Particular attention is paid to the differentiated levels of participation by universities with the MFS and the ways in which donations were represented in their public documents. We argue that diverse cultures of HEI engagement with philanthropic giving are critically linked to their: location in conventional institutional hierarchies; integration in professional knowledge networks; and ability to mobilise strategic connections across geographical scales. In doing so, we advance theoretical work on the role of philanthropic giving in reconfiguring contemporary geographies of HE.

1. Introduction

In November 2013, the annual *Million Dollar Donor's Report*, sponsored by the merchant bank Coutts, reported that, for the first time, universities in the UK received more major donations from philanthropic sources than any other cause (Coutts and University of Kent, 2013). During the same month, the School of Oriental and African Studies (SOAS) announced receipt of a 'transformational' £20m donation from a foundation headed by a former student (SOAS 2013) and the University of Birmingham reported that it had been presented with a £15m gift from a former academic and alumnus to research 'the impact of climate and environmental change' (University of Birmingham, 2013). These three announcements highlighted the growth in philanthropic activity among UK Higher Education Institutions (HEIs) following three decades of increased internationalisation and marketisation of Higher Education (HE), culminating in the introduction in 2012 of fees of up to £9000 per annum for undergraduate study at English universities (BIS, 2012; see also: Teichler, 2004; Lynch, 2006; Marginson, 2013). In recent years, a decline in state funding of HE, together with successive government policies encouraging universities to take responsibility for their financial future (DfES, 2003, 2004; Cabinet Office, 2011), have heightened the imperative for English HEIs, in particular, to intensify their engagement with potential private donors. More specifically, the UK government has, through initiatives such as the Higher Education Funding Council for England's (HEFCE's) Matched Funding Scheme (MFS) 2008-2011, sought to 'promot[e] a culture of individual giving to higher education' (DCSF, 2007: n.p.). Accordingly, by 2012-2013, UK universities had received a record £660 million in new philanthropic cash income, a rise of 23 per cent over the previous year (NatCen, 2014)[1]. This success was, at least in part, attributed to the enactment of the MFS and the increased circulation of knowledge on fundraising and alumni relations activities – collectively known as 'advancement' – among HE professionals (Coutts and University of Kent, 2013; NatCen, 2014).

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[1] The Ross-CASE Survey Report 2012 - 13 did not break down income by countries within the UK. However, as 113 out of the 136 participating HEIs (or 83%) of that cohort were based in England, it can surmised that this trend is indicative of English universities.

Yet, whilst emerging debates within geography have considered philanthropic giving and HE (Hay and Muller, 2013; Warren and Bell, 2014), there has been little examination of the impact of private donations on English universities – eligible to participate in the MFS 2008-2011 - or on the transfer of 'effective practices' of advancement amongst HEIs located within, and across, national borders. This is surprising, given the shifting policy landscape and the spatial transformations inherent in, for example, transactions between institutions based in England and overseas donors, and knowledge exchange amongst advancement professionals. In this paper, we commence our analysis by investigating related literatures on the internationalisation and neoliberalisation of universities, the expansion of philanthropy in the HE sector, and the professionalisation of HE advancement functions. By means of empirical research, examining the depiction of large-scale donations within official publications of selected HEIs participating in the MFS, we argue that institutional engagement with philanthropic giving raises questions about institutional geographies, knowledge circulation and the visibility and reach of English HEIs. Specifically, we assess the extent to which HEIs, when describing their encounters with private donors, act strategically, using personal philanthropic donations to drive their reputations as 'transformative' institutions.

2. Emerging geographies of advancement and giving

2.1 Neoliberalism and the internationalisation of HE

In their introduction to a *Transactions Virtual Issue* on Geographies of Education and Learning, Holloway and Jöns drew attention to the diversification of 'practices of internationalisation in higher education' which, following the decline in state support, had become a 'priority' for many UK HEIs (2012: 485). These processes, often depicted as being rooted in 'neoliberal restructuring' (Holloway and Jöns, 2012: 485), have resulted in many HEIs extending their spatial reach through a series of measures such as enhancing connections with other

universities, establishing overseas campuses and recruiting fee-paying international students (Teichler, 2004; Altbach and Knight, 2007; Madge et al. 2009; Rye 2014). Consequently, it is important to 'examine the historical and contemporary policies about […] education' (Holloway and Jöns, 2012: 482) and to consider the 'restructuring and rescaling of higher-education institutions and policy' (Thiem, 2009: 165). Within this landscape, universities are increasingly being defined by national and city policymakers as one part of broader 'knowledge hubs', a crucial resource servicing a globally operating economy (Hoyler and Jöns, 2008: 128) and, arguably, 'jump-start[ing] development [of] key industries' (Thiem, 2009: 164; Lai and Maclean, 2011). At the same time, individual universities have sought to form networks with preferred public and private sector partners to both consolidate their position within these spatially determined clusters and secure competitive advantage at local, regional and international scales (Olds, 2007; Hennemann, 2010; Petruzelli et al., 2010; Glückler and Ries, 2012; Cochrane and Williams, 2013; Goddard and Vallance, 2013; Addie and Keil, 2014).

