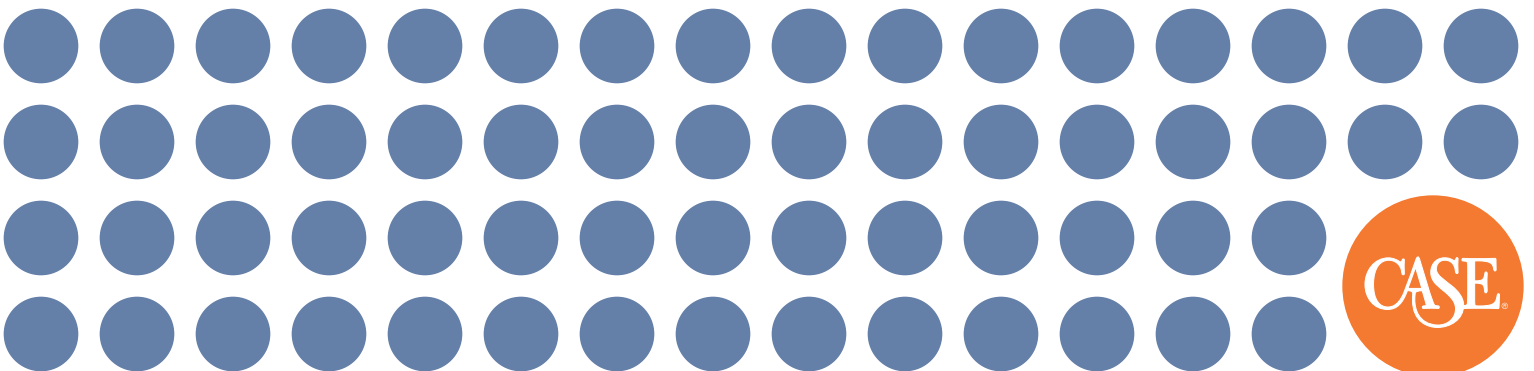
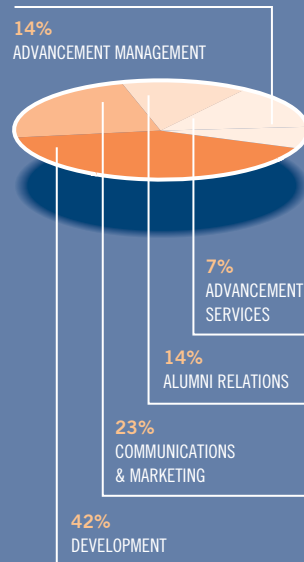


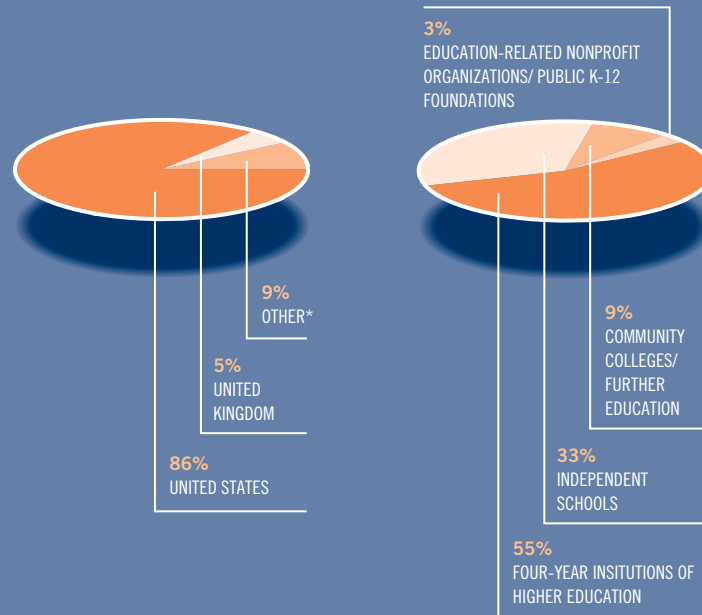
We thank the  
50,000 professionals  
we are privileged to serve.  
The accomplishments  
documented in this report  
are ultimately  
**the work of 100,000 hands**  
advancing education  
at our member institutions  
around the world.



## WHAT CASE MEMBERS DO



## WHERE CASE MEMBERS WORK



### WHAT IS CASE?

CASE is a nonprofit membership organization that provides professional development programs, publications, research, standards, and advocacy in the field of educational advancement as practiced at schools, colleges, and universities worldwide. Educational advancement includes the disciplines of alumni relations, communications & marketing, and fund raising, as well as advancement management and advancement services.

