

Investigating the importance of an advancement office at a South African university

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DECLARATION OF ORIGINALITY

I **Silvanus Welcome**, do hereby declare that this research report is my own unaided work. It is submitted in fulfilment of the requirements for the degree of Master of Business Administration at the North-West University. It has not been submitted before for any degree or examination at this or any other university.

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ABBREVIATIONS

ASPIHE	Annual Survey of Philanthropy in Higher Education
BBBEE	Broad-Based Black Economic Empowerment
CASE	Council for the Advancement and Support of Education
CHE	Council for Higher Education
DHET	Department of Higher Education and Training
FET	Further Education and Training
IAP	Institutional Advancement Process
NSFAS	National Student Financial Aid Scheme
NWU	North-West University
SPRU	Science Policy Research Unit
TVET	Technical Vocational Education and Training
UNISA	University of South Africa
WSU	Walter Sisulu University

ABSTRACT

Traditionally many Higher Education Institutions have strongly relied on first stream income (government subsidies) and second stream income (Student Fees or Tuition). The problem, however, arises when tuition and government subsidies no longer suffice to keep the university viable. A decrease in government subsidies to Public Universities and other institutions of higher learning has become a global trend and the option of increasing tuition fees in a period of “Fees Must Fall” campaigns is no longer a viable solution in South Africa (Craig & Abrahams, 2009:10). Faced with this situation, universities have been forced to focus on establishing an advancement office that is mandated to generate third-stream income to meet the demands for additional funds required. However, such an advancement office requires the involvement, commitment and support of management and all other stakeholders such as the office of the Vice-Chancellor, Alumni office, private business – among others. Against this backdrop, and using North-West University as a case for reference, the current study sought to investigate the role and importance of an advancement office at a university, the role played by the Vice-Chancellor’s office and the role played by the Alumni office in addressing the financial shortfalls that a South African university faces. A survey questionnaire was designed, and the data collected from the university was statistically analysed using SPSS 23 Statistical software. The research findings indicated the advancement office is critical to the successful third-stream income generation at the university. The result further indicated that the office of the Vice-Chancellor should guide the advancement office to avoid reputational damages to the university. The Alumni office was also found to be critical in supporting the advancement office’s resource mobilisation responsibility. Based on these research findings, some recommendations were made by this study for possible consideration by a university.

Keywords: advancement, institutional advancement, South African university, alumni, third-stream income, fundraising, Vice-Chancellor

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CHAPTER ONE (1): ORIENTATION OF THE STUDY

1.1 INTRODUCTION

The global higher education sector is very vibrant, reflecting the volatility of international socio-economic and political relations. There is no doubt that significant changes are in process and that these will, to a large degree, be driven by demand and not so much by policies of the government. This is mainly relevant in respect of increasing commercialization of knowledge, the increasing prominence of technology, reduced government subsidies, and the increasing reliance on partnerships and collaboration. It is therefore mandatory that institutions of higher learning should find means in balancing the decline in resources such as infrastructure and the maintenance thereof. Skilled human capital due to a decline of overall operational budgets of universities, and funding such as government subsidies and the income from student fees due to non-paying students by generating an added third-stream income that will enhance the traditional income from the first and second stream (Pityana, 2009:2-3).

A major challenge for the post-apartheid government was to restructure the higher education sector to eradicate racial replications, diminish costs and improve efficiency, effectiveness, and diversity. This was done through the merging of various universities and Technikons, investigated by the Council for Higher Education (CHE) and driven by the government after it had become evident that institutions were not going to merge willingly (CHE, 2016:10). From the year 2015 onwards most historically, disadvantaged institutions merged because they were underfunded as opposed to the historically advantaged institutions. This unfair practice has had a fundamental financial impact on new comprehensive universities (CHE, 2016:12). Advancement offices have therefore played a critical role together with other university departments and offices to address the issue of financial shortfalls (Craig & Abrahams, 2009:10).

The Council for Higher Education (CHE) points out the following:

South Africa's transition from apartheid and minority rule to democracy requires that all existing practices, institutions, and values are viewed anew and rethought in terms of their fitness for the new era. Higher education plays a central role in the social, cultural, and economic development of modern societies. In South Africa today, the challenge is to

redress past inequalities and to transform the higher education system to serve a new social order, to meet pressing national needs, and to respond to new realities and opportunities. It must lay the foundations for the development of a learning society that can stimulate, direct, and mobilize the creative and intellectual energies of all the people towards meeting the challenge of reconstruction and development (Council for Higher Education, 2007:8).

To accommodate the demands and needs of students and staff, and to implement the services required effectively, an institution needs adequate resources and a well-developed institutional advancement plan.

According to Worth (2002:4-5), reduced government support for universities in some countries has generated an increasing interest abroad in institutional advancement in recent years. One important component of institutional advancement educational fundraising.

Study South Africa (2015:23) indicates that South African universities are funded from three main sources, namely:

- government allocations, which, on average, account for about half of their income.
- student fees, which generate 25% of funding; and
- private income earned through investments, fundraising, donations, and entrepreneurial activities.

The ability of institutions of higher learning to attract “private” income varies greatly for some, alternative funding sources account for up to 65% of income (Study South Africa, 2015:24).

Former Minister of Education, Naledi Pandor stated that, given the lack of growth in resources available to universities, “...*we have to do more with less and do it well. This means a very rigorous examination of funds and budgeting by institutions. Therefore, a structured and well-managed approach to solicit funding from diverse funding sources will be eminently in the future existence of any higher educational institution in South Africa*” (Study South Africa, 2015:23).

All the above forms part of a well-integrated institutional advancement plan. Any organisation ought to have a vision and mission with a strategic plan. For a business to achieve its goals and objectives towards its vision, it needs the correct resources to be mobilised. If an institution cannot provide these resources, it needs to explore other means of funding. The external funding required must be in line with the strategic objectives of the institution.

The Institutional Advancement Process (IAP) is a means that will assist a university to achieve the goals of its strategic vision. Advancement is defined holistically and pertains to the enhancement and improvement of all programmes and activities of the university (Clements, 1996:28).

Creating an institutional culture for resource development through securing external funding, is an effective and efficient method for ensuring a successful university. A critical aspect of sustaining this culture is the chief development officer's role as an integral member of the management team (Blong & Bennett, 1991:33).

Worth (2002:4) suggests that the function of institutional advancement in American institutions of higher education is to enable each college or university to do well in a competitive environment and to assist the whole sector of higher education to compete effectively for available resources. It is therefore primarily the individual institution, rather than the government, that is responsible for its well-being and even survival.

In the context of South Africa, the term "institutional advancement" and its activities, as explained above, refer to the existence of a foundation, development, fundraising or advancement office at the institution. These units primarily execute and take responsibility for functions such as fundraising actions, alumni relations, building and maintaining strategic beneficial partnerships, facilitating the development of non-subsidised programmes and community development programmes, and mobilising resources to ensure sustainable development within the institution.

The problem therefore that this research aims to address is the financial shortfalls that universities are faced with, and the role advancement offices can play in addressing this challenge. Thus, the focus will mainly be on the importance of an Institutional Advancement office.

1.2 BACKGROUND TO THE STUDY

The main source of income for any South African university, are student fees (Tuition and Residence) state subsidies and grants. State subsidies have diminished over the last ten years and the inability of universities to bring their student fees in line with historically advantaged institutions creates the urgency to enhance third-stream income as the size of most universities have also increased in recent years.

Third- stream income forms a small part of most institutions' income stream. However, there are opportunities to improve the third-stream income. This is an area that an advancement office will focus on, by developing an institutional fundraising plan and strategy that will seek to address the shortfalls of the institution. The pressing need for the establishment of advancement offices across South African universities has thus grown as more universities are moving towards setting up offices.

It is with this backdrop that this research seeks to establish why it is important to have advancement offices set up in universities.

1.3 PROBLEM STATEMENT

Traditionally many Higher Education Institutions have strongly relied on first stream income (government subsidies) and second stream income (Student Fees or Tuition). The problem, however, arises when tuition and government subsidies no longer suffice to keep the university viable. The question of what we are to do becomes persistent (Lars, 2006:31). A decrease in government subsidies to Public Universities and other institutions of higher learning has become a global trend (Craig, 2009:3). One of the solutions to the problem is to raise student fees; however, this is an option with severe limitations, especially in South Africa (Beerkins, 2009:153).

The problem, therefore, revolves around the inefficiency of some higher education institutions to generate a sustainable third-stream income to meet the demands for additional funds required, because some of them don't have advancement offices that are mandated to secure third stream income. Therefore, to enhance the securing funds, the role and responsibility of an advancement office within the university require the involvement, commitment and support of management and all other stakeholders (Craig & Abrahams, 2009:9).

Considering the current situation for the university under consideration, the question must be asked how important the institution deem the establishment of an advancement office.

1.4 RESEARCH QUESTIONS

According to Creswell (2014:184), investigators place signposts to carry the reader through a plan for a study. The first signpost is the purpose statement, which establishes the central intent for the study. The next would be the research questions or hypotheses that narrow the purpose statement to predictions about what will be learned or questions to be answered in the study.

The primary question to be addressed in this research is whether a South African university deems it important to have an advancement office as part of its operations. This research is quantitative in the sense that it seeks to address and answer the research question by shaping and focusing on the purpose of the study.

In quantitative studies, investigators use quantitative research questions and hypotheses, and sometimes objectives, to shape and specifically focus the purpose of the study. Quantitative research questions inquire about the relationships among variables that the investigator seeks to know. They are frequently used in social science research and especially in survey studies (Creswell, 2014:188).

1.5 OBJECTIVES OF THE STUDY

In the next paragraph, the primary objectives together with the specific research questions are stated.

1.5.1 Primary Objectives

Is to investigate the importance of an advancement office in a South African university.

To add value to the main objective above, the following research sub-objectives will be looked at.

- The role of the Alumni unit in the functioning of the fundraising activities of the Advancement office.
- The Role of the Vice-Chancellor in Advancement.

- Importance of Advancement in the university.
- The importance of advancement in the university.

1.6 SIGNIFICANCE OF THE STUDY

As indicated in the introduction, we have seen a decline in state funding to support universities. This has created the urgency for universities to generate their funds to remain operational and functional and to ensure short- to long-term sustainability. Advancement offices are generally tasked to fundraise for institutional priority projects which range from bursaries, basic needs such as food and toiletries and infrastructure. Which bring about the question of the importance of an advancement office in a university, as the office will be tasked to address the funding needs of the institution.

The significance of this study speaks to the importance of an advancement office within a university and how it will address the financial shortfalls that a university is faced with. It will look at the roles and functions of stakeholders such as the Vice-Chancellor and alumni in the drive to raise funds. The study will be as evidence of whether advancement offices are indeed important to have or not.

1.7 SCOPE OF THE STUDY

The scope of the study will fall within the ambit of the South African Higher Education sector.

1.8 RESEARCH APPROACH, DESIGN AND METHODOLOGY

The research approach will predominantly be quantitative.

The data will be gathered in the form of questionnaires. The populations consist of advanced practitioners of universities such as donor researchers, development/fundraising officers, advancement managers, stewardship managers, heads of sports, managers of student governance and student financial aid. The population is constituted out of ten South African public universities.

The study has been approved to be conducted and there will be no infringements on any person including those more vulnerable.

1.8.1 Research approach

According to Creswell (2014:32), three research approaches can be pursued: (a) qualitative, (b) quantitative, and (c) mixed methods. Unquestionably, the three approaches are not as discrete as they first appear. Qualitative and quantitative approaches should not be viewed as rigid, distinct categories, opposites, or dichotomies. Instead, they represent different ends on a continuum. A study tends to be more qualitative than quantitative or vice versa. Mixed methods research resides in the middle of this continuum because it incorporates elements of both qualitative and quantitative approaches.

Qualitative research is an approach for exploring and understanding the meaning individuals or groups ascribe to a social or human problem. The process of research involves emerging questions and procedures, data typically collected in the participant's setting, data analysis inductively building from particulars to general themes, and the researcher making interpretations of the meaning of the data. The final written report has a flexible structure. Those who engage in this form of inquiry support a way of looking at research that honours an inductive style, a focus on individual meaning, and the importance of rendering the complexity of a situation (Creswell, 2014:32).

Quantitative research is an approach for testing objective theories by examining the relationship among variables. These variables, in turn, can be measured, typically on instruments, so that numbered data can be analysed using statistical procedures. The final written report has a set structure consisting of introduction, literature and theory, methods, results, and discussion. Like qualitative researchers, those who engage in this form of inquiry have assumptions about testing theories deductively, building in protections against bias, controlling for alternative explanations, and being able to generalize and replicate the findings (Creswell, 2014:32).

Mixed methods research is an approach to an inquiry involving collecting both quantitative and qualitative data, integrating the two forms of data, and using distinct designs that may involve philosophical assumptions and theoretical frameworks. The core assumption of this form of inquiry is that the combination of qualitative and quantitative approaches provides a more complete understanding of a research problem than either approach alone (Creswell, 2014:32).

The researcher chooses the quantitative approach to objectively meet the research objectives. The intent was to get as many responses as possible within the timeframe available for this research.

1.8.2 Research design

Research designs are types of inquiry within qualitative, quantitative, and mixed methods approach that provide specific direction for procedures in a research design. Others have called them strategies of inquiry (Denzin & Lincoln, 2011:45). The designs available to the researcher have grown over the years as computer technology has advanced our data analysis and ability to analyse complex models and as individuals have articulated new procedures for conducting social science research (Creswell, 2014:41).

