

# VSE Higher Education Survey

FY2020

**A. Outstanding Pledges**

Report the number and dollar amount of new contributions pledged (unconditionally) during the fiscal year but still outstanding at the end of the fiscal year, regardless of the promised payment date. Do not include pledges made in a previous year. Do not include pledge amounts paid during the reporting year.

**Pledges (unconditional promises) should not be counted anywhere else in the VSE survey.**

|                                  | No. of Pledges | Amount \$ |
|----------------------------------|----------------|-----------|
| <b>1. For current operations</b> | 171            | 1,067,618 |
| <b>2. For capital purposes</b>   | 22             | 2,819,302 |

**B. New Testamentary Commitments**

Report provisions made in wills (or through revocable trusts) during the fiscal year for which the institution has documentation. Documentation might include a photocopy of the pertinent portion of the will or trust document or a letter describing the commitment and its ultimate financial value to the institution. Do not include provisions that name the institution as a contingent beneficiary.

**Testamentary commitments (bequest intentions) should not be counted anywhere else in the VSE Survey.**

|                                     | Number of provisions | Face value of provisions \$ | Present value of provisions \$ |
|-------------------------------------|----------------------|-----------------------------|--------------------------------|
| <b>New Testamentary Commitments</b> | 16                   | 10,243,000                  | 10,092,692                     |

The VSE Program  
**Section 2. Finances & Enrollment (Required for All Versions)**

**This entire section must be filled out in order to be listed in the VSE Report and be eligible for the CASE Award Program.**

For Enrollment and FTEs, report the opening fall headcount or FTE count for the year being reported. Do not report unduplicated annual enrollment. For Endowment, report the market value at the end of the fiscal year being reported. For Expenditures, report the institution's E&G expenditures (read instructions for exclusions) AND the total expenditures of the affiliated foundation, if any.

**ENROLLMENT:** Count enrollment at the beginning of the academic year being reported (i.e., fall of 2016 for the report covering the 2016-17 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:** 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 - 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.

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

**EXPENDITURES:** 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.

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

|   | FY2019      | FY2020      |
|---|-------------|-------------|
| <b>1. Enrollment - total headcount</b>      | 1,730       | 1,747       |
| <b>2. Enrollment - full-time equivalent</b> | 1,724.0     | 1,738.0     |
| <b>3. Endowment market value \$</b>         | 422,019,041 | 419,099,295 |
| <b>4. Expenditures \$</b>                   | 138,100,787 | 135,338,635 |

**In what year was the institution founded? (Optional)**

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**Check here if hospital data are included in your survey.**

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**Notes on Endowment and Expenditures**

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**Section 3a. Outright Giving: Current Operations  
(Full option)**

DO NOT INCLUDE DEFERRED GIFTS IN THIS SECTION. There are three options for completing Section 3: Full, Partial, and Minimal. All forms of the survey count as full participation in the program. So, complete the version where the level of detail corresponds to the level of detail in your records. You might also want to do a shorter version because of time constraints.

Please enter 0 where no gift income was received for a particular cell. Every cell below should have a number in it when you are finished.

|   | A.<br>Alumni | B.<br>Parents | C.<br>Other<br>Individuals | D.<br>Foundations | E.<br>Corporations | F.<br>Religious<br>Organizations | G.<br>Fundraising<br>Consortia | H.<br>Other<br>Organizations | I.<br>TOTAL |
|---|--------------|---------------|----------------------------|-------------------|--------------------|----------------------------------|--------------------------------|------------------------------|-------------|
| <b>1. Unrestricted</b>                              | 2,980,655    | 942,625       | 147,362                    | 452,568           | 133,287            | 0                                | 12,552                         | 796,097                      | 5,465,146   |
| <b>Restricted</b>                                   |              |               |                            |                   |                    |                                  |                                |                              |             |
| <b>2. Academic Divs.</b>                            | 790          | 4,907         | 8,000                      | 212,500           | 240                | 0                                | 0                              | 0                            | 226,437     |
| <b>3. Faculty &amp; Staff Compensation</b>          | 0            | 0             | 0                          | 29,770            | 0                  | 0                                | 0                              | 15,772                       | 45,542      |
| <b>4. Research</b>                                  | 0            | 0             | 0                          | 0                 | 0                  | 0                                | 0                              | 0                            | 0           |
| <b>5. Public Service &amp; Extension</b>            | 0            | 0             | 0                          | 0                 | 0                  | 0                                | 0                              | 0                            | 0           |
| <b>6. Library</b>                                   | 1,330        | 0             | 12,191                     | 0                 | 0                  | 0                                | 0                              | 4,999                        | 18,520      |
| <b>7. Operation &amp; Maint of Plant</b>            | 2,140        | 13,240        | 100                        | 0                 | 250                | 0                                | 0                              | 0                            | 15,730      |
| <b>8. Student Financial Aid</b>                     | 27,525       | 5,067         | 5,225                      | 125,000           | 0                  | 1,500                            | 45,754                         | 80,000                       | 290,071     |
| <b>9. Athletics</b>                                 | 12,051       | 39,350        | 1,980                      | 1,183             | 7,590              | 0                                | 0                              | 2,750                        | 64,904      |
| <b>10. Other Restricted</b>                         | 2,852,782    | 274,039       | 163,235                    | 891,362           | 44,680             | 371                              | 750                            | 5,630,949                    | 9,858,168   |
| <b>11. Total Restricted (2-10)</b>                  | 2,896,618    | 336,603       | 190,731                    | 1,259,815         | 52,760             | 1,871                            | 46,504                         | 5,734,470                    | 10,519,372  |
| <b>12. Total Outright for Curr. Ops. (1&amp;11)</b> | 5,877,273    | 1,279,228     | 338,093                    | 1,712,383         | 186,047            | 1,871                            | 59,056                         | 6,530,567                    | 15,984,518  |