These 'changing institutional geographies' in HE have resulted, for example, in increased attention being paid to world university rankings, in particular by policymakers and HEI managers (Jöns and Hoyler, 2013: 45). Although the limitations of the data, and geographies, produced by the world rankings have been critiqued, the league tables are indicative of the 'growing significance of transnational processes' across the HE sector (Jöns and Hoyler, 2013: 45, 48; Findlay et al., 2012). In part, these processes reflect on the 'cross-cultural reach' of leading HEIs (Warren and Bell, 2014: 50), predicated on academic, student and alumni mobility (Waters, 2006, 2012; Jöns, 2009, 2011; Leung, 2012). Within the UK, this ostensibly 'neoliberal corporatization' of UK universities (Castree and Sparke, 2000: 228; Ball, 2012) has been examined through studies into HE policy reform (Thompson and Bekhradnia, 2010), notably changes in HE funding and shifts towards increased institutional accountability and greater measurement of academic performance (Castree, 2006; Pain et al., 2011; Rice, 2011; Winter, 2013; Rogers et al., 2014). In this paper, we draw attention to one aspect of HE neoliberal

reforms which has been neglected in the scholarly literature: the increased reliance on philanthropy by UK universities of varying chronologies and sizes in order to fulfil their core functions.

2.2 Changing HEI philanthropy

Granted, geographers have begun to give attention to the connections between philanthropic funding and HEI image-making (Warren and Bell, 2014). Moreover, Hay and Muller, in their wide-ranging discussion on the current 'golden age of philanthropy' (2013: 1), identified a number of areas which 'appear to warrant critical geographical inquiry' (2013: 1), including: connections between philanthropic engagement and place; favouring of 'culture' and education; moral and ethical issues; and 'conscience, place and inequality', specifically, the extent to which individuals 'turn[ed] to philanthropy to salve their consciences' (2013: 13). In addition, research has been conducted, within and beyond the geographical discipline, into: genealogies of philanthropy, and their impact on global North-South alignments (Bell, 1998, 2002; Lambert and Lester, 2004); motivations of individual philanthropists, including reference to their personal 'moral biographies' (Schervish, 1994: 167; Odendahl, 1990; see also Schervish, 1998, 2006; Ostrower 1995; Harvey et al., 2011; McDonald and Scaife, 2011); the deployment of philanthropy by individuals and corporations to specifically further business objectives (Saiia et al., 2003; Ball, 2008; Osei-Kofi, 2010; Parry et al., 2013); and the historic role of large-scale giving in promoting academic mobility (Kohler, 1985; Collins, 2009; Jöns, 2009). Much of this cross-disciplinary research has focused on university donation-seeking and philanthropic behaviour in the US, with a smaller body of work considering activities in mainland Europe (Jöns, 2009; Glückler and Ries, 2012) and Australia (McDonald and Scaife, 2011). Analysis of the undertakings of UK HEIs on this topic has, until recently, been neglected (Warren and Bell, 2014).

More generally, within HE, whilst the ethics of individual universities accepting donations from particular sources came under considerable public scrutiny in the UK in 2011 following the LSE's links with Saif Gaddafi (Woolf, 2011)[2], there has been a dearth of scholarly research into strategies deployed by universities to secure competitive advantage across spatial domains from the receipt, and then presentation, of philanthropic gifts. This is a surprising omission given that universities within the UK neoliberal funding environment are increasingly expected to act in an entrepreneurial manner and compete for private finance, including personal donations, in a 'winner takes all' market (Rice, 2011: 333; Ball, 2012). More fundamentally, this competition is geared towards generating funds for 'basic' functions such as supporting students, providing modern libraries, research and teaching in emerging disciplines. The use of philanthropy as a substitute for state funding is becoming normalised (Ball, 2012). In addition, receipt of sources of public finance that remain available to HEIs are often conditional on receiving matched funds from private or non-profit providers (Ball, 2012; Marginson, 2013). In this changed environment, universities with access to elite networks and engaged in joint-working with partners outside of the HE sector are likely to obtain the greater share of philanthropic donations.

2.3 Philanthropy and new professional practices

In this paper, therefore, we examine the role of philanthropic donations in shaping the visibility and geographical reach of English HEIs. In particular, we consider attempts by universities to develop what the *Review of Philanthropy in UK Higher Education* referred to as a 'culture of philanthropy' within and beyond their institutional setting (More Partnership, 2012: 11). The *Review,* known as the 'Pearce Review' after its chair, Professor Shirley Pearce, was a comprehensive and influential investigation of philanthropy and UK HEIs. Informed by the more extensive activities of US universities, the Pearce Review stated that, in order to 'grow a culture of philanthropy', universities needed to highlight their own philanthropic heritage to staff, students and the surrounding community, ensuring that all parties were imbued with 'a sense of

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[2] In July 2009, nine months after Saif Gaddafi was awarded a PhD at the university, the LSE signed a Gift Agreement with the Gaddafi International Charity and Development Foundation (GICDF) facilitating the receipt of a donation of £1.5m from the latter to the LSE's Centre for Global Governance (Woolf, 2011: 15).

the tradition of which they are a continuing part' and which would endure 'in the future' (More Partnership, 2012: 11, 16). This could be through commemoration of past donors via plaques and portraits, promotion of the 'student experience' whilst at university and the establishment of alumni groups (often linked to alumnus country of origin and with a named contact) to ensure students remained in touch following graduation (More Partnership, 2012: 49ff; Hall, 2011).