For purposes of this study, a quantitative research design approach will be followed. This will be done through a questionnaire. The survey questionnaire was completed by advancement professionals at other South African universities. The participants were not required to fill any personal identification on the questionnaires.

1.8.3 Research Participants

The population of the study refers to an aggregate of the total objects or subjects, based on the ability to meet certain specifications (Collis & Hussey, 2013:97). The population chosen for this study is ten al public South African universities.

The sample, however, for the study is advancement professionals working in advancement offices at the twenty-six South African universities.

1.8.4 Research Procedure

It is impossible to include the entire population in the study, due to time constraints and cost implications (Bryman & Bell, 2015:183; Collis & Hussey, 2013:97). Therefore, a suitable sample of the population must be chosen in such a way that it is a valid representation of the entire population. Bryman and Bell (2015:183), refer to two methods through which sampling can be done, namely probability and non-probability methods.

1.8.5 Probability Methods

Probability sampling refers to the process where the possibility of the person being selected to participate in the research is known and is also called non-random sampling (Brynard *et al.*, 2014:183) and (Etikan *et al.*, 2016:2). Probability methods are dependent on randomness and the probability theory. With probability methods, the population does not need to be precisely defined.

The advantage of this method is that it is not very costly and that it needs little time to complete.

The disadvantage associated with this method is that it is very open to sampling biases and that it does not always reflect a good representation of the population.

The following techniques can be used for probability sampling: Simple random sampling, systematic random sampling, stratified random sampling, cluster sampling and multistage sampling.

1.8.6 Non-probability sampling

Non-probability techniques allow for a sample of an infinite amount of the population and this sampling technique is thus appropriate for exploratory research that is aimed at producing new notions which will be tested at a later stage (Brynard *et al.*, 2014:183; Etikan *et al.*, 2016:2).

The advantage of this method is that it decreases the chance of systematic mistakes and minimise sampling biases. It allows for a good representative sample of the population can be obtained. The disadvantage of this method is that it is time-consuming and expensive.

Techniques that can be used for probability sampling includes volunteer sampling, convenience sampling, purposive sampling, quota sampling, snowball sampling, matched sampling, and genealogy-based sampling.

The sampling strategy that was used in this study is convenience sampling and refers to the process where the researcher includes those participants who are easy or convenient

to approach (Bryman & Bell, 2015:184). Convenience sampling is beneficial, especially in cases where the target population is determined very broadly.

The reason for this choice in sampling method was limited time and the researcher needed as many as possible responses in a very short timeframe. According to Blanche *et al.* (2006:37), the units of analysis of a study refer to the entities from which the researcher wishes to conclude. The unit of analysis is therefore any grouping or individual entities that the researcher will use to draw certain conclusions. For this study, the unit of analysis was advancement practitioners at ten South African universities.

1.8.7 Survey Research

Survey research provides a quantitative or numeric description of trends, attitudes, or opinions of a population by studying a sample of that population. It includes cross-sectional and longitudinal studies using questionnaires or structured interviews for data collection (Creswell, 2014: 41-42). For purposes of this study, a questionnaire was used.

1.8.8 Research paradigm

There are four main domains that you can choose from when you are about to conduct research. These are post-positivists, constructivist, transformative and pragmatic research paradigms (Creswell, 2014: 35).

The postpositivist assumptions have represented the traditional form of research, and these assumptions hold more for quantitative research than qualitative research. This worldview is sometimes called the scientific method or doing science research. It is also called positivist/postpositivist research, empirical science, and postpositivism. This last term is called post-positivism because it represents the thinking after positivism, challenging the traditional notion of the absolute truth of knowledge (Phillips & Burbules, 2000: 33-36) and recognizing that we cannot be positive about our claims of knowledge when studying the behaviour and actions of humans (Creswell, 2014: 36).

The research paradigm for this study will be a postpositivist worldview. The reason is that the approach of the study is a quantitative approach and of empirical nature.

1.8.9 Research methodology

This study comprises a literature review and an empirical study. The main research objective was to investigate the importance of an advancement office at a university.

1.8.10 Literature Review

The literature review entailed thorough scrutiny of available literature on the topic of advancement within the context of higher education, more specifically regarding the importance thereof. Some of the other constructs which were included in the literature review are the role of the vice-chancellor in fundraising, the importance of alumni in fundraising and the role of an advancement office in the university. The perceptions of the participants were measured through a questionnaire.

According to Bryman and Bell (2015:125), the relevant guidelines need to be followed for the literature review. This includes whether the references are up to date in the area of interest and if the reference is outdated. It also establishes whether the search for literature and the review is guided by the research questions. If key controversies in the literature are addressed to substantiate external validity. And if the researcher adopted a critical approach to present the literature review.

1.9 LIMITATION OF THE STUDY

1.9.1 Delimitation of the study

This study will be restricted to the managers and fundraising practitioners at all twenty-six South African public universities. The research will exclude Technical and Vocational Education and Training (TVET) colleges from the study as well as private higher learning institutions.

1.9.2 Limitations

According to the Council for Advancement and Support of Education (CASE, 2016), institutional advancement is an integrated method of managing relationships with key stakeholders to improve understanding of an institution and generate support for it.

Due to the specificity of the existence, role and responsibility of an advancement, office at public higher education institutions. The perspectives and views of the respondents and the impact of those views will not be generalised to evaluate the effectiveness of similar departments at other institutions.

1.10 DEFINITION OF TERMS (TERMINOLOGY)

Certain terminology will be consistently used in this study. The following terms and words in the context of this study mean the following:

Terminology	Definition or meaning
<i>Advancement</i>	According to the Council for the Advancement and Support of Education (CASE), institutional advancement is an integrated method of managing relationships with key stakeholders to improve understanding of an institution and generate support for it (ASPIHE, 2015: 6).
<i>Fundraising:</i>	Weinstein (2002:2) explains that fundraising is the art of nurturing relationships. So the first action step is to build strong, mission-based organisations. Successful fundraisers also form relationships with people who can assist to garner the resources needed in carrying out the organisation's mission.
<i>Development:</i>	According to Worth (2002:6), development is a sophisticated process that includes several steps or stages. It begins with the institution's academic plan, from which specific financial needs and fundraising goals are derived. It proceeds to the identification of likely prospects for gifts to support those needs.
<i>Prospect Research</i>	Prospect research identifies, analyses, and recommends avenues of financial support so that the fundraising goals of a non-profit organisation can be realised (Hogan, 2008).

Terminology	Definition or meaning
<i>Cultivation</i>	Cultivation is the process in which relationships are being built with a potential donor to win their attraction for your company or project (Case, 2017).
<i>Solicitation:</i>	This is the process of asking from the donor. Asking can happen through direct mail, email, telephone, or face-to-face (Case, 2017).
<i>“The Ask” or Asking</i>	This is asking the donor exactly what you need. used in a sentence: “You need to have the right person that will do the ask”
<i>Stewardship</i>	Stewardship is all about maintaining and evolving long-term relationships with donors. Effective stewardship will ensure that the donor knows his or her gift is being valued and put to good use, will appropriately recognize the gift, and will ideally engage the donor so that he or she feels even more positive about the institution (Case, 2017).
<i>Alumnus</i>	The classic definition of an <i>alumnus</i> is a graduate or former student of a specific school, college, or university (Case, 2017).
<i>Vice-Chancellor</i>	The Vice-Chancellor is the principal academic and administrative officer of the University. http://www.v-c.admin.cam.ac.uk/role-vice-chancellor (Accessed: 28 June 2017).
<i>Annual Giving</i>	Annual giving is a non-profit organization’s ongoing fundraising effort. The two main objectives of annual giving are to form stronger donor relationships and raise funds for the non-profit’s operational expenses. https://www.neoncrm.com/annual-giving-definitive-guide/ (Accessed: 28 June 2017).
<i>Annual Fund</i>	The annual fund is the money raised from an organization’s annual giving campaign. It’s generally used to help non-profits cover their operational

Terminology	Definition or meaning
	expenses while they run more targeted campaigns for specific projects and causes.
<i>A South African University</i>	Established, in terms of the Higher Education Act, 1997 (Act No. 101 of 1997), as a public higher education institution where students study for degrees, diplomas or certificates and where academic research is done.
<i>Third Stream Income</i>	In the Duncan report (2009), third stream income is defined as “all income derived from sources other than public subsidies (First stream income) and tuition and other student fees (second stream income)”.

1.11 SUMMARY OF CHAPTERS (CHAPTER LAYOUT)

Chapter 1 – Orientation of the Study

Chapter 1 will present the overview of the research, the motivation, focus, objectives and the proposed methodology.

Chapter 2 – Literature Review

Chapter 2 will explore and define the theoretical framework that guides the direction of any research study in the field of advancement at higher education institutions and will identify the roles and responsibilities to be considered.

A brief overview will be given of the role, existence, and importance of an advancement office. Attention will be directed to the functioning of the advancement office, referring to the background information in Chapter 1.

The main aim of the literature study was to gather information to establish whether an existing measuring instrument can be used for data gathering or whether it would be advisable to develop a new one.

Chapter 3 – Research design and methodology.

This chapter will describe the research and sampling design used to identify the roles and responsibilities of an advancement office. The discussion of statistical methods will be concluded by documenting the procedures adopted to analyse the data gathered as well as the interpretation thereof.

Chapter 4 - Analysis of Data and Interpretation

This chapter will seek to analyse the data that was collected and to give meaning and interpretation to it. The data was collected through a survey and will be presented in this chapter.

Chapter 5 –Conclusion and recommendations

Conclusions from chapter 4 and recommendations will be tabled in this chapter. The findings of the research will be discussed as more recommendations is drawn from this.

CHAPTER TWO (2): LITERATURE REVIEW

2.1 OVERVIEW

Many universities in South Africa have strongly relied on income from the government (government subsidies) and income from student fees. The problem, however, arises when tuition and government subsidies no longer suffice to keep the university viable. The question of what we are to do becomes persistent (Lars, 2006:31). A decrease in government subsidies to Public Universities and other institutions of higher learning has become a global trend (Craig, 2009:3). One of the solutions to the problem is to raise student fees; however, this is an option with severe limitations, especially in South Africa (Beerkins, 2009:153).

Advancement within higher education is a new and evolving practice in South Africa. The sources that will therefore be considered are American, European and from the United Kingdom, because fundraising practices for institutions of higher learning are well established in these countries. What this review will not include is solutions to the South African government for the protests of #FeesMustFall.

The Council for Advancement and Support of Education (CASE) will be a very useful source when conducting research. Inyathelo the South African Institute for Advancement is also a reliable source that will assist in the research because they conduct constant research on South African Universities with regards to fundraising.

The limited number of academic sources such as research that has explored third stream income for South African universities emphasizes the importance for universities to have operating business units that will generate income and the importance of establishing external relationships and partnerships. What these sources do not expand on is how these relationships are established, how they are maintained, what the cycle is for third stream income when conducting fundraising and who the key role players are to make third stream initiatives a success. As mentioned earlier that this study in South Africa is an unexplored and new practice in South Africa. This means that the availability of sources is limited mainly to reports and online articles and websites, hence international sources will also be explored. In conducting this research, emphasis will be given to the context of South Africa, as international institutions such as Harvard University, Oxford

University and others have different business models and operate under different legislations.

The Science Policy Research Unit (SPRU) of the University of Sussex merely implies that the third stream is an interaction between universities and the rest of society (SPRU, 2012). The problem with this view is that it assumes that any interaction with society will generate an income for the university. This appears not to be the case, because not all interaction between universities and society is intended to generate income for the university. For example, some universities interact with communities, and this is referred to as community engagement, community interaction or involvement. Community engagement is contrary to third-stream income in that it requires the university to use its resources to engage and develop communities with sustainable initiatives. This in other words is an expense for the university to ensure that community programmes are maintained. Third stream income on the other hand should focus on generating income for the university, of which fundraising is one of many other activities which should be championed by the advancement office. It should generate an income in financial terms or material (gifts-in-kind) for the university, through the fundraising efforts of the university, through marketing its priority projects.

2.2 ADVANCEMENT

According to CASE (2018), institutional advancement is an integrated method of managing relationships with key stakeholders to improve understanding of an institution and generate support for it. The core disciplines associated with this method are alumni relations, communications, marketing, and fundraising (ASPIHE, 2019:7). The fundamental focus of this is to achieve interest being displayed towards the institution, attraction from the donor community, positive brand building that will give stakeholders such as donors, for example, to invest in the university.

In the South African context, Advancement has taken on added vivacity owing to Inyathelo's integrated approach which involves strategic engagement with the external environment in such a way that positions an institution to attract private investment, into bursaries, infrastructure development and the wellbeing of students and food security projects, rather than chasing money by knocking on doors, as was the case in the old charitable fundraising paradigm (Gastrow, 2015:10).

