

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

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

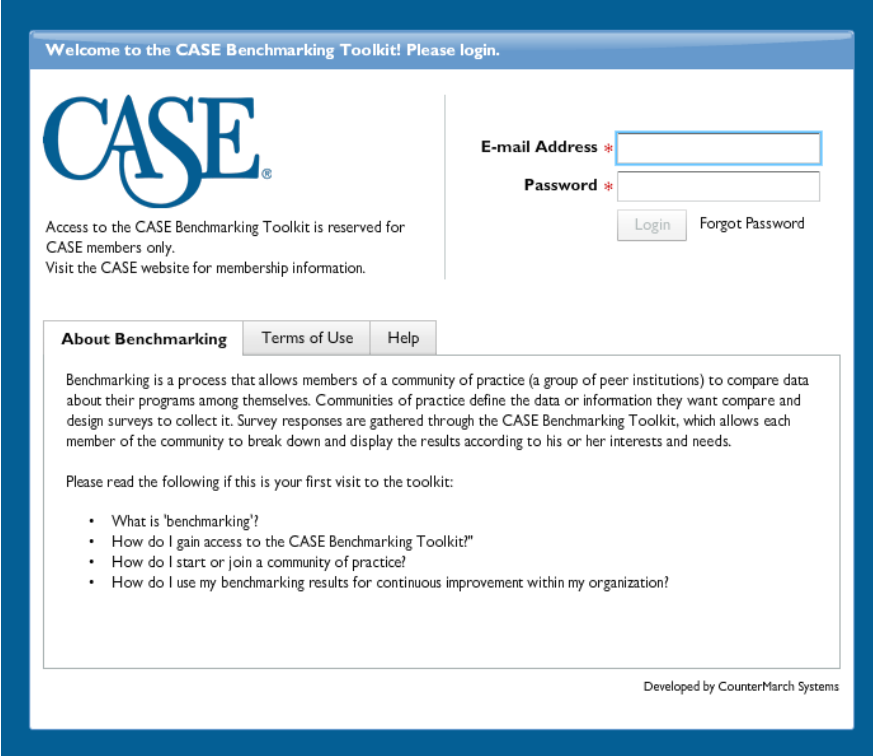
This document answers the following questions CASE members may have about using and navigating the CASE online Benchmarking Toolkit (frequently referred to as the “CBT” or, simply, the “Toolkit”):

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|---|----------------|
| A. HOW DO I GAIN ACCESS TO THE CASE BENCHMARKING TOOLKIT (CBT)? | Page 2 |
| B. HOW DO I RESPOND TO A SURVEY AND ENTER MY INSTITUTION’S DATA? | Page 4 |
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| D. HOW DO I DOWNLOAD THE RESULTS GRAPHIC INTO MY OWN MSWORD REPORT (AND PRETEND IT’S MINE)? | Page 20 |
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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.



Welcome to the CASE Benchmarking Toolkit! Please login.

CASE

Access to the CASE Benchmarking Toolkit is reserved for CASE members only.
Visit the CASE website for membership information.

E-mail Address *

Password *

About Benchmarking Terms of Use Help

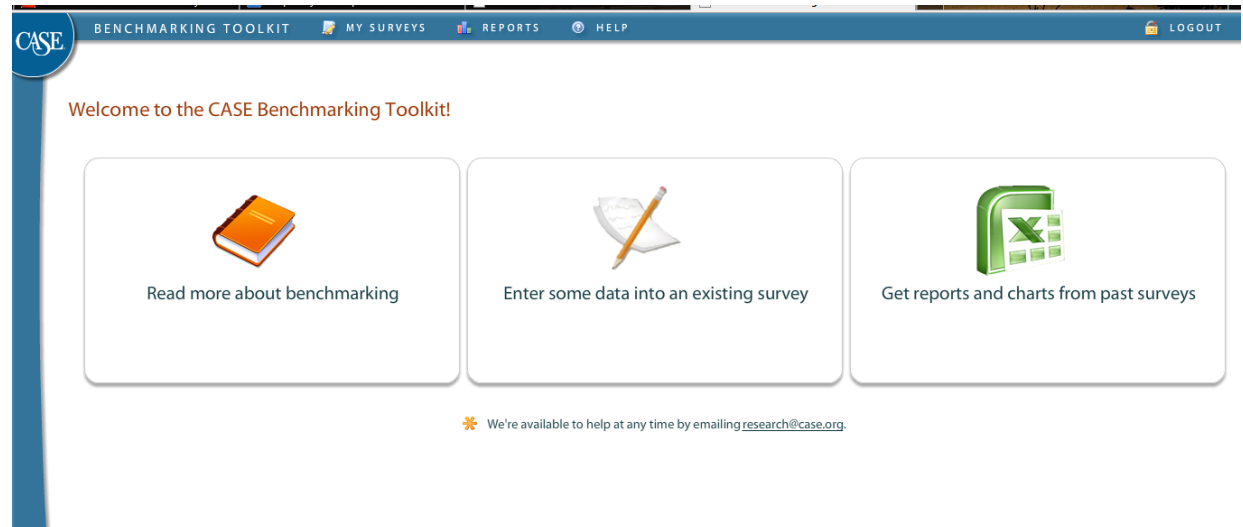
Benchmarking is a process that allows members of a community of practice (a group of peer institutions) to compare data about their programs among themselves. Communities of practice define the data or information they want compare and design surveys to collect it. Survey responses are gathered through the CASE Benchmarking Toolkit, which allows each member of the community to break down and display the results according to his or her interests and needs.