The VSE Program  
Section 3b. Outright Giving: Capital Purposes

*Do not include deferred gifts in this section.*

Please enter 0 where no gift income was received for a particular cell. Every cell below should have a number in it when you are finished!

**DO NOT INCLUDE SOFTWARE ON THE VSE SURVEY.**

|   | A.<br>Alumni | B.<br>Parents | C.<br>Other<br>Individuals | D.<br>Foundations | E.<br>Corporations | F.<br>Religious<br>Organizations | G.<br>Fundraising<br>Consortia | H.<br>Other<br>Organizations | I.<br>TOTAL |
|---|--------------|---------------|----------------------------|-------------------|--------------------|----------------------------------|--------------------------------|------------------------------|-------------|
| 1. Prop., Build.<br>& Equipment           | 2,007,834    | 19,375        | 13,405                     | 220,000           | 94,893             | 0                                | 0                              | 3,005,258                    | 5,360,765   |
| 2. Endowment -<br>Unrestricted            | 2,303,352    | 0             | 240                        | 3,000             | 0                  | 0                                | 0                              | 252,500                      | 2,559,092   |
| 3. Endowment -<br>Restricted              | 6,068,746    | 801,167       | 265,573                    | 3,963,319         | 3,721,532          | 0                                | 0                              | 1,176,725                    | 15,997,062  |
| 4. Loan Funds                             | 0            | 0             | 0                          | 0                 | 0                  | 0                                | 0                              | 2,500                        | 2,500       |
| 5. Total Outright for<br>Capital Purposes | 10,379,932   | 820,542       | 279,218                    | 4,186,319         | 3,816,425          | 0                                | 0                              | 4,436,983                    | 23,919,419  |

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The VSE Program  
Section 3c. Deferred Giving

Please report both Face Value (FV) and Present Value (PV). The Present Value for VSE purposes is defined as the tax deduction to the donor as allowed by the IRS. You must report both. If you find your records do not contain both figures, please contact [VSE Support](#) and request help. The survey cannot be accepted without face and present value figures.

This section is only for newly established deferred gifts or gifts that had funds added to them this year. Deferred gifts are ONLY: 1. Charitable Remainder Trusts. 2. Charitable Gift Annuities 3. Pooled Income Funds 4. Remainder Interest in Property. They are reported only when established, not when realized. DO NOT RECORD pledges, bequest intentions, gifts from IRAs, or gifts of life insurance in this section.

Please enter 0 where no gift income was received for a particular cell. Every cell below should have a number in it when you are finished

|                                | A.<br>Alumni -<br>FV | B.<br>Alumni<br>- PV | C.<br>Parents<br>- FV | D.<br>Parents<br>- PV | E.<br>Others<br>- FV | F.<br>Others<br>- PV | G.<br>Total<br>Face<br>Value | H.<br>Total<br>Present<br>Value |
|--------------------------------|----------------------|----------------------|-----------------------|-----------------------|----------------------|----------------------|------------------------------|---------------------------------|
| 1. Endowment -<br>Unrestricted | 0                    | 0                    | 0                     | 0                     | 0                    | 0                    | 0                            | 0                               |
| 2. Endowment -<br>Restricted   | 1,069,852            | 676,419              | 50,470                | 15,176                | --                   | --                   | 1,120,322                    | 691,595                         |
| 3. Other Purposes              | 0                    | 0                    | 0                     | 0                     | 0                    | 0                    | 0                            | 0                               |
| 4. Total Deferred Giving       | 1,069,852            | 676,419              | 50,470                | 15,176                | 0                    | 0                    | 1,120,322                    | 691,595                         |

