Kenyon College
2024-25 CASE Insights on Voluntary Support of Education (VSE) Higher Education

1. Enrollment, Endowment, Expenditures, Characteristics

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, and debt service. 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.

	2023-24	2024-25
1. Enrollment Total Headcount	2,174	2,228
2. Enrollment Full-Time Equivalent	1,752.0	1,732.0
3. Endowment Market Value	626,600,000	680,000,000
4. Expenditures	178,400,000	184,200,000

B. Characteristics

Are hospital or medical facility data included in your survey?	No

In what decade did your institution first employ full-time development/fundraising staff?	1971-1980

C. Comprehensive Campaign

Use the field below to indicate whether you were in either the silent or public phase of a comprehensive campaign in the year you are reporting about in this survey. Also indicate whether you completed a comprehensive campaign in the past five years, including this one.

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?	No

Has your institution completed a comprehensive campaign in the past five years, including this one?	Yes

D. Currency

Choose the currency used to report on this survey. This will enable you to benchmark with institutions in other regions.

Currency	USD-United States Dollars

Kenyon College
2024-25 CASE Insights on Voluntary Support of Education (VSE) Higher Education

2. New Funds Committed

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	122	8,302,836
2. Outright Gifts Not Associated with a Pledge	6,034	27,237,852
3. New Revocable Bequest Intentions	10	4,860,722
4. Total New Funds Committed without Bequests		35,540,688
5. Total New Funds Committed Including Bequests		40,401,410

The dollar amount on row 2 must be lower than the total amount received. If you haven't reported total support yet, return to this section when you have, and your total will show in this window.	40,996,539

Kenyon College
2024-25 CASE Insights on Voluntary Support of Education (VSE) Higher Education

3a. Funds Received: Current Operations

Do you want to complete the Full version of the survey, which includes Total Current Operations, Unrestricted, and Current Operations, Restricted, across seven fund designations?

OR

Do you want to complete the Partial version of the survey, which only includes Total Current Operations, Unrestricted, and Total Current Operations, Restricted?

You must choose a version before you can enter data.

	Full	Partial
Select Your Version	X	

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor-Advised Funds	F. Other Organizations	G. Total
1. Unrestricted	2,946,733	669,160	548,885	154,627	1,394,676	8,299	5,722,380
Restricted 2. Academic Divisions	8,170	650	500	0	79,752	0	89,072
3. Faculty/Staff Compensation	322,508	50,000	0	0	0	0	372,508
4. Research	3,000	0	25,000	0	5,000	0	33,000
5. Student Financial Aid	629,478	14,747	463,133	700	31,039	44,359	1,183,456
6. Student Affairs/Life	35,762	29,832	55,000	12,200	48,002	1,250	182,046
7. Athletics	102,405	167,239	10,000	5,391	50,378	0	335,413
8. Other Restricted	1,055,278	203,272	670,750	66,046	316,435	38,266	2,350,047
9a. Enter Total Current Ops/Restricted here if you do not have the details requested in 2-8.							
9b. Total Restricted	2,156,601	465,740	1,224,383	84,337	530,606	83,875	4,545,542
10. Total Outright for Curr. Ops. (1+9b)	5,103,334	1,134,900	1,773,268	238,964	1,925,282	92,174	10,267,922

Kenyon College
2024-25 CASE Insights on Voluntary Support of Education (VSE) Higher Education

3b. Funds Received: Capital Purposes

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor-Advised Funds	F. Other Organizations	G. Total
1. Property, Buildings, and Equipment	7,640,679	319,199	15,000	88,455	275,482	308	8,339,123
2. Endowment: Income Unrestricted	1,023,421	390	10,000	0	5,000	0	1,038,811
3. Endowment: Income Restricted	10,775,595	2,294,265	1,676,807	2,074,972	4,241,199	0	21,062,838
4. Loan Funds	0	0	0	0	0	0	0
5. Total	19,439,695	2,613,854	1,701,807	2,163,427	4,521,681	308	30,440,772

Are you reporting present value this year? Note that this is optional.	

	A. Alumni	B. Nonalumni Ind.	C. Total
1. New Irrevocable Deferred Gifts (Face Value) REQUIRED	287,845	0	287,845
2. New Irrevocable Deferred Gifts (Present Value) OPTIONAL			

1. Number of Irrevocable Deferred Gifts Reported Above	1

Kenyon College
2024-25 CASE Insights on Voluntary Support of Education (VSE) Higher Education

3c. Funds Received: Gift Income Summary

Did you report the IRS tax deduction value of deferred gifts (section 3b) this year?	