One stimulus to HEIs growing a culture of philanthropy has been through the professionalisation of institutional development and alumni relations (Hall, 2008, 2011; Saxenian, 2007). This has involved recruitment and training of advancement staff, establishing databases and networking with colleagues in other universities (Belfield and Beney, 2000; Proper, 2009; More Partnership, 2012; NatCen, 2014). Hall, in her investigation of MBA alumni networks, and drawing on the work of Bourdieu, argued that one focus of HEI activity in this area was to 'convert the social and cultural capital of their […] alumni networks into donations' (2011: 127). The outcomes of this professionalisation, nevertheless, depended on a number of variables including institutional history, size, resources, geographical reach and access to elite networks. Whilst all UK universities share practices and resources through the Council for Advancement and Support of Education (CASE), a membership association 'serving educational institutions and […] advancement professionals' (NatCen, 2014: 5), a smaller number of (mainly elite, research intensive) HEIs also exchange knowledge through the invitation only Ross Group, an 'independent support group of senior development directors' (NatCen, 2014: 5), which has a much less prominent public profile. Although Daly recently investigated the emergence of Directors of Development in UK HEIs (2013: 21) - examining their cultivation of professional identities and negotiation of professional roles - scholarly research into practices of collective learning of HEI employees across geographical boundaries has been limited, generally focusing on those undertaking academic roles (Solem and Foote, 2004; Solem et al., 2008; Foote, 2010). This is in contrast to investigations by geographers into the operation of professional

associations in the business world, particularly in law, advertising and entrepreneurship (Saxenian and Hsu, 2001; Faulconbridge, 2007a; Faulconbridge and Hall, 2012).

By way of a corrective, we examine the official publications of a diverse sample of HEIs participating in the MFS 2008-2011. The MFS, a policy initiative aimed at incentivising giving to HEIs in England through the provision of an additional fund of £200 million over a three year period (HEFCE, 2008)[3], also included funding for 'an extensive programme of capacity-building training' across the HE sector, delivered by CASE (More Partnership, 2012: 18). The scheme, therefore, acted as an enabler – a source of public funding, provided at a time when the role of the state in HE was being rolled back (Ball, 2012) to encourage HEIs to adapt to a more competitive, neoliberal environment (Castree, 2006; Rice, 2011; Winter, 2013). In this paper, we consider how selected HEIs represented large-scale philanthropic donations from private individuals in order to (re)position themselves strategically across geographical scales. Whilst we cannot determine individual university motivations from researching these sources alone, an analysis of HEI publications can indicate the extent to which English institutions have used gifts to develop, and signify, their relations with external partners across various spatial settings. Moreover, engagement with these publications sheds important light on the state's attempt to shape the HE funding landscape, and the response of universities to the challenges posed.

3. Methods

Our empirical work focused on a sample of 17 HEIs, all of which participated in the HEFCE Matched Funding Scheme 2008-2011. As the MFS applied only to universities based in England, the selected institutions are based in that country. The sample was stratified using the six categories defined by the Pearce Review (More Partnership, 2012: 100-105), which labelled UK HEIs chronologically by year of obtaining university status: Oxbridge; Pre-1960; 1960s; 1990s; and 2000s. A sixth category, 'Specialist', was created for institutions characterised by a

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[3] In January 2012, the UK government reduced the fund to £148 million (HEFCE 2012).

focus on discrete disciplines, such as art, theatre or music (More Partnership, 2012: 100-105). In this paper, we study the Universities of Oxford and Cambridge, plus three institutions selected from each of the remaining five groups (refer to Table 1).

When participating in the MFS, each HEI was permitted to select from one of three 'allocation tiers' which 'best reflected its experience in fundraising' (HEFCE, 2012: 1). Each Tier had different funding ratios and caps, applicable for the three years of the scheme (refer Table 1). Thus, in order to receive its capped limit of £200,000 of public funding, an institution in Tier 1 needed to raise exactly that amount from donors. Whereas a HEI participating under Tier 3, was required to generate three times the capped amount (i.e. £8,250,000) in order to access an increased sum of £2,750,000 from HEFCE. In total, 135 English institutions (including nine Further Education Colleges) participated in the MFS. Of the 124 HEIs in existence at the completion of the MFS, the allocation across the three Tiers was 40 (Tier 3), 57 (Tier 2) and 27 (Tier 1) (HEFCE, 2012: 6-8). Within our sample, ten HEIs selected Tier 3, six enrolled on Tier 2 and one participated under Tier 1 (refer to Table 1). Ten out of the 17 HEIs sampled reached their MFS cap.

Insert Table 1 approximately here

Within each Pearce Review category, we selected, as far as possible, HEIs based in diverse geographical locations. Where that was not feasible, (for example, HEIs in the Specialist grouping), we chose universities engaged in differing disciplines. In addition, universities were selected on the basis of their philanthropic activity, as reported in their official publications. Institutions showing little or no philanthropic engagement during our timeframe were rejected. We analysed HEI activity from 1 August 2006 to 31 July 2013, that is, from two years prior to MFS, to two years after its conclusion. This seven year timeframe was chosen in order to chart

progress over a significant period, identifying any changes in internal processes that could be ascribed to shifts in national HE policy.

A directed qualitative content analysis was conducted of official, outward-facing publications produced by the HEIs (for example, Annual Reports, Donor Reports, Campaign Reports and alumni magazines) in order to consider how institutions engaged with philanthropic giving across local, national and international scales. In total, approximately 350 publications were scrutinised. In addition, the research team surveyed HEI websites and online news items for relevant information. Directed content analysis was deemed to be an appropriate research method as it permitted the use of existing theory, and prior research, to focus the 'research question and allow for predictions about variables of interest' (McDonald and Scaife, 2011: 316; Hsieh and Shannon, 2005). This approach also enhanced awareness of the conditions under which selected documents were produced (Neuendorf, 2002; Fairclough, 2003). Geographers in particular have used variants of qualitative content analysis in order to investigate how institutions and individuals interact with their surrounding environments (Dittmer, 2005; Jackson et al., 2006; Brooks and Waters, 2014).