The VSE Program  
Section 3d. Gift Income Summary

This summary pulls together total rows from Section 3.a, 3.b, and 3.c. When you enter the data online, this section is filled in automatically. There is no data entry required.

|   | A. Alumni  | B. Parents | C. Other Individuals | D. Foundations | E. Corporations | F. Religious Organizations | G. Fundraising Consortia | H. Other Organizations | I. GRAND TOTAL |
|---|------------|------------|----------------------|----------------|-----------------|----------------------------|--------------------------|------------------------|----------------|
| <b>1. Total Outright for Current Operations</b> | 5,877,273  | 1,279,228  | 338,093              | 1,712,383      | 186,047         | 1,871                      | 59,056                   | 6,530,567              | 15,984,518     |
| <b>2. Total Outright for Capital Purposes</b>   | 10,379,932 | 820,542    | 279,218              | 4,186,319      | 3,816,425       | 0                          | 0                        | 4,436,983              | 23,919,419     |
| <b>3. Total Deferred at Present Value</b>       | 676,419    | 15,176     | 0                    | --             | --              | --                         | --                       | --                     | 691,595        |
| <b>Official Total Using Present Value</b>       | 16,933,624 | 2,114,946  | 617,311              | 5,898,702      | 4,002,472       | 1,871                      | 59,056                   | 10,967,550             | 40,595,532     |
|   | --         | --         | --                   | --             | --              | --                         | --                       | --                     | --             |
| <b>Total Deferred at Face Value</b>             | 1,069,852  | 50,470     | 0                    | --             | --              | --                         | --                       | --                     | 1,120,322      |
| <b>Total Using Face Value</b>                   | 17,327,057 | 2,150,240  | 617,311              | --             | --              | --                         | --                       | --                     | 41,024,259     |

Section 4a. Additional Details on Section 3 -  
Individuals

1. Contributions from Individuals

A. Contributions from Individuals for All Purposes  
Alumni Total - REQUIRED

|   | No. of Record | No. Solicited | No. Donors | Amount \$  |
|---|---------------|---------------|------------|------------|
| 1a. Alumni undergraduate degree or diploma holders            | 18,799        | 16,526        | 5,329      | 16,668,536 |
| 1b. Alumni graduate only degree or diploma holders            | --            | --            | --         | --         |
| 1c. Alumni without a degree or diploma                        | 979           | 698           | 123        | 265,088    |
| 1d. Enter Totals here ONLY if you have left 1a-1c above blank | --            | --            | --         | --         |
| 1e. Alumni Total  | 19,778        | 17,224        | 5,452      | 16,933,624 |

|            | No. of Record | No. Solicited | No. Donors | Amount \$ |
|------------|---------------|---------------|------------|-----------|
| 2. Parents | 9,553         | 8,924         | 1,612      | 2,114,946 |

|                                  | No. of Record | No. Solicited | No. Donors | Amount \$ |
|----------------------------------|---------------|---------------|------------|-----------|
| 3. Faculty and Staff             | 630           | 609           | 88         | 73,966    |
| 4. Students                      | 1,730         | 502           | 251        | 3,190     |
| 5. All Others not counted in 1-4 | 1,302         | 645           | 329        | 540,155   |
| Dollar Total of rows 3-5 above   | --            | --            | --         | 617,311   |

B. Contributions from Individuals for Current Operations Only

|   | No. Solicited | No. Donors | Amount \$ |
|---|---------------|------------|-----------|
| 1a. Alumni undergraduate degree or diploma holders            | 16,526        | 5,245      | 5,832,466 |
| 1b. Alumni graduate degree or diploma holders                 | --            | --         | --        |
| 1c. Alumni without a degree or diploma                        | 698           | 121        | 44,807    |
| 1d. Enter Totals here ONLY if you have left 1a-1c above blank | --            | --         | --        |
| 1e. Alumni Curr. Ops. Total                                   | 17,224        | 5,366      | 5,877,273 |

|            | No. Solicited | No. Donors | Amount \$ |
|------------|---------------|------------|-----------|
| 2. Parents | 8,924         | 1,588      | 1,279,228 |

|  | No. Solicited | No. Donors | Amount \$ |
|--|---------------|------------|-----------|
| 3. Faculty and Staff                   | 609           | 81         | 57,185    |
| 4. Students                            | 502           | 251        | 3,190     |
| 5. All others not counted in 1-4 above | 645           | 247        | 277,718   |
| Dollar Total of rows 3-5 above         | --            | --         | 338,093   |

