

# Peerfocus Test Institution

## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### Survey Resources

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Visit the VSE Documentation and Support page, where you can find:

- The survey guidance document.
- PDFs of the survey with the sections/questions on each version.
- Excel grids you can use to gather your data before entering them online if you wish. You must enter your data and submit the survey online.

VSE survey participant data are expected to conform to the CASE Global Reporting Standards. The standards are available for purchase in hard copy or as a digital subscription.

Contact the VSE team at [vse@case.org](mailto:vse@case.org) if you need assistance or would like to schedule a walk-through of the survey.

# Peerfocus Test Institution

## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### Data Use Agreement

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	Check here to indicate agreement.	
	Yes	No
Have you read and agreed to the data use policy?	X	

There is no charge for institutions to submit data using CASE's survey tool. All CASE members, as a benefit of membership, will have complimentary access to survey results using CASE's online reporting tool, the CASE Insights Data Portal. This reporting tool will allow you to see your own institution's data, to see any other submitting institution's data, and to select and save a group of peers and/or aspirational peers in order to see your data aligned with others'.

In addition, companies, including, but not limited to those that do business with educational institutions and affiliate with CASE as Educational Partners, can subscribe to get access to VSE survey data.

All participating institutions, thereby, are agreeing to share their data with other institutions; the data will not be anonymized when shared. Participating institutions agree not to share any other institution's data with third parties or in the public domain. CASE will only share aggregate anonymized information in the public domain. If you do not accept the data use agreement, you will not be able to submit the survey.

Further, in agreeing to this policy, you are affirming that your institution adheres to the CASE Global Reporting Standards, and the data included conform to those standards.

# Peerfocus Test Institution

## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### Select

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To participate in this survey, the following sections are required:

1. New Funds Committed
2. Enrollment, Endowment, Expenditures, Characteristics
3. Funds Received (Choose either the full/partial or minimal version below. You can return to this section to switch to another version if you change your mind. Visit the VSE Documentation and Support page and view the guidance document to learn more about the survey versions.)
- 4a. Additional Required Questions

Below you can select which optional questions you want visible. You can return to this section to hide and un-hide them, so your decision isn't locked in. The objective is to have the survey conform to your intentions and prevent it from displaying questions you would find distracting and do not want to answer.

Check Yes or No beside each item on the menu.

If you switch survey versions after you begin entering data, only the data in the version that is selected here when you mark your survey "complete and ready for review" will be saved. Any data in the unselected version will automatically be deleted upon submission. You do not have to manually remove them. This only affects Section 3 of the survey.

Need help? Email the VSE Staff.

Do you want to do the minimal survey or the full/partial?	<input checked="" type="radio"/> <b>Minimal</b>	<input type="radio"/> Full or Partial
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	Yes	No
2b. Advancement Investment (You do not have to complete every question in this section.)	X	
4b. A: Alumni Giving Details	X	
4b. B: Nonalumni Giving Details	X	
4b. C. Alumni Giving by Graduation Cohort	X	
4b. D1. Gift Bands Funds Received (\$)	X	
4b. D2. Gift Bands Number of Donors (#)	X	
4b. E. Real Property Giving	X	
4b. F. Types of Foundations	X	
4b. G. Corporations: Forms of Giving	X	
4b. H. Software Licenses	X	
4b. I. Purposes of Gifts to Endowment with Income Restricted	X	
4b. J. Support of Intercollegiate (Extramural) Athletics	X	

# Peerfocus Test Institution

## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### 1. Enrollment, Endowment, Expenditures, Characteristics

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#### A. Enrollment, Endowment, Expenditures

##### ENROLLMENT

Count enrollment at the beginning of the academic year being reported (i.e., fall of 2023 for the report covering the 2023-24 fiscal year). All students (except continuing education) are counted: full-time, part-time, resident, extension, non-degree. (DO NOT convert part-time students to full-time equivalents.)