The aim is to move towards a more structured and professional approach to conducting fundraising. Sometimes fundraising on a door-to-door basis is perceived to be “begging”. For universities to attract investment there needs to be a more formal approach. This can be achieved through the establishment of an advancement office. The advancement office will manage the approaches being made to investors. This can be done by professionally writing proposals for projects that need funding, identification of possible donors or prospects, the cultivation of such prospects, a structured method of solicitation, in terms of asking for support, and professional stewardship of relationships after successful solicitation or asking (Gastrow, 2015:28)

What Gastrow (2015:12) is alluding to above, is that universities must seriously consider adapting how it conducts their operations. There needs to be a paradigm shift from the normal “way of doing” things to meeting the needs of society and keeping up with changes. It is therefore the function of an advancement office to do the necessary market research and to be proactive about changes in society. The advancement office will have to play a role in teaching and learning, by being informed about the academic developments. Many funders are interested to know what the university has to offer academically, or how the university can assist in the training of corporate employees. The advancement office must readily have this information to market to a potential funder.

The diagram below is a demonstration of the elements and tools of an advancement office as some of the elements were briefly discussed above. Later, in the research, some of the elements will be further elaborated on.



Figure 2:1 The Ten Elements of Advancement (Inyathelo, 2018: 4)

Source: Inyathelo (2018)

2.3 VOICE AND VISIBILITY

What Gastrow means by voice and visibility of your institution, is the perception and the opinions that the public has got about your university. The role of the advancement office is to ensure that the university is being marketed, in terms of what it has to offer and what investment opportunities there exists within the university for the public and private organisations (Gastrow, 2015:22). The advancement office, therefore, needs to make use of good branding applications to ensure that the university is visible on for example billboards, posters, magazines, airport walls and on social media such as Facebook, Twitter and Instagram. The advancement office along with its marketing team will have to make sure that trust is built among stakeholders, through its communication and brand building (Gastrow, 2015:23).

2.4 RELATIONSHIPS

According to Gastrow (2018:1), resources come from external support and so does partnerships. Strength, resilience, and sustainability is therefore dependent on strong external relationships. The role of the advancement office will therefore be to forge strong

relationships that will build trust and commitment, to ensure that senior management makes use of a personal external professional network to lobby support for the institution. The relationship should not only be about fundraising, but also about communicating the achievements of the institution. The advancement office will have to play a role in sound donor relationship management, by building new relationships and maintaining existing ones. Transparency will always have to be maintained between the university and its partnerships which will build up trust and long-standing relationships. The advancement office must ensure that this takes place (Gastrow, 2018:9).

2.5 STRATEGY AND PLANNING

One of the other elements of advancement is strategy and planning. According to Gastrow (2015:29), an advancement office should have a strategy that will have external effectiveness. In other words, the strategy must give effect to how the vision will be achieved. The strategy should also explore how external opportunities for the university will be created or identified. It seems as if though the advancement office has got to have a clear strategy and that it is in line with the university strategy and vision. The role of the advancement office will be to ensure that good planning goes into achieving the strategy, that action plans will be set in place to achieve the strategy (Gastrow, 2015:30).

2.6 HUMAN CAPACITY

To have a well-functioning advancement office according to CASE (2018:3), the advancement office needs to at least have to depend on the size of the university, the following positions to execute certain tasks:

➤ Director for Institutional Advancement

The Director for Institutional Advancement will take overall responsibility for the management and operations of the office. Strategy formulation, assessment and review, development of policy and implementing and executing the resource mobilisation drive. The director may also be the link with management and other senior structures within the university. The director will lead the advancement team.

➤ Advancement Administrative Assistant

This position will be taking responsibility for all administrative functions in the department in addition to the role of managing the office of the Director. It is envisaged that this person would also assist other staff with administrative duties and take responsibility for certain financial aspects such as recording of donations, tracking funds and the like in conjunction with the Finance department.

➤ Senior Donor Relations Officer

This position will perform partial fundraising activities, having to see to the full cycle of the fundraising drive, interacting with project leaders, academics, departments. On the other hand, they will also do the actual solicitation or asking among corporate and other funders. They will furthermore assist Project Leaders, Academics and other stakeholders in proposal development and guide on procedural matters related to the advancement policy if there is one.

➤ Donor/Prospect Researcher

This role will consist of continuous prospecting of donors, especially new donors and the funding opportunities that they present. It will also research donor focus areas ensuring that up to date information on focal areas as well as donor requirements are at hand. This also deals with the application for funding procedures as well as compliance issues among funders. This is a very important function in that the pool of active donors should always grow to present more opportunities /possibilities/sources to raise and secure funds from external funders.

➤ Senior Alumni Officer

The Senior Alumni Officer will be responsible for engaging alumni by communicating developments in the university. The person will also maintain and update the database regularly to ensure that Alumni information is correct. The incumbent will plan and organise alumni events with a long-term strategy to get alumni to give back to the university in one way or another (cash or kind). The person will be responsible for the logistical arrangements of Convocation with regards to meetings, travelling and accommodation. An alumni newsletter is advised to be developed to enhance communication with alumni. The officer will have to keep track of the successes of Alumni and report on them.

2.7 GOVERNANCE STRUCTURES AND PRACTICES

It will be the role of the advancement office to ensure as indicated above those funds are being used for the intended purpose the donor had in mind when the donation was made. The donations or grants may be received from the public or directly or indirectly from the State. It is therefore important to ensure that exempt organisations use their funds responsibly and solely for their stated objectives, without any personal gain being enjoyed by any person including the founders and the fiduciaries. A university is registered as a Higher Education institution as per the Higher Education Act 101 of 1997, which gives it the status of being a Non-Profit Organisation and with Public Benefit Organisation status as per the Companies Act of 2008. This registration will give universities the ability to issue Section 18 (A) tax certificates as per the Income Tax Act 58 of 1962 for *bona fide* donations made to the university (Gastrow, 2015:32).

It is therefore important for the advancement office to make sure that it has all necessary updated information of the university such as its Statute, Tax Clearance certificate, Broad-based Black Economic Empowerment BBBEE certificate, declaration of authority and letters confirming banking details of the university. For funders to have trust in the institution, sound financial management practices must be complied with. There should be good financial systems in place and donation processing procedures. It is therefore advised that the advancement office develop a fundraising policy that is in line with all other relevant policies of the university that will ensure sound governance (Gastrow, 2015:34).

2.8 FUNDRAISING TOOLS

According to Gastrow (2015: 34) For the advancement office to function effectively, it is advised that a database be acquired that will have all donor and alumni information on it. The database will have to be maintained by dedicated staff by always updating information and loading new information about donor activity as well as projects. All the advancement staff will be issued with the basic equipment such as laptops, cell phones, at least a credit card for the director for donor meetings and a travelling allowance for fundraisers.

2.9 FINANCIAL SUSTAINABILITY

The responsibilities of the advancement office amongst others will be to contribute to the financial sustainability of the university. This will be done through well-planned fundraising initiatives, the development of compelling funding proposals for strategic university projects, development of a diverse donor database. The office will play a role in ensuring that accurate budgets are inserted in funding proposals by working closely with project leaders. Good financial planning and monitoring must be done by the advancement office working the financial committee of the university (Gastrow, 2018:30).

2.10 MONITORING AND EVALUATION

According to Gastrow (2015:36), the advancement office needs to ensure that all funds, sponsorships, and donations that have been given by a donor for a specific purpose are indeed used for the intended purpose. A report will have to be given to the funder by the advancement office indicating how the funds were utilised. That is why it is important for the advancement office to work closely with project leaders and the student financial aid office in the event of bursaries, to ensure that funds are used as stipulated by the funder in the agreement or contract. Oversight must therefore be given by the advancement office to ensure quality control.

2.11 LEADERSHIP

According to Gastrow (2018:3), a paradigm shift is needed in the terms of fundraising. Leaders of institutions should “switch from chasing money to attracting support”. Leadership in this context is referred to the Vice-Chancellor and the rest of the senior management of the university (Gastrow, 2018:4). It is therefore important for the advancement office to have close relationships with the rest of the senior management and to make sure that they understand the strategy of the advancement office. The advancement office cannot function in isolation, without the support of the university management. According to Gastrow leadership with qualities, such as a good reputation, a clear vision for the institution, good relationships with university stakeholders, an exceptional profile the leader should reflect the values and the brand of the university and should always take on the role as the leading fundraiser of the institution and continuously seeking support for the university (Gastrow, 2018:4).

2.12 THIRD STREAM INCOME

Third stream income has various meanings and definitions depending on the organisation and context. The following definition is one suitable for advancement in the higher education context.

The Higher Education Fund Council for England (2021:4) defines third stream income as “a trend among many universities toward a third function that will enhance income, which has been described using a range of terms such as knowledge transfer, community service, community engagement and the third stream.”

The function of enhancing third stream income will be the main mandate of the advancement office through the means of various avenues discussed earlier. It is therefore important for advancement offices at universities to be clear about what third-stream income means for them and that it should be enshrined in their fundraising policies.

At Walter Sisulu University (WSU) for example, third stream income is defined as any form of income other than government subsidies and tuition fees (WSU, 2018)

‘Third Stream is about the interactions between universities and the rest of society.’ (SPRU, 2017:16).

In the Duncan report (2009), third stream income is defined as “all income derived from sources other than public subsidies (First stream income) and tuition and other student fees (second stream income)”. According to the report third stream income typically comprises of the following:

- Contract or sponsored research funding (Contract income).
- Entrepreneurial and commercial income.
- Philanthropic funding (donations and gifts).
- Internal Funding (Interests/dividends or income from investments).
- Short- and long-term financing.
- Other private income.

2.13 THE ROLE OF THE VICE-CHANCELLOR

The report “*exploring third stream income for South African Universities*” does not cover, or what the speakers did not address was the involvement of the entire Senior Management of the University as well as its Council members or board of governors. Gastrow (2018:34) states that it is good for a Vice-Chancellor to be involved and to cultivate a culture of fundraising, but it can only be a success if the entire institution buys into the culture of philanthropy. Therefore, the role of the Vice-Chancellor seems critical to the support and operations of an advancement office. The advancement office will support the execution of the strategy of the university to achieve its vision and strategic objectives. Hence there needs to be a close link between the advancement office and the office of the Vice-Chancellor. It can therefore be argued that the Vice-Chancellor is capable of so much more by the position that the person holds in terms of enhancing private sector donations to the institution as well as international donations. The argument is that if a university wants to secure millions to support the academic programme, for infrastructural development, bursaries and research, the Vice-Chancellor needs to engage his counterparts in the private sector such as CEO’s of companies as well as high net-worth individuals. The work of the advancement office would be to research for example on a specific company that the Vice-Chancellor would like to engage. The research would include information about who the board members are, who the CEO is, what the corporate social investment strategy of the company is and who the relevant people are in the company to meet with the CEO.

2.14 ALUMNI RELATIONS

Whilst the focus of this research is about the importance of an advancement office in a university, the link with alumni relations is integral and often a part of the advancement office as a separate unit or entity within advancement. It demands significant attention when thinking about your start-up activities, vision and strategy and about how you make your case. Without strong alumni relations, a universities prospect pool will be significantly reduced, and its chances of significant fundraising success compromised. Alumni have the potential to be your most loyal and generous supporters (CASE, 2018).

The Council for Advancement and Support for Education (CASE, 2018) stresses the importance of Alumni relations. Alumni play key roles in opening doors for the institution

in terms of getting financial support from external sources. The advancement office engages the alumni strategically to get access to a potential donor. Many alumni occupy strategic high-level decision-making positions in corporations, but many universities do not tap into this opportunity. The is one of the functions of the advancement office, to ensure that it knows where the alumni are, what it is that they are doing professionally and whether they are in positions to make decisions with regards to donations, sponsorships and any other corporate social investment-related activities. Universities need to understand the importance of maintaining a relationship with their alumni that will ultimately enhance their third-stream income. The university needs to communicate the importance of alumni relations to its alumni and let them understand that a large part of their *alma mater* and its functionality is also their responsibility. It is there the responsibility of an advancement office to make sure that it has a well-integrated alumni relations strategy.

2.15 WHAT IS AN ALUMNUS?

It is important for the university to decide how it defines an alumnus and to document this to avoid any confusion.

The classic definition of an *alumnus* is a graduate or former student of a specific school, college, or university. Different institutions develop their definitions of what alumnus means

- Some restrict the term to graduates.
- Others widen the definition to include all former students (even those who failed to finish), retired staff and other associates.

The university needs to be clear in how it defines its alumni and to ensure that it has an alumni relations policy in place that will govern the relationship between the university and its alumni (CASE, 2016).

2.16 WHY ARE ALUMNI RELATIONS IMPORTANT?

In the past, alumni relations, or engagement, tended to be treated as a stand-alone activity divorced from fundraising and other advancement activities. Indeed, some alumni

associations were entirely independent of their parent institutions, and whilst their members interacted with each other, they had very little interaction with the institution.

Today, alumni relations are an important part of an institution's advancement activities for many reasons:

- Alumni are an institution's most loyal supporters.
- Alumni are fundraising prospects.
- Alumni generate invaluable word-of-mouth marketing among their social and professional networks.
- By engaging alumni, an institution can continue to benefit from their skills and experience.
- Alumni are great role models for current students and are often well placed to offer practical support to students as they start their careers.
- Alumni are often in the position to engage the expertise of the institution in their professional lives
- Your alumni are your international ambassadors. They take their knowledge of your institution to their hometowns and countries and into their professional and social networks.

Maintaining a positive relationship with your alumni means that the messages they share about your institution will also be positive – and current.

If the relationship between your alumni and your institution stalls when they leave campus, their knowledge of your activities and achievements will no longer evolve. The messages they will share with people will be out-of-date and could reflect poorly on the progress your institution has since achieved.

Maintaining communication channels with alumni means you can keep them informed of your achievements and make them part of your institution's future, not just its past.