Please read the following if this is your first visit to the toolkit:

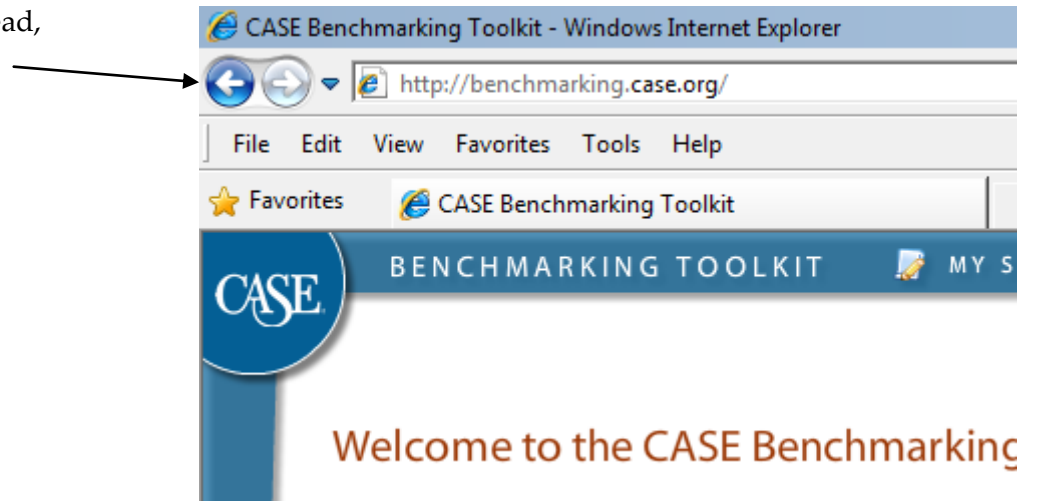
- What is 'benchmarking'?
- How do I gain access to the CASE Benchmarking Toolkit?"
- How do I start or join a community of practice?
- How do I use my benchmarking results for continuous improvement within my organization?

Developed by CounterMarch Systems

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 to click on your browser's back button.** 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”

The screenshot displays the CASE Benchmarking Toolkit interface. At the top, a blue navigation bar contains the CASE logo on the left and the following menu items: BENCHMARKING TOOLKIT, MY SURVEYS, REPORTS, and HELP. On the far right of the navigation bar is a LOCKED padlock icon followed by the text LOGOUT. Below the navigation bar, a brown heading reads "Welcome to the CASE Benchmarking Toolkit!". Three white rounded rectangular buttons are arranged horizontally. The first button features an orange book icon and the text "Read more about benchmarking". The second button features a white notepad with a yellow pencil icon and the text "Enter some data into an existing survey"; a black arrow points from the text "Enter some data into an existing survey" in the instruction above to this button. The third button features a green 3D spreadsheet icon and the text "Get reports and charts from past surveys". At the bottom center, a small orange asterisk icon is followed by the text "We're available to help at any time by emailing research@case.org."

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

The screenshot shows the CASE Benchmarking Toolkit interface. At the top, there is a navigation bar with the CASE logo, 'BENCHMARKING TOOLKIT', and links for 'MY SURVEYS', 'REPORTS', 'HELP', and 'LOGOUT'. Below the navigation bar, the page is titled 'Open Surveys' for 'Michigan State University'. A blue box highlights a survey titled 'FY09 - CASE's Basic Benchmarking Survey - DEMO ONLY' with the subtitle 'Community of Practice - Development & Fundraising' and the dates 'Open July 27 to August 29'. A yellow arrow points to a '78%' progress indicator in the bottom right corner of the blue box. To the right of the survey box, there is text explaining that clicking a survey enters school data and that progress is shown after completion. Below this, there is a note about not finding a survey and a contact email: 'research@case.org'.

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).