**C. Bequests - REQUIRED** Include realized bequests, not bequest intentions, which are reported in section 1. Make sure the bequests listed below are also reported in section 3A, 3B, and/or 3C. Bear in mind that most bequests would not appear in 3C. Generally, they are not deferred gifts. In some cases, though, a deferred gift may be established via a will. If any of the reported bequests were reported in 3C, report them below at their present value, not face value.

|  | No. of Donors | Amount \$ |
|--|---------------|-----------|
| 1. Bequests for Current Operations                                 | 6             | 266,429   |
| 2. Bequests for Capital Purposes                                   | 4             | 589,247   |
| 3. Enter Totals here ONLY if you have left lines 1 & 2 above blank | --            | --        |
| 4. Total Bequests  | 10            | 855,676   |

**D. Three Largest Donor Totals from Individuals - REQUIRED.**

If any of these gifts are deferred gifts, use PRESENT value, not face value.

|  | Largest \$ | 2nd Largest \$ | 3rd Largest \$ |
|--|------------|----------------|----------------|
| 1. From living individuals               | 2,500,000  | 1,091,311      | 691,500        |
| 2. Through estate settlements (bequests) | 350,788    | 218,031        | 150,000        |

**E. Direct Governing Board Giving for All Purposes**

Include current, emeritus and honorary board members. On row 1 include only gifts that receive legal/hard credit. Gifts that receive soft credit may be reported on row 2.

Remember to report under the dollar amount, the sum of outright gifts plus deferred gifts at PRESENT (discounted) value.

You should count trustees in this section even though you previously counted them as alumni, parents, or other individuals. And soft-credit gifts would still be counted even though they are also counted under the type of organization that provided the direct gift.

Do not enter zero to indicate you are skipping the question! Just leave the question blank if you're not answering. It is very unlikely that zero is a valid answer to this question.

|                                 | No. of Donors | Amount \$ |
|---------------------------------|---------------|-----------|
| 1. Governing Board Giving       | 47            | 3,560,048 |
| 2. Additional Soft-Credit Gifts | 19            | 4,611,295 |

**F. Deferred Giving - REQUIRED**

Number of gifts (Charitable Remainder Trusts, Pooled Income Funds, Gift Annuities, and the like) whose dollar amount is reflected in Section 3.C.

|                 | Number established or added to during reporting period |
|-----------------|--|
| Deferred Giving | 4  |

G. Appreciated Property Giving

|  | No. of Gifts | Amount \$ |
|--|--------------|-----------|
| 1. Securities  | 227          | 4,224,617 |
| 2. Real estate   | --           | --        |
| 3. Other real property   | 23           | 33,105    |
| 4. Enter Totals here ONLY if you have left lines 1-3 above blank | --           | --        |
| 5. Total Apprec. Prop.   | 250          | 4,257,722 |

H. Personal Giving Additional Details

Some personal gifts are dispensed through organizations and therefore are not reflected as personal giving data on this survey. Please report below personal gifts that are officially counted as coming from organizations elsewhere on this survey. The amount from family foundations will appear in section 4b and should not be entered here.

|   | No. of Donors | Amount \$  |
|---|---------------|------------|
| Donor-Advised Funds                             | 314           | 10,948,980 |
| Businesses                                      | 80            | 3,754,593  |
| Other Organizations (Including Federated Funds) | 7             | 4,350      |

I. Online Giving (Optional)

Please enter data for both this year and last year. DO NOT USE ZEROS TO SKIP THE QUESTION. SIMPLY LEAVE IT BLANK.

Report contributions transacted online below. Count individual and organizational donors. In row A. report total number of donors, online and via other methods. All other rows refer to online transactions only and should be a subset of all transactions for the fiscal year in question.

Only include payments that are charitable gifts as defined by the IRS.

Report below: Any electronic gift made through any of the portals provided by the institution and controlled through advancement. This may include:

- An institution's online giving page;
- Integrated portals (i.e., iModules, GiveCampus, Community Funded, etc.);
- Other social media channels (Facebook) that the institution orchestrates;
- Other electronic giving payment vehicles, such as text-to-give, Venmo, and other ways of making an electronic gift.

Include only donor-initiated online gift payments. Do not include online gift transactions made internally by staff (i.e., at special events, by phonathon callers, etc.) through your web page or portal as a means of processing gifts received through other (non-online) channels.