Good alumni relations benefit alumni as well as the institution. If you support your alumni in their professional and personal lives through activities such as the facilitation of social and professional networks, preferential access to on-campus expertise and facilities and negotiated benefits with third-party suppliers, they are likely to be your loyal life-long

supporters. Your support may also help your alumni achieve positions of success and influence, which will in turn benefit your institution as they begin to give back.

By helping the institution become bigger, stronger, and more successful, alumni are also enhancing the value of their degree qualifications (CASE, 2016).

To conclude we can see that there are not many sources or research that has been conducted on third-stream income in the Higher Education sector in South Africa. There are a few reports that have been put together based on gatherings of various stakeholders. Most of the sources give us a general overview of advancement and third-stream income but does not give us in-depth insight. The sources merely highlight the needs and issues of institutions but do not answer critical questions such as:

- How much does the university invest in terms of Rands in its advancement operations (Alumni relations, fundraising and development, marketing, and communication); This is important for an advancement office. It needs to have a budget to reach out to the stakeholders of the university to mobilise the resources of the private sector that will attract support to the university.
- What financial targets are set against the investment? It is therefore critical for an advancement office to set targets for itself to measure its successes and results. If the efforts of an advancement office and the returns they get on their engagements with alumni and the private sector exceeds the investment of the university into the advancement office. Then the unit can justify its importance in the institution, because of the investments that it secured.
- Does the alumni and fundraising office have prospect/donor researchers, dedicated proposal writers, donor administrators etc.? These are tools that are needed to have an effective advancement office.

These are just a few questions that the sources do not address. The purpose of this research is to establish the importance of an advancement office in a higher education institution.

2.17 HIGHER EDUCATION ENVIRONMENT

To understand better the multifaceted environment within which the study will be conducted, it is necessary to provide a broad overview of the environment.

According to the Council for Higher Education (2016: 8), higher education in South Africa in the post-apartheid era has never been more volatile than it is currently. Some two decades into democracy, yet it is, contradictorily, perhaps the part of the entire education sector that has advanced most in terms of achieving national goals of quality, equity and transformation.

There is much that higher education can claim to have achieved: integration as a system from its fragmented past; established quality assurance and advisory body, such as the Council for Higher Education; a single dedicated national department such as the Department of Higher Education and Training; a fundamentally altered institutional landscape; greater access and a radical change in the demography of its students, with an 80% growth in the number of African students; higher research output and international recognition through large research projects, more attention paid to teaching and learning, to curriculum and student support; the implementation of a governing framework such as the Higher Education Act 101 of 1997, for its educational offerings; the allocation of financial aid to many more students than twenty years ago; and having nationally coordinated projects and grants to address some of the identified areas for improvement (CHE, 2016:9).

In addition to the above, the CHE Review (CHE, 2016:9), despite the many advances and achievements of higher education outlined in this review, however, the student protests of 2015 and early 2016 have given expression to underlying faultiness in quite a dramatic way. The pressures of worsening underfunding in the context of enrolment growth and increasing student expectations and frustrations concerning access and financial aid have led to widening fissures in the system (CHE, 2016:9). It is evident that that underlying problem once again is funding. This is one of the issues concerning funding that the advancement office will strive to curb. The financial pressure being placed on the university will become a strategic objective of the advancement office to solve.

2.18 THE NATIONAL DEPARTMENT OF HIGHER EDUCATION (DHET) IN SOUTH AFRICA.

Historical Overview

The Department of Higher Education and Training (DHET) was established in 2009 when the former Department of Education was divided into two sections: Basic Education and Higher Education and Training (DHET, 2017).

The mandate of the new Department included aspects of skills development that had previously resided in the Department of Labour (DHET, 2017).

The new Department was specifically established to focus on post-school education and training holistically and has extended its scope of operations extensively (DHET, 2017).

DHET Vision and Mission

Our vision is of a South Africa in which we have a differentiated and fully inclusive post-school system that allows South Africans to access relevant post-school education and training, to fulfil the economic and social goals of participation in an inclusive economy and society (DHET, 2017).

It is the mission of the Department of Higher Education and Training to develop capable, well-educated, and skilled citizens who can compete in a sustainable, diversified and knowledge-intensive international economy, which meets the development goals of our country (DHET, 2017).

With the vision and mission in mind of the DHET, it is evident that sustainable economic contribution employing well-skilled citizens is a major factor for institutions of higher learning. This can be achieved if there are well-funded institutions of higher education and advancement offices as one of the role players can contribute to the financial viability of universities.

The DHET will undertake its mission by reducing the skills bottlenecks, meaning that critical skills are accumulating in one area, whereas those skills can be reassigned to address issues such as funding, especially in priority and scarce skills areas, improving low participation rates in the post-school system, correcting distributions in the shape,

size and distribution of access to post-school education and training and improving the quality and efficiency in the system, its sub-systems and institutions (DHET, 2017).

DHET Value Statement

The Department of Higher Education and Training (DHET) is committed to:

- Distinction and excellence in all our work efforts to develop a skilled and capable workforce for the country.
- Honesty, perseverance, and commitment in providing differentiated education and training opportunities for all the people of South Africa.
- The efficiency of work habits and proficiency of all DHET employees in fulfilling the mandate of the Department.
- Teamwork, cooperation, and solidarity in working with our partners in higher education and training to achieve the shared goals.
- Transformation imperatives to address social inequality, race, gender, age, geography, HIV/Aids, and disability issues in all our higher education and training institutions to normalise them (DHET, 2017).

What the Department is not committing to above is the long-term financial sustainability of universities. It is evident in recent times that students and university staff are protesting for the underlying resource which is money. It is either about salary increases or the improvement of the living conditions of students on campuses, such as residences, student centres, computer laboratories, and dining halls.

This means that at the time of this research the DHET has not committed in its mission statement to address issues of student and staff protests due to the need for tuition fees or living conditions or staff salaries.

DHET Mandate

The DHET is mandated by various legislations to fulfil its vision and mission. Some of these legislations include the Constitution of the Republic of South Africa and the Higher Education Act.

2.18.1.1 DHET Constitutional Mandate

Higher Education and Training derive its mandate from the supreme law of the Republic, the Constitution, within the purport of Section 29, read with schedule 4, which lists education at all levels, including tertiary education as a functional area of concurrent national and provincial legislative competence (DHET, 2017).

There appears to be a constitutional mandate on the government to give access to education for its citizens within its available limited resources. The crux of this statement is that of limited available resources. Meaning, that the government can only contribute financially within its limits of what is nationally available to universities. Any shortfalls that university experiences, must be taken care of by the respective university. They can do this by exploring the means of enhancing their third-stream income. Funding can be explored from various avenues by advancement offices such as alumni, corporate funding, personal philanthropic gifts, and other sources of funding grants.

2.18.1.2 Education's Section 29 rights

According to Section 29 of the Constitution (1996), everyone has a right to:

- A basic education, including adult basic education; and
- Further education, which the state, through reasonable measures, must make progressively available and accessible.

Considering Section 29 sub-section 1 above it is evident that education in South Africa is a right for its citizens and that the South African government must provide education to those who demands it (Constitution,1996). However, education is not accessible to everyone due to financial constraints which is one of the constraints within the greater socio-economic context of South Africa.

Education is not free in South Africa, despite the various movements such as #FeesMustFall. This includes Basic Education which refers to schooling before you enter the tertiary education sector, such as universities and colleges. This means that universities must explore sourcing funding externally because government subsidies are not enough to absorb all prospective qualifying and currently enrolled students in their

systems without sufficient financial support. Whereas on the other hand there are students who cannot afford higher education due to financial constraints.

The shortfall of the fees must be recouped in one way or another and that is why an Advancement office will be of great assistance to secure external funding employing bursary campaigns such as the #FundAFuture by the University of the Free-State (UFS, 2018) and the Isivivane fund campaign done by Rhodes University (Rhodes, 2020). The role of the advancement office will be to mobilise private sector resources in such a way that corporates, high net-worth individual trusts and foundations as well as alumni of the university find an interest to invest with the university that will assist students meeting their academic goals utilizing financial support.

Furthermore, to section 29 sub-section 2 of the Constitution (1996) everyone has the right to receive education in the official language or language of their choice in public educational institutions where that education is reasonably practicable. To ensure effective access to, and implementation of this right, the state must consider all reasonable educational alternatives, including single medium institutions, considering:

- Equity.
- Practicability; and
- The need to redress the results of past racially discriminatory laws and practices.

According to section 29 sub-section 3 of the Constitution (1996), everyone has the right to establish and maintain, at their own expense, independent educational institutions that:

- Do not discriminate based on race.
- Are registered with the state; and
- Maintain standards that are not inferior to standards at comparable public educational institutions.

It appears that the establishment of private institutions of higher learning has become a trend in South Africa such as Varsity College, Damelin College, ELMI college and CTI College. With the growing need for education and especially those who can afford it, send their children to these private institutions where there is less student protest action. Of course, the other alternative would be the University of South Africa (UNISA) that allows

for part-time studies, which is more affordable than full-time mainstream universities. The only issues about private institutions are that they are expensive, and access is a problem for those who cannot afford them.

DHET Legislative Mandate

The Higher Education Act (101 of 1997) provides for a unified and rationally planned system of higher education and the statutory Council on Higher Education (CHE) (CHE, 2017). The Act also speaks to the funding of universities. It will be important for an advancement office to know what the financial input is of the DHET to universities.

The National Student Financial Aid Scheme Act (56 of 1999) provides for the granting of loans and bursaries to eligible students at universities as well as for the administration of such loans and bursaries. It is appearing that NSFAS is not allocated enough funds to accommodate the demand for education in South Africa since many students are unfunded and that payments are not made to all students who qualify for NSFAS. According to the Commission of Inquiry into NSFAS (2017:35), the flaw of NSFAS is that many students upon the completion of their studies do not pay back the NSFAS study loans, and NSFAS does not have a strategy in place to collect and trace students now. Student funding is argued to remain a problem in South Africa despite the various efforts of government such as the NSFAS initiative and can be seen by the various student protests across South Africa.

Unpaid student fees leave universities with enormous student debt that is not paid up as in the case of Walter Sisulu University (WSU) which was left with outstanding student debt of just over R800 million (WSU, 2017). A possible solution is that universities need to find ways to close this student debt gap by possibly partnering with the private corporate sector and alumni via their advancement offices. Through which it will solicit funding and seek financial investment for financial sustainability.

The Further Education and Training Act (98 of 1998) provides for the establishment of public and private adult learning centres. And provides for the governance and funding of FET Colleges and matters related to providing a FET college education.

The funding that is provided by the FET Act (98 of 1998) is not enough if one considers the NSFAS initiative. FET Colleague students also need to apply for NSFAS which is not enough to meet the demand.

The Continuing Education and Training Act (16 of 2006).

The National Qualification Framework Act (67 of 2008) provides for the management of the NQF via level dispensations and related matters, as well as for qualifications and quality assurance of qualification required on the sub-frameworks of the NQF.

The Skills Development Levies Act provides for the imposition of skills development levies and matters related thereto.

The Skills Development Act provides for the creation of a National Skills Agency, the establishment of the Quality Council for Trades and Occupations and regulation of apprenticeships and learnerships and matters related to skills development (DHET, 2017).

The above legislative framework by the DHET caters for various aspects and elements of education. But does not effectively speak to the issues of student funding.

2.19 NORTH-WEST UNIVERSITY AS A HIGHER EDUCATION INSTITUTION IN SOUTH AFRICA

The NWU officially came into being on 1 January 2004 as part of the South African government's plan to transform higher education. In the case of North-West University, this saw a historically white university and a historically black university merging to create a new university where South Africans from all walks of life have come together (NWU, 2017).

The merger was between a historically black university namely the University of North-West, whose students were mostly black people from rural communities. The historically white university was the Potchefstroom University for Christian Higher Education, whose students were mostly white Afrikaans people from Christian backgrounds. A third party included in the merger was the Sebokeng Campus of another mainly black university, Vista, whose staff, and students were incorporated (NWU, 2017).

With the above backdrop, the merging of these three institutions to form the North-West University (NWU) was a strong symbolic act of reconciliation and nation-building – and a highly effective one. The transition to the unified NWU has been hailed as one of the most successful and stable higher education mergers in South Africa. Each year since the merger, the NWU has produced a healthy financial surplus, improved student pass rates, increased research output and risen in the corporate governance rankings for South African universities (NWU, 2017).

2.20 THE ADVANCEMENT OFFICE WITHIN NORTH-WEST UNIVERSITY

The advancement office of the NWU is situated in the department of Stakeholder Engagement.

Vision

The vision of the Institutional Advancement Office at the University is to be a centre of institutional financial support through sustainable partnerships and philanthropy, based on creativity, leadership, common values, sound management, and effective deployment of resources (NWU, 2017).

The dream of the North-West University is to be an internationally recognised university in Africa, distinguished for engaged scholarship, social responsiveness, and an ethic of care (NWU, 2018).

The vision of NWU is to be a pre-eminent University in Africa, driven by the pursuit of knowledge and innovation (NWU, 2018).

For NWU to achieve its vision all sub-divisions and departments must be aligned with the overall strategy of the university and its vision. Considering the vision of the advancement office we can see that it is in support of the institutional vision. For NWU to achieve this vision its financial viability must be considered. The advancement office therefore will serve as one of the support divisions that will assist the university in achieving its goals, through means of establishing strategic relationships with stakeholders such as corporates, Alumni, staff and students.