The screenshot shows the CASE Benchmarking Toolkit interface. At the top, there is a navigation bar with 'BENCHMARKING TOOLKIT', 'MY SURVEYS', 'REPORTS', 'HELP', and 'LOGOUT'. Below the navigation bar, the page title is 'CASE's Basic Benchmarking Survey - DEMO ONLY'. There are two tabs: 'About this survey' (selected) and 'About surveys'. The main content area contains a description of the survey and two buttons: 'View Survey' and 'Download Survey'. Below this, there is a progress bar for three sections: A (100.0%), B (100.0%), and C (66.6%).

Section	Progress
A. First, let's gather some basic descriptive information about your organization...	100.0%
B. Next, let's hear about the voluntary support your organization raises...	100.0%
C. Finally, let's hear about your advancement operation's staffing levels and expenditures...	66.6%

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.

The screenshot shows a web browser window titled "CASE Benchmarking Toolkit - Windows Internet Explorer" with the URL "http://benchmarking.case.org/". The browser's address bar and menu bar are visible. The application header includes the CASE logo and navigation links: "BENCHMARKING TOOLKIT", "MY SURVEYS", "REPORTS", and "HELP". The breadcrumb trail reads: "Available Surveys > CASE's Basic Benchmarking Survey - DEMO ONLY (FY 2009) > Finally, let's hear about your advancement operation's staffing levels and expenditures".

C. Finally, let's hear about your advancement operation's staffing levels and expenditures

In this section we will be asking about staffing levels and expenditures for your advancement operations.

Please report your staff numbers in paid "full-time equivalent" employees (FTEs) to two decimal places. For example, if you have two full-time employees would enter (2x1.00)+(3x0.50), or 4.50. If you have 50 paid conference center staff who are employees of your institution and who are working one day a week, you would enter 50x0.125, or 6.25.

Include all staff who are paid and who work for, or who are under the direction of, the advancement office, even if they are legal employees of another organization or external contractors or consultants. Do NOT include the time spent on advancement activities by your organization's senior-most non-advancement executive staff.

There are separate questions for the different advancement disciplines and for front-line/support staff. The disciplines are "alumni relations," "development," and "advancement management". If you are a "one-person shop" wearing multiple hats and working 300% time, then CASE understands and feels for you, but please spread the fractions of yourself appropriately across the different disciplines according to how your time is distributed. By "front-line staff" we mean fundraising staff. By "support staff" we mean everyone else.

When you get through this section, you're DONE! Ready? Ok, let's go!

1. How many paid full-time-equivalent "front-line" staff do you have who work on alumni relations/alumni affairs?
2. How many paid full-time-equivalent "support" staff do you have who work on alumni relations/alumni affairs?
3. How many paid full-time-equivalent "front-line" staff do you have who work on fundraising/development?

A yellow tooltip box with the text "This question does not apply to me" is positioned over the input field for question 2.

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).

The screenshot displays the CASE Benchmarking Toolkit interface. At the top, a blue navigation bar contains the CASE logo, the text 'BENCHMARKING TOOLKIT', and icons for 'MY SURVEYS', 'REPORTS', and 'HELP'. A 'LOGOUT' button is located in the top right corner. The main content area features three numbered questions, each with a text input field:

- 13. What was your organization's total actual budget expenditures this year, or in its most recently completed accounting year, for all communications and marketing? (Input: 350,000)
- 14. What was your organization's total actual budget expenditures this year, or in its most recently completed accounting year, for all advancement services? (Input: 250,000)
- 15. What was your organization's total actual budget expenditures this year, or in its most recently completed accounting year, for all advancement management? (Input: 150,000)

Below the questions is a text box with the prompt: "If there's any other information you'd like to include, please do so below!". At the bottom of the page, there are three buttons: "Clear Responses" (light red), "Cancel Changes" (light blue), and "Save Responses" (green).

