

12 October 2011

Ross-CASE Survey: the Annual Survey of Gifts and Costs of Voluntary Giving to HE in the UK – completion deadline: 23 November 2011

In the year 2000 an ad hoc group of Vice-Chancellors, recognising the need for comparative data to help guide decisions on fundraising policies, initiated a survey of gift revenue and fundraising costs. This survey has now expanded to cover most of the HE sector and many FE institutions and provides the most authoritative picture of fundraising activity and performance in the UK. We are writing to ask you to take part in this year's survey, which covers the 2010-11 financial year.

You will be aware that the Government launched a scheme on 1 August 2008 to provide £200M over three years to match eligible philanthropic donations raised by English Universities and further education colleges with HE provision. Completion of the Ross-CASE survey is mandatory for institutions participating in the HEFCE matched funding scheme. This is because the Government recognises the value of the information that this survey uniquely provides.

*All information about completing the survey is available at <http://www.rosscasesurvey.org.uk>. The survey is completed electronically and is available until 23 November 2011. Completion by this date is essential to enable data analysis in order for HEFCE to make the final percentage payment of year 3 matched funds by March 2012. **Institutions failing to submit their completed Ross-CASE survey by this date may not receive their matched funds for year 3 of the scheme.***

As in previous years, The National Centre for Social Research (NatCen) is administering the survey on behalf of The Ross Group of Development Directors and Council for Advancement and Support of Education (CASE). NatCen are responsible for the survey administration and reporting, as well as providing benchmarking data to participating institutions, and facilitating the optional confidential data sharing.

If your institution has taken part previously, you will be familiar with what is involved. If you have not, we hope you will consider completing it this year.

There is a consistent national need for this kind of data. It is the only way we can accurately monitor the long-term health of philanthropic funding in the Higher Education sector. It also enables us to make visible the efforts universities are making to secure more voluntary income. It is therefore extremely important that as many institutions take part as possible.

Participation in the survey will also directly benefit your organisation. All participants receive an electronic copy of the findings and published report (if you have not already seen it, the 2009-10 report is available at the survey website). Further, all participating institutions are

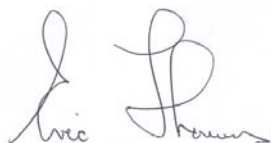
entitled to request private benchmarking reports of the aggregate income and costs data for similar institutions. Institutions that took part in the 2009-10 survey may now apply for a benchmarking report on the survey website, which will be provided free of charge. Sixty-three institutions have already received their reports.

An exciting development in the survey last year, which is being repeated this year for survey participants, is the opportunity for your institution to join others who agree to share their survey returns on a confidential basis. Last year 83 institutions did so and are now able to analyse in detail their performance against the other 82 institutions.

You may be interested to know about how the data will be used by NatCen, the Ross Group and CASE. The published report of the survey will show aggregated results for the UK, plus broad institution-type categories such as Mission Groups. Disaggregated data for individual institutions will have more limited circulation to the Ross Group members responsible for overseeing the survey and (for English institutions only) to HEFCE and possibly BIS. Full details are given in the Data Release Protocol on the survey website. Please note that if a university participates in the matched funding scheme, the Government then has license to publish resulting income (but not cost) figures for that university, should it choose to do so.

If you need any further information, please contact the NatCen survey team on 020 7549 9584 or at rosscasesurvey@natcen.ac.uk.

Thank you for your help in ensuring that the scale and the importance of fundraising and philanthropy in HE are properly understood.

The image shows a handwritten signature in black ink. The signature is cursive and appears to read 'Eric Thomas'. The first part of the signature is a large, stylized 'E' that loops around, and the last part is a long, horizontal stroke.

Professor Eric Thomas
Chair of CASE Europe

PS Please remember to complete your survey by 23 November 2011