NWU stance on Advancement

Community service and outreach programmes are integral to the University's strategic plan, which is to move from local relevance to local impact. The Institutional Advancement Office works to promote this strategic plan, striving to remain relevant to the current South African context, our situation within the African continent and the varied demands of the University's external clients (NWU, 2017).

The NWU believes that responsible giving starts with individuals, therefore we keep our relationships with our individual donor's one-to-one, drawing on the allegiance of our alumni and cultivating friendships with other philanthropists (NWU, 2017).

The University also actively encourages its students and staff to contribute to the institution, through leadership gifts, memorial giving and several other fundraising initiatives (NWU, 2017).

Fundraising and Donations

The North-West University wants to make a big and lasting impact on an international and national level, and especially in the communities around its campuses. For this, the university needs increasing financial support from interest groups like alumni, friends, the business sector and trusts and foundations (NWU, 2017).

The NWU want to make it as easy as possible for donors to donate money to the university. As an interim measure the university has established the following simplified processes:

1. There is one central fundraising team with representation in Pretoria and Johannesburg.
2. NWU arrange projects under the following umbrella funds:
 - Vice-Chancellor's Fund:
 - All large infrastructure or other strategic projects as established by the vice-chancellor, and that need fundraising that stretches over more than one year.

- The “We Care” Fund:
 - All initiatives in support and upliftment of needy students and communities.
- The Innovation Fund:
 - Projects and spin-off companies that commercialise the university’s patents and other commercial knowledge.
- Other projects:
 - Specific projects that do not fall in the above-mentioned categories, including Flagship and New Horizon projects.

The importance of the above funds is to ensure that there is another form of income for which the purposes of the funds is. These funds are set up for the financial support of students and NWU at large that will speak to the specific needs such as, for example, tuition, food, books, as well as infrastructural developments and maintenance. It will therefore be the mandate of the advancement office to develop marketing campaigns to attract support for these funds. Some of these campaigns can for example be bursary fund campaigns, capital campaigns for infrastructure, food security campaigns and student wellness marketing campaigns.

It will therefore be important if the university management identify strategic projects that need to be pioneered by the advancement office, that will assist the university to curb some of the financial and socio-economic challenges that students may face.

3. Donors are encouraged to make allocated/designated donations in the above-mentioned categories, and the NWU offers to allocate unallocated donations (i.e. donations for discretionary employment) itself.

Through good relationship management by the advancement office with key stakeholders such as corporates in the private sector, funding can be secured if the advancement office implements good strategic marketing strategies. Funders will show interest in projects if the projects speak to the strategies of companies, and that will have to be one of the

functions of the advancement office, to ensure that the needs of the university speak to the strategies of corporates to secure investment.

4. Allocations are handled by the university's management according to the recommendation of the budget committee of the NWU. Those donations will therefore be employed where the biggest need is at that time.

It is therefore important for the advancement office to understand what the needs of the university are and where to focus its efforts in terms of marketing the needs to possible investors.

5. Designated donations are employed according to the donor's preference.

Many times, donors would stipulate what their donations must be used for either through a memorandum of agreement, contracts or guidelines given by them. The role of the advancement office is very important in this regard. The advancement office must adhere to the terms and conditions of the donor. If for example, the donor wishes to donate money to a specific faculty or the business school. Then the advancement office needs to ensure that it is done accordingly. It would be advised that the advancement office supply the donor with a report of how the donation was utilised and who the beneficiaries were perhaps.

6. NWU will issue a Section 18 A tax certificate as per the Income Tax Act, for donations that qualify. Donations that do not qualify for certificates include sponsorships that are given in return for brand exposure and bursaries where the donor chooses/appoints the beneficiaries themselves. In such cases, we would gladly provide written acknowledgement and a receipt for the donation.

The above point would be considered as part of stewarding the relationship with the donor. The advancement office needs to be clear of what the donor wants in return for their donation. The office must ensure that all the correct processes are followed as per the university policies and take responsibility for the tax certificate to be issued to the donor on time.

7. The university gladly accepts unconditional donations.

8. From time to time the university set a minimum donation limit per transaction, considering the bank charges and administrative inputs with the processing and reporting of donations.
9. The NWU also provide certificates on demand that you can use for BBBEE in support of:
 - Skills development (bursaries for needy black students)
 - Business development (innovation donations for businesses of black students)
 - Social development (donations to qualifying community projects of the university)

Some funders require certain documents such as university registration documents, BBBEE certificates and declaration of authorities signed by the registrar. The Advancement office should have all these documents to ensure that there is streamlined processing of donations and all transactions are legal and compliant with policies and national laws of South Africa.

With all the above in mind, it is evident that the university has put in place all legislative measures such as a fundraising policy and a stewardship policy as well as an alumni relations policy and have made resources available such as the appointment of a fundraising director, fundraisers, and a donor administrator. The South African government has also taken several steps to redress the imbalances of the pre-1994 government of South Africa. Various former colleges and Technikons have merged to form new comprehensive universities as part of making education accessible to many others. However, the fundamental underlying issue of all the above actions is financial sustainability and affordability of education for many people. People have the right to have an education, but not necessarily have access due to affordability. Therefore, to meet the shortfall that government cannot provide to universities. The universities need to take action necessary steps to stay operationally functional and to keep education affordable at the same time. An Advancement office in any university would be the custodian of working towards increasing third-stream income to sustain functions and or resources such as infrastructural development, keeping tuition at an affordable rate, funding for projects, expansion of the university. This will be done by active fundraising through the

advancement office through capital campaigns for infrastructural developments, bursary campaigns, benefit events, and by engaging various stakeholders to ensure that there is additional income for the university.

2.21 SUMMARY OF CHAPTER

Chapter 2 explores and defines the theoretical framework that guides the direction of any research study in the field of advancement at higher education institutions. An overview of the role, existence and importance of an advancement office is given.

The main aim of the literature study was to gather information to establish whether an existing measuring instrument can be used for data gathering or whether it would be advisable to develop a new one. Chapter two also provides an overview of the environments in which the research is being conducted with a focus on the university being researched. It highlights the mandate and legislative framework in which the higher education institution functions as well as the mandate of the department of higher education.

CHAPTER THREE (3): RESEARCH DESIGN AND METHODOLOGY

3.1 INTRODUCTION

The main objective of this chapter is to give an overview of the research process, which includes the research methodology that was used during the empirical research process. The questionnaire contained a cover letter which indicated that the survey was conducted for academic research to investigate the importance of an advancement office at a South African university. This was ensured by not asking for any identifiable information. Participants were asked to complete the questionnaires via Survey Monkey.

3.2 SUMMARY OF RESEARCH QUESTIONS

The following research questions are addressed through the study that is being undertaken namely:

- The role of the Alumni unit in Advancement.
- The role of the Vice-Chancellor in Advancement.
- Importance of Advancement in the university.
- The importance of advancement activities in the university

3.3 OVERVIEW OF THE STUDY

The main source of income for any South African university, are student fees (Tuition and Residence) state subsidies and grants. State subsidies have diminished over the last ten years and the inability of universities to bring their student fees in line with historically advantaged institutions creates the urgency to enhance third-stream income as the size of most universities has also increased in recent years.

Third- stream income forms a small part of most institutions' income stream. However, there are opportunities to improve the third-stream income. This is an area that an advancement office will focus on, by developing an institutional fundraising plan and strategy that will seek to address the shortfalls of the institution. The pressing need for the establishment of advancement offices across South African universities has thus grown as more universities are moving towards setting up offices.

It is with this backdrop that this research seeks to establish why it is important to have advancement offices set up in universities.

3.4 RESEARCH APPROACH

There are various approaches for researchers to capture the needed information, and two main distinguishable research designs, namely qualitative and quantitative approaches.

A qualitative approach is a descriptive form of research rather than a particular design or set of techniques (Welman *et al.*, 2010:188). Qualitative studies can be used in the description of groups, communities, and organisations. Qualitative studies may lend themselves to study cases that do not fit into theories (Welman *et al.*, 2010:188). On the other hand, quantitative studies are a more objective approach and seek precise measurement and analysis of target groups (Welman *et al.*, 2010:188).

The purpose of quantitative research is to evaluate objective data consisting of numbers, while qualitative research deals with subjective data that are produced by the thoughts of respondents or interviewees (Welman *et al.*, 2010:188).

The researcher chose the quantitative approach to objectively meet the research objectives. The intent was to get as many responses as possible within the timeframe available for this research.

3.5 POPULATION

Leedy and Ormrod (2013:206) suggest that the researcher that is conducting the study may have to describe one or more attributes of a decently sizable population. A group of the population that was generalised from the attained results.

The focused study population was the advancement offices of other South African universities. The population consisted of advanced practitioners of universities such as donor researchers, fundraising officers, advancement managers, stewardship managers as well as deans of faculties, heads of sports, managers of student governance and student financial aid. The researcher had limited time to meet with the population and therefore distributed questionnaires electronically via a survey using survey monkey. The

population consisted of 200 participants with a response rate of 38. The respondents that completed the questionnaire formed the sub-population that was studied in the research; they will be the study population. The entire study population was included in the study. The survey was done through a questionnaire.

3.6 SAMPLE

White (2014:77) postulates that a sample can be seen as a group of subjects or situations selected from a larger population to be part of the research.

According to Watkins (2015:109), it is necessary to demarcate the target population, which can be defined as the entire group a researcher is interested in.

In this study, the advancement offices of 10 public higher education institutions in South Africa was approached to support the anticipated critical success factors identified from the managements' perspectives of such departments or entities within other institutions. The various heads, directors, managers, presidents, and fundraising practitioners of those advancement offices were requested to participate in the study and complete the questionnaire.

The questionnaire deals with some basic questions and statements in terms of the role, functioning and existence of an advancement office at a public higher education institution. Through factor analysis, certain factors or dimensions were identified that support the role, functioning and existence of such entities within public higher education institutions.

The questionnaire was forwarded to 80 advancement practitioners at 10 public universities in South Africa. The excluded institution was North-West University. The reason for its exclusion was that management perspectives from all other institutions were requested ultimately to assess the anticipated critical success factors and how they influence the role, existence, and responsibilities of the advancement office at a South African university. North-West university is merely used as a point of reference due to the experience of the researcher with the said university and not as the institution being used for the research.

A total of 80 questionnaires were sent to 10 local public universities of which 38 responses were received. They were used to assess the importance of an advancement office through the perceptions gained from the management's perspectives of an advancement office at a public higher education institution.

The following public higher education institutions were approached and participated in the research study:

- University of Cape Town
- University of KwaZulu-Natal
- University of Pretoria
- Rhodes University
- University of the Western Cape
- University of the Witwatersrand
- University of Stellenbosch
- University of Johannesburg
- Walter Sisulu University
- Tshwane University of Technology

3.7 DATA COLLECTION METHOD

White (2014:88) states that a questionnaire is an instrument with open or closed questions or statements to which a respondent should respond. Different kinds of questionnaires can be distinguished, such as mailed or posted questionnaires, telephonic questionnaires, or group questionnaires. The questionnaire is a quantitative data collection tool.

Questionnaires were used in this study to gather the necessary data that relate to the objective and problem statement mentioned in Chapter 1. The questions posed to the participants were formulated in such a manner that they measured the anticipated research objectives discussed in Chapter 2, which have been identified for the existence, role and responsibilities of such a department or entity at any institution.

The questionnaires were forwarded electronically to the offices that carry out the fundraising activities at the 10 institutions identified. Only staff members who are well-

informed and have experience in fundraising activities were requested, through the manager or director of the department, to complete the questionnaires.

3.8 THE MEASURING INSTRUMENT

The survey was created using survey monkey (www.surveymonkey.com). The survey was distributed to the study population electronically by sharing the link to the survey via email. The following link (<https://www.surveymonkey.com/r/V9HVVVD>) gave the population access to the survey.

Some typical information that the survey asked for was Biographical information such as gender, age, home language, place of employment, level of employment in terms of rank or seniority and years of employment in the higher education sector. Twenty-Five questions were asked relating to the study goal. The questions were given in the form of statements of which participants had to choose a number between 1 and 4 which indicated the following scale:

1 = Strongly disagree; 2 = Disagree 3 = Agree 4 =Strongly agree

Please see Appendix A for the questionnaire.

3.9 DATA ANALYSIS APPROACH

The data collected was coded first in an Excel spreadsheet and imported into Statistical Package for Social Science (SPSS) 23 software for statistical analysis. Descriptive statistics were performed for demographic data and for the measurement instruments used to collect the data.

3.10 SUMMARY OF CHAPTER

This chapter aimed to reflect on the research design, the sample, collection method, measuring instrument, statistical methodology and the limitations of the study. The latter clearly define the necessary methods and approaches to be followed, to measure and arrive at certain outcomes in the following chapter.

It is necessary to identify the methods used to gather useful data, stipulating the techniques to be followed to measure variables and to ultimately have data or information

available that is useful to the study. The next chapter that focuses on data analysis will provide the descriptive statistics for the demographic data and the survey questionnaire. The importance of the critical success factors crucial for a fundraising office at any public higher education institution will be provided in the research findings.