Through an abductive process, and with reference to the literature identified above, we were able to identify eighteen key themes, which formed the basis of our directed qualitative content analysis (Neuendorf, 2002) (refer Table 2, below). Each selected text was examined for the presence of these themes and for broader sociocultural discourses relating to the HE expansion and philanthropic giving. Quotes were included in our analysis as exemplars to allow validity of our interpretations to be assessed. These excerpts were selected because they were deemed to be the most representative of the findings under each of the themes (McDonald and Scaife, 2011: 316).

4. Varied spaces of philanthropy

Our initial survey of texts from the sample HEIs identified eighteen themes relating to institutional engagement with philanthropic giving, including professionalisation of advancement functions, development of institutional advancement capability, enhancement of alumni functions, knowledge transfer across institutional boundaries, liaison with professional associations, enhanced collaboration with overseas HEIs and HEI visibility across spatial scales (refer to Table 2). A further content analysis was conducted in order to identify commonalities among the eighteen themes and develop a framework through which we could draw together key findings from the HEI's engagement in strategic philanthropy. This additional process was informed by examining in detail the purposes for which the documents were created, the professional practices described and references to changing geographies of HE philanthropy. By this process, we consolidated the eighteen themes to highlight three key findings: institutional geography and development of a culture of philanthropy; knowledge circulation and the emergence of professional associations; philanthropy and the visibility and reach of HEIs. The relationship between the eighteen themes and the key findings is described in Table 2. Each of the three findings will be investigated in further detail.

Insert Table 2 approximately here

4.1 Institutional geography and development of a 'culture of philanthropy'

The development and expansion of HEI advancement capacity was referred to extensively in the literature of the sample HEIs, irrespective of date of foundation. For example, the newer HEIs were engaged in the growth of their, more nascent, fundraising facilities. In part, this capacity building would have been assisted by funds from the MFS. For instance, in 2010, the University of Northampton reported that:

> …[m]ore than £1million has been generously donated to the University since a dedicated Alumni and Development team was established five years ago to raise the profile of philanthropy and support the alumni community (University of Northampton, *Annual Review 2010*)

For this HEI, a former university college awarded full university status in 2005, the establishment of an advancement function served to increase the status of the institution. Its apparent fundraising success suggested a confidence also evidenced by its self-allocation into Tier 2 of the MFS, with Northampton receiving almost £650,000 from the scheme. Similarly, the University of Worcester, also established in 2005 and one of the smaller institutions by enrolment in our sample, broadcast in its alumni magazine that it had, in a relatively short period:

> … managed, through small and large donations, to achieve the Government's Matched-Funding target of £200,000 by July 2011, which means the University will receive a further £200,000 in recognition of our fundraising endeavours. We have launched a Legacy Giving campaign and Scholarships and Prizes appeal. (University of Worcester, *Spirit*, Autumn / Winter 2011)

The use of alumni publications in this way to broadcast news of donations can be considered to be part of the University's efforts to remind the students of their positive experiences of a place in order to generate affection for, and loyalty towards, the institution (More Partnership, 2012). By this means, Worcester can be seen to be cultivating future donors. The above extract, therefore, arguably represented an attempt at 'grow[ing] a culture of philanthropy' (More Partnership, 2012: 11; Warren and Bell, 2014). Worcester's ostensible success under Tier 1 of the MFS appeared to spur further fundraising endeavour, with the launch of a legacy giving campaign and an appeal aimed at rewarding students by means of scholarships and prizes,

thus ensuring future recipients of philanthropy who might, at a later date, engage with the institution.

Among older HEIs, the discourse focused on the expansion of advancement capacity. For example, the University of Cambridge drew attention to its appointment of a new Development and Alumni Relations Director:

> An international appointment reflecting the university's formidable global reputation and performance, the Executive Director of Development and Alumni Relations will carry forward the philanthropic agenda to the next stage. This follows the recent decision by the University to increase substantially its investment in development and alumni relations, including making preparations with the Colleges for the next Collegiate Cambridge Campaign. (University of Cambridge, *Alumni e-bulletin*, March 2013)

Although the scale and institutional setting differ hugely, Cambridge, like Worcester, was looking to the future and seeking to renew. The broadcasting of this news in an alumni outlet extended engagement with potential donors beyond graduation (Hall, 2008, 2011). In addition, and more specific to its institutional circumstances, Cambridge implicitly drew on its own philanthropic heritage through reference to its famous system of individual Colleges, themselves often founded on individual benefactions (Owen, 1964; More Partnership, 2012). This represented an important means of shaping student memory of a particular place (Liu, 2014; Holton and Riley, 2014) and the reference to Colleges might remind past students of the exclusive nature of their experience.

Although we need to be aware of the tendency for organisations to use external facing publications to self-promote and boost their status (Hay and Muller, 2013), individual HEIs from across our sample, during the timeframe of our study, portrayed themselves as seeking to

reform their internal systems and expand their expertise in order to embed a culture of philanthropy into their institutions. In practical terms, transformations included the establishment, or consolidation, of: legacy giving campaigns; giving circles, whereby additional recognition and privileges were granted to donors regularly contributing a certain sum of money; and full-scale, institution-wide campaigns. However, the embedding of philanthropy within organisational culture extended beyond these schemes, as universities drew on their institutional heritage to 'inculcate philanthropic expectations' in their students from the moment of their arrival on campus (More Partnership, 2012: 45-46). Examples included promotion of the role of the university, in particular, utilising corporate memory to honour past donors, capture their stories and highlight 'what generosity can achieve' (More Partnership, 2012: 16). For instance, in 2013, The University of Manchester celebrated the bicentenary of the birth of Charles Frederick Beyer, its 'greatest ever benefactor' who contributed to the construction of the university and to 'scholarships and Professorships' (The University of Manchester, *Your Manchester Impact*, 2013), whilst the University of Exeter used one of its donor reports to remind readers that '[b]uildings like Mardon, Washington Singer and Hatherly represent the names of some of the benefactors who have shaped Exeter's history' (University of Exeter, *Donor Report 2008-09*, 2009).

