

14<sup>th</sup> September 2009

**Ross-CASE Survey: the Annual Survey of Gifts and Costs of Voluntary Giving to HE in the UK**

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 2008-9 financial year.

You will be aware that the HEFCW Matched Funding Scheme for Voluntary Giving commenced on 1 August 2009. Up to £10M will be provided over three years to matched funds raised by Welsh Universities. Participation in the Ross-CASE survey is mandatory for those Welsh institutions who are eligible and wish to participate in the matched-funding scheme. This is because HEFCW 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 Friday 6 November 2009. Please note this key deadline as HEFCW have indicated that completion of the survey is a condition of participation in the scheme.*

The Ross Group of Development Directors and Council for Advancement and Support of Education (CASE) are pleased to have developed a long-term partnership with The National Centre for Social Research (NatCen), the largest independent social research institute in Britain, to strengthen the survey. NatCen are responsible for the survey administration and reporting, as well as providing benchmarking data to participating institutions.

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. Please note that CASE Europe will be offering an online seminar at 2.30pm on 13 October aimed at helping those who are responsible for completing the survey forms. Further details can be found at <http://www.rosscasesurvey.org.uk/>.

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 (the 2007-8 report will be

downloadable from the survey website later this autumn). 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 2007-8 survey may now apply for a benchmarking report on the survey website, which will be provided free of charge.

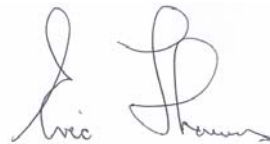
You may be interested to know about how the data will be used by NatCen, the Ross Group and CASE. The published report of the survey will show aggregated results for the UK, plus broad institution-type categories. Disaggregated data for individual institutions will have more limited circulation to the bodies responsible for overseeing the survey and (for Welsh institutions only) to HEFCW and possibly the Welsh Assembly Government. 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](mailto: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.



Professor Duncan Rice  
CASE Europe Trustee and Chair



Professor Eric Thomas  
CASE Europe Trustee