



CASE Insights on College and University Foundations (CUFs) FY2025

A. Demographic Information

* 1. What is the full legal name of the foundation?

* 2. What is your name?

First name

Last name

* 3. What is your e-mail address?

Email address

* 4. What is the classification of your primary institution? Please choose the category that best describes your college or university.

- Bachelor's
- Master's
- Research/Doctoral
- System/District
- Professional/Specialty
- Community College

* 5. Which of the following best describes your foundation?

Definitions:

Independent - pays for the use of institution resources and operates with a high level of autonomy.

Interdependent - receives some free in-kind benefits such as office space and shares staff with the institution.

Dependent - controlled by institution, which provides office space, staff and other support.

- Independent
- Interdependent
- Dependent

* 6. On what date did your last fiscal year end?

- June 30
- September 30
- December 31
- Other



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B. Fundraising

7. What was the total funds received by your foundation and institution in the last fiscal year?

Include total outright giving and total irrevocable deferred giving at present value for private support raised.

If you participate in the Voluntary Support of Education Survey, please use "Official Grand Total Using Present Value" from Section 3c of the full or partial survey or "Official Grand Total by Purpose" from the minimal survey.

If you have not yet completed the VSE Survey for FY2025, include an estimate. Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641".

8. Does your foundation lead/manage the fundraising function at your institution?

If your response is No; please go directly to Q10.

Yes

No

9. What percentage (%) of the foundation staff is employed by the foundation?

If No is selected for Q8; this question does not need a response.

Limit your response to 1 decimal place. No need to include % sign.

10. What was the total funds received by your foundation in the last fiscal year? *NEW QUESTION*

Funds received includes outright gifts, pledge payments, realized bequests, and total deferred giving at face value. This is solely the foundation giving.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641".

11. How much of the total funds received by your foundation came from planned gifts in the last fiscal year? *NEW QUESTION*

Include all planned gift vehicles such as realized bequests and charitable gift annuities, charitable remainder trusts, and charitable lead trusts at face value.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641".

12. What amount reported in total productivity is attributable to University Grants and Contracts (e.g. research) in the last fiscal year? *NEW QUESTION*

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641".

13. How much was reported as contribution revenue on your financial statements (Form 990) in the last fiscal year? *NEW QUESTION*

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641".



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C. Endowment

14. What was your foundation's endowment balance at the close of the last fiscal year?

Report endowment balance as defined in the NACUBO-Commonfund Endowment Study. If your foundation and institution report separate endowment balances, please combine for this question.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

15. At the close of the last fiscal year, what was the return on your Long-Term Investment Pool (LTIP)?

Limit your response to 1 decimal place. No need to include % sign.

16. What is the three-year return on your Long-Term Investment Pool (LTIP)?

Limit your response to 1 decimal place. No need to include % sign.

17. What is the ten-year return on your Long-Term Investment Pool (LTIP)?

Limit your response to 1 decimal place. No need to include % sign.



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D. Endowment Spending

18. What was your effective annual spending rate (%), exclusive of fees during the last fiscal year?

Effective spending rate is total distributions for spending to the participating fund accounts divided by the total market value of the endowment at the end of the last fiscal year.

Limit your response to 1 decimal place. No need to include % sign.

19. Does your foundation plan to maintain, increase or decrease its spending policy/formula in the current fiscal year?

- Increase
- Decrease
- Maintain



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E. Expenses and Funding Sources for Foundation Operating Budget

20. During the last fiscal year, how much did your foundation spend on DEVELOPMENT?

Development expenses are operating expenses associated with fundraising, including any salaries and benefits paid by the foundation related to development. Development includes staff focused on areas such as major gifts, alumni giving, planned giving, and those with development or advancement in their job titles.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

21. How much of the above total (for Q20) was SALARIES & BENEFITS?

Only include salaries and benefits paid for by the foundation and associated with development.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

22. During the last fiscal year, what were your foundation's NON-DEVELOPMENT EXPENSES?

Non-development expenses include all operating expenses paid for by the foundation not associated with fundraising or development, including salaries and benefits not associated with fundraising and development.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

23. How much of the above total for NON-DEVELOPMENT EXPENSES (Q22) was SALARIES & BENEFITS?

Only include salaries and benefits paid for by the foundation and not associated with development.

Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

24. During the last fiscal year, what did your foundation spend in TOTAL on OPERATING EXPENSES? *NEW QUESTION*

This is solely the foundation operating budget. Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

Response to Q 24 = Response to Q20 + Response to Q22.

25. During the last fiscal year, what was the amount received by the foundation through:

This is solely the foundation operating budget. Please respond using only whole numbers and do not include commas, decimals, or dollar signs, e.g. "\$1,555,641.42" would be entered as "1555641."

Institutional Support	<input type="text"/>
Unrestricted Gift Funds	<input type="text"/>
Gift Funds Restricted for Foundation Operations	<input type="text"/>
Investment Income on Unrestricted Funds	<input type="text"/>
Cash Float	<input type="text"/>
Management Fee on Endowment Funds	<input type="text"/>
Gift Fees	<input type="text"/>
Revenue from Real Estate Under Management	<input type="text"/>
Other	<input type="text"/>
Total	<input type="text"/>



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F. Gift Fees

26. Does your foundation have a one-time fee on non-endowed gifts?

If your response is No; please go directly to Q28.

Yes

No

27. What is your foundation's fee for Non-Endowed gifts?

If No is selected for Q26; this question does not need a response.

Limit to 2 decimal places. Do not include percent sign. For example, 1.25.

28. Does your foundation have a one-time fee on endowed gifts?

If your response is No; please go directly to Q30.

Yes

No

29. What is your foundation's fee for Endowed gifts?

If No is selected for Q28; this question does not need a response.

Limit to 2 decimal places. Do not include percent sign. For example, 1.25.



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G. Miscellaneous

30. Is your alumni association separate from the foundation?

Yes

No

31. What are the biggest challenges you face this fiscal year?