In addition, HEIs appeared to hold the improvement of the 'student experience' as a central tenet to embedding a culture of philanthropy within the institution (More Partnership, 2012: 49ff; Hall, 2011; Liu, 2014; Holton and Riley, 2014). Engagement activities were often geographical in the connections they forged, being closely aligned to the origins, and subsequent mobilities, of many students (Waters, 2006). Alumni relations work, in particular, cut across national boundaries as HEIs sought to maintain links with overseas students. For example, the University of Oxford boasted 171 alumni groups located in over 80 countries (University of Oxford, WWW), and the University of Cambridge reported the existence of 314 overseas groups

(Alumni Groups Directory, 2013). Other HEIs broadcast the extension of their alumni reach. Furthermore, the University of Exeter (with 85 alumni groups worldwide) reported:

> During the last year, we have organised alumni events in the UK and internationally. We now have 33 alumni country contacts around the world and held alumni events in Malaysia, Thailand, Taiwan, Hong Kong, China, and the United Arab Emirates. In the UK, we held a number of networking events and receptions. (University of Exeter, *Annual Report*, 2009)

The University of Exeter's cultivating of markets in East Asia and the Middle East is not surprising, given the economic growth in those regions, and the spatial reach of the university. Arguably, these activities - contingent on institutional factors including age of HEI, student and alumni profile and ability to attract significant donations from wealthy individuals - can result in geographically uneven outcomes (Wolpert, 1988). Indeed, private donor activity more generally can encourage 'philanthropic particularism' (Salamon, 1987: 39), with resources concentrated on supporting specific population groups located within designated geographical areas. Yet, significantly, our investigation demonstrates that newer HEIs, such as Brighton, were also seeking to maintain international alumni contacts – and thereby compete – within the same geographical areas as more established institutions (University of Brighton, WWW). This activity is indicative of the internationalisation of HE, which arguably has perpetuated increased student and alumni mobility (Waters, 2006, 2012; Jöns, 2009, 2011). At the same time, we suggest that the 'cross-cultural reach' of HEIs engaged in international alumni engagement has extended beyond institutions deemed to be 'world-leading', or 'elite' (Warren and Bell, 2014: 50) to encompass a broader cross-section of UK universities.

4.2 Knowledge circulation and the emergence of professional associations

According to the Pearce Review, the development of institutional cultures of philanthropy was expected to entail the sharing of effective practice among HE professionals, either among

universities or indirectly via professional associations (More Partnership, 2012: 46-47). Our analysis of HEI documents and associated news items indicated the degree to which information was shared and professional networks were forged among practitioners. For example, in a similar fashion to the 'brain circulation' among select academics (Jöns, 2009: 315), there existed within (and beyond) the UK HE sector, a series of mobilities among advancement professionals, particularly those employed at more established universities. The University of Oxford, for instance, in 2011, appointed a Director of Development who had previously held equivalent posts at Durham University and the University of Edinburgh (University of Oxford, *News,* 31 May 2011). Similarly, the incoming Head of Alumni and Supporter Relations at the University of Cambridge had been in prior employment at the University of Exeter (University of Cambridge, *News,* 22 August 2013), the incumbent Director of Development at the University of Manchester had held a senior post at the University of Newcastle (CASE, n.d.) and the new Director of Development at the University of Cambridge had been recruited from the University of Virginia, where she had served as Campaign Director (University of Cambridge, *CAM,* 69, 2013). These movements focused on elite postholders across some of the country's foremost universities and may, therefore, be criticised for reinforcing the retention of knowledge among a small group of professionals (Faulconbridge, 2007b; Cook et al., 2012).

Within the advancement profession, arguably the most prominent professional association is CASE. Founded in the US in 1974, and tracing its origins back to the formation of the Association of Alumni Secretaries in 1913, CASE set up its first office outside of the US in London (as CASE Europe) in 1994[4]. In the UK, analysis of texts produced by the University of Brighton indicated that CASE played an important role during the course of the MFS in 'celebrating' the success – measured in terms of 'improving and sustaining […] fundraising activity' - of universities and advancement practitioners within their allocated MFS Tiers (CASE and HEFCE, 2011: 3). Acknowledgement by CASE therefore produced a sense of belonging to

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[4] Subsequent offices were established in Singapore (CASE Asia-Pacific, 2007) and Mexico City (CASE América Latina, 2011) (CASE, WWW).

a shared 'knowledge communit[y]' (Moodysson, 2008: 453; Amin and Cohendet, 2004). In 2011, Brighton, positioned in Tier 2, was recognised for its achievements during year two (2009-10) of the scheme:

> The university has received national recognition for its fundraising achievements, winning an award for improved and sustained progress during the second year of the government-led matched funding scheme for voluntary giving to education. The awards were made jointly by CASE (Council for Advancement and Support of Education) and HEFCE (Higher Education Funding Council for England). Brighton was one of just three institutions to receive an award and it surpassed both the universities of Bath and Kent to be selected as the overall winner for its category.
>
> This was a double celebration as Steve Maycock […] was chosen for the Matched Funding Volunteer Award for his "exemplar volunteer leadership" in fundraising and alumni engagement with praise given for his "unstinting enthusiasm and interest". (University of Brighton, *Annual Review*, *2010-11*)