##### FULL-TIME EQUIVALENT ENROLLMENT

Count the FTE enrollment figure as of the beginning of the reporting period, i.e., opening fall FTE enrollment. If the FTE figure is not available, use the formula: the sum of all full-time students plus one-third of the number of part-time students (e.g., three part-time students equal one full-time student).

##### ENDOWMENT/LONG-TERM INVESTMENTS

Public institutions should include the combined endowment of the foundation(s) and the institution.

Include all the following:

- True endowment: funds provided the institution, the principal of which is not expendable by the institution under the terms of the agreement that created the fund.
- Term endowment: similar to true endowment except that all or part of the funds may be expended after a stated period or upon the occurrence of a certain event as stated in the terms governing the funds.
- Quasi-endowment: funds functioning as endowment, such as funds given to the institution "with no strings attached" or surplus funds that have been added to the endowment fund, the principal of which may be spent at the discretion of the governing board.

##### EXPENDITURES

Public institutions should enter the combined expenditures for the foundation and the institution.

Include all expenditures for Instruction, Research, Public Service, Academic Support, Student Services, Institutional Support, Scholarships and Fellowships, and Operation and Maintenance of Physical Plant. Exclude Auxiliary Enterprises, Hospital Services, and Independent Operations.

If you wish to change your previous-year data, contact vse@case.org. You do not need to provide the previous-year data if the fields are blank.

	2022-23	2023-24
1. Enrollment Total Headcount		
2. Enrollment Full-Time Equivalent		
3. Endowment Market Value		
4. Expenditures		

#### B. Characteristics

Are hospital or medical facility data included in your survey?	
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In what decade did your institution first employ full-time development/fundraising staff?	
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#### C. Comprehensive Campaign

Use the field below to indicate whether you are in either the silent or public phase of a comprehensive campaign.

CASE Insights on Campaigns in partnership with Marts&Lundy is a global survey on educational fundraising campaigns. Learn more about the survey and how you can participate here.

Is your institution in the silent or public phase of a comprehensive campaign?	
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# Peerfocus Test Institution

## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### 2. New Funds Committed

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Click on underlined row and column headings to open more help. You may have to allow popups for the VSE website in your browser. See also New Funds Committed in section 4.1 of the CASE Global Reporting Standards.

Note that the CASE Global Reporting Standards concerning pledges were revised in 2024. You should report the entire pledge. Do not limit it to 5 years.

	Number of Hard-Credit Donors	Value of Commitments
1. New Pledges		
2. Outright Gifts Not Associated with a Pledge		
3. New Revocable Bequest Intentions		
4. Total New Funds Committed without Bequests		
5. Total New Funds Committed Including Bequests		

# Peerfocus Test Institution

## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### 3. Funds Received: Totals (Minimal)

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#### A. Total Support by Type of Donor

	Total \$ Amount
1. Alumni	
2. Nonalumni Individuals	
3. Foundations	
4. Corporations	
5. Donor-Advised Funds	
6. Other Organizations	
Grand Total	

#### B. Total Support by Purpose

	Total \$ Amount
1. Current Operations, Unrestricted	
2. Current Operations, Restricted	
3. Current Operations Total	
4. Gifts to Endowment, Income Unrestricted	
5. (Outright) Gifts to Endowment, Income Restricted	
6. Property, Buildings, Equipment	
7. Loan Funds (If Any)	
8. Outright to Capital Purposes	
9. New CRTs, CGAs, Pooled-Income Funds (Full Face Value)	
Grand Total	3,800

	Number of Irrevocable Deferred Gifts
C. How many gifts are reported on row 9 above? Enter zero if dollar amount is zero.	

The Grand Total by source in question A must add to the same amount as the Grand Total by purpose in question B. They are the same dollar amount divided two ways. When you save the section, the box below will show a zero if the two questions add to the same amount. If they do not, try to balance them. If you need help, email VSE support.

Validation Box Please click the Save and return to this Section button to update the amount in the box below. The amount in the box below MUST equal zero (0).	3,800
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# Peerfocus Test Institution 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

## 4a. Additional Required Questions

### A. Contributions from Alumni

Do not count any soft credits in this section. You may do so in optional questions in section 4b.

