How do I use the CASE Benchmarking Toolkit ("CBT")?

- a click-by-click guide for the busy advancement professional

This document answers the following questions CASE members may have about using and navigating the CASE online Benchmarking Toolkit (frequently referred to as the "CBT" or, simply, the "Toolkit"):

If this is your first time accessing the system, start with question "A" on the next page. If you have already accessed the system and are somewhat familiar with it, you may wish to skip to question "C" on page 12. If your question is not in the above list, please contact CASE Research at research@case.org for further assistance.

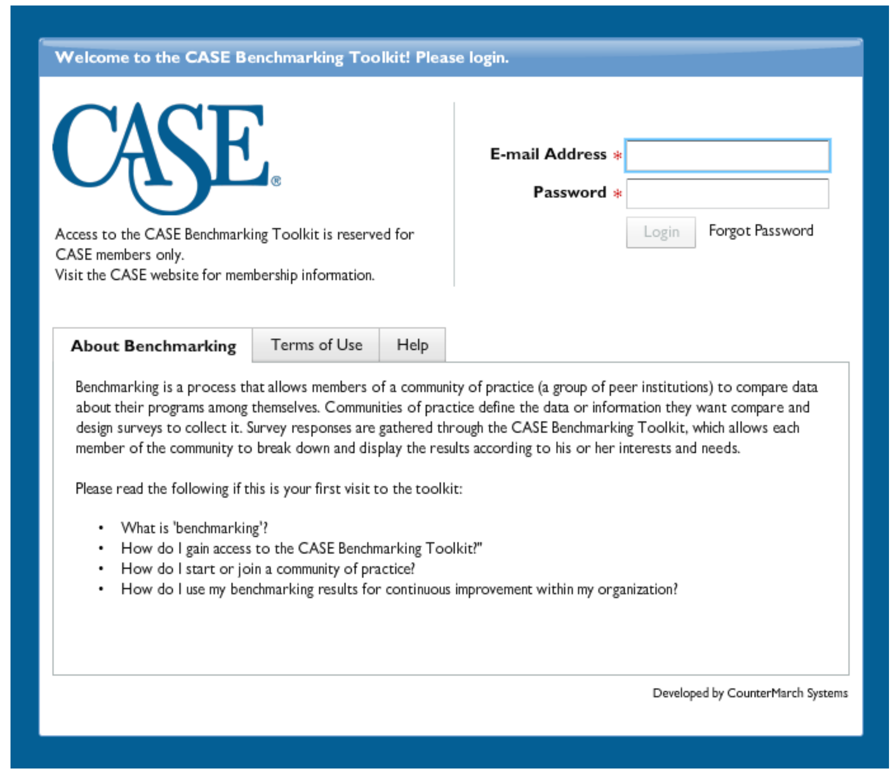
A. How do I gain access to the CASE Benchmarking Toolkit (CBT)?

1. Your educational institution must be a CASE member, as an individual must be a general or professional member of CASE.

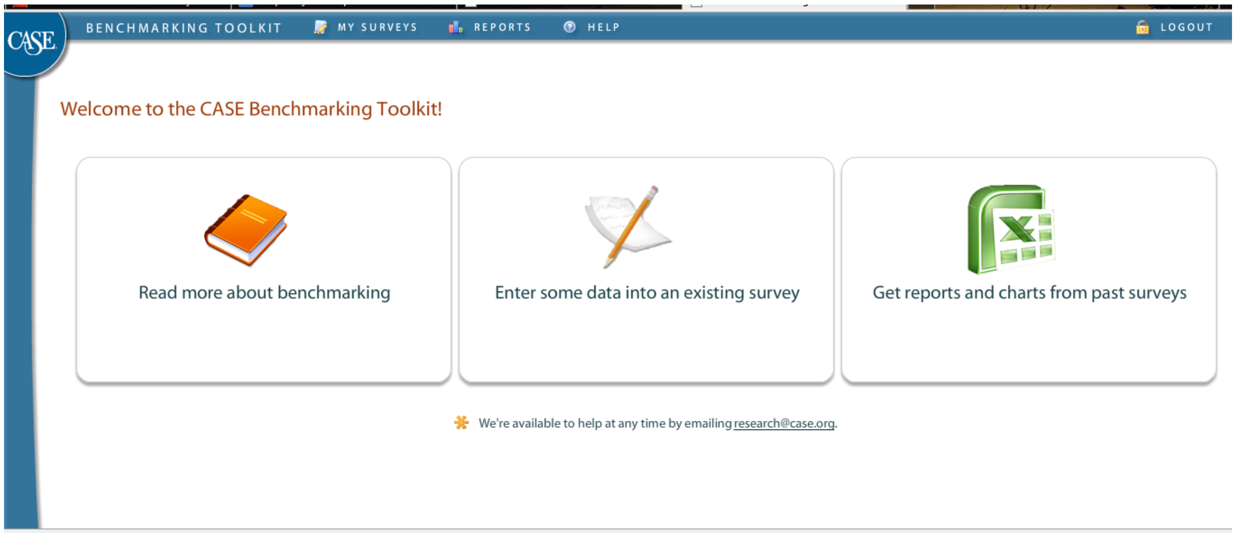
2. You must be designated by the leader of your community of practice or by CASE to be a user of the CBT.

3. In the URL address space, type: http://benchmarking.case.org. This takes you to the "front door" of the CBT, shown here.

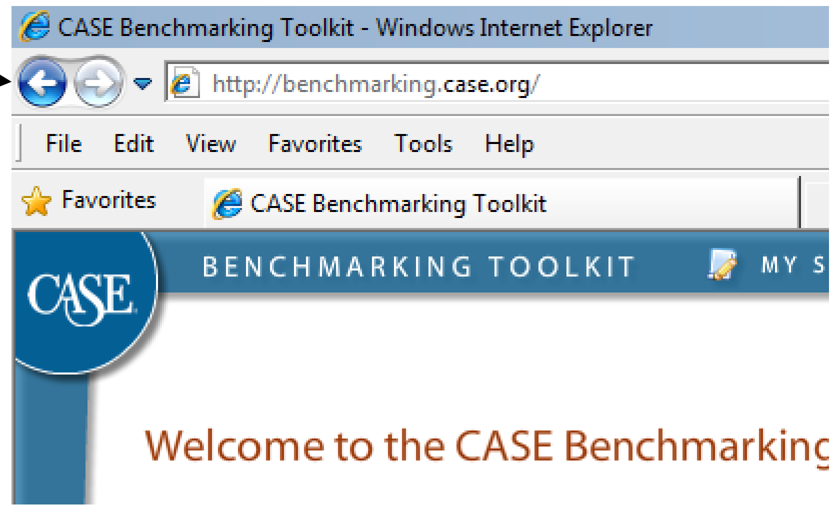
4. To login, please enter your email address and CASE password. If you have misplaced your CASE password you can retrieve it online at: http://iweb.case.org/iweb/LogIn/RetrievePassword.aspx
or via the **Login Help** on the CASE homepage.



