

# VSE Higher Education 2022

## FY2022

**You must agree to the data use policy to submit this survey. Check here to indicate your agreement.**

1

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, AMAtlas Data Miner. 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.

Exceptions to this are that CASE publicly releases the institution names and amounts raised for those respondents reporting the twenty largest giving totals annually. CASE also supplies a list of institutions and amounts raised by state to media outlets requesting such information.

## 1. New Funds Committed

### 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.

	A. Number of Hard-Credit Donors	B. Value of Commitments
<b>1. New Pledges</b>	236	16,268,866
<b>2. Funds Received that Were Not Pledged Either this Year or in Any Other Year.</b>	6,920	36,712,363
<b>3. New Revocable Bequest Intentions</b>	15	2,755,000
<b>4. Total New Funds Committed Without Bequests</b>	--	52,981,229
<b>5. Total New Funds Committed Including Bequests</b>	--	55,736,229

## 2. Enrollment, Endowment, Expenditures, Characteristics (Required)

**ENROLLMENT:** Count enrollment at the beginning of the academic year being reported (i.e., fall of 2021 for the report covering the 2021-22 fiscal year). All students (except continuing education) are counted: full-time, part-time, resident, extension, nondegree. (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.

If you wish to change your previous-year data, contact [vse@case.org](mailto:vse@case.org). If the fields for last year are blank, there is no need to add them this year.

	FY2021	FY2022
<b>1. Enrollment - total</b>	1,617	1,877
<b>2. Enrollment - full-time equivalent</b>	1,612.0	1,871.0
<b>3. Endowment market value \$</b>	545,722,454	517,006,638
<b>4. Expenditures \$</b>	133,211,430	159,590,479

**Are hospital or medical facility data included in your survey?**

No

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



## 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.

The following reporting standards have changed:

1. Report **both** exempt and non-exempt positions.
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.

**There is no longer a separate column for communications and marketing outside fundraising and alumni relations. Communications and marketing within fundraising or alumni relations should continue to be recorded in columns A or B.**

You are allowed to complete only question A or only question B. You are no longer required to complete both questions.

### A. Expenditures

If someone works in more than one functional area, distribute the costs of the position accordingly.

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

### 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
<b>1. Staff FTEs</b>	21.50	7.50	10.00	2.00	41.00

**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.

	<b>A. Development/ Fundraising</b>	<b>B. Alumni Relations/Affairs</b>	<b>C. Total</b>
<b>1. Student Worker \$</b>	4,979	4,000	8,979
<b>2. Student Worker Hours</b>	579.0	370.0	949

**D. Comprehensive Campaign**

Use the field below to indicate whether you are in either the silent or public phase of a comprehensive campaign. **You must select yes or no below.**

CASE and Marts & Lundy are collecting a full data set on campaigns. You can look for more information here: [CASE-Marts & Lundy Campaign Source](#)

**Is your institution in the silent or public phase of a comprehensive campaign?**

Yes

### 3a. Current Operations (Full and Partial)

**Please note:** Your institution has been assigned the full/partial version of the VSE survey based on the version completed in the past or if a contact from your institution specifically requested it. If you prefer to complete the **Minimal** version of the survey, in which section 3 is less detailed, send your request to [VSE Support](#). Specify the name of your institution and the state where it is located. VSE Staff will adjust the survey form made available to your institution. All forms of the survey count as full participation in the program.

For this question, you have two options. You can provide details by completing rows 1-8. Row 9a will gray out. Rows 9b and 10 will auto-total. This is the full version of the survey.

**OR**

If you cannot provide details, complete rows 1 and 9a only. Rows 2-8 will gray out. Rows 9b and 10 will auto-total. This is the partial version of the survey.

If you choose the detailed full version, please enter 0 where no gift income was received for a particular cell. Do not leave any cells blank. Do not use decimals. Round to whole numerals.

**If you are unable to break out DAFs this year, enter 0s in column E, and check this box. Next year you must provide accurate data.**

--

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor- Advised Funds	F. Other Organizations	G. Total
<b>1. Unrestricted</b>	2,797,702	931,751	438,867	167,031	743,102	11,583	5,090,036
<b>Restricted 2. Academic Divisions</b>	1,250	45,785	12,500	0	1,047	1,000	61,582
<b>3. Faculty/Staff Compensation</b>	0	0	25,000	0	53,594	0	78,594
<b>4. Research</b>	0	25,000	0	0	0	0	25,000
<b>5. Student Financial Aid</b>	200	897,704	125,000	0	21,356	53,628	1,097,888
<b>6. Student Affairs/Life</b>	264,442	17,268	22,500	15,838	35,500	2,536	358,084
<b>7. Athletics</b>	16,811	93,529	0	7,500	20,000	0	137,840
<b>8. Other Restricted</b>	6,018,170	214,215	817,308	10,704	756,495	15,500	7,832,392
<b>9a. Enter Total/ Current Ops/Restricted here if you do not have the details requested in 2-8.</b>	--	--	--	--	--	--	--
<b>9b. Total Restricted</b>	<b>6,300,873</b>	<b>1,293,501</b>	<b>1,002,308</b>	<b>34,042</b>	<b>887,992</b>	<b>72,664</b>	<b>9,591,380</b>
<b>10. Total Outright for Curr. Ops. (1+9b)</b>	<b>9,098,575</b>	<b>2,225,252</b>	<b>1,441,175</b>	<b>201,073</b>	<b>1,631,094</b>	<b>84,247</b>	<b>14,681,416</b>