CASE also collects a full panel of data on alumni engagement that includes, but is not limited to, philanthropic engagement. Data from that survey, called CASE Insights on Alumni Engagement, are much more robust evidence of how engaged your alumni are with the institution than is philanthropic participation alone. To learn more about that survey, visit the CASE Insights on Alumni Engagement web page. You may also email us with questions about that survey.

	A. Legally Contactable Alumni	B. Number Solicited	C. Number Hard-Credit Donors
1. Total			

If this box is blank, you did not yet report on additional soft-credit alumni donors. To provide that figure, enter it in question 4b. A. You can add that variable, and skip the rest of that question.	
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### B. Bequests

Include realized bequests, not bequest intentions, which may be reported in section 2. Make sure the bequests listed below are also reported in section 3, where you credit them to the decedent, either an alumnus or a nonalumni individual.

	A. No. of Donors	B. Amount \$
1. Total Bequests Received		

### C. Largest Donor Totals

Report accumulated totals for the year (including any newly established irrevocable deferred gifts - CRTs, CGAs, pooled income funds, or remainder interest in property at face value).

If a donor makes multiple separate contributions during the year, it is the sum of those gifts that should be used to determine if the donor is one of the three largest.

Count only realized bequests in line 2. Do not include bequest intentions.

When reporting on donor-advised funds, count the individual account within the fund, not the entire fund. You are reporting on a person or organization that requested the DAF send the contribution rather than reporting on the DAF itself, which may have multiple accounts within it.

	A. Largest Donor	B. Second Largest Donor	C. Third Largest Donor	D. Total
1. Living Individuals				
2. Bequests				
3. Donor-Advised Funds				
4. Foundations				
5. Corporations				
6. Totals				

The sum of the three largest donor totals must be less than or, sometimes, equal to the total amount reported for that type of donor. For reference, the values are below.

Note that the calculation for "Living Individuals" is the sum of total alumni giving and total nonalumni individual giving minus the amount given by bequest (reported in Question B above). Credit realized bequests on the survey to the decedent, not to an entity such as a trust.

	Alumni	Nonalumni Individuals

The term "living individuals" is derived by subtracting bequests from the sum of alumni and nonalumni individual giving. You reported the following for those:		
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	Donor-Advised Funds	Foundations	Corporations
These are the total giving values reported for these sources.			



# Peerfocus Test Institution 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

## 2b. Advancement Investment

Regardless of how the advancement function is administered (centrally or in a decentralized manner), report the distribution of expenditures by function below. Salaries and benefits should be included in rows 1 and 2 by function, even if they are paid for centrally.

1. Report both exempt and non-exempt positions. Only include employees who receive W-2 forms.
2. Report communications and marketing expenses in their functional area. So, if you're reporting communications and marketing for fundraising, put those investments in the fundraising column.
3. If someone works in more than one functional area, distribute the costs of the position accordingly.

### A. Expenditures

	A. Development/ Fundraising	B. Alumni Relations/ Affairs	C. Advancement Services	D. Advancement Management	E. Total Expenditures
1. Salaries					
2. Benefits					
3. Current Operations Expenditures					
4. Capital Expenditures					
5. Total Expenditures					

### B. Advancement Staff FTEs

Report the FTEs of paid staff by function. A single employee\*s time may be spread over several functional areas. This question is for number of staff, not for dollar amounts. Distribute FTES to correspond to the distribution of costs in question A.

	A. Development/ Fundraising	B. Alumni Relations/ Affairs	C. Advancement Services	D. Advancement Management	E. Total Staff
1. Staff FTEs					

Do you want to answer the next question about student workers? If you have no student workers, check "No."	<input type="radio"/> Yes <input type="radio"/> No
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### C. Student Workers

Payments to student workers should be counted in Question A, Row 3, either under fundraising or alumni relations. In Row 1 below, record how much such workers were paid in the reporting period. In Row 2, record the number of hours students worked in total for each function. Note, this is not an FTE count. Rather, it is a count of student work hours. One student working 40 hours is recorded as 40. Ten students working 4 hours each is also recorded as 40 student-work hours.