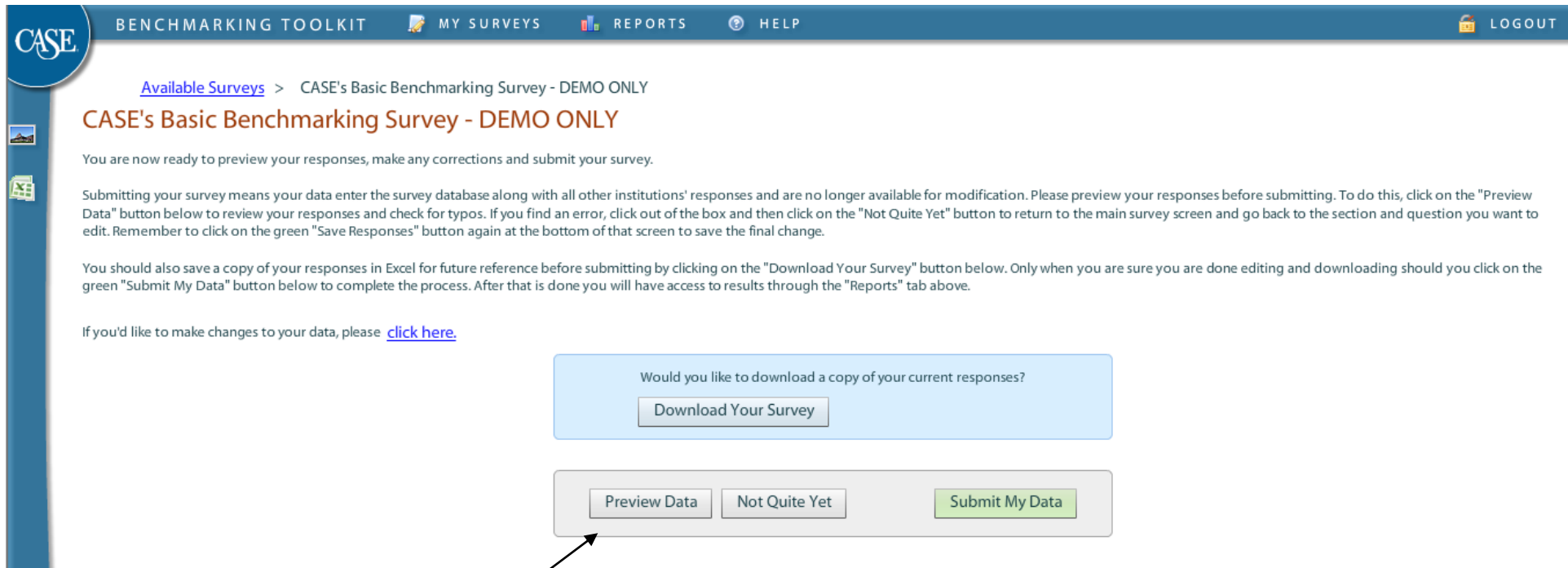
10. When you have completed and saved all the questions in all sections, you can preview and submit your data.

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

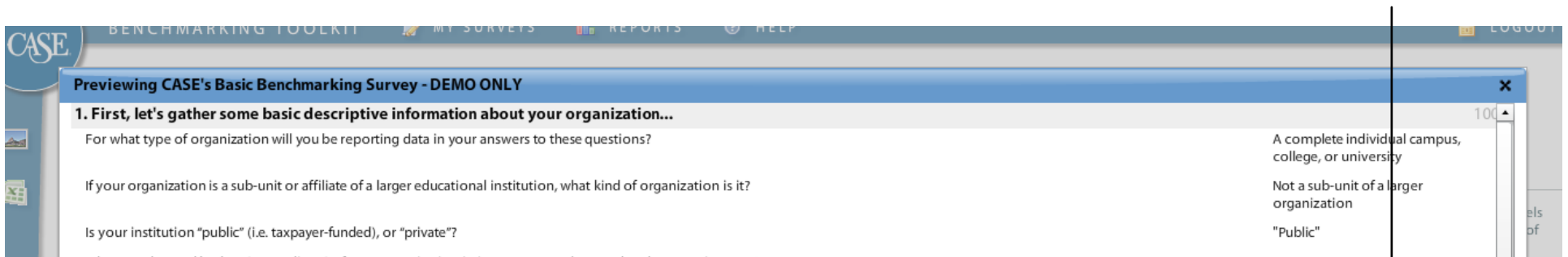
The screenshot shows the CASE Benchmarking Toolkit interface. At the top, there is a navigation bar with the CASE logo, 'BENCHMARKING TOOLKIT', 'MY SURVEYS', 'REPORTS', 'HELP', and 'LOGOUT'. Below the navigation bar, the breadcrumb trail reads 'Available Surveys > CASE's Basic Benchmarking Survey - DEMO ONLY'. The main heading is 'CASE's Basic Benchmarking Survey - DEMO ONLY', followed by a green arrow labeled 'Preview and Submit Survey'. Below this, there are two tabs: 'About this survey' (selected) and 'About surveys'. The 'About this survey' tab contains a paragraph of text: 'This basic survey can be taken by any post-secondary or higher education organization. Data you enter will automatically generate some simple key ratios that your organization can use for benchmarking its fundraising and staffing levels with those of peer institutions. It should take you no more than 20 minutes to complete, once you have gathered the basic data. Some tips to help you complete the survey more easily: (1) Gather your organization's data on number of staff and total expenditures before going through the survey. (2) For the expenditure questions, enter the whole dollar amount only, i.e. without the dollar symbol, commas, decimal point, and cents. For large numbers, make sure you enter the correct number of zeros. (3) For those organizations entering from outside the USA and not using dollars, convert your own currency to dollars using the information available at: http://www.xe.com/. (4) CASE Research staff are at your elbow to help: call Jackson at 202/478-5661 or contact research@case.org.' Below the text are two buttons: 'View Survey' and 'Download Survey'. At the bottom, there is a progress summary table with three rows, each showing a section name and a 100.0% completion rate.

