CASE-Marts&Lundy CampaignSource Survey for Active Campaigns

Introduction: CASE-Marts&Lundy CampaignSource - Active Campaign Survey
The intent of this survey is to take a snapshot of the activities and goals of a comprehensive campaign during the quiet / silent phase before the campaign and goals are announced to the general public.

CampaignSource Survey Help

- Visit the CASE-Marts&Lundy CampaignSource resource page.
- Email us at campaignsource@case.org.

How It Works

- Each institution has a single primary contact for the survey. The primary contact receives the invitation to participate and the survey link.
- The primary contact may share the survey link with others at their institution as needed, but please ensure that only one person at a time enters data into the survey.
- Your progress is automatically saved during each survey session. You do not have to complete the survey all at once.
- Some questions may be specific to schools or higher education institutions and will only display to those institution types. Some questions are conditional and may only be required based on your answer to a previous question.
- At the end of the survey there is a review page where you can review all your entries, go back if you need to edit your entries, and generate a PDF of your survey. **Please follow the instructions on the review page to submit your completed survey.**

Survey Overview

- Section 1: Institution Information (Required) - 14 questions (schools) / 12 questions (higher education institutions)
- Section 2: Active Campaign Background - 22 questions (10 required / 8 optional / 4 conditional)
- Section 3: New Funds Committed during an Active Campaign (Required) - 4 questions
- Section 4: Other Campaign Funds (Required) - 1 question
- Section 5: Staffing and Budget - 4 questions (1 required / 3 optional)

About CampaignSource Survey Reporting Totals

For campaigns completed or entering into the public phase before March 21, 2021 it is expected that your counting policies may not be in alignment with the newest edition of the CASE Global Reporting Standards. A copy of the previous edition [2009 CASE Reporting Standards and Management Guidelines, 4th edition] is included at the end of the digital edition of the CASE Standards.

How reporting totals are calculated in this survey depends upon which version of the standards are being applied.

- Totals = New Funds Committed + Bequest Intentions [CASE Global Reporting Standards (2021)]
- Totals = New Funds Committed + Bequest Intentions + Other Funds Counted [CASE Reporting Standards and Management Guidelines, 4th Edition (2009)]

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1. Institution Information
Some questions are specific to schools or higher education institutions and will only display to those institution types. You may see a jump in question numbers because of this.

1.1 Contact Information

1.1.1 Institution Name (Required)

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1.1.2 Survey Contact First Name (Required)

____

1.1.3 Survey Contact Last Name (Required)

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1.1.4 Survey Contact Email Address (Required)

____

1.2 Institution Type (Required)

- ○ Independent School
- ○ International School
- ○ Community College ((Primarily two year)
- ○ Primarily Undergraduate
- ○ Combined Undergraduate and Postgraduate
- ○ Professional School (Postgraduate only)

1.2.1 What ages do you serve? (Required for schools)
Select all that apply.

- [ ] 3-10
- [ ] 11-14
- [ ] 15 and up

1.2.2 Does your school have a boarding program? (Required for schools)

- ○ No
- ○ Yes

1.2.3 What is your school type? (Required for schools)

- ○ Girls only
- ○ Boys only
- ○ Co-educational

1.2.4 Are hospital or medical facility data included in your survey? (Required for higher education institutions)

- ○ No
- ○ Yes

1.2.5 Select the numeral corresponding to the month in which your fiscal year ends. (Required)

- ◯ 1
- ◯ 2
- ◯ 3
- ◯ 4
- ◯ 5
- ◯ 6
- ◯ 7
- ◯ 8
- ◯ 9
- ◯ 10
- ◯ 11
- ◯ 12

1.2.6 Home Currency (Required)

Select one. For Other, please enter your three-letter ISO 4217 currency code. Currency codes can be found online on multiple websites.

- ○ U.S. (USD)
- ○ Canada (CAD)
- ○ U.K. (GBP)
- ○ Europe (EUR)
- ○ AU (AUD)
- ○ NZ (NZD)
- ○ MX (MXN)
- ○ Other (Enter three-letter currency code)

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1.3 Institutional Statistics

Report figures as whole numbers without decimals.

1.3.1 Total institution expenditures / expenses for the last fiscal year completed (Required)

Public institutions that have a foundation should enter the combined expenditures for the foundation and the institution.

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1.3.2 Endowment market value at the end of the last fiscal year completed (Required)

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1.3.3 Enrollment: Total Headcount (Required)

Please provide the total number of students (total headcount, not full-time equivalent) who were enrolled at the beginning of the academic year within the fiscal year reporting period (e.g., fall of 2020 for a 2020-21 fiscal year). All students (except continuing education) are counted: full-time, part-time, resident, extension, nondegree.