If you do not have any student workers or prefer not to answer, leave this question blank. Do not enter zeroes in all cells.

	A. Development/ Fundraising	B. Alumni Relations/Affairs	C. Total
1. Student Worker \$			
2. Student Worker Hours			

# Peerfocus Test Institution 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

## 4b. A. Contributions from Alumni

If you are able to break down alumni by type of degree(s) earned, you may do so here. You may also report additional soft-credit donors and dollars. Do not count anyone twice. If an alumnus/a already has a hard credit, do not add the person again in soft-credit counts of donors. Also, do not add the hard-credit donors or dollars to the "additional" soft-credit donors and dollars columns. If there are additional soft-credit dollars for that hard-credit donor, do add those to Column F.

If a married couple or legal partners, both of whom are constituents, make a gift, hard-credit the legal donor with the full amount, regardless of which constituent type the person is. The person who receives soft credit as a donor also gets soft credit for the full dollar amount.

If an organization such as a DAF, family foundation, or company makes a gift that is soft-credited to one person in a legal partnership or marriage, the other person in the partnership ALSO gets soft credit as a donor, and that person is also soft credited for the full dollar amount.

For this question, you have an option. You can provide details by completing rows 1-5, 7 & 8. Rows 6 and 10 will auto-total; row 9 will gray out. If you cannot provide details, complete row 9 only. Row 10 will auto-total and will match row 9.

You may complete only some columns in this question and skip others if you wish. For example, you may complete hard-credit columns and skip soft-credit columns. For columns you choose to complete, you must fill in all the cells in that column. Enter zeros where applicable; do not leave blanks.

If you are skipping a column, leave the entire column blank. Do not enter zeroes to signal you're skipping the column. Blanks mean not answering. A zero means the numeral 0.

	A. No. Legally Contactable Alumni	B. No. Solicited	C. No. Hard- Credit Donors	D. Hard- Credit Dollars	E. No. Additional Soft-Credit Donors	F. Additional Soft-Credit Dollars
1. Multiple-Degreed						
2. 4-Year Undergraduate Degreed						
3. Associate's Degreed						
4. Graduate Degreed						
5. Certificate or Award						
6. Total Degreed Alumni						
7. Non-Degreed						
8. Other						
9. If you cannot report by type of alumni report only totals here.						
10. Totals						

1. Number of Legally Contactable Alumni in cell A10 must equal Number of Legally Contactable Alumni in Section 4a, shown here:	
2. Number of Alumni Solicited in cell B10 must equal Number of Alumni Solicited in Section 4a, shown here:	
3. Number of Alumni Donors in cell C10 must equal Number of Alumni Donors in Section 4a, shown here:	

4.. Hard credit Alumni \$ in cell D10 must equal the value in Section 3 Minimal or 3c Full/Parital, shown here:	
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### 4b. B. Nonalumni Individual Giving Details

Count individuals here even if they are also alumni. For example, alumni who are faculty should be counted here as well as in their alumni categories in question 4b. A. Contributions from Alumni.

There is no hierarchy in this question. One individual may have a variety of roles at the institution. For example, someone could be a student, faculty, and a board member. The objective of this question is to allow institutions to track participation without omitting someone due to the hierarchy in the CASE Global Reporting Standards. Note that this is an optional question that is not intended to violate standards, but, rather, to give institutions a place to record participation among constituencies.

Institution Type of Control	<input type="radio"/> Public <input type="radio"/> Private
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	A. Hard-Credit Donor Count	B. Additional Soft-Credit Donors	C. Total Donor Count	D. Hard-Credit Dollars	E. Additional Soft-Credit Dollars	F. Total Dollars
1. Parents						
2. Faculty/Staff						
3. Students						
4. Other Individuals (Not in Rows 1-3 Above)						
5. Trustees/Board of Directors						
6. Public Institution Foundation Board Members						

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### 4b. C. Alumni Giving by Graduation Cohort

Report unduplicated counts of legally contactable degreed alumni by graduation cohort. In Row 8, include all nondegreed alumni—former students and honorary alumni who did not receive a diploma, degree, award, or certificate—regardless of year(s) of attendance.