5. If you have successfully gained entry to the CBT you will see this "Welcome" screen:

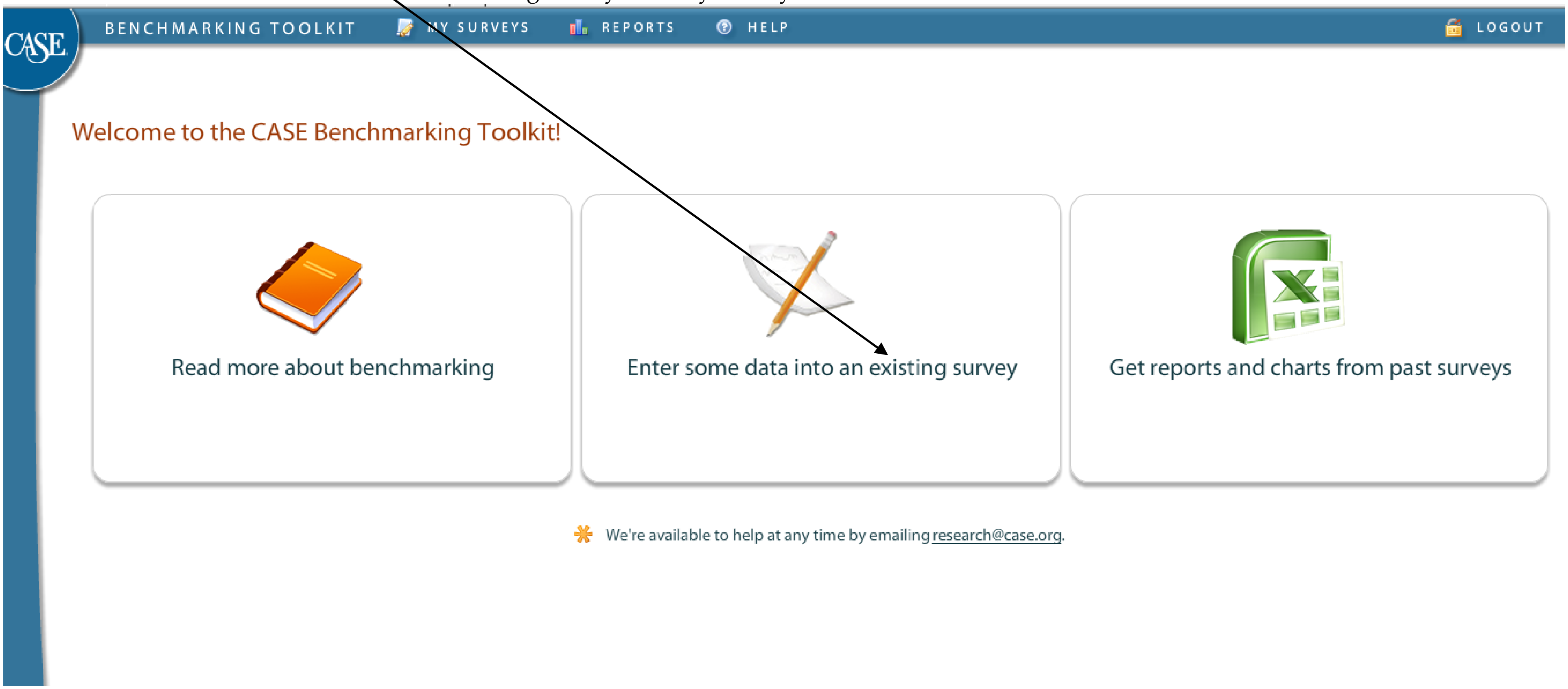


6. From this point on, whenever you want to move around inside the CBT, it is important ***NOT*** <u>to click on your browser's back button.</u> Instead, click on the CBT's own internal buttons and tabs.

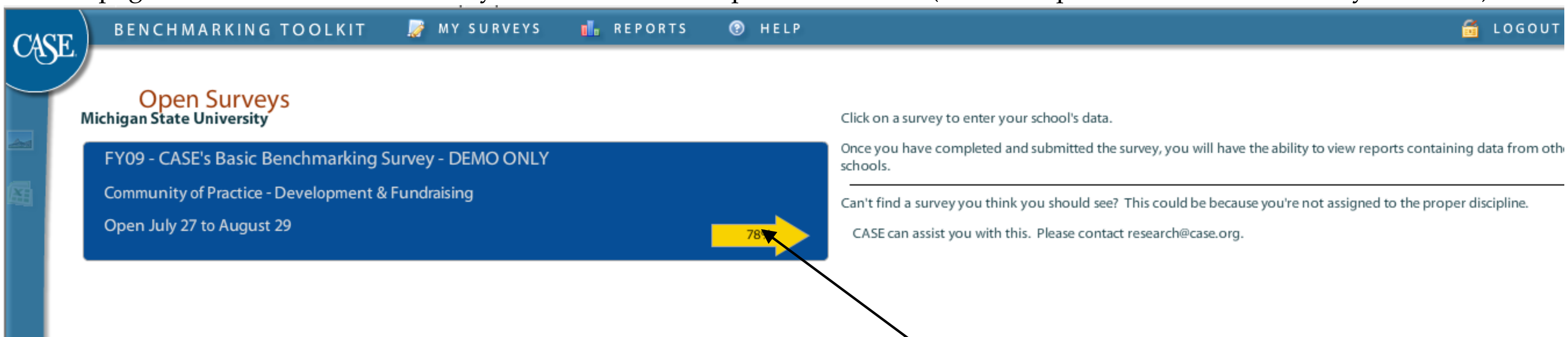


B. How do I respond to a survey and enter my institution's data?

1. Please click on "Enter some data into an existing survey" or "My Surveys"



2. The next page lists all the available surveys, each in its own separate blue box. (The example shown has one survey available).

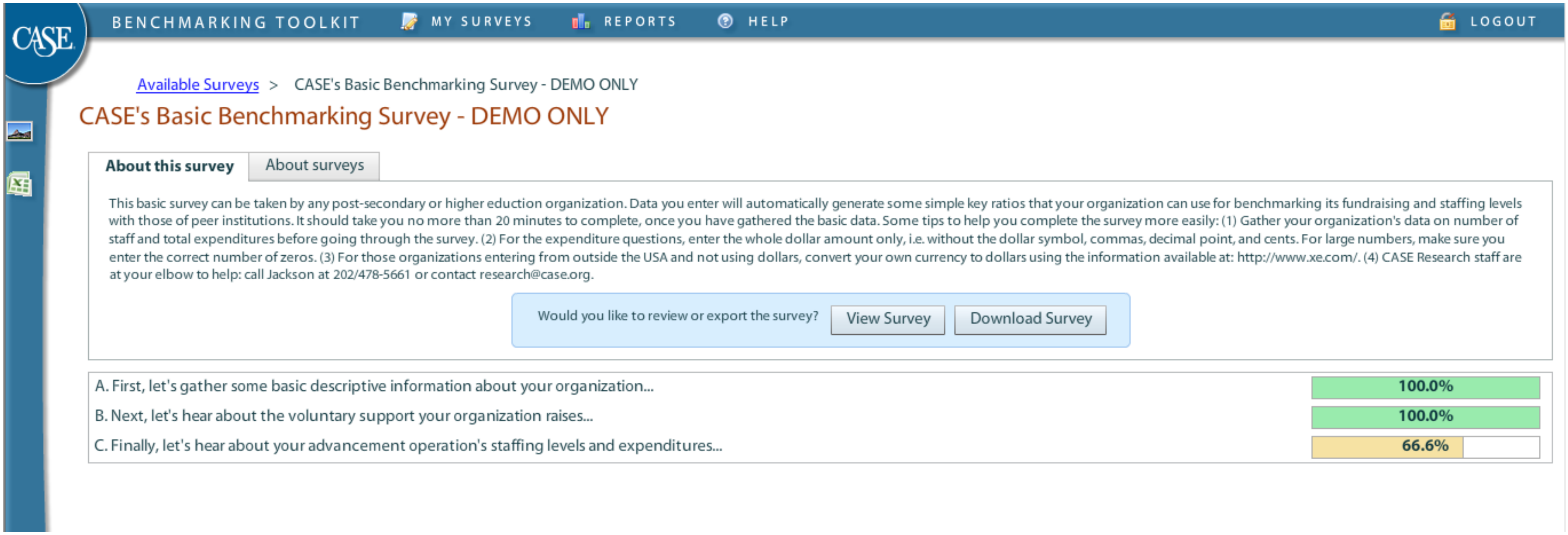


Each survey can be accessed by clicking on the blue box. The yellow arrow in the lower right hand corner indicates what percentage of the questions you have already answered for that survey. In the example shown, we have almost completed the survey, it presently shows "78%". If you were only half complete it would indicate "50%".

If you do not see your survey listed it is most likely because you have not yet been designated to take the survey. Please contact research@case.org if you are the designated respondent for your institution and do not see your survey.

Please select the blue box with the title of your survey to continue to step three.

3. Clicking anywhere on the blue box takes you into the survey. You will notice the title of the survey at the head of the page, a short description of it, and then section headings (A, B, C).