### WHO ARE CASE MEMBERS?

More than 3,200 independent schools, two- and four-year colleges and universities, as well as affiliated and related organiza-

tions, belong to CASE, making it the largest association of educational institutions in the world. CASE member institutions can be found in 46 countries and employ at least 50,000 people in advancement, with nearly half of them registered as professional members of CASE. In addition, more than 200 for-profit firms involved in advancement are currently CASE Educational Partners.

### HOW DOES CASE SERVE MEMBERS?

As the leading association for educational advancement, CASE provides nearly 100 conferences, workshops, and online seminars each year at which professionals hone their skills, refresh their

knowledge, and broaden their network of colleagues. CASE also shares with members the latest approaches and the best practices in the field through CURRENTS magazine, a catalog of approximately 100 advancement-related books, an extensive annual awards program, a monthly online newsletter, and a peer-reviewed research journal. In addition, CASE conducts and disseminates research and benchmarking studies that help institutions and individuals assess and improve the effectiveness of their advancement offices. An array of other services, such as our matching-gifts offerings and the U.S. Professors of the Year program, are fully described at [www.case.org](http://www.case.org).

### WHY IS ADVANCEMENT IMPORTANT?

Advancement, whether practiced through alumni relations, communications & marketing, or fund raising, is crucial to the long-range success of educational institutions. Advancement professionals help their campuses build lasting and supportive relationships with alumni, donors, advocates, elected officials, community and business leaders, parents, taxpayers, media representatives, prospective students, and others on whom the future of the institution depends. At its core, the field of advancement is dedicated to expanding educational opportunities and extending educational benefits to all those who can be served by them.

\* AUSTRALIA • BAHAMAS • BELGIUM • BERMUDA • BRAZIL • BULGARIA • CANADA • CHILE • COLOMBIA • COSTA RICA • DENMARK • EGYPT • FINLAND • FRANCE • GERMANY • GREECE • HONDURAS • HONG KONG • HUNGARY • INDONESIA • ISRAEL • ITALY • JAMAICA • JAPAN • KUWAIT • LEBANON • MALAYSIA • MEXICO • NETHERLANDS • NEW ZEALAND • NORWAY • PAKISTAN • PHILIPPINES • POLAND • PORTUGAL • REPUBLIC OF IRELAND • REPUBLIC OF SOUTH AFRICA • SINGAPORE • SOUTH KOREA • SPAIN • SWEDEN • SWITZERLAND • TURKEY • UNITED ARAB EMIRATES

# Resilience, Relevance, & Resolve

The fiscal year ending June 30, 2003 at CASE clearly demonstrated resilience, relevance, and resolve in pursuit of our mission: advancing education by enhancing the professional effectiveness of our members.

The importance of our efforts has perhaps never been greater. During 2002-2003, our member institutions faced unprecedented challenges and pressures, with serious budgetary constraints heading the list. Despite those constraints — and in many cases because of them — advancement professionals turned to CASE in growing numbers for best practices, innovative approaches, performance standards, and skills development. We were particularly gratified by the growth in institutional memberships over the previous year, with the greatest percentage increases occurring in Europe.

In the following pages, you will find highlights of the many ways in which we served our member institutions and their staffs. These highlights convey a story of committed volunteers and of dedicated staff. What these highlights do not convey fully is the quality and quantity of our ongoing services to members — from the roughly 1,700 expert sessions we conducted at professional conferences and workshops to the more than 1,500 pages of valuable information we published in CURRENTS magazine and CASE Books.



A handwritten signature in black ink that reads "Vance T. Peterson".

**Vance T. Peterson**  
CASE President

Even as we continued to provide a wide array of programs and services and even as we implemented new ways to respond to member needs, we also set the course for CASE's long-range development with the passage of a five-year strategic plan. A summary of CASE's strategic plan can be found within these pages.

This annual report also includes the audited financial statements for fiscal year 2003. The statements show a welcome, albeit modest, operating surplus. Our sound financial performance even in a difficult economic climate also serves to reinforce our fundamental belief that the strength of our balance sheet is directly linked to the strength of our service to members.



A handwritten signature in black ink that reads "Kent D. Rollins".

**Kent D. Rollins**  
Chair, CASE Board of Trustees  
and President,  
University of Arizona  
Medical Center Foundation

At the conclusion of this annual report are listings of a small fraction of the people who contributed to our many successes in 2002-2003. We offer our thanks to all of them, and want to express our special appreciation to Jack Ohle, president of Wartburg College, for his exemplary chairmanship of the CASE Board of Trustees during this period of steady progress in fulfillment of our mission. Most of all, we thank the 50,000 professionals we are privileged to serve. The accomplishments documented in this report are ultimately the work of their 100,000 hands, advancing education at our member institutions around the world.