Section	Completion Rate
A. First, let's gather some basic descriptive information about your organization...	100.0%
B. Next, let's hear about the voluntary support your organization raises...	100.0%
C. Finally, let's hear about your advancement operation's staffing levels and expenditures...	100.0%

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.



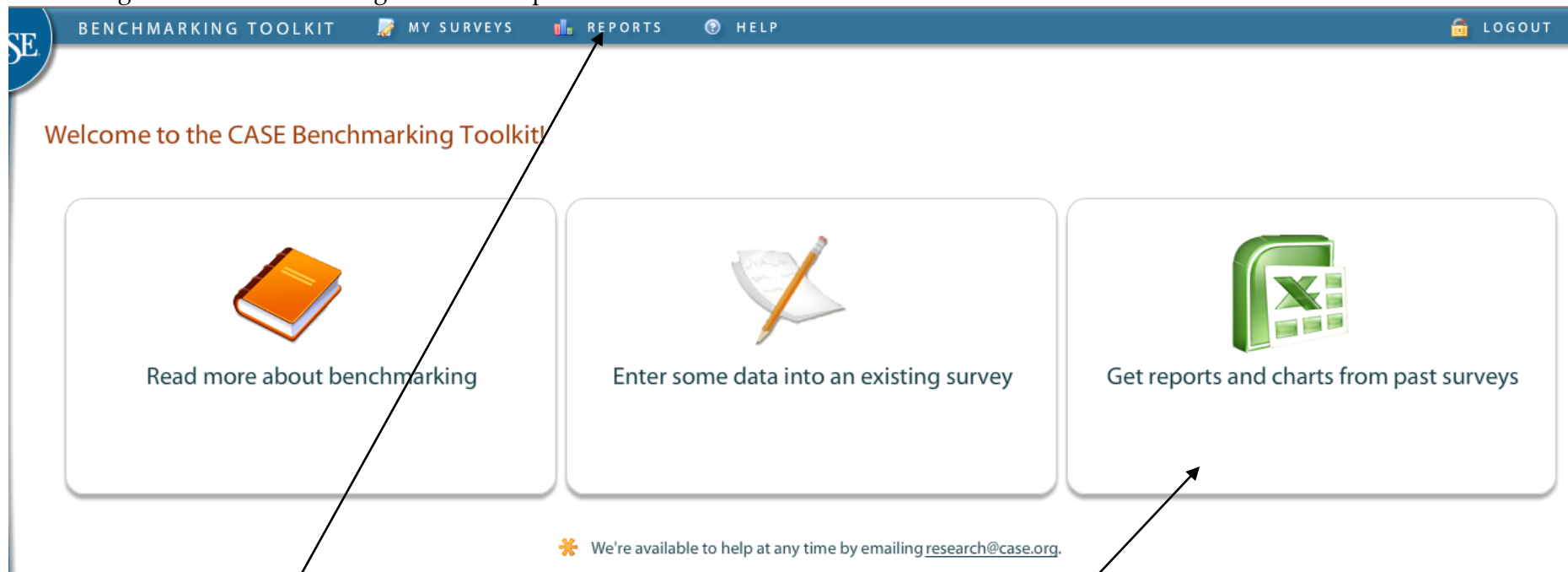
Please pay particular attention to the number of zeros you have typed in for large numbers. Do you have 10,000 alumni, or 100,000?

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.