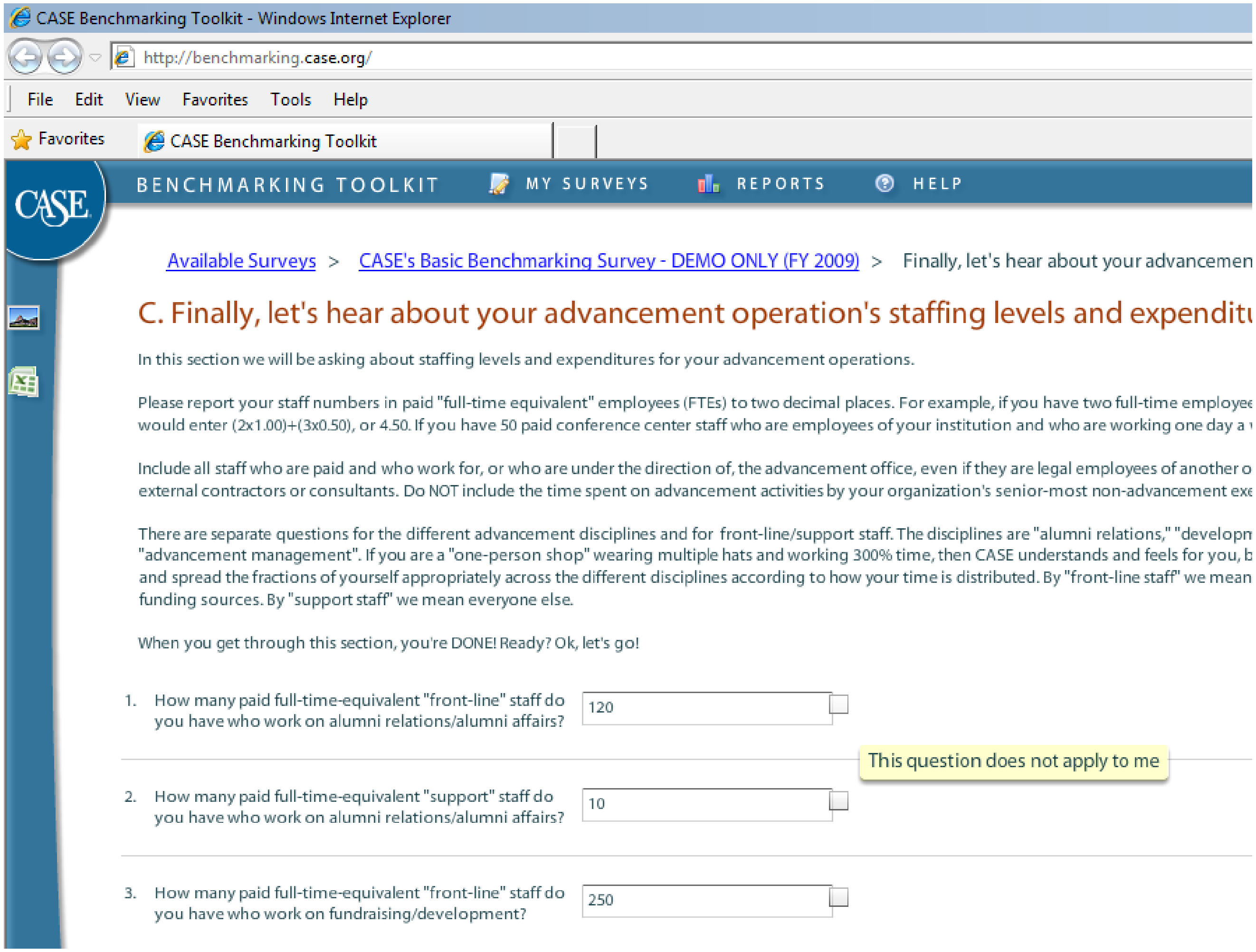


4. Before you select a section to begin you may want to download the survey for internal dissemination to aid in the collection of requested data. To download the survey, please click the "Download Survey" button. This will download an xml file of the full survey (to be opened in Excel as an .xls file). Alternately, you may make a cursory review of the survey by clicking the "View Survey" button.

5. To begin answering questions please click on the first (or pertinent) section. The percentage of completed answers for that section is displayed on the far right of the row. In the example above I would click section C, as it is only 66 percent complete. The other sections have been completed and stand at 100%.

Let's click on section C…

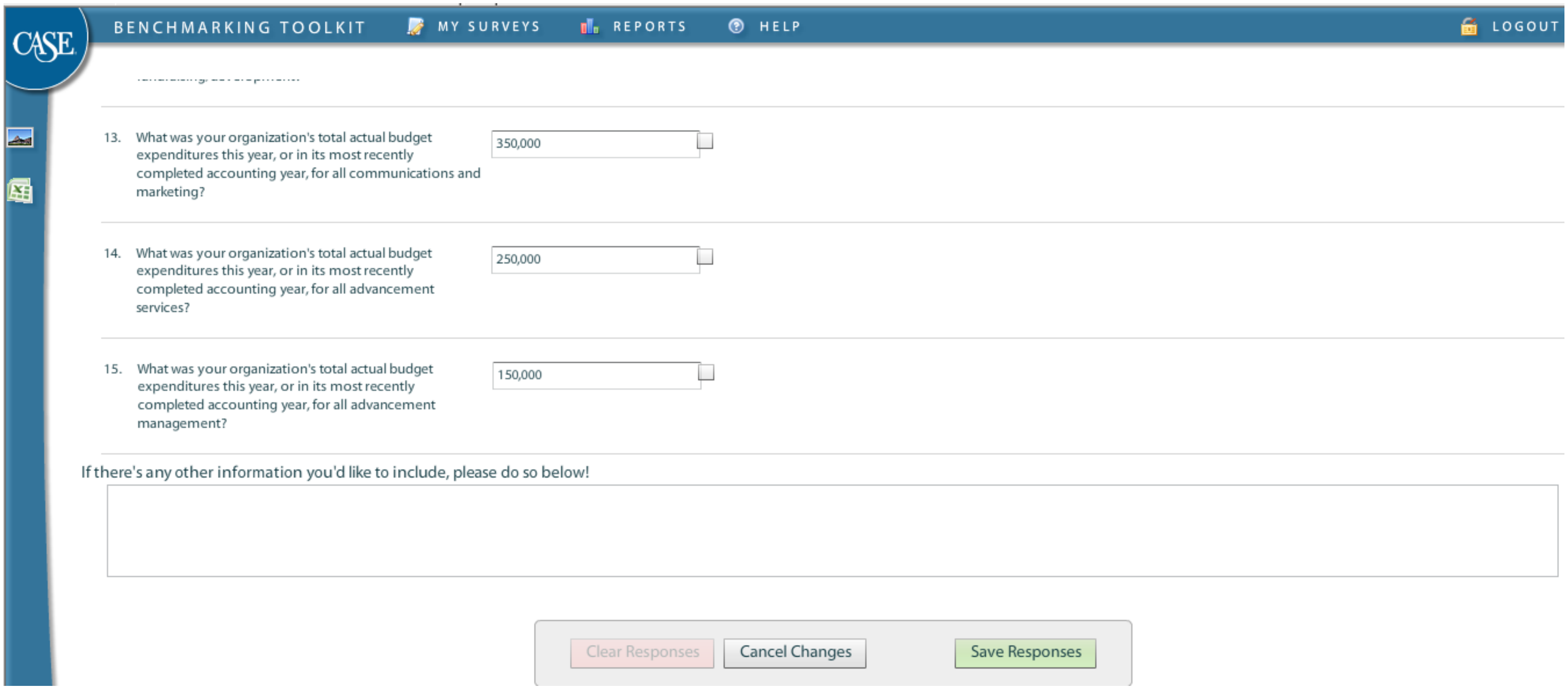
6. The survey may include definitions and clarifications at the head of the section.



7. Questions types include text/numeric, multiple choice dropdowns, and question matrices. Please click on dropdown boxes to display all available choices. The toolkit requires a response for each question. If a question does not apply to you, please check the not applicable box ("This question does not apply to me").

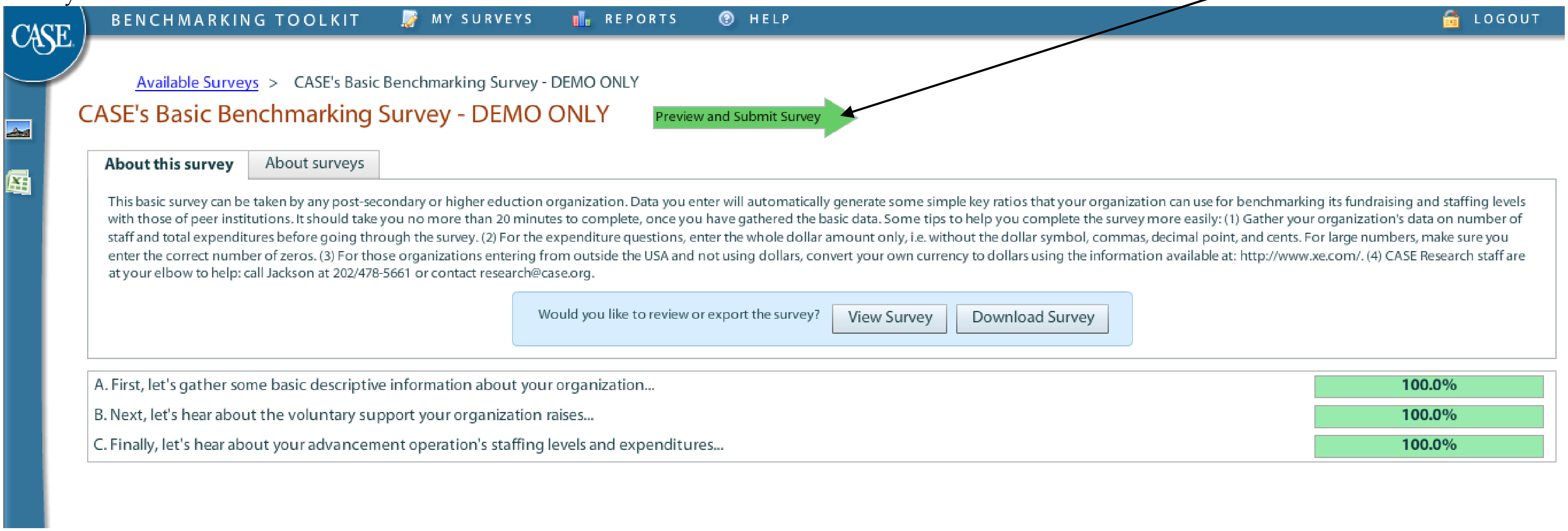
8. Use the open ended text box located at the bottom of the page to give, if necessary, some very brief additional information that you think would be useful for the survey participants to know, such as why your number may be unusual, or that your staffing includes a large number of full-time employees for only a one month period, for example.