In Columns B and C, count both hard- and soft-credit contributions.

Count individuals who received multiple credentials from the institution (an undergraduate degree and subsequent professional degree) based on when the first credential was awarded.

	A. No. Legally Contactable Alumni	B. No. Donors (Hard & Soft Credit)	C. Dollars (Hard & Soft Credit)
1. 0-5 Years Out			
2. 6-10 Years Out			
3. 11-20 Years Out			
4. 21-30 Years Out			
5. 31-40 Years Out			
6. 41-50 Years Out			
7. 51+ Years Out			
8. Other Alumni--Non Degree/Diploma Holders			
9. Total			

Error Check Cell 9A

The number of contactable alumni in cell A9 above should equal the number reported in section 4a of the survey, which is:

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## 4b. D1. Gift Bands Funds Received (\$)

Report the value of funds received in the reporting year, based on hard/legal credit. Values of funds received should be counted in the gift band corresponding to the donor's total contributions in the reporting year. If one donor made several gifts, add the amounts together to determine the donor's gift band. Credit realized bequests to the decedent, either under alumni or nonalumni.

	A. Alumni \$	B. Nonalumni Individuals \$	C. Foundations \$	D. Corporations \$	E. Donor- Advised Funds \$	F. All Other Orgs. \$	G. Total \$
1. \$25,000,000+							
2. \$10,000,000-\$24,999,999							
3. \$5,000,000-\$9,999,999							
4. \$1,000,000-\$4,999,999							
5. \$250,000-\$999,999							
6. \$100,000-\$249,999							
7. \$50,000-\$99,999							
8. \$25,000-\$49,999							
9. \$10,000-\$24,999							
10. \$5,000-\$9,999							
11. \$2,500-\$4,999							
12. \$1,000-\$2,499							
13. \$500- \$999							
14. \$100-\$499							
15. Under \$100							
16. Total							

This grid shows you what you reported in Funds Received for each type of donor. The amount on row 16 above must be exactly the same number.

	A. Alumni \$	B. Nonalumni Individuals \$	C. Foundations \$	D. Corporations \$	E. Donor- Advised Funds \$	F. All Other Orgs. \$	G. Total \$
Amount to Match							

# Peerfocus Test Institution 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

## 4b. D2. Gift Bands Number of Donors (#)

Submit unduplicated counts of donors based on hard/legal credit. Count donors within the gift band corresponding to the total value of funds received from them by the institution in the reporting year. Credit realized bequests to decedents, either under alumni or nonalumni.

	A. Alumni No. Donors	B. Nonalumni Individuals No. Donors	C. Foundations No. Donors	D. Corporations No. Donors	E. Donor- Advised Funds No. Donors	F. All Other Orgs No. Donors	G. Total No. Donors
1. \$25,000,000+							
2. \$10,000,000-\$24,999,999							
3. \$5,000,000-\$9,999,999							
4. \$1,000,000-\$4,999,999							
5. \$250,000-\$999,999							
6. \$100,000-\$249,999							
7. \$50,000-\$99,999							
8: \$25,000-\$49,999							
9. \$10,000-\$24,999							
10. \$5,000-\$9,999							
11. \$2,500-\$4,999							
12. \$1,000-\$2,499							
13. \$500- \$999							
14. \$100-\$499							
15. Under \$100							
16. Total							

The number you report here in cell 16a is also required in section 4a. The numbers must match exactly. If you answered question 4b. F., Types of Foundations, the total number of foundation donors here in cell 16c must match the total reported in cell 3a of that question exactly.

