

VSE Higher Education 2022

FY2022

2. Enrollment, Endowment, Expenditures, Characteristics

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. If the fields for last year are blank, there is no need to add them this year.

	FY2021	FY2022
1. Enrollment - total	--	--
2. Enrollment - full-time equivalent	--	--
3. Endowment market value \$	--	--
4. Expenditures \$	--	--

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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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.

	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor- Advised Funds	F. Other Organizations	G. Total
1. Unrestricted	--	--	--	--	--	--	--
2. Academic Divisions	--	--	--	--	--	--	--
3. Faculty/Staff Compensation	--	--	--	--	--	--	--
4. Research	--	--	--	--	--	--	--
5. Student Financial Aid	--	--	--	--	--	--	--
6. Student Affairs/Life	--	--	--	--	--	--	--
7. Athletics	--	--	--	--	--	--	--
8. Other Restricted	--	--	--	--	--	--	--
9a. Enter <i>Total</i> Current Ops/Restricted here if you do not have the details requested in 2-8.	--	--	--	--	--	--	--
9b. Total Restricted	--	--	--	--	--	--	--
10. Total Outright for Curr. Ops. (1+9b)	--	--	--	--	--	--	--

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	--	--	--	--	--	--	--
2. Endowment: Income Unrestricted	--	--	--	--	--	--	--
3. Endowment: Income Restricted	--	--	--	--	--	--	--
4. Loan Funds	--	--	--	--	--	--	--
5. Total	--	--	--	--	--	--	--

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	--	--	--	--	--	--

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	--

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.

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	A. Alumni	B. Nonalumni Individuals	C. Foundations	D. Corporations	E. Donor- Advised Funds	F. Other Organizations	G. Total
1. Total Outright for Current Operations	--	--	--	--	--	--	--
2. Total Outright for Capital Purposes	--	--	--	--	--	--	--
3. Total Face Value of CRUTs, etc.	--	--	--	--	--	--	--
4. Official Grand Total	--	--	--	--	--	--	--
	--	--	--	--	--	--	--
5. Tax Deduction for New CRUTs, etc.	--	--	--	--	--	--	--
6. Alternate Grand Total Using Tax Deduction	--	--	--	--	--	--	--

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	--	--	--

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

	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	--	--	--	--