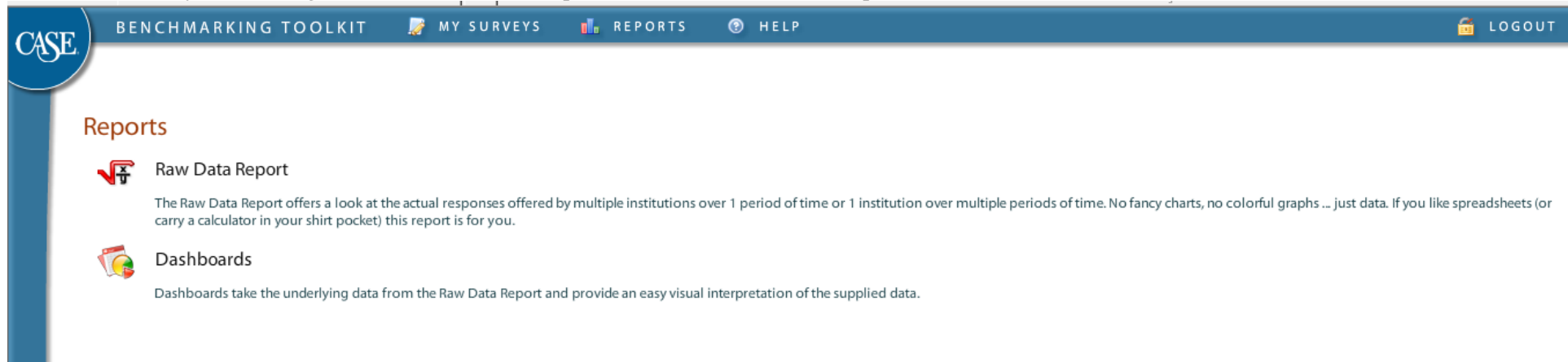
C. How do I display survey results on my screen?

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

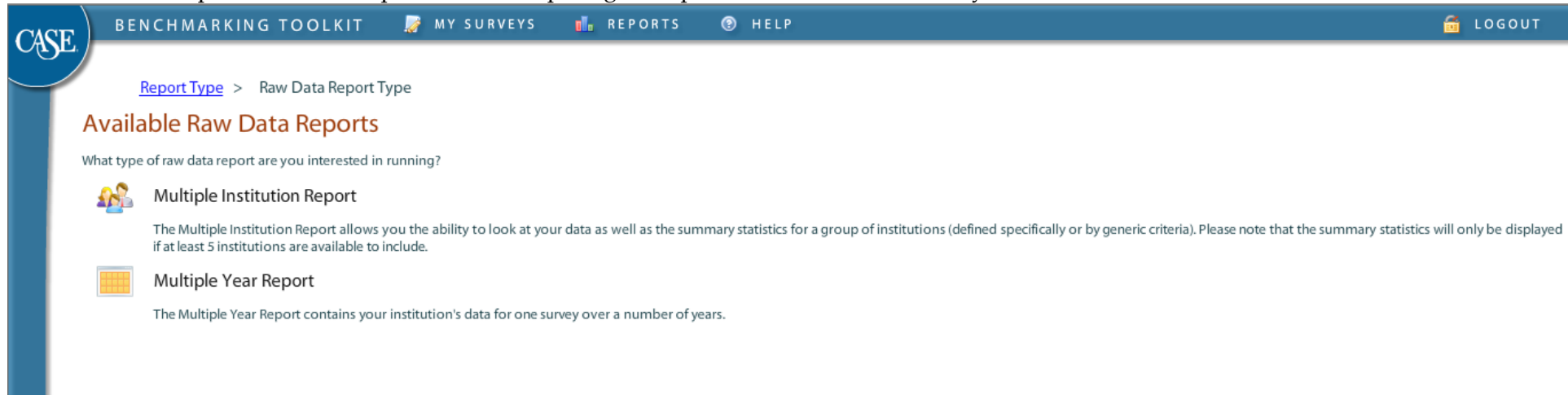
3. To benchmark your data against other institutions please choose “Raw Data Report.”



The screenshot shows the 'Reports' section of the CASE Benchmarking Toolkit. The navigation bar at the top includes 'CASE', 'BENCHMARKING TOOLKIT', 'MY SURVEYS', 'REPORTS', 'HELP', and 'LOGOUT'. The 'Reports' section is titled 'Reports' and contains two main options:

- Raw Data Report**: Accompanied by a red checkmark icon. The description states: "The Raw Data Report offers a look at the actual responses offered by multiple institutions over 1 period of time or 1 institution over multiple periods of time. No fancy charts, no colorful graphs ... just data. If you like spreadsheets (or carry a calculator in your shirt pocket) this report is for you."
- Dashboards**: Accompanied by a dashboard icon. The description states: "Dashboards take the underlying data from the Raw Data Report and provide an easy visual interpretation of the supplied data."

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.



The screenshot shows the 'Available Raw Data Reports' page. The navigation bar at the top includes 'CASE', 'BENCHMARKING TOOLKIT', 'MY SURVEYS', 'REPORTS', 'HELP', and 'LOGOUT'. The breadcrumb trail is 'Report Type > Raw Data Report Type'. The page title is 'Available Raw Data Reports'. Below the title, it asks 'What type of raw data report are you interested in running?' and lists two options:

- Multiple Institution Report**: Accompanied by a group of people icon. The description states: "The Multiple Institution Report allows you the ability to look at your data as well as the summary statistics for a group of institutions (defined specifically or by generic criteria). Please note that the summary statistics will only be displayed if at least 5 institutions are available to include."
- Multiple Year Report**: Accompanied by a calendar icon. The description states: "The Multiple Year Report contains your institution's data for one survey over a number of years."