Do not include recurring gifts. Count each donor only one time per year.

|  | Last Year | This Year |
|--|-----------|-----------|
| A. Total No. Donors (Individuals and Organizations)        | 8,433     | 7,945     |
| B. Total No. Online Donors (Individuals and Organizations) | 5,726     | 6,065     |
| C. Total Online \$   | 2,124,490 | 2,319,415 |
| D. Largest Online Transaction                              | 50,000    | 50,000    |
| E. 2nd Largest Online Transaction                          | 25,000    | 25,000    |
| F. 3rd Largest Online Transaction                          | 25,000    | 21,500    |

Section 4b. Additional Details on Section 3 - Organizations & Other

2. Contributions from Organizations

A. Foundations

|  | No. of Donors | Amount \$ |
|--|---------------|-----------|
| 1. Personal and Family                               | 71            | 5,295,811 |
| 2. Other foundations and trusts, excluding corporate | 15            | 602,891   |
| 3. Total   | 86            | 5,898,702 |

B. Three Largest Donor Totals from Foundations - REQUIRED

The sum of the three largest donor totals from Foundations below must not exceed the total dollar amount reported from Foundations above because these largest donor totals must be included in the amounts reported above and in Section 3.

|             | Largest \$ | 2nd Largest \$ | 3rd Largest \$ |
|-------------|------------|----------------|----------------|
| Foundations | 1,160,500  | 1,080,374      | 1,026,000      |

C. Corporations

1. Forms of Giving

**DO NOT INCLUDE SOFTWARE HERE OR IN SECTION 3. IF IT WAS INCLUDED IN SECTION 3, PLEASE RETURN TO THAT SECTION, REMOVE THE GIFT(S), AND SAVE 3D AGAIN.**

|  | No. of Gifts | Amount \$ |
|--|--------------|-----------|
| 1. Cash and securities (exclusive of matching gifts) | 182          | 3,845,944 |
| 2. Company products                                  | --           | --        |
| 3. Other company property                            | --           | --        |
| 4. Matching gifts                                    | 217          | 156,528   |
| 5. Total   | --           | 4,002,472 |

2. Additional Matching Gifts Details

In addition to the amounts listed directly above in line 4, please report below 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, but are under the control of companies.

|  | No. of Gifts | Amount \$ |
|--|--------------|-----------|
| Matching Gifts Not Directly From a Corporation | 14           | 6,254     |

3. Software

If your institution wishes to record gifts of software, include them below. DO NOT include them anywhere else in the survey.

|          | Value of Software | No. Contributing Companies |
|----------|-------------------|----------------------------|
| Software | 0                 | 0                          |

D. Three Largest Donor Totals from Corporations - REQUIRED

The sum of the three largest donor totals from Corporations below must not exceed the total dollar amount reported from Corporations you reported in Section 3.

DO NOT INCLUDE SOFTWARE HERE OR IN SECTION 3. IF IT WAS INCLUDED IN SECTION 3, PLEASE RETURN TO THAT SECTION, REMOVE THE GIFT(S), AND SAVE 3D AGAIN.

|              | Largest \$ | 2nd Largest \$ | 3rd Largest \$ |
|--------------|------------|----------------|----------------|
| Corporations | 2,000,000  | 1,668,667      | 55,000         |

### 3. Other Fundraising Activity

**A. Purposes of Gifts to Endowment: Income Restricted**  
 (Include both outright and deferred gifts, and use the PRESENT value of deferred gifts.)

|                                       | Amount \$         |
|---------------------------------------|-------------------|
| 1. Academic Divisions                 | 1,048,374         |
| 2. Faculty and Staff Compensation     | 2,464,575         |
| 3. Research                           | 131,500           |
| 4. Public Service and Extension       | 0                 |
| 5. Library                            | 0                 |
| 6. Operation and Maintenance of Plant | 22,333            |
| 7. Student Financial Aid              | 5,288,070         |
| 8. Athletics                          | 30,551            |
| 9. Other                              | 7,703,254         |
| <b>Total</b>                          | <b>16,688,657</b> |

**B. Support of Intercollegiate (Extramural) Athletics ONLY**

Note that the total you report here is not comparable to other Athletics Giving Totals in the VSE Survey. In Section 3A, you report Current Operations Restricted Giving to Athletics for both Intramural and Extramural combined. Here you report only Extramural. Here should also include Extramural Gifts to Endowment, Income Restricted to Athletics that you include in Section 3.B (outright) and 3.C (deferred).

|                                     | No. of Donors | Amount \$     |
|-------------------------------------|---------------|---------------|
| 1. Restricted to current operations | 91            | 61,971        |
| 2. Restricted to capital purposes   | 2             | 30,551        |
| <b>3. Total</b>                     | <b>93</b>     | <b>92,522</b> |