9. Remember to click on the green "Save Responses" button at the end of each section to save your responses. Once you save your responses you can leave and come back to the toolkit. *("Save" is not the same as "Submit", which we will review later).*

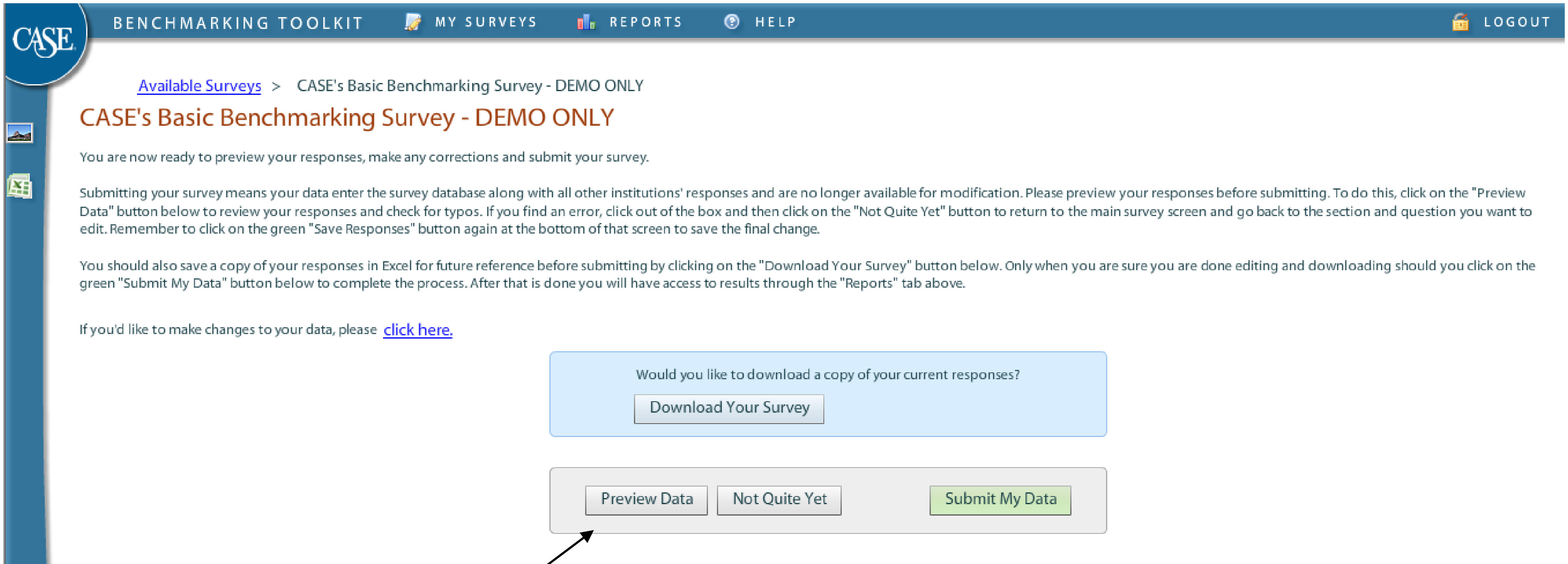


10. When you have completed and saved all the questions in all sections, you can preview and submit your data.

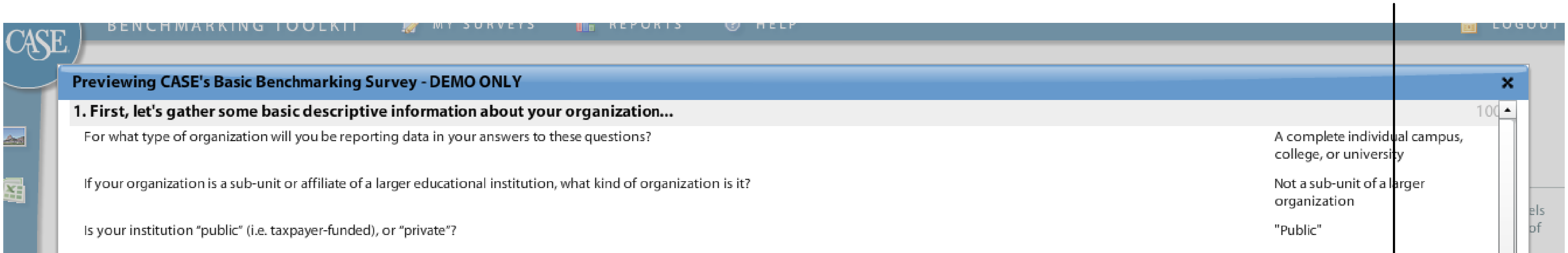
The survey screen now shows that 100% of the survey questions have been answered, and displays an additional green "Preview and Submit Survey" arrow.



Click on that green arrow to submit your data. You will then be given the chance to preview and download your responses before submitting:



11. Please review your data using the "Preview Data" button. You can see the questions and examine your responses for errors and typos.



Please pay particular attention to the number of zeros you have typed in for large numbers. Do you have 10,000 alumni, or 100,000?

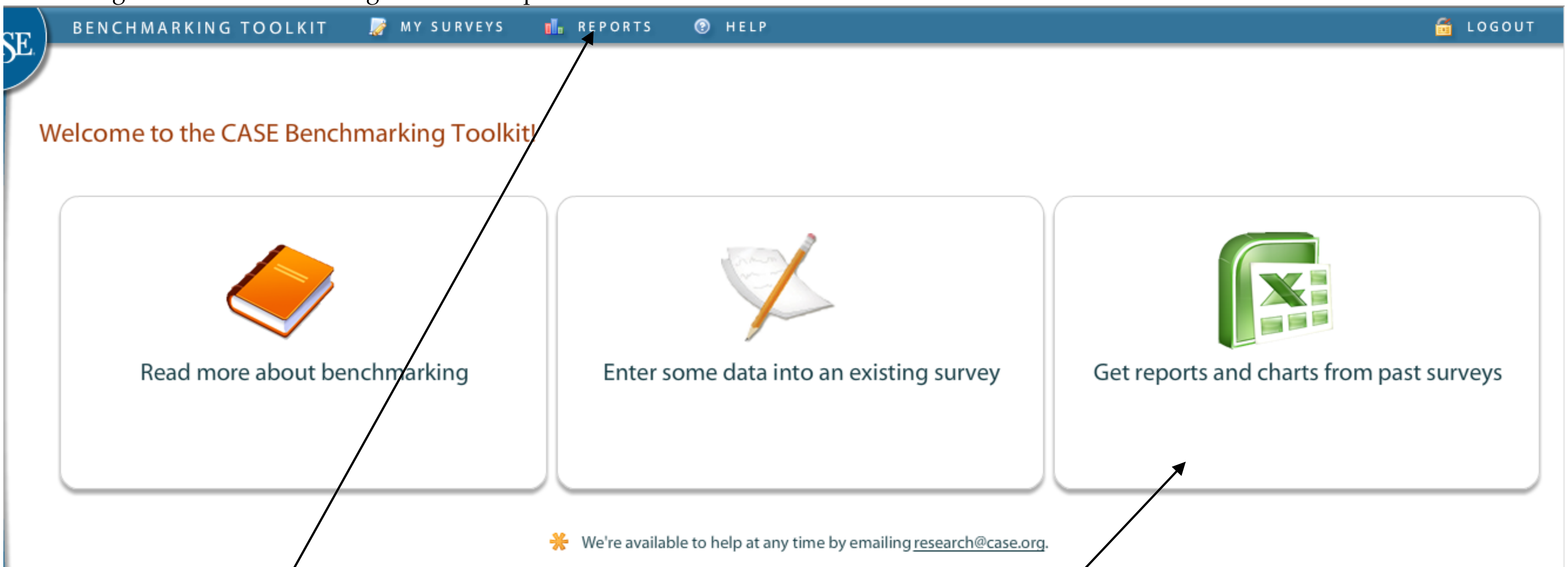
12. If all your responses were fine, please click the "x" in the top right corner of the preview pane to close it, and hit the green submit button. If instead you spotted entries you want to change or correct, click the "Not Quite Yet" button to return to your survey. To make the changes, simply go to the question as before and manually change the present response to your new response. ***IT IS IMPORTANT TO CATCH ALL THE ERRORS AND TYPOS AT THIS STAGE, BECAUSE ONCE YOU "SUBMIT" YOUR DATA AT THE NEXT STEP, YOU WILL NOT BE ABLE TO MAKE ANY MORE CHANGES.***

13. When you are satisfied with ALL your responses, click out of the preview pane via the "x" again, and click on the green "Submit Data" button. Once you have done this you will be returned to the "Available Surveys" page, but this time the survey you have just completed will not appear.

Congratulations, your responses are now part of the accumulated data in the CASE Benchmarking Toolkit.

