Q1 Introduction: CASE-Marts&Lundy CampaignSource - Active Campaign Survey

The survey for Active Campaigns collects data on new funds committed, donor counts, and other campaign funds raised throughout the quiet phase of the campaign beginning with the start of the campaign’s counting period up until public launch. The quiet phase (also known as leadership, pre-public, or planning phase) is a period during which pace-setting gifts are sought from the individuals and organizations closest to the institution. The public phase (also known as the “active” phase) begins when the campaign is announced to the community and stakeholders. This is also when the official public marketing and reporting happen. Donor counts and values of funds raised reported in the survey should correspond to those in reports issued at the start of the public phase.

It is possible to start the survey, save responses, and resume the survey later but be sure to use the same survey link on the same computer and browser.

Please direct questions about this survey to campaignsource@case.org.

End of Block: Introduction
The person the CASE AMAtlas team can contact if we have questions about your survey.

Q5 Survey Contact Email Address

End of Block: Participant Information

Start of Block: 1A. Institution Characteristics

Q6 Section 1A. Institution Characteristics
Q7 1A-1. What is your institution's home currency?

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) (36)
- Canada (CAD) (37)
- U.K. (GBP) (38)
- Europe (EUR) (39)
- AU (AUD) (43)
- NZ (NZD) (44)
- MX (MXN) (45)
- Other (Enter three-letter currency code) (46)

Q8 1A-2. Which of the following best describes your institution?

- Independent School (1)
- International School (2)
- Community College (Primarily two year) (3)
- Primarily Undergraduate (4)
- Combined Undergraduate and Postgraduate (5)
- Professional School (Postgraduate only) (6)
Q9 1A-3. Total institution expenditures for the last fiscal year completed during the quiet phase of the campaign.

If you participate in the CASE Voluntary Support of Education (VSE) survey, this figure aligns with the expenditures figure submitted in section 2 of the VSE survey.

Please report a whole number without decimals.

________________________________________________________________

Q10 1A-4. Endowment market value at the end of the last fiscal year completed within the quiet phase of the campaign.

Please report a whole number without decimals.

________________________________________________________________

Q11 1A-5. Is your institution engaged in clinical medicine?

- Yes (1)
- No (2)
Q12 1A-6. Number of Living Alumni at the end of the quiet phase. 

Please report a whole number without decimals.

**Living Alumni:** An individual who is not marked as deceased in your files, whether or not you have contact information.

Q13 1A-7. Number of Legally Contactable Alumni at the end of the quiet phase. 

Please report a whole number without decimals.

An individual who is not marked as deceased, for whom you have a means of contact (email, postal mail, or telephone number), and who does not have a total (for all purposes and by all means) no contact status. Because of privacy laws that differ by country, individuals may 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 as Legally Contactable.

**Note:** For the purposes of this survey the ability to contact via social media (Twitter, Facebook, Instagram, etc.) without another method of contact is not sufficient to meet the definition of Legally Contactable.
Q14 1A-8. How many comprehensive campaigns has your institution completed prior to the current campaign?


Q15 1A-9. If your institution has completed at least one comprehensive campaign prior to the current campaign, what was the total value of funds counted as part of the institution's last campaign?

Please report a whole number without decimals.


Page Break
Q16 Section 1B. Campaign Policies & Goals

Q17 1B-1. Enter the month and year that gifts began being counted toward the campaign.

**Format:** mm/yyyy

Q18 1B-2. Enter the month and year of the public launch of the campaign.

**Format:** mm/yyyy

Q19 1B-3. Enter the month and year in which the campaign is planned to conclude.

**Format:** mm/yyyy

Q20 1B-4. What was the announced campaign goal (financial) as of public launch?

Please report a whole number without decimals.
Q21 1B-5. Does the campaign have specific goals for any of the following?

If you answer Yes, please describe.

Q22 1B-5-1. Alumni participation

- No (1)
- Yes (2) ________________________________________________

Q23 1B-5-2. Faculty/staff participation

- No (1)
- Yes (2) ________________________________________________
Q24 1B-5-3. Parent/Grandparent participation

- No (1)
- Yes (2) ________________________________

Q25 1B-5-4. Acquisition of new first time donors

- No (1)
- Yes (2) ________________________________
Q26 1B-5-5. New qualified prospects

- No (1)
- Yes (2) ________________________________________________

Q27 1B-5-6. Alumni engagement beyond alumni giving

This might include specific goals for experiential engagement, volunteerism, or engagement in communications; or overall goals for engagement extending to modes of engagement other than or inclusive of philanthropic engagement.

- No (1)
- Yes (2) ________________________________________________

Q28 1B-5-7. Other

- No (1)
- Yes (2) ________________________________________________
Q29 1B-6. Please report the percentage of campaign pledges that the institution projects will have to be written off.

Maximum one decimal place

________________________________________________________________

Q30 1B-7. Does the campaign counting policy comply with the CASE Global Reporting Standards guidance that pledge payments scheduled to be received more than five years after the conclusion of the campaign be excluded from campaign counts?

○ Yes (1)
○ No (2)

Q31 1B-8. If the campaign has a different policy regarding maximum pledge duration period, please indicate the maximum duration in months for which pledge payments are counted after the end date of the campaign.

Please report a whole number without decimals.

**Example:** If your campaign policy allows pledge payments to be counted for 7 years after the conclusion of the campaign enter 84
Q32 1B-9. 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?

- Yes (3)
- No (4)

Q33 1B-10. If you answered No, please describe the campaign policy for counting and valuing revocable bequest/legacy intentions.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Q34 1B-11. Were any gifts/pledges made prior to the start of the campaign counting period included in campaign funds committed as reported in section 2 (New Funds Committed) of this survey?