Do not convert part-time students to full-time equivalents. Do not provide a rolling headcount for the whole year or just the number of new students registering.

Institutions that complete the CASE Voluntary Support of Education (VSE) survey and CASE Global Alumni Engagement Metrics (AEM) survey are required to report this figure there, as well.

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1.3.4 Number of legally contactable alumni at the end of the last fiscal year completed (Required)

Legally Contactable Alumni: An individual who is not marked as deceased, for whom you have a means of contact, and who does not have a total “no contact” status (for any purpose or by any means).

For institutions in some countries, individuals specifically need to provide “opt-in” consent to allow the institution to be in touch with them. In those cases, only individuals who provided such consent should be counted here. Another way to interpret this definition is that there is nothing that restricts you from legally contacting this person because a) you have at least one of the three means of contact, b) the person is not marked as fully opted-out of contact, and/or c) the institution would be compliant with applicable law should it contact the individual.

Institutions that complete the CASE Alumni Engagement Metrics (AEM) survey are required to report this figure there, as well.

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2. Active Campaign Background

2.1 Campaign Name

2.1.1 What is the name of the active campaign you are currently reporting on? (Required)

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2.2 Campaign Timeline

For the active campaign you listed in 2.1, report the following:

2.2.1 Enter the month and year that gifts began being counted toward the campaign. (Required)

Format: mm/yyyy

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2.2.2 Enter the month and year of the public launch of the campaign. (Required)

Format: mm/yyyy

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2.2.3 Enter the month and year in which the campaign is planned to end. (Required)

Format: mm/yyyy

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2.2.4 Enter the month and year in which gifts will no longer be counted towards the campaign. (Required)

Format: mm/yyyy

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2.2.5 Was there a transition in the institution's senior-most leader during the quiet/ silent phase of the campaign? (Optional)

- ○ Yes
- ○ No

2.2.6 Was the duration of the campaign changed during the quiet/silent phase? (Optional)

- ○ Yes
- ○ No

2.2.7 If yes, please indicate whether the length was increased or decreased and by how many months the duration change? (Optional)

- ○ Increased (Enter number of months) ______________________________
- ○ Decreased (Enter number of months) ______________________________

2.2.8 Why was the campaign duration changed? (Optional)

2.2.9 Has planning begun for the next campaign? (Optional)

- Yes
- No

2.3 Campaign Goals

Report figures as whole numbers without decimals unless otherwise instructed.

2.3.1 What was the announced campaign goal (financial) as of public launch? (Required)

2.3.2 Please report the percentage of campaign pledges that the institution projects will have to be written off. (Required)

Maximum of one decimal place

2.3.3 Does the campaign have specific goals for any of the following: (Optional)

	Value of Gifts	Number of Donors / Participants
Alumni participation		
Faculty/staff participation		
Parent/Grandparent participation		
Acquisition of new first time donors		
New qualified prospects		
Alumni engagement beyond alumni giving (Value N/A; provide number of participants only)		

2.3.4 If the campaign has specific goals not listed above, please note them here. (Optional)

2.4 Campaign Policies

Pledges

2.4.1 Does the campaign counting policy comply with the CASE Global Reporting Standards guidance that pledge payments scheduled to be received more than 5 years after the conclusion of the campaign be excluded from campaign counts? (Required)

- ○ Yes
- ○ No

2.4.2 If you answered no, please describe the campaign policy for counting policy with regard to pledges. (Required if you answered no to 2.4.1)

2.4.3 If the campaign has a different policy regarding the duration of time that pledge payments can be counted toward the campaign, please indicate the maximum duration in months for which the pledge payments are counted after the end date of the campaign. (Required if you answered no to 2.4.1)

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Bequests / Legacy Intentions

2.4.4 In the campaign, are revocable bequest and legacy intentions counted in accordance with the CASE Global Reporting Standards that stipulate that only bequest/legacy intentions from donors who will be age 65 or older by the end of the campaign be included in campaign counts at face value? (Required)

- ○ Yes
- ○ No

2.4.5 If you answered No, please describe the campaign policy for counting and valuing revocable bequest/legacy intentions. (Required if you answered no to 2.4.4)

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2.4.6 Does the campaign have a campaign gifts acceptance committee to review and vet complex gifts? (Optional)

◯ Yes

◯ No

2.5 Campaign Counting Timeline

2.5.1 Were any gifts / pledges made prior to the start of the campaign counting period included in campaign funds committed as reported in section 3 (New Funds Committed) of this survey? (Required)