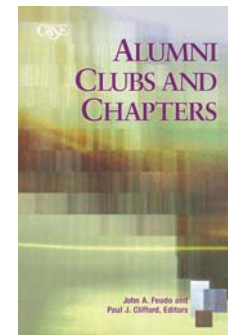
# Serving the Profession

CASE continues to be known for its excellent professional development opportunities, wide array of resources, body of knowledge about advancement, and effective advocacy and outreach.

The best measure of CASE's success is the success of our members. When we can connect members with resources that help them achieve their professional goals, then we've met *our* goals. CASE in 2002-03 provided a supportive, knowledgeable, and caring community through which our members were able to learn and grow together and gain valuable new insights to advance education.

CASE continues to be known for its excellent professional development opportunities, wide array of resources, body of knowledge about advancement, and effective advocacy and outreach. Timely information and awareness of important trends are essential in advancement, and we know our members cannot serve their institutions without it.

While our members are engaged in the day-to-day work of supporting their institutions, CASE is also concerned with the "big picture" — what is the climate for advancement today? What government policies and initiatives can CASE pursue that will enhance our members' success, especially in a time of economic challenge? What standards should our members



adhere to as they strive to secure their institutions for future generations of students? How can we frame for the public the connection between the practice of advancement and the success of education? How can we increase the ethnic and racial diversity among advancement professionals to better reflect the populations they serve? CASE supported its members in every aspect of their work and at the same time grappled with the larger issues of the day.

## INFORMATION AND RESOURCES

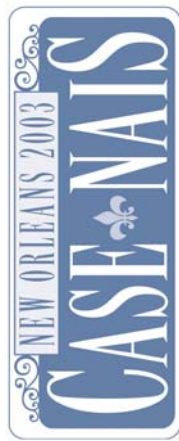
In 2002-03, CASE continued to offer top-notch professional development programs. From conferences on major gift fund raising and sessions on media relations and marketing strategies to our online speaker series, CASE provided members with information to enhance efficiency and heighten success. Our more than 100 conferences, seminars, Summer Institutes, and workshops in the United States, Canada, Mexico, Europe, the United Kingdom, and online are a critical measure of our commitment to advancement.

CASE sought to improve the value of the annual International Assembly to members through the efforts

of the Task Force on the Future of the Assembly, which in the fall of 2002 began crafting a new approach to CASE's signature gathering. The result of the committee's work was a focus on the major, overarching issues that affect all of advancement and how those issues — including demographics and the global economic environment — impact various advancement disciplines.

New approaches were also reflected in the online speaker series and the CASE Advancement Management Institute, inaugurated in the spring of 2003. By delivering focused seminars over the Web and phone lines, the online series allows CASE to provide timely information to members wherever they are, in a format conducive to give-and-take. The Advancement Management Institute, an intensive three-day conference on overseeing the entire advancement function, responded to the special professional development needs of mid- and senior-level managers.

Because of our reputation for providing high-quality professional development, other organizations sought CASE's expertise in developing program content, selecting faculty members, and providing



resource materials for their educational advancement conferences. One such collaboration resulted in the Kresge HBCU Initiative Learning Institute in May 2003, which focused on enhancing advancement activities at private, historically black colleges and universities.

CASE is also collaborating with the Carnegie Corporation of New York as part of the Partnership to Strengthen African Universities, an initiative aimed at improving institutions' capacity for advancement.

CASE's publications are another example of our commitment to delivering the best information possible to our members and others. We redesigned our award-winning magazine, *CURRENTS*, in January 2003 to give it a more contemporary, crisp look. The redesign, only the third in the magazine's 28-year history, includes a new column on career-development ideas for advancement professionals.

We published new book titles in 2002-03, including *Alumni Clubs and Chapters*, *Innovations in Annual Giving*, and *Fund Raising from Black-College Alumni*, while continuing to make available the traditional titles for which CASE Books is known, and while also planning for additional titles in 2003-04.

Because our members are served best when information is available in a variety of formats, CASE launched a monthly e-newsletter, *BriefCASE*, in April 2003, providing members with a quick, reader-friendly summary of noteworthy topics and trends in education and educational advancement.

Our membership also benefited from our expanded matching-gift programs, through which we supplied more information to donors and fund raisers alike about the requirements and criteria for thousands of companies that match the charitable gifts of their employees. We enhanced our Jobs Online services as well, successfully connecting thousands of advancement professionals with a variety of career opportunities.

To ensure that members are knowledgeable about all that we offer, CASE began an integrated approach to marketing our products and services. This approach included "bundling" services by professional interest area in periodic e-mails to appropriate subsets of our membership.

## STANDARDS AND RESEARCH

At CASE, we believe that the best advancement practices are informed by good research, solid data, informative benchmarking studies, and professional standards that help institutions to be more accountable to all constituencies, and more productive as well.