This approval of Brighton's work, broadcast prominently in its *Annual Review*, was clearly deemed by the producers of this text (the university) to be significant and of interest to the text's recipients (staff, students and the wider community). Moreover, this extract reinforced the exclusive nature of this recognition, emphasising that Brighton had 'surpassed' two well established HEIs to be considered the highest achieving institution within Tier 2. Ultimately, Brighton only received half of its potential £1.35m payment from the MFS (HEFCE, 2012: 6). Yet, the university - in accordance with Fairclough's work on 'meaning-making' in the production of the text (2003: 10) - used the receipt of the institutional and individual awards to draw attention to its 'national' prominence. By contrast, another HEI in our sample, Nottingham Trent University (NTU), did not appear to mention within its literature recognition by CASE for its improved fundraising as part of the Tier 3 category during year one of the MFS (CASE and

HEFCE, 2010). Nevertheless, a year earlier, NTU had broadcast recognition of its philanthropic activity by *Times Higher Education (THE)* in its alumni magazine:

> NTU's fundraising team has been recognised in the inaugural *Times Higher Education Leadership and Management Awards.* The Development and Alumni Relations Office (DARO) has won the award for '*Outstanding university fundraising team*' at a ceremony that highlighted some of the sector's top performers. The past year has been a significant one for fundraising. Nearly £9 million in gifts and pledges has been received, including a single pledge of £7.65 million, believed to be the largest ever gift to a post-92 university. The donation is being used to develop the John van Geest Cancer Research Centre at the University's Clifton campus. (NTU, *Network*, summer 2009)

In a similar fashion to the University of Brighton, the text - written for consumption by its past students - drew attention to NTU's ostensibly strong position on the national stage. Indeed, NTU was praised as one of the sector's 'top performers' by a sponsor (*Times Higher Education*) whose remit extended beyond serving the advancement community. Moreover, NTU had enjoyed a 'significant' year, receiving 'nearly £9 million', including the van Geest pledge, comparable to the value of gifts received by the pre-92 UK universities (More Partnership, 2012). Although caution must be exercised when examining a small sample of HEIs, it did appear that a culture of philanthropy – encouraged by HEI management, but also involving alumni engagement - was being established in the UK, particularly within the newer institutions. Whilst further research is required to assess the contribution of professional associations to this process, it is clear that CASE, through its support of the MFS awards, helped raise the profile of 'improved' HEIs and drew attention to the 'leadership' displayed by 'exemplar' volunteers (University of Brighton, *Annual Review 2010-11*). The qualities required by the latter, and by advancement professionals employed by HEIs, were suggested within the official literature through generic references to 'enthusiasm', 'interest' and 'leadership' (University of Brighton,

Annual Review 2010-11). Such associations, moreover, allowed individuals – in 'close and less close physical proximity' (Faulconbridge, 2007c: 1652) - to 'come together and learn from one another' and develop solutions to sector specific challenges (Faulconbridge and Hall, 2012: 232-3). There is clearly scope to investigate the work of, and interactions between, professionals, volunteers and academics further, and to consider the extent to which they participate in 'cluster-based collective learning' within, and beyond, their institutional setting (Faulconbridge, 2007a: 965; Moodysson, 2008).

4.3 Philanthropy and the visibility and reach of HEIs

Our analysis indicates that UK HEIs used philanthropic donations to demonstrate their visibility and geographical reach (Altbach and Knight, 2007; Holloway and Jöns, 2012; Waters, 2012). This process occurred across various spatial scales, and was associated with celebration of the donation and, by extension, the success of the institution. For certain HEIs, increased geographical prominence was directly linked to the additional leverage made possible through participation in the MFS. The University of Exeter, for example, used the MFS as part of a 'triple match' with foundation and alumni funding to generate £2 million to finance a new building for their Business School (University of Exeter, *Campaign Celebration Report*, 2011). Similarly, the University of Warwick heavily promoted the MFS, branding it as part of the 'Warwick Match' and using the promise of additional funds to encourage further donations for sundry causes including 'scholarships, research, specific departments and individual projects' (University of Warwick *Warwick Connect* 2009: 27). Courtauld (allocated under MFS Tier 3) reported that MFS funding received by the HEI would contribute to their £24 million campaign goal (Courtauld, *The Courtauld News*, 2010). Yet, we also uncovered tensions between the publicity given to the MFS and the amount raised by the institution. The Central School of Speech and Drama (CSSD), for example, made extensive mention of the MFS in its publications. However, in spite of self-allocating to Tier 3, CSSD appeared to generate limited income from their participation in the scheme (HEFCE, 2012).

Moreover, for other HEIs in the sample, little direct connection was made in their official publications between (often substantial) private donations received and the MFS. This was particularly the case for the most well established universities which broadcast their receipt of selected donations in ways that drew attention to the global nature of their research, and enhanced collaboration with overseas institutions. For example, in highlighting a donation from a Hong Kong based entrepreneur, the University of Oxford reported:

> Sir Ka-shing Li is to donate £5 million to the University of Oxford to extend and strengthen the university's global health research networks with Asia, and, in particular, China. The donation from the Li Ka Shing Foundation will fund a series of partnerships, teaching and research projects that will see Shantou University in Guangdong, China become a full partner in Oxford University's Asia Research Network along with centres in Vietnam and Thailand. (University of Oxford, *News*, 13 May 2013)

Therefore, rather than being stimulated by UK policy - in particular, the MFS - the gift was an outcome of an existing association between donor and recipient. The establishment of a partnership with Shantou University, an institution founded by Li Ka Shing, was one product of this relationship (Shantou University, *At a Glance*, 2013). Although the formation of strategic partnerships by HEIs across national boundaries has been increasingly discussed in the geographical literature (Olds, 2007; Thiem, 2009; Waters, 2012), less attention has been given to the extent to which these arrangements have been underpinned by philanthropic donations. In 2013, for example, the LSE broadcast in its donor magazine that its existing partnership with the University of Cape Town, South Africa, had been bolstered by philanthropic support (LSE, *Impact*, spring 2013), helping to continue its collaboration with an overseas institution located in an emerging economy, arguably with a view to cultivating a new cohort of international students (Waters, 2012; Waters and Leung, 2013).