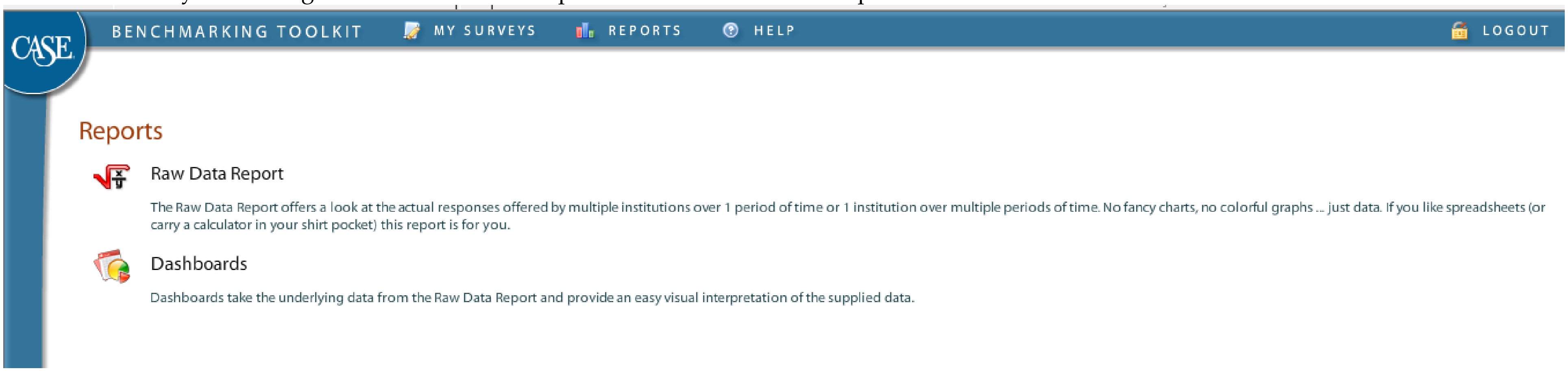
C. How do I display survey results on my screen?

1. Login to the Benchmarking Toolkit as explained above

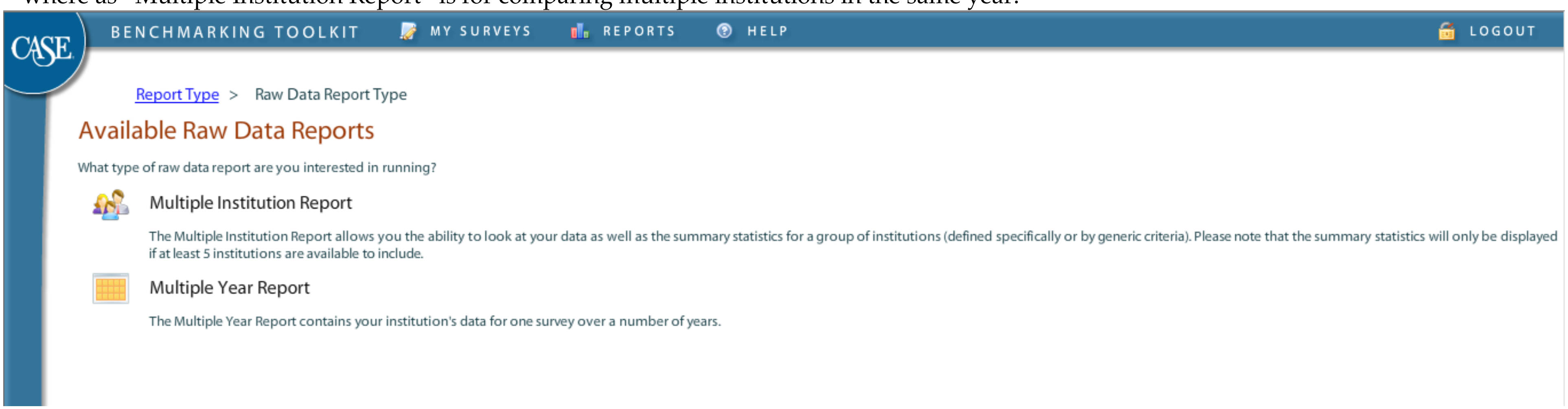


2. Click on the "Reports" tab in the top menu bar, or alternatively, click on the Reports button

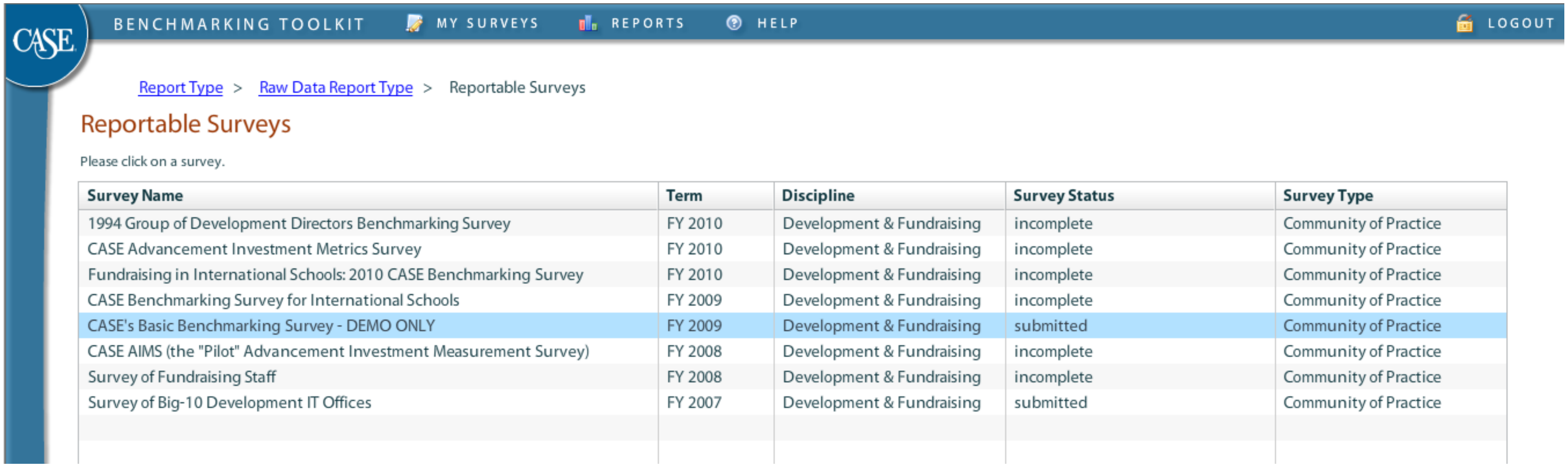
3. To benchmark your data against other institutions please choose "Raw Data Report."



4. To benchmark your data against other institutions please select "Multiple Institution Report." "Multiple Year Report" is only for repeat participants who wish to compare their own institution's data by year. "Multiple Year Report" is for one institution over multiple years, where as "Multiple Institution Report" is for comparing multiple institutions in the same year.



5. Pick which available survey you want to see the results for by clicking on it (your list of survey names may be different to the ones shown here). For this example we'll select the "CASE's Basic Benchmarking Survey" to be displayed. Notice under Survey Status that this survey has been submitted.



CASE BENCHMARKING TOOLKIT MY SURVEYS REPORTS HELP LOGOUT

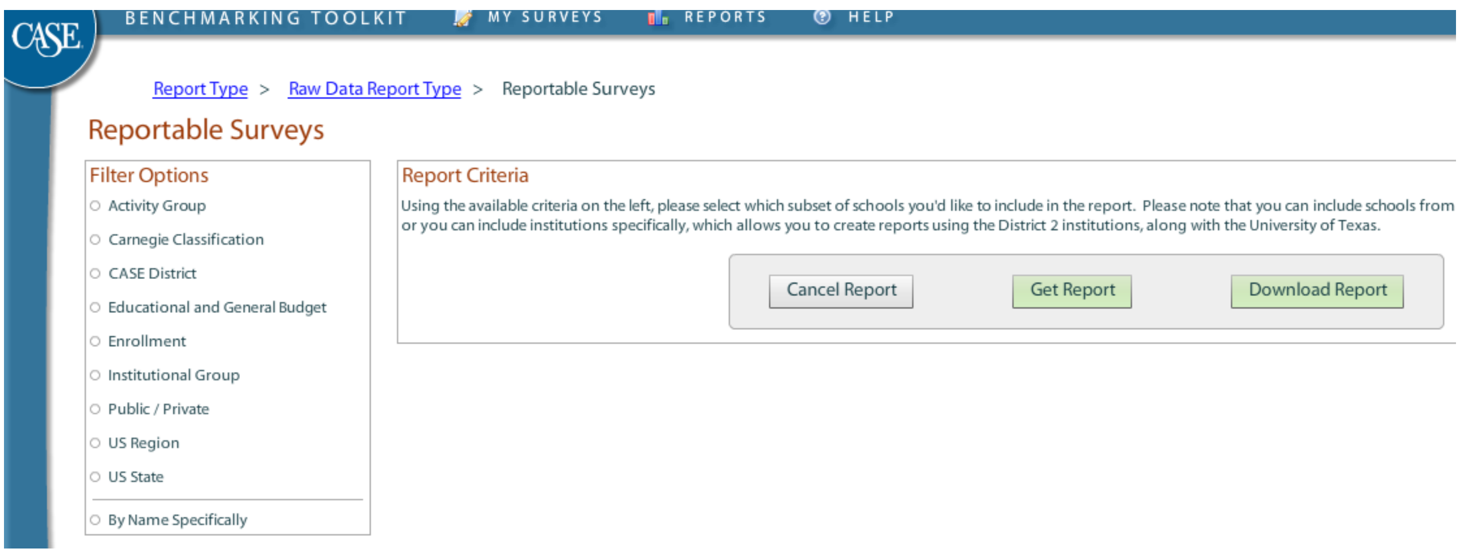
Report Type > Raw Data Report Type > Reportable Surveys

Reportable Surveys

Please click on a survey.