The Board of Trustees approved revisions to CASE's standards for managing fund-raising efforts and reporting results, after a deliberative process that included broad-based member feedback and focused discussion. The revisions to the Management and Reporting Standards, which are meant to provide greater clarity and greater comparability of fund-raising totals across institutions, impact data submitted for fund-raising surveys conducted by CASE and by the Council for Aid to Education.



CASE also published the results of its 2002 Advancement Salary Survey in *CURRENTS* in July 2002, and set an ambitious agenda for collecting additional data. We embarked on a major census of members to capture important data on primary areas of responsibility, years in advancement, and much more. The information allows us to do a better job of meeting our members' needs through taking the pulse of our profession.

In its third full year of publication, *The CASE International Journal of Educational Advancement* welcomed a new editor, devoted a special issue to international research, continued to offer its readers the latest scholarly studies on the advancement disciplines, and made lasting contributions to the growing body of knowledge in the field.

### ADVOCACY FOR ADVANCEMENT

We took important stands on issues affecting advancement and continued our strong support for legislation before the U.S. Congress that would provide additional incentives for charitable giving. Beyond advocating for that legislation and educating our members about its benefits, CASE was successful in linking with other nonprofit and membership organizations around the world in support of policies to enhance support of education.

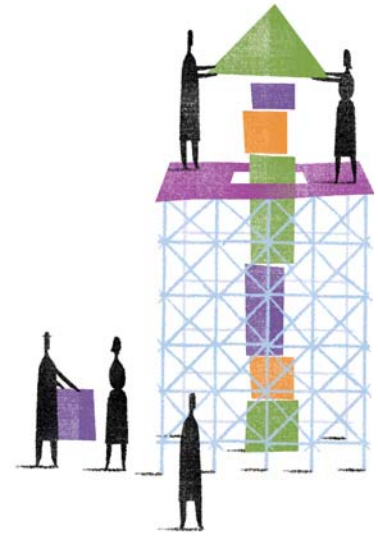
As part of our legislative-relations efforts in the United States, CASE signed on to friend-of-the-court briefs in Supreme Court cases that focused on state attempts to regulate fund-raising costs and on affirmative action in higher education.

CASE also created a Web-based Public Policy Chart in 2002-03, providing members with the opportunity to learn, at a glance, about federal policies in the States and initiatives likely to impact their work.

We continued to advocate for the profession by taking steps to increase diversity, believing that a diverse workforce is crucial to ensuring the widest support for educational institutions.

Internationally, CASE was part of high-level discussions on educational advancement from South America to Asia, including a symposium in Hong Kong on creating policies to encourage private giving to universities. Through collaborations such as the Partnership to Strengthen African Universities, CASE is sharing best practices in educational advancement and helping to ensure the success of educational institutions wherever they are.

In the United Kingdom, the government published a far-reaching and groundbreaking White Paper on the Future of Higher Education. Among other proposals, the paper drew attention to the potential for alumni support, the importance of building up endowment, and the value of professional fund-raising operations. CASE Europe was pleased to be able to contribute to the briefing process in the run-up to the White Paper and in its aftermath, and to be able to cite the experience of educational institutions ranging from Canada to Hong Kong as helpful benchmarks. ●



# Organizing for the Future

CASE has always been remarkable for the number of volunteers who eagerly give back to the profession and contribute to the success of their association.

As we sought to build on the record of accomplishment in 2002-2003 and to continue CASE's nearly 30-year legacy of exceptional service to members and to education, we undertook a number of planning and organizational initiatives.

## **PLANNING**

A broad range of planning initiatives came to fruition with the publication of a new strategic plan for the organization as a whole. In addition, each division completed complementary operating plans to guide budget development and strategic plan implementation.

CASE senior staff also developed the "CASE Business Resumption Plan," designed to protect staff and continue core operations in the event of a catastrophic occurrence in the Washington, DC, metroplex that would deny access to the CASE building, seriously affecting records and technology, or otherwise compromising CASE's ability to carry out its mission.

## **VOLUNTEER GOVERNANCE**

CASE has always been remarkable for the number of volunteers who eagerly give back to the profession

# To Advance Education and the Profession

## CASE STRATEGIC PLAN 2003-2008 | EXECUTIVE SUMMARY

The strategic plan for CASE is the result of a planning process reflecting the importance that CASE places on the needs of its members, as well as the key role of the volunteer leadership — at the regional, national, and international level — in setting the direction for the organization.

The resulting plan (full text at [www.case.org](http://www.case.org)) provides specific strategies and tactics for responding to the four imperatives outlined at right and rests squarely on CASE's core statements of vision, mission, and key values adopted by the Board of Trustees.