- Yes (1)
- No (2)

Q35 1B-12. If you answered Yes, what was the value of gifts/pledges made prior to the counting period and reported as new funds committed?

Please report a whole number without decimals.

Q36 1B-13. What was the announced value of funds raised in the quiet phase of the campaign?

Please report a whole number without decimals.

End of Block: 1B. Campaign Policies & Goals

Start of Block: 2. New Funds Committed

Q37 Section 2. Campaign New Funds Committed
This section asks for counts of donors and the value of new funds committed in conformity with the CASE Standards (4.1 and 7.9).

Section 3 of this survey (Other Campaign Funds) collects data on other funds that are excluded from New Funds Committed under the CASE Standards but that some institutions may include in their campaign goals and reports.
In this section, count donors that were hard OR soft credited. For example, any donor-advised fund (DAF) gifts, most family foundation gifts, and some corporate gifts will be credited to the individual that caused the gift to be made, rather than to the hard-credit/legal entity.

Distributions from institutionally managed DAFs that have not been distributed to the institution are excluded from counting as new funds committed by the CASE Standards. Funds from DAFs are counted when they are paid out for use by the institution, not when the DAF account is funded by the donor.

Count each donor in any category he or she falls in. Since individuals may fall into multiple categories (e.g. Alumni and Parents) these counts may be duplicative.

If donors made multiple gifts during the silent phase of the campaign only count them once in all appropriate categories.
Q38 2-1. Individuals: Recognition Credit (Duplicated Counts)

Please report in whole numbers without decimals.

<table>
<thead>
<tr>
<th></th>
<th>Value of Gifts (1)</th>
<th>Number of Donors (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumni (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parents/Grandparents (2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Faculty/Staff (3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Individuals (4)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Governing Board Members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(5)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>All Volunteers (6)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Q39 2-2. Organizations

Please report in whole numbers without decimals.

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>Value of Gifts (1)</th>
<th>Number of Donors (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundations (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporations (2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Organizations (3)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q40 2-3. Total Campaign Funds Committed

Enter the Value and Number of new revocable Bequest/Legacy Intentions, Irrevocable Planned Gifts, and Outright Gifts/Pledges secured during the quiet phase of the campaign.

Base donor counts on legal/hard credit.

Report bequest/legacy intentions at face value. Only include bequests/legacies from donors who are or will be 65 years of age or older during the campaign reporting period. If your institution counts and values bequest/legacy intentions in a different way, these may be reported in “Other Campaign Funds” (Section 3 below).
Report Irrevocable Planned Gifts at present value.

Please report in whole numbers without decimals.

<table>
<thead>
<tr>
<th></th>
<th>Value of Gifts (1)</th>
<th>Number of Donors (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revocable Bequest/Legacy Intentions (1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Irrevocable Planned Gifts (2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Outright Gifts and Pledges (3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Page Break
Q41 2-4. Hard-Credit Donor Counts (Unduplicated)

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

Please report in whole numbers without decimals.

<table>
<thead>
<tr>
<th></th>
<th>Value of Gifts (1)</th>
<th>Number of Donors (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Individual Donors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Organization Donors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New First-Time Donors</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(Leave Value of Gifts blank)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

End of Block: 2. New Funds Committed

Start of Block: 3. Other Campaign Funds
Q42 Section 3. Other Campaign Funds

Other Campaign Funds includes intellectual property, sponsored research, and other contributions excluded from counting by the *CASE Global Reporting Standards* but which individual institutions include in their campaign reports.

Please report in whole numbers without decimals.
### Q43 3.1. Other Campaign Funds

<table>
<thead>
<tr>
<th>Value (1)</th>
</tr>
</thead>
</table>

- **Value of bequest commitments counted in the silent phase but excluded from counts of New Funds Committed in Section 2 of the survey (e.g., bequest commitments from donors who were not 65 years of age or older within the reporting period of the campaign.)** (1)

- **Value of pledges counted in the silent phase but excluded from counts of New Funds Committed in Section 2 of the survey (e.g., pledge payments scheduled to be received more than 5 years after the completion of the campaign).** (2)

- **Value of contributions to institution-sponsored donor-advised funds that were not distributed to the institution during the silent phase of the campaign.** (3)

- **Value of intellectual property, such as software licenses that are counted in the silent phase.** (4)

- **Value of contracted / sponsored research counted in the silent phase.** (5)

- **Value of any additional contributions counted in the silent phase that are not included in**
New Funds Committed (Section 2). (6)

Total

End of Block: 3. Other Campaign Funds

Start of Block: 4. Staffing and Budget

Q44 Section 4. Staffing and Budget
Q45 4-1. Total Staff FTE Positions (as of the end of the last fiscal year completed during the silent phase)

Maximum of one decimal place.

<table>
<thead>
<tr>
<th>Department</th>
<th>Staff FTEs (1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advancement Management</td>
<td>(1)</td>
</tr>
<tr>
<td>Advancement Services</td>
<td>(5)</td>
</tr>
<tr>
<td>Alumni Relations</td>
<td>(2)</td>
</tr>
<tr>
<td>Communications and Marketing</td>
<td>(3)</td>
</tr>
<tr>
<td>Development/Fundraising</td>
<td>(4)</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td></td>
</tr>
</tbody>
</table>

*
Q46 4-2. Total Campaign Expenditures (last fiscal year completed during silent phase)

Total Amount - Please report a whole number without decimals.

End of Block: 4. Staffing and Budget