Conversely, within national boundaries, the following two gifts - respectively to the Royal Northern College of Music (RNCM) and the University of Worcester - were represented by HEIs as being spurred by strong connections to a specific locality:

The legacy from Gordon Lyth received earlier this year has been left to the RNCM specifically for clarinettists. Mr Lyth left the bequest in the name of his father, Mr Giles Thomas Lyth, a Hulme-born professional clarinettist. [...] Music ran through the family as Giles' father and his brother were also both professional musicians. Gordon Lyth, who was also born in Manchester, decided he wanted to use his bequest to encourage young clarinettists in memory of his father and acknowledge his pride in his Manchester connections. (RNCM, *RNCM News*, spring 2009)

One hundred new scholarships will be created for students joining the University of Worcester in September 2012, thanks to a leading Herefordshire philanthropist and businessman. The Clive Richards Charity Scholarships will be worth £1,000 each and will be awarded to students based on their first year academic performance. […] Clive Richards OBE DL FCA FCMA FBIM is probably best known for his charity work in Herefordshire and Worcestershire, although other areas throughout the UK have also benefited. The Clive Richards Charity, established in 1987, specialises in helping educational establishments in both the public and private sectors. It has sponsored the majority of Hereford high schools to obtain Specialist School Status and has supported many other facilities of a capital nature. Mr Richards, who is a Fellow of the University of Worcester, has a long and successful career in business […]. (University of Worcester, *Spirit*, autumn / winter 2011)

These donations suggested that, for the smaller and perhaps less internationally well connected institutions, geographical proximity, defined by Glückler and Ries as 'physical co-presence' (2012, 515), continued to matter more (although place matters to all HEIs, irrespective of their spatial roles; Cochrane and Williams (2013)). Both reports implied that the immediacy of the institutions to the donor, either personally or through family connections, were factors in their receipt of these gifts. Specifically, in the case of the University of Worcester, 'organized proximity' (Glückler and Ries, 2012: 515) was likely to have been significant as the donor, locally-based Clive Richards, had had a series of previous engagements with both the institution – through his appointment as a university fellow – and the surrounding community, owing to his charitable work supporting various educational schemes. Although policy initiatives such as the MFS were influential, in the aforementioned cases, locally based interventions also mattered in determining giving behaviour. Nevertheless, in the same edition of its alumni magazine, the University of Worcester also stated that it would target the spending of its MFS receipts on 'building funds for student scholarships in the year ahead' (University of Worcester, *Spirit*, autumn / winter 2011). The HEI would, therefore, draw on both locally and nationally sourced funds to develop a culture of philanthropy within its institution.

5. Discussion and conclusion

Our investigation has highlighted the variegated spatialities of giving to HEIs within a changing HE landscape of increased marketisation and internationalisation. We draw attention to three ways in which our empirical research advances theoretical work on the interactions between HE and philanthropic giving. These relate to the institutional cultures of HEIs, the policy environment within which they operate and their strategic actions.

First, HEIs were seeking to develop not merely a 'culture of philanthropy' but, more particularly, varied and nuanced philanthropic cultures. Initiatives included promotion of the student experience in order to shape their collective memory of the institution, drawing attention to the endeavours of past donors (for example, through the use of plaques, photographs and the naming of facilities) and the expansion of alumni groups across geographical territories. Although many of these developments were not new in the established HEIs, these universities still drew considerable attention to them in their publications. For such HEIs, associations with key major donors (often non-alumni) were important. In the case of 'elite' universities, they were based on economically productive relationships with prominent personalities in business, which had developed over a number of years. In these instances, notably when donors provided scholarships for those 'in need', the university was seen to appeal to the individual's 'moral biography', borne out of the donor's 'personal capacity' (i.e. their financial assets), and 'moral compass' (Schervish, 2006: 478-480). Within this complex landscape, we argue that there is more than one 'culture of philanthropy' at play (More Partnership, 2012: 11; Warren and Bell, 2014), with divergences amongst HEIs reflecting an institution's physical and virtual location within national and international hierarchies.