### VISION

As the premier professional association for educational advancement, CASE aspires to be the leading resource for professional development and information, the leading proponent of professional ethics and standards, and the leading advocate for diversity.

### MISSION

The Council advances and supports educational institutions by enhancing the effectiveness of the alumni relations, communications, and fund-raising professionals who serve them.

### KEY VALUES

Fundamental to CASE's success is service to education and members as a primary focus; respect for volunteers and staff as leaders, partners, and shareholders; and a commitment to integrity, ethical behavior, and inclusiveness as key characteristics of leadership.

#### IMPERATIVE: CONTINUOUSLY STRENGTHEN MEMBER SERVICES

**STRATEGY 1:** Become a more member-centered and responsive organization by utilizing technology to focus on the specific needs of individual professionals for information, training, and affiliation.

**STRATEGY 2:** Expand and enhance professional development offerings for senior advancement professionals.

**STRATEGY 3:** Use CASE's strong brand equity and industry leadership position to strengthen member benefits through new partnerships and business ventures.

**STRATEGY 4:** Expand and enhance services to the districts and CASE Europe.

**STRATEGY 5:** Expand and enhance professional development offerings for campus chief executive officers.

#### IMPERATIVE: FURTHER THE PROFESSION

**STRATEGY 1:** Take the lead in developing, maintaining, and reporting research on the theory, practice, attributes, and results of educational advancement that will promote more effective understanding within all educational sectors.

**STRATEGY 2:** Take the lead in promoting a more diverse workforce in educational advancement.

**STRATEGY 3:** Reach out to new and emerging practitioners involved in advancing education.

**STRATEGY 4:** Establish global standards, principles, and models of ethical best practice for the profession.

**STRATEGY 5:** Study and adopt strategies that encourage high levels of confidence in the excellence and effectiveness of educational advancement practice.

**STRATEGY 6:** Promote greater public, legislative, and media understanding and appreciation for the educational enterprise.

#### IMPERATIVE: ESTABLISH GLOBAL LEADERSHIP

**STRATEGY 1:** Ensure that CASE membership reflects the global nature of the educational advancement profession.

**STRATEGY 2:** Increase professional services offered outside the U.S.

**STRATEGY 3:** Develop and maintain a governance model that promotes participation by colleagues from all regions at all levels and within all disciplines of advancement.

**STRATEGY 4:** Become an influential partner with chief executive officers of member campuses outside the U.S.

#### IMPERATIVE: LEAD CHANGE IN ADVANCEMENT PRACTICE

**STRATEGY 1:** Continuously monitor the changing nature of the advancement profession.

**STRATEGY 2:** Periodically report the changing nature of the advancement profession.

**STRATEGY 3:** Appropriately reflect the changing nature of the advancement profession in CASE services, staffing, and governance.

# The CASE Community



and contribute to the success of their association. This tradition continued unabated during 2002-03.

The CASE Board of Trustees underwent restructuring in 2002-03 in order to further streamline its work and align its focus with the strategic imperatives of the association as a whole. Within this new structure and under the chairmanship of Jack Ohle, president of Wartburg College, the Board accomplished a great deal including passage of the new strategic plan for CASE, approval of revisions to the CASE standards for managing fundraising efforts and valuing and reporting their results, development of an industry advisory council, and creation of a Lifetime Achievement Award.

During this same period, the CASE Europe Board of Trustees oversaw the continued growth of our European operations, including a new UK-based Spring Institute in Educational Fundraising and a planned leadership conference funded by external philanthropic support.

CASE continued in 2002-03 to further extend and integrate the work of our eight regional districts, under the oversight of the District Boards of Directors. The District Exchange program, whereby district volunteers attend other district conferences in the year preceding assumption of major conference responsibilities, continued to prove effective in creating opportunities for sharing best practices among district leaders. The District Chairs Council further strengthened its fall District Leadership Conference through the inclusion of all district diversity committee chairs and district treasurers, as well as district conference and program chairs, and district chairs and chairs-elect.

In addition to monitoring the CASE curriculum and tracking key horizon issues during the past year, the three CASE Commissions (Alumni Relations, Communications & Marketing, and Philanthropy) engaged in joint discussion of the future of the advancement paradigm. A key preliminary outcome from the discussions has been the realization that all functional elements of advancement are engaged fundamentally in relationship management. Thus, rethinking the paradigm along the lines of relationship (vs. functional) management is potentially significant to the future of CASE and the profession.

## STAFF RESOURCES

Reorganization of the CASE staff was completed in 2002-03, driven by strategic plan priorities and business imperatives. New divisions headed by vice presidents were established or completed for Member & Volunteer Relations, International Operations, and Research & Data Services and became fully operational. Their work is now closely integrated with that of the Business & Finance, Professional Development, and Communications & Marketing Divisions.