Survey Name	Term	Discipline	Survey Status	Survey Type
1994 Group of Development Directors Benchmarking Survey	FY 2010	Development & Fundraising	incomplete	Community of Practice
CASE Advancement Investment Metrics Survey	FY 2010	Development & Fundraising	incomplete	Community of Practice
Fundraising in International Schools: 2010 CASE Benchmarking Survey	FY 2010	Development & Fundraising	incomplete	Community of Practice
CASE Benchmarking Survey for International Schools	FY 2009	Development & Fundraising	incomplete	Community of Practice
CASE's Basic Benchmarking Survey - DEMO ONLY	FY 2009	Development & Fundraising	submitted	Community of Practice
CASE AIMS (the "Pilot" Advancement Investment Measurement Survey)	FY 2008	Development & Fundraising	incomplete	Community of Practice
Survey of Fundraising Staff	FY 2008	Development & Fundraising	incomplete	Community of Practice
Survey of Big-10 Development IT Offices	FY 2007	Development & Fundraising	submitted	Community of Practice

Next you will see some "Filter Options" and "Report Criteria". The CBT allows you to "filter" (i.e. select) by 9 different options for types of institution:



Moving the cursor over the name of a filter option causes it to become highlighted in blue. Clicking on the small circle next to a filter option opens up the following respective choices of sub-group within it:

"Carnegie Classification":	33 different classes of institution.
"CASE District":	includes Districts I through VIII, CASE Europe (which includes the UK, Ireland, the rest of Europe, Middle East, and Africa) and CASE Asia-Pacific.
"Educational and General Budget":	four quartile ranges of total institutional budget size (using the 2006 data distribution for US institutions in IPEDS).
"Enrollment":	four quartile ranges of FTE students at start of fall semester (using the 2006 data distribution for US institutions in IPEDS).
"Institutional Group":	groupings of institutions by survey or community of practice.
"Public/Private":	whether an institution is primarily government-funded or privately funded.
"Region":	the nine official US Bureau of the Census Regions, plus "US Service Schools".
"State":	all States of the USA, plus the District of Columbia, American Samoa, the Commonwealth of Puerto Rico, the Federated States of Micronesia, Guam, the Marshall Islands, Northern Marianas, and Palau.
"By Name Specifically":	Allows you to hand pick your group by institution name. Must select at least 5 other institutions.

When you click on the circle button for one of the filter options in the list, the respective sub-groups listed above for that option will appear on the right. You can then make either *one* selection or *multiple* selections of sub-groups of institutions from a single filter option to put into your chosen results mix, or you can combine selections from multiple filter options.

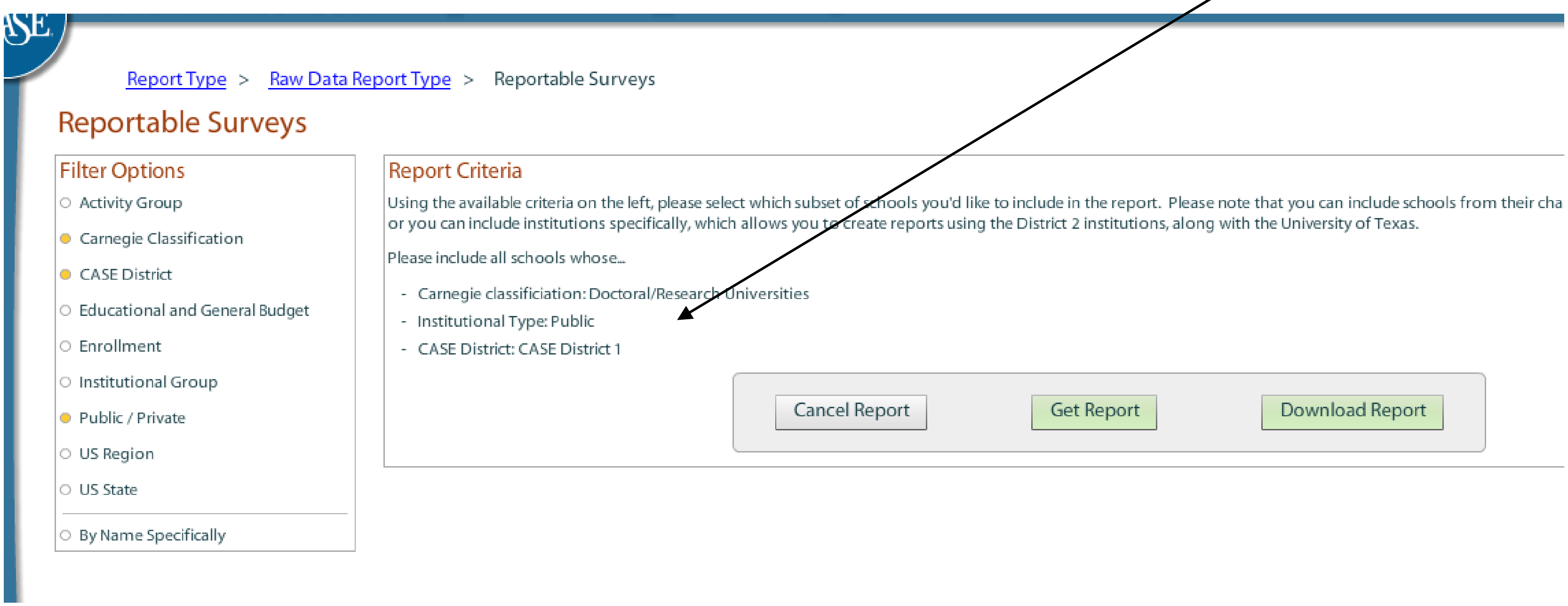
Be sure to save your criteria each time you add to it.

- To select institutions using *one* filter option, such as "Public/Private", click on "Public" to select only public institutions that have responded to this survey.

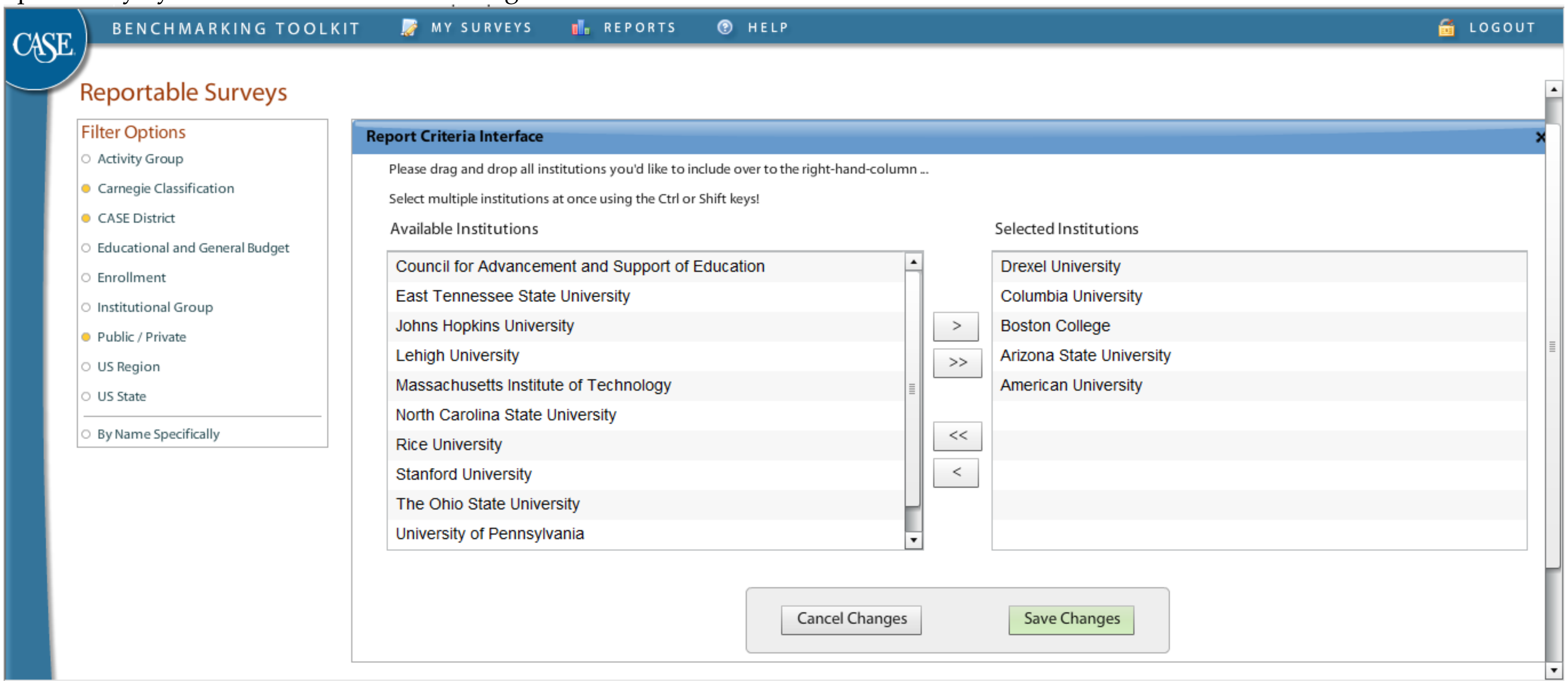
- To select institutions using *multiple* selections of sub-groups *within* one filter option, such as on "CASE District", click the circle next to "CASE District" and then select, for example, three CASE districts by holding the "CTRL" button down on your keyboard and left-clicking on "District 2", "District 4" and "District 8". This means only institutions from any of those three CASE Districts that have responded to this survey will be included in your chosen results display.

