CASE-Marts&Lundy CampaignSource Survey for Completed Campaigns

Introduction: CASE-Marts&Lundy CampaignSource - Completed Campaign Survey

The survey for Completed Campaigns collects data on new funds committed, donor counts, and other campaign funds raised throughout the full duration of the campaign from the start through the end of the campaign's counting period.

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: Completed Campaign Background - 25 questions (14 required / 6 optional / 5 conditional)
Section 3: New Funds Committed in a Completed Campaign (Required) - 4 questions

Section 4: Other Campaign Funds (Required) - 1 question

Section 5: Uses and Designations of Funds (Required) - 2 questions

Section 6: Principal Gifts – Hard-credit Counts (Optional) - 2 questions

Section 7: Staffing and Budget - 4 questions (3 required / 1 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)]

---

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)

____

1.1.2 Survey Contact First Name (Required)

____

1.1.3 Survey Contact Last Name (Required)

____

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)

____

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.

____

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

Please report a whole number without decimals.

____

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.

____

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.

2. Campaign Background

2.1 Completed Campaign

2.1.1 For the campaign you are reporting on, what year did the campaign close? (Required)

Enter four-digit year: yyyy

2.1.2 What is the name of the campaign you are reporting on? (Required)

2.2 Past Campaigns

Report figures in whole dollars without decimals unless otherwise instructed.

2.2.1 Have you completed a comprehensive campaign before? (Required)

- ○ Yes
- ○ No

2.2.2 Past campaign grand totals as publicly reported (Required if you answered yes to 2.2.1)

	Value of Gifts	Number of Donors
Campaign #1		
Campaign #2		
Campaign #3		
Campaign #4		

2.3 Campaign Timeline

For the completed campaign you listed in 2.1.2 (entry from 2.1.2 will be piped in here), report the following:

2.3.1 Enter the month and year in which gifts began being counted toward the campaign. (Required)

Format: mm/yyyy

____

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

Format: mm/yyyy

____

2.3.3 Enter the month and year in which the campaign concluded. (Required)

Format: mm/yyyy

____

2.3.4 Enter the month and year in which gifts were no longer counted towards the campaign. (Required)

Format: mm/yyyy

____

2.3.5 Was there a transition in the institution's senior-most leader during the public phase of the campaign period? (Optional)

- ◯ Yes
- ◯ No

2.3.6 Was the duration of the campaign changed during the public phase? (Optional)

- ◯ Yes
- ◯ No

2.3.7 If yes, please indicate whether the length was increased or decreased and by how many months the duration changed. (Optional)

- ◯ Increased (Enter # of Months) ____________________
- ◯ Decreased (Enter # of Months) ____________________

2.3.8 Why was the campaign duration changed? (Optional)

____

____

____

____

____

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

- ◯ Yes
- ◯ No

2.4 Campaign Goals

Report figures in whole numbers without decimals unless otherwise instructed.

Report the following for the completed campaign you listed in 2.1.2: entry from 2.1.2 will be piped in here

---

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

____

2.4.2 What was the campaign goal (financial) as of the close of the campaign? (Required)

____

2.4.3 What was the announced grand total raised by the campaign at the end of the campaign counting period? (Required)

____

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

Maximum one decimal place

____

2.4.5 Did the campaign have specific goals for any of the following? (Optional)

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

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

2.5 Campaign Policies

Pledges

2.5.1 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? (Required)

- ○ Yes
- ○ No

2.5.2 If no, please state the campaign counting policy with regard to pledges (Required if you answered no to 2.5.1)

2.5.3 If the campaign has a different policy regarding the duration of time 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 2.5.1)

Bequests / Legacy Intentions

2.5.4 In the campaign, are revocable bequests / 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 should be included in campaign counts at face value? (Required)

- Yes
- No

2.5.5 If you answered No, please describe the campaign policy for counting and valuing revocable bequests / legacy intentions. (Required if you answered No for 2.5.4)

Page Break

2.6 Campaign Counting Timeline

2.6.1 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

2.6.2 If you answered Yes, please state the beginning of the campaign counting period. (Required if you answered Yes for 2.6.1)

Format: mm/yyyy

____

3. New Funds Committed in a Completed Campaign

This section asks for value of gifts and the number of donors in alignment with the CASE Global Reporting Standards (4.1 and 7.9)

For campaigns completed or entering 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.

Please report figures 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.

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		
Foundation Board Members		
Other Volunteers		

3.2 Organizations (Required)

	Value of Gifts	Number of Donors
Foundations		
Corporations		
Donor-advised Funds (DAFs)		
Other Organizations		

3.3 Total Campaign Funds Committed (Required)
Enter the Value and Number of new revocable bequest / legacy intentions, irrevocable planned gifts, and outright gifts / pledges secured during the campaign.

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

If your institution does not count these gifts until they are realized, skip this question.

	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 / Hard-credit Counts (Required)

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

	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 importance here is to be transparent with constituencies in your counting policies.

The total from question 4.1 (Other funds counted towards the campaign) + the total from question 3.3 (Total Campaign Funds Committed) should equal the total in 2.4.4 Announced Campaign Grand Total: *[entry from 2.4.4 will be piped in here]*

4.1 Other Funds Counted Towards 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
Bequest / legacy intentions from donors under 65		
Pledges over 5 years		
Institutional Donor-Advised Funds (DAFs)		
Intellectual Property		
Government Grants		
Exclusive Contracts		
Contracted / Sponsored Research		
Other		

Total		

5. Uses and Designations of Funds

These numbers include funds counted under New Funds Committed, Bequest / Legacy Intentions, and Other Funds Counted.

Please report in whole numbers without decimals.

5.1 Uses of Funds (Required)

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

	Value of Funds
Current Operations	
Endowment	
Other Capital	
Total	

5.2 Designations of Funds (Required)

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

	Value of Funds
Unrestricted	
Academic Support	
Research	
Scholarships	
Student Affairs/Life	
Other	
Total	

6. Principal Gifts – Hard-credit Counts

6.1 Principal Donors (Optional)

This section includes gifts and donors included under New Funds Committed, bequests/Legacy intentions, and Other Campaign Funds.

Please report value in whole numbers without decimals.

	Value of Gifts
Top 1% of Donors	
Top 5% of Donors	
Top 10% of Donors	

6.2 Value and Donor Type of Largest Gifts (Optional)

	Value	Donor Type					Was the donor also a trustee, former trustee, or key/senior volunteer?	
	(No	Alumni	Other	Corporation	Foundation	Other	Yes	No

	decimals)		Individual			Organization		
Largest Donor		○	○	○	○	○	○	○
2nd Largest Donor		○	○	○	○	○	○	○
3rd Largest Donor		○	○	○	○	○	○	○
4th Largest Donor		○	○	○	○	○	○	○
5th Largest Donor		○	○	○	○	○	○	○

7. Staffing and Budget

7.1 Staffing

7.1.1 Total Staff FTE positions as of the end of the last fiscal year completed during the campaign. (Required)

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

7.1.2 Of the above total staff FTE, what number of these staff are dedicated to the campaign? (Required)

____

7.2 Campaign Finances

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

Please report a whole number without decimals.

____

7.2.2 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	▢	▢

End of Survey