CASE has been fortunate in attracting experienced and highly competent professionals to head up all divisions and to provide the senior leadership needed for each area in the future. With the appointment during the past year of all remaining senior staff, the staff organization and leadership now in place promise to take CASE to the next level in its service to members, and in helping our members further the support of education. ●



# Finding Strength in Numbers

We recorded a 96-percent retention rate, which along with 183 new members brought institutional memberships to 3,038 in FY03.

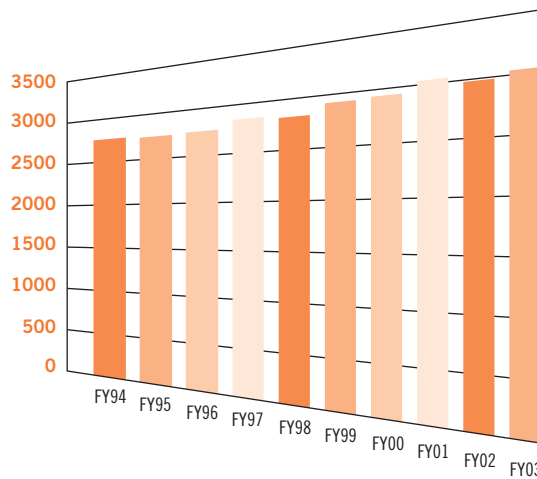
The success of CASE is measured in many ways: by the systematic evaluation of our products and services, by the levels of participation in our activities, and by the regular feedback of those we serve. Of course, we also measure our success by charting key indicators of organizational vitality.

## **MEMBERSHIP**

It is especially significant that even as our member institutions faced difficult budget choices, they continued to renew their memberships in CASE. We recorded a 96-percent retention rate, which along with 183 new members brought institutional memberships to 3,038 in FY03 (a 1.8 percent gain over FY02).

The highest percentage growth in institutional membership occurred outside North America, where the numbers were up 22 percent over the previous year. In FY03, membership in CASE Europe alone reached nearly 200 institutions. We also saw the ranks of our Educational Associates (education-related nonprofit organizations other than schools, colleges, or universities) increase by 8 percent.

## INSTITUTIONAL MEMBERS 1994-2003



The number of Professional Members (individuals at member institutions who receive premium services) remained near record levels, despite a very modest drop of 2 percent to 22,909 during 2002-03. That drop may reflect the way in which some CASE member campuses managed to retain their institutional membership while reducing their overall costs.

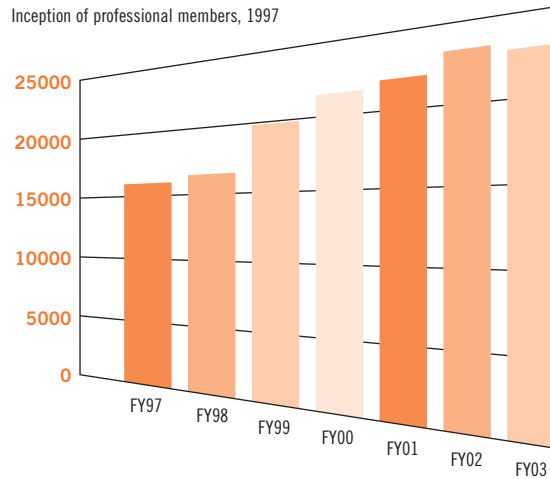
## FINANCES

As shown on the charts that follow, CASE's financial picture was positive overall, although not without challenges similar to those faced by other major associations and CASE-member institutions.

In FY02, we reversed the net operating losses of the previous three years. We continued that trend in FY03, delivering a modest surplus of approximately \$170,000. This result is particularly noteworthy at a time when institutional budgets for staff travel and professional development were cut and participation at some of our conferences declined. We managed to offset those declines with revenue growth in other areas, the launch of new products (such as the Online Speaker Series), and judicious cost-cutting efforts.

## PROFESSIONAL MEMBERS 1997-2003

Inception of professional members, 1997



Membership dues as a percentage of total revenues stood at 38.1 percent in FY03. In comparison with other associations comprising the Washington Higher Education Secretariat, our reliance on membership dues remains relatively low.