◯ Yes

◯ No

2.5.2 If yes, please state the beginning of the campaign counting period. (Required if you answered yes to 2.5.1)

Format: mm/yyyy

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3. New Funds Committed during an Active Campaign

This section asks for value of gifts and the number of donors during the quiet / silent phase of the campaign that are in alignment with the CASE Global Reporting Standards (4.1 and 7.9)

For campaigns completed or entering into the public phase before March 21, 2021 it is expected that your counting policies may not be in alignment with the newest edition of the CASE Global Reporting Standards. A copy of the previous edition [2009 CASE Reporting Standards and Management Guidelines, 4th edition] is included at the end of the digital edition of the CASE Standards.

Section 4 of this survey (Other Campaign Funds) collects data on other funds that are excluded from New Funds Committed under the CASE Global Reporting Standards but still counted toward your institution’s campaign totals.

Please report in whole numbers without decimals unless otherwise instructed.

3.1 Individuals: Recognition Credit (Duplicated Counts / Soft-credit Counts) (Required)

In this section duplication is expected as donors can fall in many categories. For example, if a donor is a current parent and a trustee, you would count the person in both categories.

For Governing Board Members and Foundation Board Members, include only those who were active during point of the campaign counting period.

This question is required. There should be no blank cells. If you had no gifts from a constituency, enter zeroes in that row.

	Value of Gifts	Number of Donors
Alumni		
Parents / Grandparents		
Students		
Faculty/Staff		
Other Individuals		

Governing Board Members (Active only)		
Foundation Board Members (Active only)		
Other Volunteers		

3.2 Organizations (Required)

This question is required. There should be no blank cells. If you had no gifts from a constituency, enter zeroes in that row.

	Value of Gifts	Number of Donors
Foundations		
Corporations		
Donor-Advised Funds		
Other Organizations		

3.3 Total New Funds Committed during the Quiet / Silent Phase (Required)

Enter the value and number of new revocable bequest / legacy intentions, irrevocable planned gifts, and outright gifts / pledges secured during the quiet / silent phase of the campaign.

Base donor counts on **legal/hard credit.**

This question is required. There should be no blank cells. If you had none of a gift type, enter zeroes in that row.

	Value of Gifts	Number of Donors
Revocable Bequest / Legacy Intentions		
Irrevocable Planned Gifts (CRUTs, CGAs, etc.)		
Outright Gifts and Pledges		
Total		

3.4 Unduplicated Donor Counts (Required)

For New First-Time Donors: Provide a count of first-time donors who made gifts or pledges counted during the quiet / silent phase of the campaign. *Leave Value of Gifts blank for New First-Time Donors.*

Base donor counts on legal/hard credit.

	Value of Gifts	Number of Donors
Total Individual Donors		
Total Organization Donors		
New First-Time Donors (Leave Value of Gifts blank)		

4. Other Campaign Funds

This section is for reporting gifts counted during the campaign which fall outside of the newest CASE Global Reporting Standards.

CASE understands that there are many valid reasons why an institution may choose to count these gifts. The key here is to be transparent.

Please report in whole numbers without decimals unless otherwise instructed.

4.1 Other Funds Counted During the Quiet / Silent Phase of the Campaign (Required)

This question is required. There should be no blank cells. If you had no gifts in a category, enter zeroes in that row.

	Value of Funds	Number of Donors
Bequests / Legacy Intentions from donors under age 65		
Pledges over 5 years		
Institutional Donor-Advised Funds (DAFs)		
Intellectual Property		
Government Grants		
Exclusive Contracts		
Contracted / Sponsored Research		
Other		

Total		

Section 5. Staffing and Budget

5.1 Staffing

5.1.1 Total Staff FTE positions including both exempt and non-exempt staff as of the end of the last fiscal year completed during the campaign. (Required)

	Staff FTEs
Advancement Management	
Advancement Services	
Alumni Relations	
Communications and Marketing	
Development/Fundraising	
Total	

5.1.2 Of the above Total Staff FTEs, what number of these staff are dedicated to the campaign? (Required)

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5.2 Campaign Finances

5.2.1 Total Campaign Expenditures (last fiscal year completed during the campaign) (Required)

Total Amount - Please report a whole number without decimals.

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5.2.2 Did you invest in any of the following? (Optional)

Select all that apply.

	Purchase / Hire	Upgrade
Engagement software	☐	☐
CRM system	☐	☐
Wealth screening	☐	☐
Feasibility study	☐	☐
Mailing list	☐	☐
Adding staff	☐	☐
External campaign counsel	☐	☐