Second, these hierarchies were visible in the way HEIs publicly acknowledged the MSF, with the more recently established institutions giving the initiative greater prominence within their official publications than 'elite' universities. For the former, the MSF not only provided additional funding, but also facilitated the development of carefully constructed, individuated, cultures of philanthropy. The MFS thereby discriminated between institutions, causing HEIs to position themselves at a level at which they considered they would be able to secure optimal funding (Glückler and Ries, 2012; Cochrane and Williams, 2013). For some universities, adroit placement within the funding framework defined by the scheme enabled a substantial amount of money to be raised. However, other HEIs fell far short of the expectations set by their MFS allocation (refer to Table 1), and scope exists for further investigation into the effectiveness of

the MFS in 'correcting' imbalances in philanthropic funding among comparable English universities. Similar variations in strategy occurred in the ways in which universities publicised their engagement with the main professional association, CASE. Newer institutions generally made more extensive mention of CASE and its endeavours, especially of its recognition of 'improving and sustaining [of HEI] fundraising activity' (CASE and HEFCE, 2011: 3). By contrast, the more established HEIs rarely, if at all, referred to the professional body. For the latter universities, arguably, relationships with individual donors and personal connections, established through processes of 'collective learning' (Faulconbridge 2007a: 965), were deemed to be more important, utilising 'exclusive' knowledge networks such as the Ross Group [personal communication, former Ross Group member]. These private interactions were indicative of an alternative approach to engendering individual philanthropic contributions, through the mobilisation of personal connections across geographical scales (Hall, 2011).

Third, HEIs were using philanthropy strategically to cultivate future, wealthy, donors. This could be realised through a number of geographically-related processes including strengthening regional interactions, building up alliances with overseas institutions and engaging with emerging economies (Saxenian, 2007; Hennemann, 2010; Glückler and Ries, 2012). These connections were often a consequence of neoliberal reforms of HE undertaken in many 'advanced capitalist' economies during the last three decades (Thiem, 2009: 154-155). The success, moreover, of HEI philanthropic initiatives appeared to be dependent on the ability to establish, and then foster, personal connections, not only regionally, but also nationally and internationally. Clearly, the reputation of the institutions studied influenced their geographical reach and their ability to mobilise donations at a distance. However, in all cases, the strategic actions of the HEIs in generating these connections relied heavily on promoting a strong sense of institutional identity and association with place (Hall, 2008, 2011). Our analysis of HEI publications indicated that universities sought to attract private donations by appealing to their 'locational power', whether this be alumni memories of their former institution or, in the case of

non-alumni, their prestige and contemporary significance (Hall, 2011; Liu, 2014;.Warren and Bell, 2014) In these ways, the universities acted strategically, using practices of 'advancement' to cultivate, and then trade on, potential donors' desire to be associated with specific places in order to secure competitive advantage (Rice, 2011; Ball, 2012). In effect, institutional and individual strategies came together in the form of philanthropic giving, with the HEI seeking to ensure that the personal decision of the donor mapped on to its institutional vision for future success. Although we were not party to negotiations between donor and HEI, our research has argued that the publicly promoted partnership between these two entities was mutually reinforcing. Undoubtedly, tensions exist between philanthropy and the marketisation of the HE sector, each with inherently different value systems. This paper has opened up this debate and set out some key areas of engagement. Further critical enquiry is needed into the geographically varied and at times contested role played by philanthropic giving and its potential for increased influence on strategic decision-making within HE.

Table 1: Sample of 17 UK universities

University	Category*	MFS Tier[†]	MFS (2008-11): Payments received[§] (£)
University of Oxford	Oxbridge	3	2,750,000
University of Cambridge	Oxbridge	3	2,750,000
London School of Economics and Political Science (LSE)	Pre-1960	3	2,750,000
The University of Manchester	Pre-1960	3	2,750,000
University of Exeter	Pre-1960	3	2,750,000
University of Sussex	1960s	2	1,349,997
University of Warwick	1960s	3	2,750,000
Lancaster University	1960s	3	1,864,225
University of Northumbria	1990s	2	82,927
Nottingham Trent University (NTU)	1990s	3	2,750,000
University of Brighton	1990s	2	677,789
University of Worcester	2000s	1	200,000
University of Northampton	2000s	2	647,789
University of Bedfordshire	2000s	2	179,350
Courtauld Institute of Art	Specialist	3	2,750,000
Royal Northern College of Music (RNCM)	Specialist	2	1,350,000
Central School of Speech and Drama (CSSD)	Specialist	3	17,911

*As determined by the Review of Philanthropy in UK Higher Education (More Partnership 2012, 100-105) (known as the 'Pearce Review').

[†]One of the HEFCE Matched Funding Scheme allocation tiers (HEFCE 2012).

[§]The amount of public funding received from HEFCE. Ten HEIs in this sample reached their MFS cap: Oxford; Cambridge; LSE; Manchester; Exeter; Warwick; NTU; Worcester; Courtauld; RNCM.

Table 2: HEIs engagement with strategic philanthropy: identified themes

	Theme	Consolidated findings
1	Professionalisation of advancement functions (intra- and extra-HEI)	A,B,C
2	Development of institutional advancement capability	A, B
3	Advancement as a long-term investment	A, B
4	Enhancement of alumni functions	A, B
5	Alumni as potential donors	A
6	Ensuring a presence overseas	A
7	Knowledge transfer across institutional boundaries	B
8	Knowledge transfer across national boundaries	B
9	Heritage / institutional tradition of philanthropy	A, B
10	Highlighting good practice by HEI advancement offices	A, B
11	Liaison with professional associations	B
12	Publication of MFS successes to date (e.g. 'running totals')	A, B
13	Broadcast local / regional significance of donations	A, C
14	Broadcast international reach of donations	C
15	Enhanced collaboration with overseas HEIs	A, C
16	Donor role in shaping new HEI partnerships	C
17	Attention to geographic origin of donation	C
18	HEI visibility across spatial scales	A, B, C

*Key findings

A   Institutional geography and development of a culture of philanthropy
B   Knowledge circulation and the emergence of professional associations
C   Philanthropy and the visibility and reach of HEIs

Note: These themes were identified through a content analysis of over 350 HEI publications, and then combined to highlight three key areas for analysis arising from the HEIs' engagement with strategic philanthropy.

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