As the performance of our investment portfolio began to improve in FY03, we slowed recent declines in our total net assets. Those declines reflected not only the poor performance of the equity markets, but also costs associated with the purchase of the 1307 New York Avenue building, in partnership with three other associations. Not otherwise visible in terms of net asset strength (due to current accounting conventions) is the fact that CASE's ownership interest in the building has increased over \$3 million based on a recent market appraisal. Should CASE ever decide to sell or refinance its interest in the property, net asset strength on the balance sheet for the organization as a whole would jump dramatically as a result. This unrealized gain in property value has had the additional benefit of releasing approximately \$2 million in bank-held collateral for reinvestment in rebounding equity markets that previously was locked up in low-yielding maturities. ●

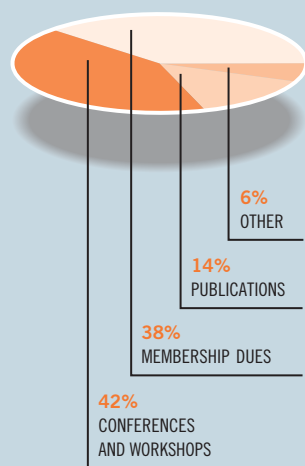
## Statement of Financial Position

CASE's financial audit was conducted by Tate & Tryon, certified public accountants and consultants. The full report, including statements of financial position, activities, cash flows, and notes, is available from CASE's Department of Finance and Administration.

	Year Ending June 30		
	2003	2002	2001
<b>ASSETS</b>			
Current Assets			
Cash & Cash Equivalents	(\$108,140)	\$272,104	\$97,494
Accounts Receivable	280,347	395,157	454,923
Publication Inventory	278,820	331,701	335,063
Prepaid Expenses	1,162,247	552,141	438,901
Total Current Assets	1,613,274	1,551,103	1,326,381
Property & Equipment, at cost			
Land	2,304,603	2,304,603	2,304,603
Building & Improvements	6,259,644	6,259,644	6,259,644
Furniture & Equipment	1,235,373	1,214,193	1,266,409
Software	446,905	446,454	445,670
Total Property & Equipment	10,246,525	10,224,894	10,276,326
Less Accumulated Depreciation & Amortization	(1,861,649)	(1,530,847)	(1,252,957)
	8,384,876	8,694,047	9,023,369
Annuity Contract	114,632	158,166	178,841
Long-Term Investments	5,685,709	5,658,599	6,052,875
Pledges Receivable	418,737	426,419	0
<b>TOTAL ASSETS</b>	<b>\$16,217,228</b>	<b>\$16,488,334</b>	<b>\$16,581,466</b>
<b>LIABILITIES &amp; NET ASSETS</b>			
Current Liabilities			
Accounts Payable & Accrued Expenses	\$992,975	\$1,178,844	\$1,053,237
Deferred Revenue	2,630,625	2,470,977	2,313,350
Mortgage Payable, current portion	223,486	213,250	203,014
District Escrow Funds	652,472	645,010	723,683
Total Current Liabilities	4,499,558	4,508,081	4,293,284
Accrued Post-Retirement Benefits	354,692	349,172	340,829
Mortgage Payable, less current portion	7,014,663	7,236,807	7,450,057
Annuity Obligation	114,632	158,166	178,841
Interest Swap Agreements	613,751	507,439	251,881
Total Liabilities	12,597,296	12,759,665	12,514,892
Net Assets			
Unrestricted	3,168,629	3,245,890	4,016,804
Temporarily Restricted	451,303	482,779	49,770
Total Net Assets	3,619,932	3,728,669	4,066,574
Commitments & Contingencies	0	0	0
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<b>\$16,217,228</b>	<b>\$16,488,334</b>	<b>\$16,581,466</b>

# Statement of Activities

## REVENUE



## EXPENSES



## CHANGE IN UNRESTRICTED NET ASSETS

### REVENUE

	2003	2002	2001
Conferences & Workshops	\$5,736,355	\$5,706,776	\$5,592,708
Membership Dues	5,302,429	5,161,438	4,441,255
Publications	1,947,105	1,971,105	2,180,472
Awards	481,077	461,670	538,287
Contributions	91,273	90,230	149,651
Interest From Operations	14,712	23,592	50,896
<b>Total Revenue</b>	<b>13,572,951</b>	<b>13,414,811</b>	<b>12,953,269</b>
Net Assets Released From Restrictions due to satisfaction of program restrictions	235,582	180,507	164,800
<b>Total Unrestricted Revenue and Other Support</b>	<b>13,808,533</b>	<b>13,595,318</b>	<b>13,118,069</b>

### EXPENSE

#### PROGRAM SERVICES

Conferences & Workshops	4,586,816	4,513,897	4,329,985
Publications	1,955,614	1,990,334	1,952,646
Information & Research	1,731,867	1,898,806	1,949,136
International	1,311,317	1,160,395	816,557
External Affairs	840,212	836,013	632,041
Awards & Services	259,448	199,744	259,557
District Services	222,055	97,645	223,052
<b>Total Program Services</b>	<b>10,907,329</b>	<b>10,696,834</b>	<b>10,162,974</b>