- To select from several *different* filter options, click on, for example, the filter option "Carnegie" and select "Doctoral/Research universities", plus click on "Region" and select "Great Lakes", plus click on "Public/Private" and select "Private". The institutions that will now be included in your report display are any that completed this survey and fulfill at least one of these filter conditions.

6. When you have made all the selections you want, save your changes at the bottom of the screen. This will take you back to the "Reportable Surveys" page, where you will now see listed in the "Report Criteria" box all the selections you have made.



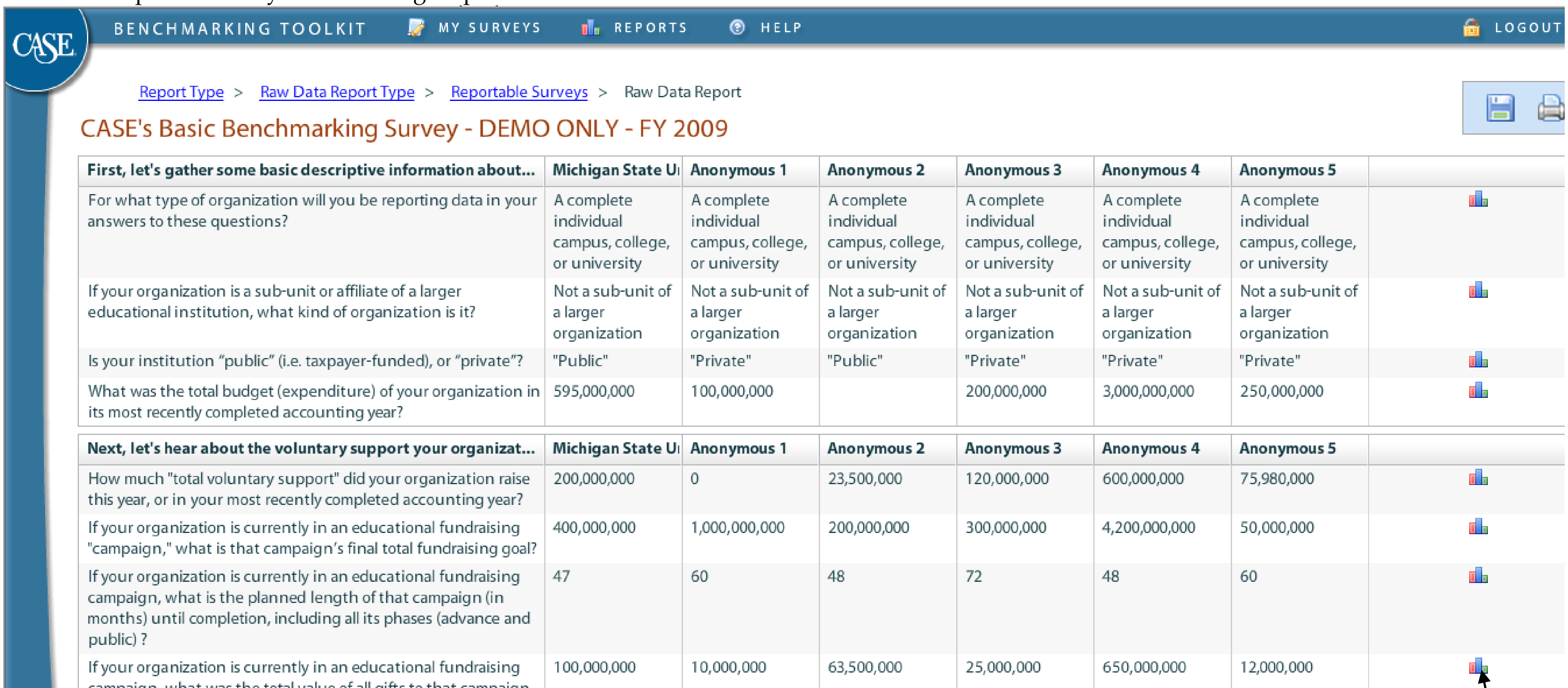
If your Community of Practice (survey group) is located outside of the U.S., you will want to create your selected group “By Name Specifically.” This is will allow you to hand pick the group you wish to benchmark yourself against. After you click on “By Name Specifically” you will be taken to this dialog box:



To select your group please highlight 5 or more institutions in the left box (which houses all submitted respondents) and hit the single “>” button to move them over to the right box. This will be your selected group. In this example, we have selected Drexel, Columbia, Boston, Arizona State, and American University as our selected group. Once you have created your selected group hit save.

IMPORTANT NOTE: You MUST select at LEAST 5 other institutions to run or download a report. If your report fails to generate it is most likely because there are not 5 institutions (in addition to your own) which meet your selected criteria. You MUST have 5 institutions which meet the criteria (or were chosen by name specifically) to run reports in the CBT to preserve anonymity.

7. Click on "Get Report" and you should see the screen below. All the questions in the survey are listed down the left, and all the institutions in your selected group are listed across the top. Their answers to the survey questions are shown in the columns. The first column contains your institution's responses, and its name is shown at the top. The other column headings are shown as "anonymous" to prevent identification of other respondents in your selected group.



First, let's gather some basic descriptive information about...	Michigan State U	Anonymous 1	Anonymous 2	Anonymous 3	Anonymous 4	Anonymous 5
For what type of organization will you be reporting data in your answers to these questions?	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university
If your organization is a sub-unit or affiliate of a larger educational institution, what kind of organization is it?	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization
Is your institution "public" (i.e. taxpayer-funded), or "private"?	"Public"	"Private"	"Public"	"Private"	"Private"	"Private"
What was the total budget (expenditure) of your organization in its most recently completed accounting year?	595,000,000	100,000,000		200,000,000	3,000,000,000	250,000,000

Next, let's hear about the voluntary support your organizat...	Michigan State U	Anonymous 1	Anonymous 2	Anonymous 3	Anonymous 4	Anonymous 5
How much "total voluntary support" did your organization raise this year, or in your most recently completed accounting year?	200,000,000	0	23,500,000	120,000,000	600,000,000	75,980,000
If your organization is currently in an educational fundraising "campaign," what is that campaign's final total fundraising goal?	400,000,000	1,000,000,000	200,000,000	300,000,000	4,200,000,000	50,000,000
If your organization is currently in an educational fundraising campaign, what is the planned length of that campaign (in months) until completion, including all its phases (advance and public) ?	47	60	48	72	48	60
If your organization is currently in an educational fundraising campaign, what was the total value of all gifts to that campaign	100,000,000	10,000,000	63,500,000	25,000,000	650,000,000	12,000,000

8. To view a graphical display of numeric and multiple choice questions, please click the bar chart symbol on the left hand side of the page.

9. You should now see a multi-column bar chart similar to the one below. A list of the chosen filter criteria is listed at the top of the chart. Below that is your institution's response (in this example 10). Below your response is the median and aggregate mean for both your selected group and the whole group. The N count represents the number of respondents you are comparing yourself to (in this case, I have selected 5 institutions by name specifically). You now have two benchmarks against which you can compare your own institution's value: (i) your chosen peer group (i.e. Selected Group), and (ii) the universe of institutions (all submitted respondents).