## 3b. Capital Purposes (Full & Partial)

### A. Outright Gifts for Capital Purposes

On this survey, the term "Capital Purposes" refers to gifts donors designated to purposes that add to the financial or physical infrastructure of an institution. They include: gifts to endowment (both with and without restrictions on the use of income), gifts of or for the purchase of property, buildings, or equipment, and, while uncommon, loan funds.

When reporting gifts of property, only include gifts that are for use by the institution, not those that are converted to cash via sale or auction. Do not include conservation easements on the survey unless they produce income, which is rare. Do not include software licenses.

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor- Advised Funds	F. Other Organizations	G. Total
1. Property, Buildings, and Equipment	21,456,443	712,493	5,000	275	128,506	0	22,302,717
2. Endowment: Income Unrestricted	844,363	814	19,000	0	2,500	0	866,677
3. Endowment: Income Restricted	7,265,048	2,947,198	2,987,248	909,642	3,789,521	0	17,898,657
4. Loan Funds	0	0	0	0	0	0	0
5. Total	29,565,854	3,660,505	3,011,248	909,917	3,920,527	0	41,068,051

**B. Newly Established Irrevocable Deferred Gifts: Charitable Gift Annuities, Charitable Remainder Trusts, Pooled Income Funds, and Remainder Interest in Property**

This section is for *irrevocable* deferred gifts only.

Report both the Face Value of and the IRS Tax Deduction for newly established 1. Charitable Remainder Trusts. 2. Charitable Gift Annuities 3. Pooled-Income Funds 4. Remainder Interest in Property. You must report both the face value and the tax deduction permitted. There is a calculator on the CASE website's [VSE Survey Help page](#) to determine the tax deduction of these instruments. Scroll down until you see the Deferred Gift Tax Deduction Calculator.

If you had no such gifts, enter zero. Do not include pledges, gifts from IRAs, bequest intentions, or realized bequests here. Gifts to be reported below are specific types of gifts and are a subsection of what may be referred to as "planned" gifts.

	A. Alumni (Face Value)	B. Alumni (IRS Tax Deduction)	C. Nonalumni Ind. (Face Value)	D. Nonalumni Ind. (IRS Tax Deduction)	E. Total Face Value	F. Total IRS Tax Deduction
1. New Irrevocable Deferred Gifts	1,022,995	360,953	0	0	1,022,995	360,953

C. Total number of newly established irrevocable deferred gifts reported in section B above.

	Number of Gifts
1. Number of Irrevocable Deferred Gifts Reported Above	1

## 3c. Gift Income Summary (Full & Partial)

This form displays data you entered in Sections 3a and 3b so that you can see your calculated Grand Total. If you wish to adjust any figures, return to 3a or 3b, and make the changes there. Then resave this section

**It is important that you save this section whenever you make a change to another part of section 3.**

Check here, and save this section.

1

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor- Advised Funds	F. Other Organizations	G. Total
1. Total Outright for Current Operations	9,098,575	2,225,252	1,441,175	201,073	1,631,094	84,247	14,681,416
2. Total Outright for Capital Purposes	29,565,854	3,660,505	3,011,248	909,917	3,920,527	0	41,068,051
3. Total Face Value of CRUTs, etc.	1,022,995	0	--	--	--	--	1,022,995
4. Official Grand Total	39,687,424	5,885,757	4,452,423	1,110,990	5,551,621	84,247	56,772,462
	--	--	--	--	--	--	--
5. Tax Deduction for New CRUTs, etc.	360,953	0	--	--	--	--	360,953
6. Alternate Grand Total Using Tax Deduction	39,025,382	5,885,757	--	--	--	--	56,110,420

## 4a. Additional Details: Required

### A. Contributions from Alumni

Do not count any soft credits in this section. You may do so in 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 the AEM survey, are much more robust evidence of how engaged your alumni are with the institution than is philanthropic participation alone. If you wish to learn more about that survey, visit: [AEM Resources](#)

You may also email us with questions about the AEM survey: [AEM Support](#).

	A. Legally Contactable Alumni	B. Number Solicited	C. Number Hard-Credit Donors
1. Total	20,292	18,645	5,213

### B. Bequests

Include realized bequests, not bequest intentions, which may be reported in section 1. Make sure the bequests listed below are also reported in section 3 and credit them to the decedent, either an alumnus or a nonalumni individual.

	A. No. of Donors	B. Amount \$
1. Total Bequests Received	17	4,340,411