#### SUPPORTING SERVICES

Management & General	2,882,979	2,930,744	3,178,662
Fund Raising	23,858	83,449	5,929
<b>Total Supporting Services</b>	<b>2,906,837</b>	<b>3,014,193</b>	<b>3,184,591</b>

### Total Expense

<b>Total Expense</b>	<b>13,814,166</b>	<b>13,711,027</b>	<b>13,347,565</b>
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Change in Unrestricted Net Assets Before Investments	(5,633)	(115,709)	(229,496)
Loss on Fair Value of Interest Swap Agreements	(106,312)	(255,558)	(320,780)
Interest from Long-Term Investments	90,016	112,531	180,335
Investments Gain (Loss), net	(55,332)	(512,178)	407,502
<b>Change in Unrestricted Net Assets</b>	<b>(77,261)</b>	<b>(770,914)</b>	<b>37,561</b>

## CHANGE IN TEMPORARILY RESTRICTED NET ASSETS

Contributions	203,519	612,917	12,500
Interest & Dividends	587	599	4,241
Net Assets Released from Restrictions	(235,582)	(180,507)	(164,800)
<b>Change in Temporarily Restricted Net Assets</b>	<b>(31,476)</b>	<b>433,009</b>	<b>(148,059)</b>

## CHANGE IN NET ASSETS

<b>Change in Net Assets</b>	<b>(\$108,737)</b>	<b>(\$337,905)</b>	<b>(\$110,498)</b>
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Net Assets, beginning of Year	\$3,728,669	\$4,066,574	\$4,177,072
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<b>NET ASSETS, END OF YEAR</b>	<b>\$3,619,932</b>	<b>\$3,728,669</b>	<b>\$4,066,574</b>
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CASE's Board of Trustees comprises 30 voting members, including four officers, eight district trustees, and 18 trustees-at-large. In addition, the president of CASE serves as a non-voting ex officio member. During the annual business meeting at the International Assembly, the membership elects trustees to serve a three-year term that may be renewed once. The primary responsibilities of the board include setting CASE policies, approving the annual budget, and ensuring sound management of the organization.

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2001-

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### PAGE 1

Vance T. Peterson and Kent D. Rollins by  
 Marvin Jones.

### PAGE 2-5

Circle photos by Billy Howard.

### PAGE 4

Participants in the Ghana seminar, part of the Partnership to Strengthen African Universities, were, from left, John Kaburise, vice chancellor, University for Development Studies; CASE volunteer Joanne Agnew; Stephen Owusu, professor, Kwame Nkrumah University of Science and Technology; E.A. Obeng, vice chancellor, University of Cape Coast; T. Tabi, assistant registrar, University of Ghana; Jophus Anamuah Mensah, vice chancellor, University College of Education; CASE trustee James Osterholt, vice president for development, the Milken Institute; and Jonas Nartey, professor, University College of Education.

### PAGE 6

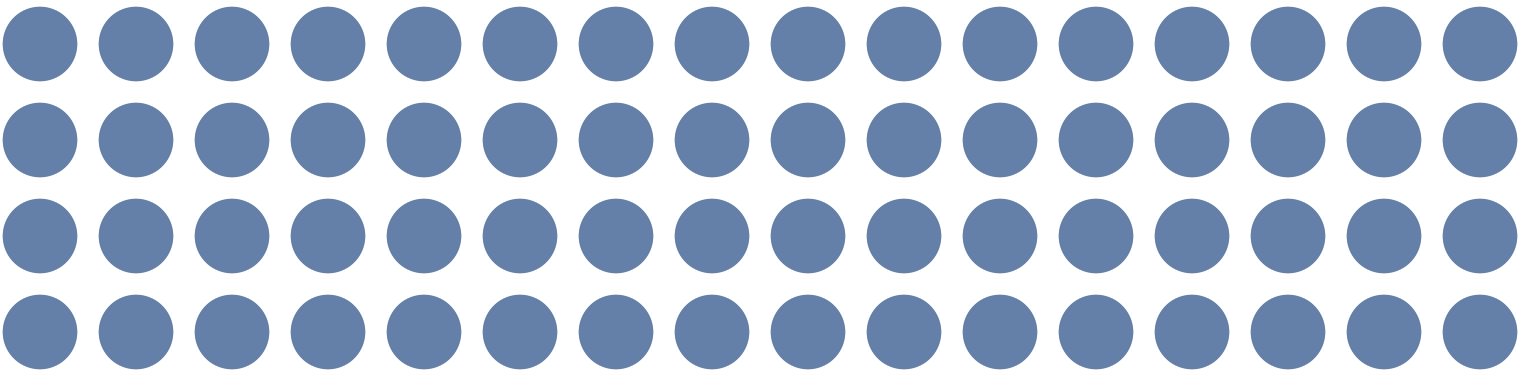
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