CHAPTER FOUR (4): DATA ANALYSIS AND RESULTS INTERPRETATION

4.1 INTRODUCTION

Chapter 3 discusses the methods and techniques that were used to obtain the findings that will be presented in this chapter. This chapter presents and discusses the findings that were obtained through empirical research. This chapter presents the statistical analysis of data that was acquired through the data collection tool (research questionnaire). To analyse the data, the SPSS 23 was utilised. In this chapter, descriptive statistics was discussed based on the response provided to the questionnaire. As indicated previously, the questionnaire was sent out to 80 advancement practitioners at 10 public South African universities, of which only 38 responded. The response rate therefore is 48%.

4.2 DEMOGRAPHIC DATA

The first five Tables (Table 1 – 5) present the demographic data analysis. In particular, the study provides the respondents' gender, language, age, employer, and employment levels. The frequency tables are provided with statistical figures for comparative analysis.

Table 1: Indicate your gender

Gender				
		Frequency	Percent	Valid Percent
Valid	Female	20	52.6	52.6
	Male	17	44.7	44.7
	Would prefer not to disclose	1	2.6	2.6
	Total	38	100.0	100.0

The table above shows the gender results of the participants who participated in the study. Most of the participants were female represented by (52.6%). This was followed by males constituting about (44.7%) and the remainder (2.6%) preferred not to disclose, respectively.

Table 2: Indicate your home language

Home Language				
		Frequency	Percent	Valid Percent
Valid	Afrikaans	8	21.1	21.1
	English	19	50.0	50.0
	IsiNdebele	1	2.6	2.6
	IsiXhosa	6	15.8	15.8
	IsiZulu	2	5.3	5.3
	Other	2	5.3	5.3
	Total	38	100.0	100.0

Table 2 above shows the home language results of the participants who participated in the study. Half of the participants use English as their home language represented by 50%. This was followed by those who use Afrikaans constitute (21.1 %), those who use isiXhosa (15.8%), those who use IsiZulu and other home languages represented by (5.3%) and the remainder (2.6%) use IsiNdebele home language, respectively.

Table 3: Indicate your age

Age Group				
		Frequency	Percent	Valid Percent
Valid	26-30 years	4	10.5	10.5

	31-35 years	5	13.2	13.2
	36-49 years	8	21.1	21.1
	41-45 years	7	18.4	18.4
	46-50 years	7	18.4	18.4
	51-55years	3	7.9	7.9
	56-60 years	1	2.6	2.6
	60 and older	3	7.9	7.9
	Total	38	100.0	100.0

Table 3 above shows the age results of the participants who participated in the study. Most of the participants were between the age of 36-49 years represented by (21.1%). This was followed by those who between 41-45 years and 46-50 years constitute 18.4 %, those who between 31-35 years (13.2%), those who between 26-30 years represented by 10.5%, those between 51-55 years and 60 years and older representing (7.9%) and the remainder (2.6%) between 56-60 years, respectively.

Table 4: Identify the higher education institution where you are employed.

Employer				
		Frequency	Percent	Valid Percent
Valid	Stellenbosch University	2	5.3	5.6
	Tshwane University of Technology	5	13.2	13.9
	University of the Western Cape	4	10.5	11.1
	Rhodes University	8	21.1	22.2
	University of the Witwatersrand	6	15.8	16.7

	University of Kwa-Zulu Natal	4	10.5	11.1
	Walter Sisulu University	7	18.4	19.4
	Total	38	100.0	100.0
Total		38	100.0	100.0

Table 4 above shows the higher education employed results. Most of the participants were employed by Rhodes University (21.1%). Those employed by Walter Sisulu University represented 18.4% of respondents, the third group that constituted 15.8% are those employed by the University of Witwatersrand. This was followed by those employed by the Tshwane University of Technology (13.2%), while those employed by the University of Western Cape and the University of Kwa-Zulu Natal represented (10.5%) and the last group represents those employed by Stellenbosch University constituted (5.3%) respectively.

Table 5: Indicate your level of employment at your institution.

Employment Levels				
		Frequency	Percent	Valid Percent
Valid	Senior management	11	28.9	30.6
	Middle management	9	23.7	25.0
	Junior management	8	21.1	22.2
	Other	8	21.1	22.2
	Total	36	94.7	100.0
Total		38	100.0	

As observed in table 5 above, the level of employment of the participants in the study is indicated. Most of the participants were at the senior management level represented by (28.9%). This was followed by those at the middle management level constituting (23.7%) and the remainder 21.1% were those at junior and other levels of employment, respectively. 2 respondents chose not to disclose their agreeability for this question.

4.3 DESCRIPTIVE STATISTICS – MEASUREMENT INSTRUMENTS

Table 6 – 24, provided below provide the results on the measurement instruments used in this study. The instruments focused on the advancement office, alumni office, and the office of the University Vice-Chancellor. The frequencies and percentages related to how the participants responded are provided below.

Table 6: Given the size of universities, it is not critical that the advancement office is well-staffed, because of a high number of employees with advancement skills in other departments.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	19	50.0	55.9
	Disagree	11	28.9	32.4
	Agree	3	7.9	8.8
	Strongly Agree	1	2.6	2.9
	Total	34	89.5	100.0
Total		38	100.0	

As observed in Table 6. Most of the participants strongly disagreed with the statement that “it is not critical that the advancement office is well-staffed, because of a high number of employees with advancement skills in other departments” 50%). Those who disagreed with the statement followed this (28.9%). (7.9%) agreed and (2.6%) strongly agreed with the statement respectively. 4 respondents chose not to disclose their agreeability for this question.

Table 7: It is important to be in close proximity to other support functions in the university.

Location of Advancement Office				
		Frequency	Percent	Valid Percent
Valid	Disagree	3	7.9	8.6
	Agree	14	36.8	40.0
	Strongly agree	18	47.4	51.4
	Total	35	92.1	100.0
Missing	System	3	7.9	
Total		38	100.0	

As observed in Table 7, above show the results on the statement that “It is important to be located in close proximity to other support functions in the university”. Most of the participants strongly agreed with the statement that “it is important to be located in close proximity to other support functions in the university.” (47.4%). Those who agreed with the statement followed this (36.8%) and (7.9%) disagreed with the statement respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 8: Investment of financial resources into the advancement office is not important, because it is seen as the fundraising arm of the university.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	17	44.7	48.6
	Disagree	13	34.2	37.1
	Agree	3	7.9	8.6
	Strongly Agree	2	5.3	5.7
	Total	35	92.1	100.0

Total	38	100.0	
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As observed in Table 8, Most of the participants strongly disagreed with the statement (44.7%). Those who disagreed with the statement followed this (34.2%), those who agreed (7.9%) and (5.3%) strongly agreed with the statement respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 9: Fundraising by a consultant will tarnish the reputation of the university.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	2	5.3	5.7
	Disagree	15	39.5	42.9
	Agree	11	28.9	31.4
	Strongly agree	7	18.4	20.0
	Total	35	92.1	100.0
Total		38	100.0	

Table 9, above show the results that majority of the participants disagreed with the statement (39.5%). Those who agreed with the statement followed this (28.9%), those who strongly agreed (18.4%) and lastly (5.3%) strongly disagreed with the statement respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 10: Maintaining relationships with strategic stakeholders will lead to mutually beneficial partnerships.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	3	7.9	8.6

	Agree	6	15.8	17.1
	Strongly agree	26	68.4	74.3
	Total	35	92.1	100.0
Total		38	100.0	

Table 10, above show the results on the statement that “Maintaining relationships with strategic stakeholders will lead to mutually beneficial partnerships”. The majority of the participants strongly agreed with the statement (68.4%). Those who agreed with the statement followed this (15.8%) and the reminder (7.9%) strongly disagreed with the statement respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 11: In your experience, the role of an advancement office is of the utmost importance for any higher education institution.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	1	2.6	2.9
	Disagree	1	2.6	2.9
	Agree	9	23.7	25.7
	Strongly agree	24	63.2	68.6
	Total	35	92.1	100.0
Total		38	100.0	

Table 11, above show the results on the statement that majority of the participants strongly agreed with the statement (63.2%). Those who agreed with the statement followed this (23.7%) and the reminder (2.9%) strongly disagreed and disagree with the statement, respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 12: The advancement office is the engine of the university strategy.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	1	2.6	2.9
	Disagree	1	2.6	2.9
	Agree	11	28.9	31.4
	Strongly agree	22	57.9	62.9
	Total	35	92.1	100.0
Total		38	100.0	

Table 12, above show the results of the statement that most of the participants strongly agreed with the statement (57.9%). Those who agreed with the statement followed (28.9%) and lastly, (2.6%) strongly disagreed and disagree with the statement, respectively. 3 respondents chose not to disclose their agreeability for this question.

Table13: Senior management does not have to be involved in the activities of the advancement office.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	20	52.6	57.1
	Disagree	11	28.9	31.4
	Agree	2	5.3	5.7
	Strongly Agree	2	5.3	5.7
	Total	35	92.1	100.0
Total		38	100.0	

Table 13 above show the results on the statement that most of the participants strongly disagreed with the statement (52.6%). This was followed by those who disagreed (28.9%) and (5.3%) agreed and strongly disagree with the statement. 3 respondents chose not to disclose their agreeability for this question.

Table 14: All advancement related activities should be centralised in the advancement office.

		Frequency	Percent	Valid Percent
Valid	Disagree	6	15.8	17.1
	Agree	13	34.2	37.1
	Strongly agree	16	42.1	45.7
	Total	35	92.1	100.0
Total		38	100.0	

Table 14 above show the results that most of the participants strongly agreed with the statement (42.1%). This was followed by those who agreed with the statement (34.2%) and (15.8%) disagreed with the statement respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 15: The core function of advancement is to mobilise resources to secure financial sustainability of the university.

		Frequency	Percent	Valid Percent
Valid	Disagree	3	7.9	8.6
	Agree	18	47.4	51.4
	Strongly agree	14	36.8	40.0
	Total	35	92.1	100.0

Total	38	100.0	
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As observed in Table 15 above. Most participants agreed with the statement (47.4%). This was followed by those who strongly agreed constituted (36.8%) and finally, (7.9%) disagreed with the statement respectively. 3 respondents chose not to disclose their agreeability for this question.

Table 16: Communication is critical between advancement and internal stakeholders.

		Frequency	Percent	Valid Percent
Valid	Disagree	1	2.6	2.9
	Agree	8	21.1	23.5
	Strongly Agree	25	65.8	73.5
	Total	34	89.5	100.0
Total		38	100.0	

As observed in Table 16 above, that show results on the statement that “Communication is critical between advancement and internal stakeholders” Most participants agreed with the statement (21.1%). This was followed by those who strongly agreed (65.8%) and finally (2.6%) who disagreed with the statement respectively. 4 respondents chose not to disclose their agreeability for this question.

Table 17: The Vice-Chancellor should be the chief fundraiser at your institution.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	1	2.6	2.9
	Disagree	5	13.2	14.7

	Agree	6	15.8	17.6
	Strongly agree	22	57.9	64.7
	Total	34	89.5	100.0
Total		38	100.0	

Table 17 above show the results of the statement that majority of the participants strongly agreed with the statement (57.9%). This was followed by those who agreed with the statement (15.8%) and (13.2%) disagreed and (2.6%) strongly disagree with the statement respectively. 4 respondents chose not to disclose their agreeability for this question.

Table 18: An advancement office does not have to exist in your university.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	25	65.8	73.5
	Disagree	9	34.2	26.5
	Total	34	100.0	100.0
Total		38	100.0	

Table 18 above show the results on the statement that most of the participants strongly disagreed with the statement (65.8%). The remainder (34.2%) disagreed with the statement respectively. 4 respondents chose not to disclose their agreeability for this question.

Table 19: Specific donor funding can be used for any other projects.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	23	60.5	67.6
	Disagree	7	18.4	20.6
	Agree	2	5.3	5.9
	Strongly agree	2	5.3	5.9
	Total	34	89.5	100.0
Total		38	100.0	

Table 19 above show the results on the statement that “Specific donor funding can be used for any other projects”. Most of the participants strongly disagreed with the statement (60.5%). This was followed by those who disagreed with the statement (18.4%) and 5.3% agreed and strongly agree with the statement. 4 respondents chose not to disclose their agreeability for this question.

Table 20: Securing additional funding from the private sector is important for the future existence of any higher education institution in South Africa.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	22	57.9	64.7
	Disagree	10	26.3	29.4
	Agree	1	2.6	2.9
	Strongly agree	1	2.6	2.9
	Total	34	89.5	100.0
Total		38	100.0	

Table 20 above show the results on the statement that “: Securing additional funding from the private sector is important for the future existence of any higher education institution in South Africa”. Most of the participants strongly disagreed with the statement (57.9%). This was followed by those who disagreed with the statement (26.3%) and 2.6% agreed and strongly agree with the statement, respectively. 4 respondents chose not to disclose their agreeability for this question.

Table 21: Alumni relations should be independent of the advancement office.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	13	34.2	38.2
	Disagree	16	42.1	47.1
	Agree	4	10.5	11.8
	Strongly agree	1	13.1	2.9
	Total	34	89.5	100.0
Total		38	100.0	

Table 21 above show the results on the statement that most of the participants disagreed with the statement (42.1%). This was followed by those who strongly disagreed with the statement (34.2%) and (13.1%) strongly agreed that Alumni Relations should be independent of the Advancement office and (10.5%) agreed with the statement, respectively. 4 respondents chose not to disclose their agreeability for this question.

Table 22: Alumni can open doors for advancement practitioners in the private sector.