- 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.

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:

Report Type > Raw Data Report Type > Reportable Surveys

Reportable Surveys

Filter Options

- Activity Group
- Carnegie Classification
- CASE District
- Educational and General Budget
- Enrollment
- Institutional Group
- Public / Private
- US Region
- US State
- By Name Specifically

Report Criteria

Using the available criteria on the left, please select which subset of schools you'd like to include in the report. Please note that you can include schools from or you can include institutions specifically, which allows you to create reports using the District 2 institutions, along with the University of Texas.

Cancel Report
Get Report
Download Report

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.

Report Type > Raw Data Report Type > Reportable Surveys

Reportable Surveys

Filter Options

- Activity Group
- Carnegie Classification
- CASE District
- Educational and General Budget
- Enrollment
- Institutional Group
- Public / Private
- US Region
- US State
- By Name Specifically

Report Criteria

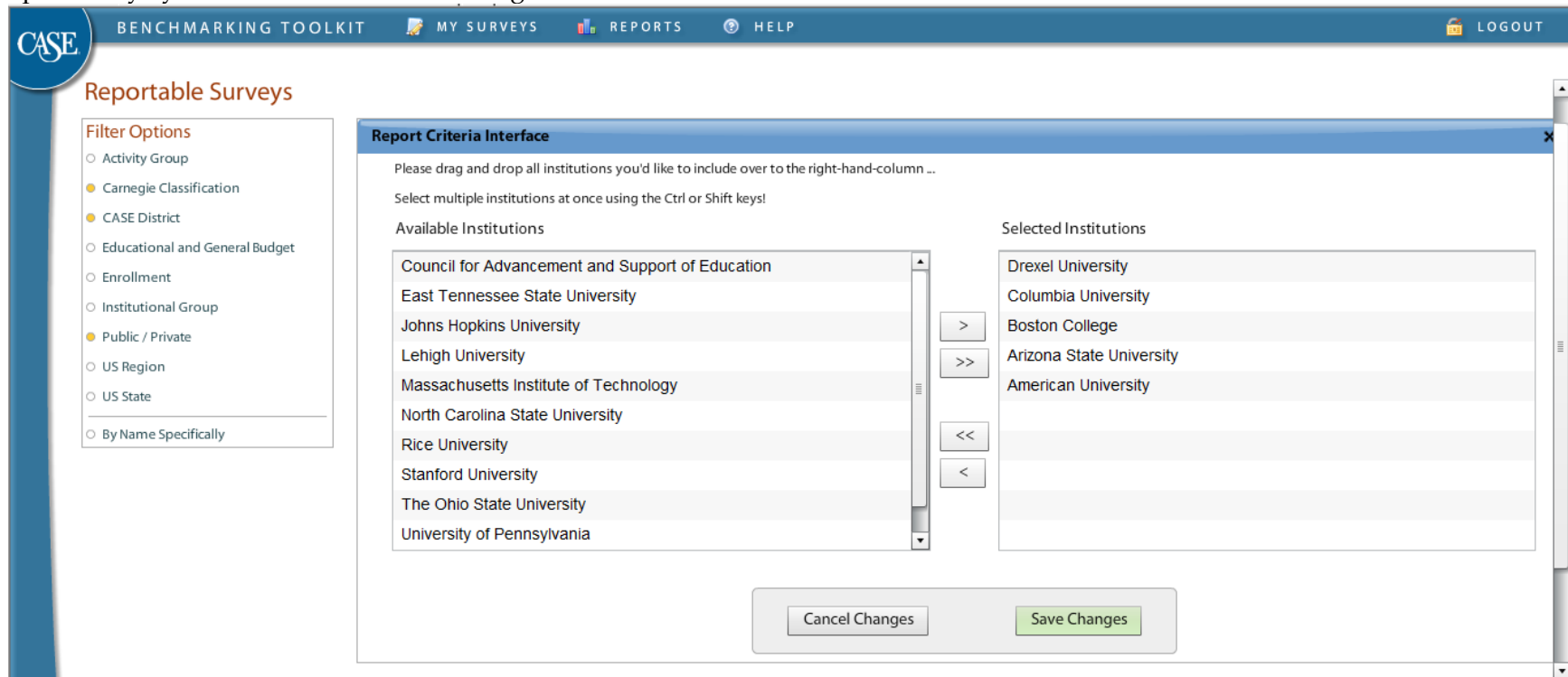
Using the available criteria on the left, please select which subset of schools you'd like to include in the report. Please note that you can include schools from their cha or you can include institutions specifically, which allows you to create reports using the District 2 institutions, along with the University of Texas.

