

**CASE Insights<sup>SM</sup> on  
Voluntary Support of Education (United States)**

Requirements to Participate

Updated July 2024

# Contents

- CASE Global Reporting Standards ..... 3
- Eligibility to Participate ..... 3
- Access to the Survey Instrument ..... 3
- Access to the Survey Results..... 3
- About the Different Survey Versions ..... 3
- Data Required to Participate ..... 4
  - Enrollment, Endowment, Expenditures, Characteristics ..... 4
  - New Funds Committed ..... 4
  - Funds Received ..... 4
  - Additional Required Details ..... 5
- Data for Optional Sections/Questions ..... 6
  - Advancement Investment..... 6
  - Additional Optional Questions..... 6
- Survey Support..... 6

## CASE Global Reporting Standards

The CASE Insights on Voluntary Support of Education (VSE) survey aligns with the [CASE Global Reporting Standards](#), which represent worldwide standards for reporting the outcomes of institutional fundraising. The publication is available for purchase in print and digital editions.

## Eligibility to Participate

There is no cost to participate in the VSE survey. Any U.S. nonprofit college or university may participate. Canadian institutions are eligible as well; however, CASE also offers a fundraising survey specifically for Canadian institutions, [CASE Insights on Philanthropy \(Canada\) in partnership with CCAE](#).

## Access to the Survey Instrument

The VSE survey is completed and submitted online and requires an individual user account. We can create user accounts for more than one staff member at your institution if more than one person will be entering data into the survey. Contact the [VSE staff](#) to set up survey access for your institution.

You can request survey access even if you are still considering whether to participate. When the survey opens each year, your survey contact(s) will be notified and can then opt in or opt out.

## Access to the Survey Results

CASE publishes an annual summary report on the results of the survey. Institutions that participated in that year's survey are eligible for a participant discount on the report. CASE members get a further discount.

In addition, CASE member institutions have access to the most recent 20 years of VSE survey data in the [CASE Insights data portal](#), CASE's online benchmarking tool. Contact the [VSE staff](#) for more information or to request an account if you work at a member institution.

## About the Different Survey Versions

All versions of the survey require a core set of data that you must be able to provide. See [Data Required to Participate](#) below. On the full/partial version of the survey, CASE collects more detail about the sources, purposes, and donor-designated uses of gift funds than on the minimal version, which is the shortest version. All versions of the version count as full participation provided you submit a complete, error-free survey.

Each version of the survey also includes optional sections and questions. See [Data for Optional Sections](#) below.

The best way to decide which version of the survey suits your institution is to [request an appointment](#) with one of our staff to discuss your needs and capacity. Another way to proceed if your institution has not yet participated is to complete the minimal survey the first year and then revisit the question once you have experience. You do not have to do the same version every year.

## Data Required to Participate

### Enrollment, Endowment, Expenditures, Characteristics

- **Enrollment:** Total student headcount as of the beginning of academic year corresponding to the fiscal year being reported
- **FTE Enrollment:** Student full-time equivalent enrollment as of the beginning of academic year corresponding to the fiscal year being reported
- **Endowment:** Market value as of the end of the fiscal year being reported
- **Expenditures:** Total expenditures for the institution (including foundation for public institutions) for the reporting year
- Are hospital or medical facility data included in your survey? Y/N
- In what decade did your institution first employ full-time development/fundraising staff? Y/N
- Is your institution in the silent or public phase of a comprehensive campaign? Y/N

### New Funds Committed

- Number of hard-credit donors
- Value of commitments

For each of the following categories:

- **New Pledges:** Made during the reporting year
- **Outright Gifts Not Associated with a Pledge:** Outright gifts not pledged this year or in a previous year, realized bequests not documented this year or in a previous year, and newly established irrevocable deferred gifts at face value.
- **New Revocable Bequest Intentions:** Bequest intentions that you can value. You must have a formal commitment from the donor. The donor must be 65 years old or older at some point during this fiscal year.

### Funds Received

#### By Source

##### Individuals

- Total Support from Alumni
- Total Support from Nonalumni Individuals

##### Organizations

- Total Support from Foundations

- Total Support from Corporations
- Total Support from Donor-Advised Funds
- Total Support from Other Organizations (all other organizations that do not fall into the categories above)

#### **By Purpose**

- Total Support for Current Operations, Unrestricted
- Total Support for Current Operations, Restricted
- Total Support for Endowment, Income Unrestricted
- Total Support for Endowment, Income Restricted
- Total Support for Property, Buildings, or Equipment
- Total Support for Loan Funds
- Face Value and Number of Newly Established **Irrevocable** Deferred Gifts (Charitable Gift Annuities, Charitable Remainder Trusts, Pooled-Income Funds, Remainder Interest in Property)

#### **Full/Partial Version of Survey**

- The Fund Received requirements above are for the minimal (short) version of the survey.
- The full/partial version requires total support by each source for each purpose.
- The full version further requires the uses donors designated for gifts to Current Operations, Restricted.
- The full/partial version requires the IRS tax deduction value of irrevocable deferred gifts in addition to the face value. There is a link to a Deferred Gift Tax Deduction Calculator available on the [VSE Documentation and Support page](#).

#### **Additional Required Details**

- Number of Legally Contactable Alumni – Living alumni for whom the institution has a valid means of contact who have not totally opted out of communications from the institution
- Number of Alumni Solicited
- Number of Alumni Hard-Credit Donors
- Number and Dollar Value of Realized Bequests
- Three Largest Donor Totals from:
  - Living Individuals
  - Bequests
  - Donor-Advised Funds

- Foundations
- Corporations

## Data for Optional Sections/Questions

Below are brief descriptions of the optional sections and questions on the survey. These sections appear on all versions of the survey but do not have to be completed to submit your survey. Visit the [VSE Documentation and Support page](#) for PDFs that show the specific questions or contact the [VSE staff](#) with any questions.

### Advancement Investment

Advancement expenditures and staff FTEs across each of four functional areas; information about student worker number of hours and amount paid

### Additional Optional Questions

You can complete some, none, or all of these optional questions.

- Details on Contributions from Alumni
- Details on Contributions from Nonalumni Individuals
- Giving by Alumni Graduation Cohort
- Funds Received by Source by Gift Band
- Number of Donors by Source by Gift Band
- Real Property Giving
- Types of Foundations
- Corporations: Forms of Giving
- Software Licenses (DO NOT include them anywhere else in the survey)
- Purposes of Gifts to Endowment with Income Restricted
- Support of Intercollegiate (Extramural) Athletics

## Survey Support

Visit CASE's [VSE Documentation and Support page](#) for a detailed survey guidance document, as well as PDFs of the survey versions, data collection grids, and more. Contact the [VSE staff](#) if you have any questions.