		Frequency	Percent	Valid Percent
Valid	Disagree	5	26.4	15.2
	Agree	16	42.1	48.5

	Strongly agree	12	31.6	36.4
	Total	38	100.0	100.0
Total		38	100.0	

Table 22 above show the results on the statement that most of the participants agreed with the statement (42.1%). This was followed by those who strongly agreed with the statement (31.6%) and (26.4%) disagreed that alumni can open doors for advancement practitioners in the private sector, respectively.

Table 23: Alumni can drive the advancement strategy of the university.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	1	13.1	2.9
	Disagree	10	26.3	29.4
	Agree	15	39.5	44.1
	Strongly agree	8	21.1	23.5
	Total	38	100.0	100.0
Total		38	100.0	

Table 23 above show the results on the statement that “Alumni can drive the advancement strategy of the university”. The majority of the participants agreed with the statement (39.5%). This was followed by those who disagreed with the statement (26.3%), (21.1%) strongly agreed and (13.1%) strongly disagreed.

Table 24: The advancement office should distance itself from alumni relations.

		Frequency	Percent	Valid Percent
Valid	Strongly disagree	21	55.3	61.8
	Disagree	11	28.9	32.4
	Agree	2	15.7	5.9
	Total	38	100.0	100.0
Total		38	100.0	

Table 24 above show the results on the statement that “The advancement office should distance itself from alumni relations”. Most of the participants strongly disagreed with the statement (55.3%). This was followed by those who disagreed with the statement (28.9%) and (5.7%) strongly disagreed

4.4 RELIABILITY TESTING

The data analysis uses techniques discussed earlier. The researcher used tables to present the results as seen in 4.3 above. Reliability and validity are central issues in all measurements, and both are concerned how measures are connected to constructs (Kopung, 2016: 157).

Validity is concerned with the extent to which an instrument measures what it is intended to measure, while reliability is about the ability of an instrument to measure consistently. It is imperative to calculate and report Cronbach’s coefficient when using Likert-type scales (Taber, 2017: 34). Bryman and Bell (2015: 164) argue that Cronbach’s alpha is commonly used to test internal reliability. Alpha coefficient varies between 1 and 0 with 1 denoting perfect reliability and 0 no internal reliability.

However, Chinomona and Cheng (2012) suggest that the acceptable values range from 0.60 to 0.80. A low value of alpha could be due to low number of questions, poor

interrelatedness between items or heterogeneous construct. The measurement of reliability is based on the Cronbach's instrument and Means Inter item.

Based on the acceptable values suggested by Chinomona and Cheng (2012: 47). The tables below reflects that there are acceptable levels of internal reliability.

Reliability Assessment of Measurement Instruments

Importance of Advancement in the university

Reliability Statistics		
Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.756	.766	5

	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
B12	2.710	.790	.719
B14	2.201	.612	.752
B15	3.013	.844	.701
B3	2.481	.719	.714
B4	1.840	.726	.726

The results above indicate that the reliability of the five instruments (B3, B4, B12, B14, B15) used to measure the importance of advancement in the university and has a Cronbach Alpha value of 0.766. Since this value is above the 0.6 – the acceptable threshold recommended by Chinomona & Cheng, (2012: 48), it can be concluded the all the measurement instruments used to measure the importance of advancement in the university are reliable measures. The Corrected Item to Total Correlation statistics for all the four items is above 0.5 which implies that all the measurement instruments are

converging well on what they are supposed to measure hence convergent validity (Hair *et al.*, 2016: 34).

The role of the Vice-Chancellor in Advancement

Reliability Statistics		
Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.701	.708	4

	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
B1	1.547	.697	.672
B2	1.951	.620	.700
B5	1.487	.731	.649
B13	1.758	.829	.633

The results above indicate that the reliability of the four instruments (B1, B2, B5, B13) used to measure the role of the Vice-Chancellor in advancement has a Cronbach Alpha value of 0.708. Since this value is above the 0.6 – the acceptable threshold recommended by Chinomona & Cheng, (2012: 48), it can be concluded the all the measurement instruments used to measure the role of the Vice-Chancellor in advancement are reliable measures. The Corrected Item to Total Correlation statistics for all the four items is above 0.5 which implies that all the measurement instruments are converging well on what they are supposed to measure hence convergent validity (Hair *et al.*, 2016: 34).

Importance of Advancement activities in the university

Reliability Statistics		
Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.736	.754	6

	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
B6	2.196	.826	.667
B7	2.378	.751	.733
B9	2.047	.746	.724
B10	2.670	.633	.753
B11	2.728	.764	.742
B8	4.379	.890	.678

The results above indicate that the reliability of the six instruments (B6, B7, B8, B9, B10, B11) used to measure advancement office activities in the university, has a Cronbach Alpha value of 0.754. Since this value is above the 0.6 – the acceptable threshold recommended by Chinomona & Cheng, (2012: 48), it can be concluded the all the measurement instruments used to measure advancement office activities in the university are reliable measures. The Corrected Item to Total Correlation statistics for all the four items is above 0.5 which implies that all the measurement instruments are converging well on what they are supposed to measure hence convergent validity (Hair *et al.*, 2016: 34).

The Role of the alumni office in fundraising activities of the advancement office

Reliability Statistics		
Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
.775	.782	4

	Scale Variance if Item Deleted	Corrected Item-Total Correlation	Cronbach's Alpha if Item Deleted
B16	1.570	.815	.619
B17	1.648	.773	.722
B18	1.881	.849	.623
B19	1.820	.723	.776

The results above indicate that the reliability of the four instruments used to measure the role of the alumni office in the fundraising activities of the advancement office has a Cronbach Alpha value of 0.782. Since this value is above the 0.6 – the acceptable threshold recommended by Chinomona & Cheng, (2012: 48), it can be concluded the all the measurement instruments used to measure the role of the alumni office in the fundraising activities of the advancement office are reliable measures. The Corrected Item to Total Correlation statistics for all the four items is above 0.5 which implies that all the measurement instruments are converging well on what they are supposed to measure hence convergent validity (Hair *et al.*, 2016: 34).

CHAPTER FIVE (5): DISCUSSION, RECOMMENDATIONS, CONCLUSIONS AND AREAS FOR FUTURE RESEARCH

5.1. INTRODUCTION

The main purpose of this study is to determine and identify empirically the perceptions of management and fundraising practitioners at other public higher education institutions in South Africa on the role, importance, and existence of an advancement office. Through determining the perceptions on the existence, role, and responsibilities of such an office, critical success factors contributing to the success of such an office will be identified.

The purpose of this chapter is to make deductions from the results presented in the Data Analysis and Results Chapter. The chapter will first provide an overview of the findings. Herein, major findings of the study are reviewed once more. Thereafter, the implications that findings have on the current study are described. The Chapter will also provide the Conclusion and Recommendations to this study based on the research findings.

5.2. DISCUSSION OF THE OVERALL FINDINGS

The current study sought to examine the functions and relationship between the university and the advancement office, financial investment and fundraising, strategic stakeholder relationship, advancement office activities, and alumni office activities and relations.

5.3. RESEARCH OBJECTIVE 1: THE IMPORTANCE OF AN ADVANCEMENT OFFICE IN THE UNIVERSITY.

On the issue of instruments related to functions and the relationship between the university and the advancement office, five questions were asked. These measurement instruments are represented in Tables 9, 10, 18, 20 and 21 of Chapter 4. These questions, by and large, focused on perceptions regarding university size and relationship with advancement office employees' skills; the proximity of critical offices to other support functions in the university; the importance of the advancement office to the existence of the university and finally the relevance of relationship maintenance between the university and other strategic stakeholders.

Drawing from the research findings regarding the university size and the advancement office, the current study observes that the response of more than 78% of the respondents indicate that there should be an association between the university size and the number of employees with advanced skills in the advancement office at the university. This finding is in tandem with the usual practice at many international universities and is often most observed or supported in the literature.

Furthermore, based on the current study findings on the proximity of critical offices to other support functions in the university, it observed that more than 83% of the respondents support the notion that critical offices at the university should be closely situated next to each other. Perhaps, this perception could be closely knitted to the “one-stop-shop” concept whereby customers or clients prefer to get related products and services in one place for convenience’s sake.

Based on the findings related to the respondents’ opinions on the importance of the advancement office to the existence of the university, this study found out that more than 86% of the respondents think that the advancement office is the engine of the university strategy. Perhaps given the paramount importance of the advancement office that include resource mobilisation, this research finding validated it.

Deducing from the current study findings presented in the data analysis chapter, when asked about the relevance of relationship maintenance between the university and other strategic stakeholders, more than 82% of the respondents believe that ‘maintaining relationships with strategic stakeholders will lead to mutually beneficial partnerships at the university. This assertion is buttressed by the stakeholder theory in the empirical literature. According to stakeholder theory, the interconnected relationships between a business and its customers, suppliers, employees, investors, communities, and others who have a stake in the organization facilitate value creation for all (Freeman, 2016).

The conclusions made to this objective is captured and linked to the literature in chapter 2 under 2.2 and 2.12. It is eluded in chapter 2 that the existence of an advancement office in a university is important and the results as per the tables listed above confirm this. The researcher therefore concurs with Gastrow (2018) that the existence of an advancement office is critical in order for a university to meet its funding shortfalls.

5.4. RESEARCH OBJECTIVE 2: THE ROLE OF THE VICE-CHANCELLOR IN ADVANCEMENT.

On the issue of financial investment and fundraising, four questions were asked. These measurement instruments are represented in Tables 7, 8, 11 and 19 in Chapter 4. These questions by and large focused on the role played by the Vice-Chancellor as the chief fundraiser, donor funding of university projects, the importance of securing funding from the private sector, investment and financial resources from the advancement office and the effects of fundraising by a private consultant.

Based on the research findings regarding the role played by the Vice-Chancellor as the chief fundraiser, the current study found out that more than (72%) of the respondents either agreed or strongly agreed that the Vice-Chancellor should be the chief fundraiser at the university or institution. Such a find could be informed by the fact, it is not a unique practice at many universities across the globe that Vice-Chancellors are actively involved in leading and instituting a culture of external resources fundraising. Thus, this study finding is in line with the standard practice at many universities.

Furthermore, drawing from the current study findings on donor funding of university projects, it can be noted that more than (78%) of the respondents do not believe that 'specific donor funding can be used for any other projects.' This research finding is surprising. This is so because donor funding is usually tied to specific projects of interest to the donors. Perhaps, this perception could imply that the respondents prefer a situation whereby all sourced funds are pulled together to a central fund where they will be further disbursed based on university priorities at any given time.

When asked about the importance of securing funding from the private sector, more than (83%) of the respondents believe that 'securing additional funding from the private sector is important for the future existence of any higher education institution in South Africa.' This study finding is not unique at all, since most universities sustain their operations – especially research projects that require huge financial injections over a protracted period.

Regarding the investment and financial resources from the advance office, more than (78%) of the respondents think that investment of financial resources into the

advancement office is important, although it is seen as the fundraising arm of the university. This finding could be informed by the fact that although the advance office could be a fundraising arm of the university, it must be also well resourced such that it can perform its functions with efficacy.

Deducing from the current study findings presented in the data analysis chapter, when asked about whether 'fundraising by a consultant will tarnish the reputation of the university' the respondents were almost split on the half (44:47), but with a slight majority asserting that fundraising by a private consultant might tarnish the university reputation. This finding is interesting indeed. Perhaps those respondents that do not believe that fundraising by a private consultant on behalf of the university is acceptable could be informed by the fact that private consultants are often most regarded to be more efficient and effective in doing their work compared to internal university entities that may be affected by perhaps organisational politics. However, that said, a slight majority of the respondents still believe that contracting a private consultant might damage the reputation of a university – perhaps too, because the university will hardly control the activities and operations of the consultants, hence exposing it to potential reputational risk.

Gastrow (2018:45), states that it is good for a Vice-Chancellor to be involved and to cultivate a culture of fundraising, but it can only be a success if the entire institution buys into the culture of philanthropy. Therefore, the role of the Vice-Chancellor seems critical to the support and operations of an advancement office. The advancement office will support the execution of the strategy of the university to achieve its vision and strategic objectives. Hence there needs to be a close link between the advancement office and the office of the Vice-Chancellor. It can therefore be argued that the Vice-Chancellor is capable of so much more under the position that the person holds in terms of enhancing private sector donations to the institution as well as international donations.

There is a strong link between what the literature reveals and what the results have implied. It confirms that the Vice-Chancellor plays a critical role in the execution of advancement activities, by taking on the role of "chief fundraiser". It demonstrates that the advancement office will do all the necessary work setting up meetings between the Vice-Chancellor and senior executives of corporates, where the VC will have to spearhead projects of interest with these corporate executives.

5.5. RESEARCH OBJECTIVE 3: IMPORTANCE OF ADVANCEMENT OFFICE ACTIVITIES IN THE UNIVERSITY.

On the issue of instruments related to advancement office activities, six questions were asked. These measurement instruments are represented in Tables 12, 13, 14, 15, 16 and 17. These questions, by and large, focused on the importance of advancement office at the institution of higher education, the role of advancement office in university strategy, the role of senior management in the advancement office, centralisation of the advancement office, resource mobilisation by advancement office and advancement office and internal stakeholder communication.

Drawing from the research findings regarding the role of advancement office at the institution of higher education, the current study observes that the response of more than (86%) of the respondents indicate that the 'role of an advancement office is of the utmost importance for any higher education institution'. This finding is in line with the usual practice at many universities in South Africa.