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor-Advised Funds	F. Other Organizations	G. Total
1. Total Outright for Current Operations	5,103,334	1,134,900	1,773,268	238,964	1,925,282	92,174	10,267,922
2. Total Outright for Capital Purposes	19,439,695	2,613,854	1,701,807	2,163,427	4,521,681	308	30,440,772
3. Total Face Value of CRUTs, etc.	287,845	0					287,845
4. Official Grand Total	24,830,874	3,748,754	3,475,075	2,402,391	6,446,963	92,482	40,996,539
5. Tax Deduction for New CRUTs, etc.							
6. Alternate Grand Total Using Tax Deduction	24,543,029	3,748,754					40,708,694

Kenyon College
2024-25 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	21,385	19,565	3,827

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.	737

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	11	4,576,338

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	6,098,227	1,814,940	1,720,663	9,633,830
2. Bequests	1,650,000	975,720	500,000	3,125,720
3. Donor-Advised Funds	1,766,666	500,000	382,245	2,648,911
4. Foundations	80,000	70,000	50,000	200,000
5. Corporations	1,933,332	85,000	50,000	2,068,332
6. Totals	11,528,225	3,445,660	2,702,908	17,676,793

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 Indivduals" 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 substracting bequests from the sum of alumni and nonalumni individual giving. You reported the following for those:	24,830,874	3,748,754

	Donor-Advised Funds	Foundations	Corporations
These are the total giving values reported for these sources in section 3.	6,446,963	3,475,075	2,402,391

Kenyon College
2024-25 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	21.00	7.00	11.50	2.00	41.50

Do you want to answer the next question about student workers? If you have no student workers, check “No.”	o Yes o No

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			

Kenyon College
2024-25 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 in this question. 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 dollars to the "additional" soft-credit dollars column.

UPDATED 2025: Reporting Additional Soft-Credit Gifts

Internal records will have more soft-credit gift records than the number reported on the survey. Internal records are for stewardship purposes, and it is useful to credit multiple individuals for a single payment. For example, if someone's DAF makes a payment, that person is soft-credited, and that person's spouse is also credited. So, the DAF payment is counted three times internally.

On the survey, we want to count that DAF gift payment only once under soft credit. Any organizational gift for which an individual or entity is soft-credited should be credited only once for any category of donor.

So, if a family foundation makes a gift, and two alumni who are married made decisions at the foundation, only record the soft-credit payment amount once. You may count each donor in the soft-credit count if they do not already have hard credit for another gift.

If an alumni household makes a gift, hard-credit the individual who made the gift. Soft-credit the other individual unless they have hard credit for another gift. Count the dollars only in the hard-credit dollars column. Do not duplicate any hard-credited alumni dollars in the soft-credit column.

The aim is to report any single transaction only once in soft-credit gifts for any constituent type. Then, we can add soft- and hard-credit giving from, for example, alumni, and get a value that does not double-count any transaction. That is the measure of the giving behavior of alumni.

In choosing which entity or person to credit with the transaction, stay as close to the origin as possible. If a DAF makes a corporate matching gift, the corporation, not the individual whose gift was matched, gets the soft credit.

For this question, you have two options: 1) You can provide details by completing rows 1-5, 7 & 8. Rows 6 and 10 will auto-total; row 9 will gray out. 2) 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 for the option you have chosen (i.e., rows 1-5, 7 & 8 -OR- row 9). 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.

Soft-credit alumni donors can be a useful variable for benchmarking. If you would like to provide only the total number of alumni additional soft-credit donors, enter that figure in cell E9. You can leave the rest of the cells blank.

	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.					737	
10. Totals					737	

1. Number of Legally Contactable Alumni in cell A10 must equal Number of Legally Contactable Alumni in Section 4a, shown here:	21,385
2. Number of Alumni Solicited in cell B10 must equal Number of Alumni Solicited in Section 4a, shown here:	19,565
3. Number of Alumni Donors in cell C10 must equal Number of Alumni Donors in Section 4a, shown here:	3,827

4.. Hard credit Alumni $ in cell D10 must equal the value in Section 3 Minimal or 3c Full/Parital, shown here:	24,830,874