

**CASE InsightsSM on
Voluntary Support of Education (United States)**

Requirements to Participate

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 (All Versions) 4
 - Enrollment, Endowment, Expenditures, Characteristics 4
 - Total Giving by Source & By Purpose..... 4
 - Additional Required Details 5
- Data for Optional Sections/Questions..... 6
 - New Funds Committed 6
 - Advancement Investment 6
- Additional Optional Details 6
- Additional Survey Help..... 6

CASE Global Reporting Standards

The VSE survey aligns with the CASE Global Reporting Standards, released in March 2021, which represent worldwide standards for reporting the outcomes of institutional fundraising. The publication is available for purchase in print and digital editions. Learn more on the [CASE Global Reporting Standards webpage](#).

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, the [CASE-CCAE Support of Education Survey](#).

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 [Data Miner](#), 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 designations for the use of gift funds made by the donor 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 particular 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 (All Versions)

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

Total Giving by Source & By Purpose

Total Giving by Source must be equal to Total Giving by Purpose

Total Support from Individuals:

- Alumni
- Nonalumni Individuals

Total Support from Organizations:

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

Total Giving by Purpose must be equal to Total Giving by Source

Support that Donors Designated for:

- Current Operations (unrestricted)
- Current Operations (restricted)
 - The most detailed option on the full/partial version further requires the specific donor designations (e.g. – research, student financial aid, athletics, etc.)
- Endowment (income unrestricted)
- Endowment (income restricted)
- Property, Buildings, or Equipment
- Loan Funds
- Value and Number of Newly Established **Irrevocable** Deferred Gifts (Charitable Gift Annuities, Charitable Remainder Trusts, Pooled-Income Funds, Remainder Interest in Property)
 - The full/partial version of the survey requires the full face value of the of the assets used to fund the gift and the tax deduction the donor received for establishing the gift. In the survey, there is a link to a Deferred Gift Tax Deduction Calculator available on the [VSE Survey Help page](#).
 - The minimal version requires only the face value.

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 Gifts 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 Survey Help page](#) for PDFs that show the specific questions or contact the [VSE staff](#) with any questions.

New Funds Committed

Number of hard-credit donors and value of commitments for new pledges, new revocable bequest intentions, and funds received that were not pledged in a previous year.

Advancement Investment

Advancement expenditures and staff FTEs across each of four functional areas; information about student worker number of hours and amount paid; a Yes/No question about whether you are in a campaign.

Additional Optional Details

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

- Details for Contributions from Alumni
- Details for 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

Additional Survey Help

Visit CASE's [VSE Survey Help page](#) for a detailed survey guidance document, as well as PDFs of the survey versions, data collection grids, and more. There are also links to the guidance document and help page from the VSE survey menu when you are logged into the [survey data collection website](#). Contact the [VSE staff](#) if you have any questions.