Based on the findings related to the respondents' opinions on the role of advancement office in university strategy, this study found out that more than (85%) of the respondents think that the 'the advancement office is the engine of the university strategy.' Perhaps given the paramount importance of the advancement office that include resource mobilisation, it is critically important that the university strategy should include the advancement office activities.

Furthermore, based on the current study findings on senior management involvement in the activities of the advancement office, it observed that more than 80% of the respondents support the notion that senior management should be involved in the advancement office activities. Perhaps, this perception could be influenced by the fact that since the advancement office is critically important in the fundraising of resources, then the involvement of senior management is imperative in that regard.

Based on the findings related to the respondents' opinions on the centralisation of the advancement office, this study found out that more than (76%) of the respondents think that 'all advancement related activities should be centralised in the advancement office.' Perhaps given the paramount importance of the advancement office that include resource

mobilisation, centralisation will ensure control of the activities to achieve the desired goals.

Deducing from the current study findings, when asked about the resource mobilisation by the advancement office, more than (83%) of the respondents believe that ‘the core function of advancement is to mobilise resources to secure the financial sustainability of the university.’ Given the centrality and importance of the office and the highly skilled manpower in the office, perhaps, situating the resource mobilisation in this office makes logical sense.

Drawing from the research findings regarding the advancement office and internal stakeholder communication, the current study observes that the response of more than (76%) of the respondents indicate that ‘communication is critical between advancement and internal stakeholder.’ This finding is in line with the usual practice at many universities in South Africa. The literature in chapter 2 highlights that it is critical for the advancement office to engage with other necessary offices within the university to address the financial shortfalls that the university is faced with. It is therefore important that the activities of the advancement office are in line with the needs of the university and the overall strategic objectives of the institution. There is therefore no doubt as revealed by the results and the literature that the activities of the advancement office are critical to the financial sustainability of the university. These activities as shown in chapter 2 includes stakeholder engagement, donor events, marketing, and communication through newsletters and publications and invitations to strategic events.

5.6. RESEARCH OBJECTIVE 4: THE ROLE OF THE ALUMNI OFFICE IN THE FUNDRAISING ACTIVITIES OF THE ADVANCEMENT OFFICE.

On the issue of instruments related to advancement office activities, four questions were asked. These measurement instruments are represented in Tables 22, 23, 24, and 25. These questions by and large focused on the independence of the alumni office from the advancement office, alumni office and advancement office practitioners, alumni office and advancement office strategy and the relationship between the alumni office and the advancement office.

Based on the research findings regarding the independence of the alumni office from the advancement office, the current study observes that the response of more than 76% of the respondents believe that the ‘alumni relations office should not be independent of the advancement office.’ This finding is interesting and logical given that most Alumni are usually interested in contributing to the development of their former universities – linking the Alumni office with the advancement office that is responsible for resource mobilisation will be a strategic positive alignment.

Drawing from the research findings related to the respondents’ opinions on the alumni office and advancement office practitioners, this study found out that more than 73% of the respondents think that the ‘alumni office can open doors for advancement practitioners in the private sector.’ Perhaps given that many Alumni end up working in the private sector where universities might end up sourcing funding for their projects, it would make logical sense for the advancement office to keep its doors open to their Alumni in the private sector.

The current study findings on alumni office and advancement office strategy observed that more than (60%) of the respondents believe that ‘Alumni office can drive the advancement strategy of the university.’ Perhaps, this perception could be influenced by the fact that since the Alumni could be strategically important in fundraising – including them in driving resource mobilisation in the advancement office may pay dividends.

Based on the findings related to the respondents’ opinions on the relations between the alumni office and advancement office, this study found out that more than (83%) of the respondents think that the ‘advancement office should not distance itself from the alumni relations office.’ Perhaps given the strategic importance of the two offices regarding resource mobilisation, the two offices must be closely aligned.

The literature stresses the importance of a university’s alumni in its advancement activities. Alumni therefore can be seen as potential donor prospects. They are also seen as being loyal to the university and those alumni can “open doors” for the university advancement team to potential funders.

5.7. CONCLUSIONS ON RESEARCH OBJECTIVES

The purpose of this section is to make conclusions and recommendations regarding the findings presented in chapter 4. Hence, tests were conducted to address the study's empirical objectives. Inferences regarding objectives and findings associated with them were discussed in the preceding sections. The conclusion and recommendations sections will be followed by describing the study's limitations including suggestions for future research as the last part of the chapter.

Conclusion on Research objective 1: Based on the findings on the functions and relationship between the university and the advancement office, a conclusion can be made. Four conclusions related to this objective are that, the university should consider increasing the number of employees with advanced skills in line with the size of the university; that critical office closes related to the advancement office's functions and activities should be situated in proximity to each other for convenience purposes; also that the advancement office should be considered the advancement as the engine of the university concerning resource mobilisation, and that the university should consistently endeavour to maintain mutually beneficial relationships with all strategic stakeholders.

Conclusion on Research objective 2: Deducing from results on the second objective, five conclusions on the issue of financial investment and fundraising are made. The conclusions are focused on the role played by the Vice-Chancellor as the chief fundraiser, donor funding of university projects, the importance of securing funding from the private sector, investment and financial resources from the advance office and the effects of fundraising by a private consultant. The conclusions are that the Vice-Chancellor should be the chief fundraiser at the university or institution; that no specific donor should be used for a specific project; that the university should endeavour to source for additional projects funding from the private sector; that the advancement office should be seen as the investment and the fundraising arm of the university, and eventually that the university should not use private consulting firms for fundraising as this can potentially have reputational damage.

Conclusion on Research objective 3: Drawing from the research findings on the advancement office activities, six conclusions are made. The first conclusion is that the university should give utmost importance to the advancement office and that in university

strategic plans to do with fundraising, the advancement office should occupy a central role; that the senior management should be involved in the advancement office activities; that all advancement related activities should be centralised in the advancement office; that the resource mobilisation should be the core responsibilities of the advancement office and that communication between advancement office and internal stakeholder are of critical importance for effective and efficient resource mobilisation.

Conclusion on Research objective 4: Based on the findings on Alumni office activities, four conclusions are made. The conclusions are that the Alumni relations office should not be independent of the advancement office; that the alumni office should open doors for advancement practitioners in the private sector; that the Alumni office should complement the advancement strategy for the university; and that the advancement office should work in cohort with the alumni relations office regarding resource mobilisation.

By and large, the importance of advancement office regarding resource mobilisation at a university cannot be over-emphasised. However, the advancement office should work in tandem with other important entities at the university such as the Alumni office and another university internal and external stakeholder. The external stakeholders include private companies and Alumni. Internal stakeholders include employees in the advancement office and the Alumni office. In this regard, communication between and among these stakeholders is critically important for university resource mobilisation.

5.8. RECOMMENDATIONS

Findings of the current study have prompted suggestions that are likely to lead to the betterment of resource mobilisation by the advancement office on behalf of the university. The recommendations are provided below:

Recommendation 1 – Communication efficacy: To maintain mutually beneficial relationships with all strategic stakeholders, this study recommends that the university strengthen the communication between and among the advancement office and other stakeholders such as the alumni, existing and potential donors, immediate community, corporates, trusts and foundations.

Recommendation 2 – Vice Chancellor' strategic involvement: Based on the findings, the current study recommends that the Vice-Chancellor who is the university Principal and

the Chief Executive Officer, should be accorded the role of the Chief Fundraiser instead of using private consultancy who may potentially have a reputational damage risk. This can be achieved by meetings being arranged by the advancement office for the VC with senior executives of corporates, foundations, trusts and government departments. The VC can also meet with illustrious alumni who are in strategic high level executive positions, that can cultivate a relationship for potential investment in the university.

Recommendation 3 – Skilled manpower and senior management involvement: This research recommends the university ought to recruit highly skilled manpower in the advancement office and involve senior management in the advancement office's resource mobilisation activities to ensure the achievement of university goals with efficacy. Based on the research it is demonstrated that an advancement office needs to be well capacitated to fulfil the funding needs of the university. Therefore, serious investment needs to be made into an advancement office to ensure that there are significant returns on the investment which will be demonstrated by increased donations, support for the university among its alumni and private sector.

Recommendation 4 – Collaboration between Alumni office and Advancement office: This study recommends that the resource mobilisation activities by the Advancement Office and the Alumni office should be synchronised to avoid duplication of duties, avoid conflicts and confusion over the resource mobilisation from the external university community. This can be achieved, when the advancement office identifies its illustrious alumni and establish relationships with them. The alumni office needs to profile outstanding alumni of the university and develop a strategic plan how to involve and engage the alumni in partnership with the advancement office. It is therefore imperative that the alumni office and advancement office work very closely with regards to advancement and alumni activities of the university which will maximise the efforts with regards to resource mobilisation in the private sector.

5.9. OVERALL RECOMMENDATIONS

Overall, for the university to successfully achieve its resource mobilisation goals, the university Vice-Chancellor should play a leading role, to ensure effective communication among all the stakeholders involved in the university resource mobilisation and that the

advancement office should be the central office coordinating all the resource mobilisation activities at the university in collaboration with other university departments.

5.10. LIMITATIONS AND FUTURE STUDIES

The current research has some limitations. For instance, the study did not conduct an exploratory factor analysis to determine some factors that could be used to conceptualise a research model and potentially test the relationships between these factors because of the small data that could be collected given the limited time. However, future studies should consider collecting data at a large scale from perhaps many universities that can be used to do what this study could not manage to complete. Such an expanded conceptual model can be expected to yield more interesting insights to practitioners in the institutions of the higher education sector in terms of generating and adding new knowledge to the existing body of academic literature on university resource mobilisation.

5.11. SUMMARY OF THE CHAPTER

This chapter provided the final deductions of the study. Recommendations were also made. The chapter ended with a discussion on the limitations that were encountered, and suggestions were made for future studies.

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APPENDIX: SURVEY QUESTIONNAIRE

A. Demographic information

Please answer the following questions:

1. Indicate your gender.	Male (1)
	Female (2)
2. Indicate your home language.	English (1)
	Afrikaans (2)
	IsiNdebele (3)
	IsiSwati (4)
	IsiXhosa (5)
	IsiZulu (6)
	Other (7)
3. Indicate your age	25 and younger (1)
	26 – 30 (2)
	31 – 35 (3)
	36 – 40 (4)
	41 – 45 (5)
	46 – 50 (6)
	51 – 55 (7)

	56 – 59 (8)
	60 and older (9)

B. Questions related to your work location, qualifications, and experience.

4. Identify the higher education institution where you are employed.	Stellenbosch University (1)
	Tshwane University of Technology (2)
	University of the Western Cape (3)
	Rhodes University (4)
	University of the Witwatersrand (5)
	University of Kwa-Zulu Natal (6)
	Walter Sisulu University (7)
	University of Johannesburg (8)
	University of Pretoria (9)
	University of Cape Town (10)
5. Indicate your level of employment at your institution.	Senior management (1)
	Middle management (2)
	Junior management (3)
	Other (4)
6. Indicate your total years of	Less than 1 year (1)

employment in the higher education sector.	1 – 3 years	(2)
	4 – 6 years	(3)
	7 – 9 years	(4)
	10 – 12 years	(5)
	13 – 15 years	(6)
	16 and more	(7)

C. The following questions relate to the services rendered, responsibilities and resources of, the value and importance of, and the existence of an advancement or development office at YOUR institution.

According to the Council of Advancement and Support of Education (CASE, 2016), institutional advancement is an integrated method of managing relationships with key stakeholders to improve understanding of an institution and generate support for it.

Please indicate whether you agree or disagree with the statements below:

	Strongly disagree (1)	Disagree (2)	Agree (3)	Strongly agree (4)
7. Given the size of universities, it is not critical that the advancement office is well-staffed, because of a high number of employees with advancement skills in other departments.				

8. It is important to be located in close proximity to other support functions in the university.				
9. Investment of financial resources into the advancement office is not important, because it is seen as the fundraising arm of the university.				
	Strongly disagree (1)	Disagree (2)	Agree (3)	Strongly agree (4)
10. Fundraising by a consultant will tarnish the reputation of the university.				
11. Maintaining relationships with strategic stakeholders will lead to mutually beneficial partnerships.				
12. In your experience, the role of an advancement office is of the utmost importance for any higher education institution.				

13. The advancement office is the engine of the university strategy.				
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	Strongly disagree (1)	Disagree (2)	Agree (3)	Strongly agree (4)
14. Senior management does not have to be involved in the activities of the advancement office.				
15. All advancement related activities should be centralised in the advancement office.				
16. The core function of advancement is to mobilise resources to secure financial sustainability of the university.				
17. Communication is critical between advancement and internal stakeholders.				
	Strongly disagree (1)	Disagree (2)	Agree (3)	Strongly agree (4)
18. The Vice-Chancellor should be the chief fundraiser at your institution.				

19. An advancement office does not have to exist in your university.				
20. Specific donor funding can be used for any other projects.				
21. Securing additional funding from the private sector is important for the future existence of any higher education institution in South Africa.				
	Strongly disagree (1)	Disagree (2)	Agree (3)	Strongly agree (4)
22. Alumni Relations should be independent of the Advancement office.				
23. Alumni can open doors for advancement practitioners in the private sector.				
24. Alumni can drive the advancement strategy of the university.				
25. The advancement office should distance itself from alumni relations.				