	Alumni No. Donors	Foundations No. Donors
Amount to Match		

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### 4b. E. Real Property Giving

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This question is intended to capture gifts of property that have likely, though not necessarily, increased in value over the cost basis. There may be exceptions, but do not use the question to report contributions of little or no value. Do not include conservation easements on the survey unless they produce income, which is rare.

This question, unlike most, asks for the number of transactions, rather than the number of donors. This enables users of the data to calculate the average value of each type of gift.

	A. No. Transactions	B. Amount \$
1. Securities		
2. Real estate		
3. Other real property		
4. Enter Totals here ONLY if you have left lines 1-3 above blank		
5. Total Real Property		



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## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### 4b. F. Types of Foundations

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Report the number of foundations (excluding corporate foundations) and the dollar amount they contributed. If a foundation gave more than one gift, count the entity only once, and add the amounts together.

The term "Family Foundation" has no legal definition. The Council on Foundations defines a family foundation as one whose funds are derived from members of a single family. The Council on Foundations suggests that family foundations have at least one family member serving as an officer or board member of the foundation and, as the donor, that individual (or a relative) must play a significant role in governing and/or managing the foundation.

	A. No. of Donors	B. Amount \$
1. Personal and Family		
2. Other Foundations		
3. Total		

	Total Foundation Support
The total amount of foundation giving reported here must equal the amount in Section 3 Minimal or Section 3c Full/Partial exactly. The figure in cell B3 should be:	

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## 4b. G. Corporations: Forms of Giving

Count the number of transactions, not the number of donors. So, if one company matched 100 gifts, count that as 100 matching gift transactions. This is an exception to the usual practice.

In the third and fourth column in row 4, you may report matching corporate gifts that were dispensed through a third party, such as a community foundation, charitable gift fund, or other entity. These would not be counted as corporate giving elsewhere in the survey.

	A. No. of Gifts/Transactions	B. Amount \$	C. No. Additional Soft-Credit Matching Gift Transactions	D. Additional Soft- Credit Matching Gift Dollars
1. Cash and Securities (excluding matching gifts)				
2. Company Products				
3. Other Company Property				
4. Matching gifts				
5. Total				

	Total Corporate Support
The total in cell B5 must equal total corporate support from Section 3 Minimal or Section 3c Full/Partial, which is:	

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### Higher Education

#### 4b. H. Software Licenses

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Software licenses are not charitable gifts and should not appear elsewhere on the survey.

	A. No. Contributing Companies	B. Value of Software
1. Software		

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## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### 4b. I. Purposes of Gifts to Endowment with Income Restricted

Include both outright gifts to endowment, income restricted, and the face value of all newly established charitable remainder trusts, gift annuities, remainder interest in property, or pooled-income funds that you reported in either Section 3b Full/Partial or Section 3 Minimal. If some of the newly established irrevocable deferred gifts do not have restrictions or you cannot determine what they are, record them in "Other."

	A. Amount \$
1. Academic Divisions	
2. Faculty/Staff Comp	
3. Research	
4. Student Financial	
5. Student Affairs/Life	
6. Athletics	
7. Other	
8. Total	

	Target Amount
The amount in cell A8 should equal the sum of gifts to endowment, restricted, and the face value of newly established irrevocable deferred gifts reported in Section 3b Full/Partial or Section 3 Minimal.	

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### 4b. J. Support of Intercollegiate (Extramural) Athletics

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Note that the total you report here is not comparable to other athletics giving amounts in the VSE survey. In Section 3A and optional question 4b. I., you report gifts restricted to intramural or extramural athletics. Here you report only gifts to extramural sports.

In addition, here you would break out gifts of property or for buildings dedicated to extramural athletics or largely used for those teams. This breakout does not exist anywhere else on the VSE survey.

	A. No. of Donors	B. Amount \$
1. Restricted to current operations		
2. Restricted to capital purposes		
3. Total		

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## 2023-24 CASE Insights on Voluntary Support of Education (VSE) Higher Education

### Comments

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Leave comments about your survey here. If you want to edit a survey or provide new data, email <a href="mailto:vse@case.org">vse@case.org</a> .	
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