CASE Benchmarking Toolkit Report

Selected Group matches the following filters:

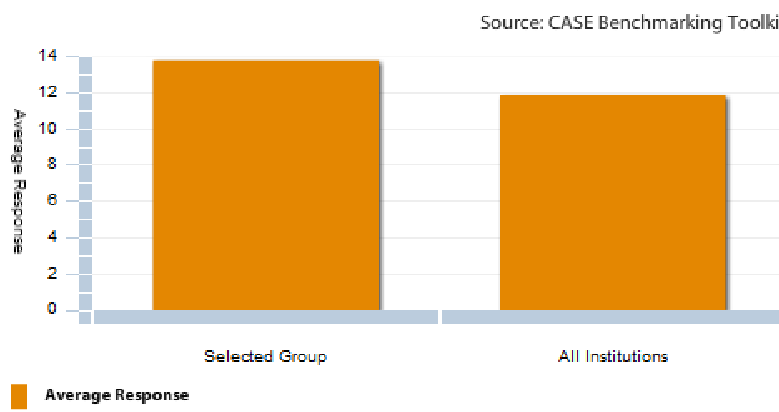
-Institution Name: Drexel University, Columbia University, Boston College, Arizona State University, American University

How many paid full-time-equivalent "support" staff do you have who work on alumni relations/alumni affairs? (FY 2009)

Michigan State University

Response: 10.00

Group	Median	Mean	n
Selected Group	5.00	13.80	5
All Institutions	5.00	11.83	15



** Your response is included in all aggregates*

** N/A responses are excluded from all aggregates*

So this chart tells me that the responding institution:

Has reported 10 support staff who work on AR/AA in FY 2009

The median of the Select Group (chosen by name specifically) is 5, and just also happens to be the same for All Institutions (15 in total)

The mean is 13.8 for the select group and 11.83 for all institutions

D. How do I download the results graphic into my own MSWord report (and pretend it’s mine)?

1. Click on the diskette symbol at top right of the multi-column bar chart screen graphic. When prompted, select a destination folder in your directory in which to save your graphic (and remember where you put it!).

2. Open up the Word file with your text report and position your cursor roughly where you want the graphic to appear. It’s a good idea to press “Enter” several times to make a space for the graphic, so you can see ahead of time the shifting of surrounding text that might occur).

3. If you are working in XP with Word version 2003, click on “Insert” in the top menu, and then in the drop-down sub-menu click on “Picture” and “From file”. This generates a folder and file map for you to select from. Click on the name of the file you just saved with your chart in to import it into Word. It should then appear in your Word file where you left your cursor.

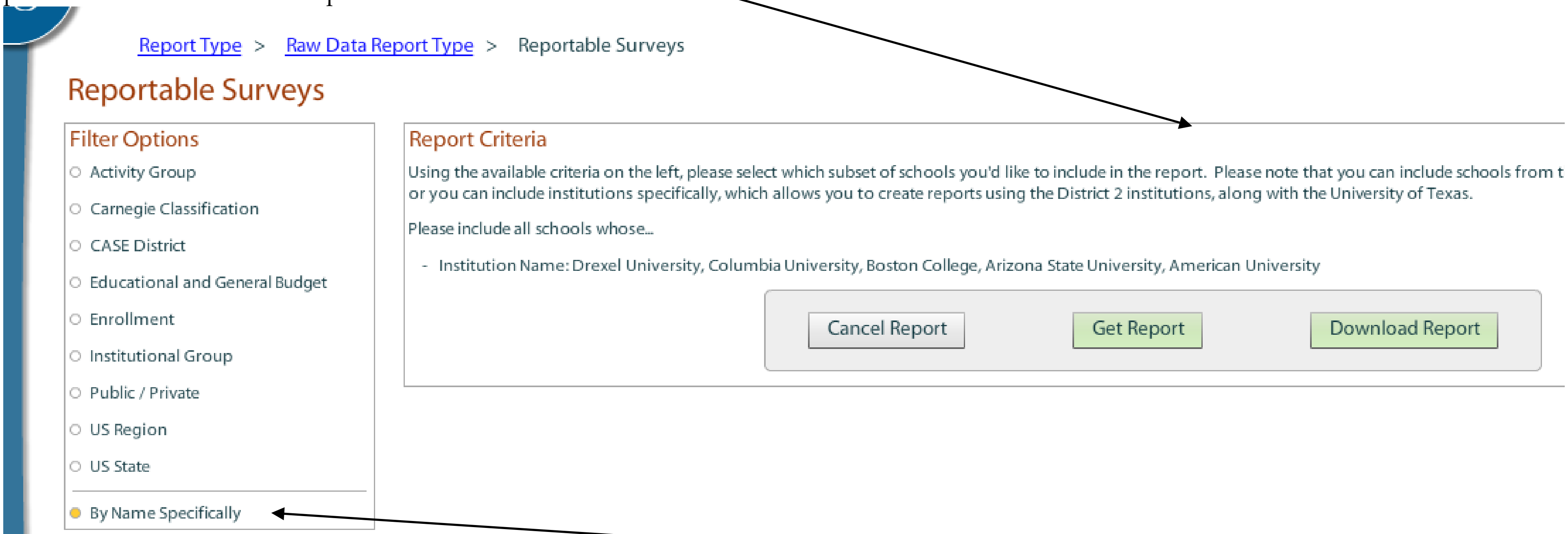
4. If you are working in the Office 2007 version of Word, click on “Insert” in the top menu, and then in the ribbon menu click on “Picture”. This generates a folder and file map for you to select from. Click on the name of the file you just saved with your chart in to import it into Word. It should then appear in your Word file where you left your cursor.

5. To fine-control the position of the graphic further on the page, click on the center of the graphic to make it active. Then click on “Format” in the top menu, and then in the drop-down sub-menu click on “Object” and “Picture” and then on the “Layout” tab. This should bring you into a dialog box with five “doggie” pictures. Click on “Square” to set the rule for positioning text around the picture, and then on one of the “Left”, “Center” and “Right” buttons, according to where you want the graphic to sit horizontally. The text should “wrap” around the sides of the graphic automatically.

6. You can always adjust the position of the graphic and surrounding text further by left-clicking on the graphic and holding the left button down, and then moving the mouse around. You will see the shadow outline of the graphic move with you. Let go of the left button to drop the graphic in a new place. It may take several tries to get it to look “perfect,” as the whole page of text can change around with you. Sometimes the graphic can even jump to a new page if there is not enough room. To help it position where you want, you can adjust the size of the graphic itself by left-clicking on it once to make it active, and then positioning your cursor on the small circle marking its top left corner. The cursor arrow will change to a double-headed arrow line. Hold the left button down and move the cursor towards the center of the rectangle to reduce the size of the graphic.

E. How do I download numeric data into an Excel spreadsheet for my own further analyses?

You can download the report from the filter criteria platform or from a rendered report. To download the report from the filter criteria screen, please click the "Download Report" button.



If I wanted to download a report with "All Institutions" I would simply select the whole group "By Name Specifically." The xml spreadsheet will be exported for use in Excel.

You can also download the data from rendered reports. In the upper right hand corner of your rendered report is a small graphic of a diskette. Please click the diskette to download your rendered report in Excel.

First, let's gather some basic descriptive information about...	Michigan State U	Anonymous 1	Anonymous 2	Anonymous 3	Anonymous 4	Anonymous 5
For what type of organization will you be reporting data in your answers to these questions?	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university	A complete individual campus, college, or university
If your organization is a sub-unit or affiliate of a larger educational institution, what kind of organization is it?	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization	Not a sub-unit of a larger organization
Is your institution "public" (i.e. taxpayer-funded), or "private"?	"Public"	"Private"	"Public"	"Private"	"Private"	"Private"
What was the total budget (expenditure) of your organization in its most recently completed accounting year?	595,000,000	100,000,000		200,000,000	3,000,000,000	250,000,000

Next, let's hear about the voluntary support your organizat...	Michigan State U	Anonymous 1	Anonymous 2	Anonymous 3	Anonymous 4	Anonymous 5
How much "total voluntary support" did your organization raise	200,000,000	0	23,500,000	120,000,000	600,000,000	75,980,000

Important Note: The downloaded file is an xml spreadsheet. If your browser is set to "hide file extensions" you may have to add .xls to the file name. Please set your browser to "Show file extensions."

If you have any questions or concerns please contact the research staff at research@case.org.

For more information on the CASE Benchmarking Toolkit please visit us online at:
http://www.case.org/Samples_Research_and_Tools/Benchmarking_and_Research/CASE_Benchmarking_Toolkit.html

F. Is there a short walk through / summary for running or accessing your results in the CBT?

To view and download your data:

1) Click reports tab or button
2) Click "Raw Data Report"
3) Click "Multiple Institution Report"
4) Select your survey from those listed
5) Now select your filter criteria on the left hand side (you may wish to choose "By Name Specifically")
6) Please select and move all institutions you wish to benchmark against into the "selected institutions" box using the arrow buttons
7) Hit Save

You will need to select at least 5 other institutions to run a benchmarking report. Then click save changes. Now you have your institution in line to benchmark against your selected group (or all respondents if you like).

You now have two choices:

1) Render your report on screen (this enables you to view the data and pop-out charts) by clicking GET REPORT (charts contain medians and mean)

2) Download your data by clicking DOWNLOAD YOUR DATA

If you have downloaded your data in the UK the file extension may be missing from the download. This is because your browser is set to hide file extensions. I recommend you change this browser setting. You can also just rename the file and type ".xls" after the file name. Then go ahead and open the file up in Excel. If it gives you a warning about being from a trusted source, just click allow or ok. You can now save your file as a 07 workbook, 03 workbook, or an xml file.

Once you have downloaded your data you can still view it on-screen by clicking never mind and then GET REPORT. You can also download the rendered table in Excel by clicking the disk icon in the upper right hand corner.

Please contact CASE Research at research@case.org if you have any questions or concerns.