Please include all schools whose...

- Carnegie classification: Doctoral/Research Universities
- Institutional Type: Public
- CASE District: CASE District 1

Cancel Report Get Report Download Report

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 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.

- 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.

CASE's Basic Benchmarking Survey - DEMO ONLY - FY 2009

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	

- 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 ✕

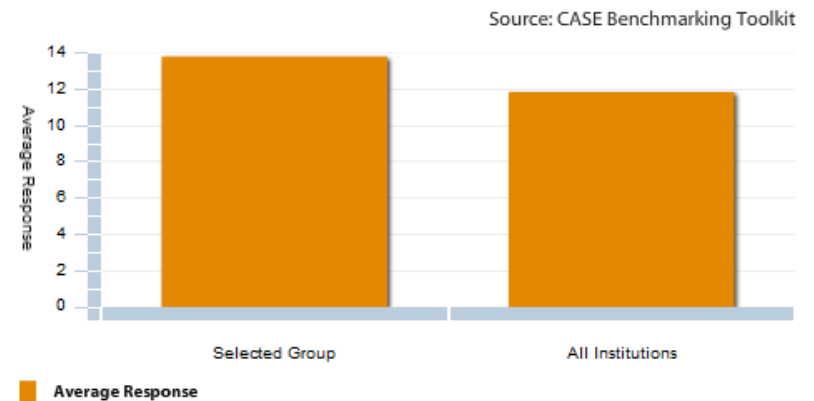
Selected Group matches the following filters:

-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)

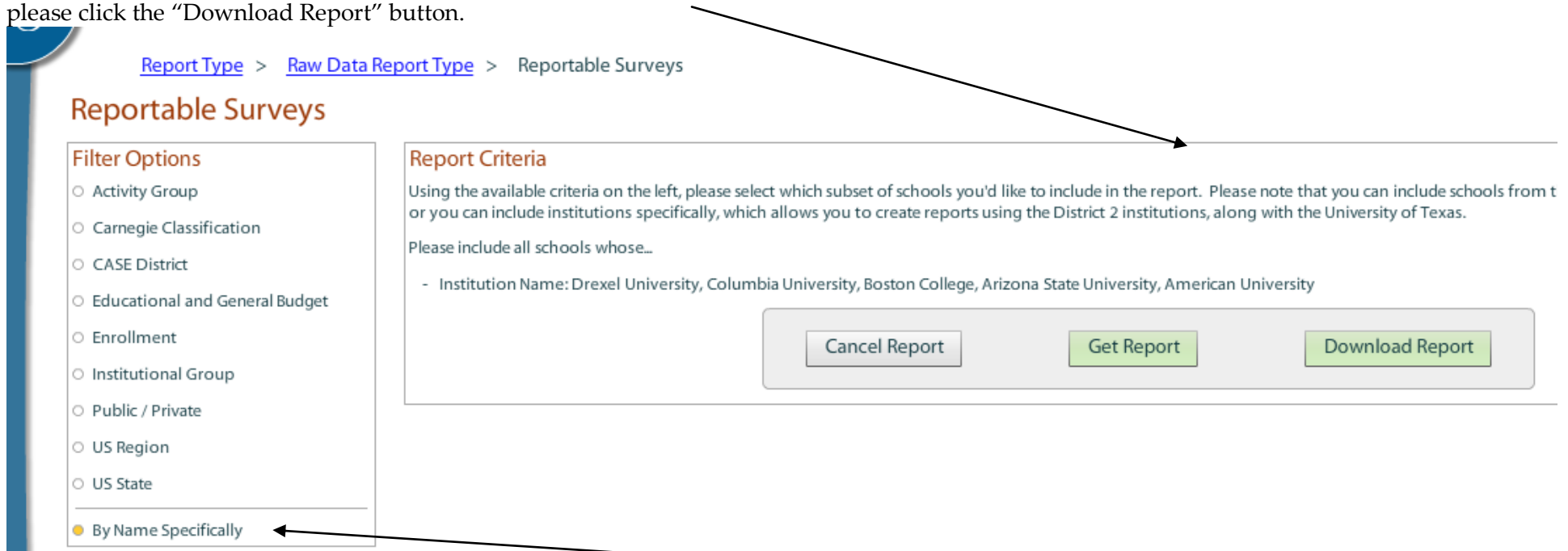
The mean is 13.8 for the select group and 11.83 for all institutions

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.

CASE's Basic Benchmarking Survey - DEMO ONLY - FY 2009

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.