

Sample Survey
FY2010 Precollegiate Survey
Section 1. Pledges & Testamentary Commitments

A. Outstanding Pledges Report the number and dollar amount of new contributions pledged (unconditionally) during the fiscal year but still outstanding at the end of the fiscal year, regardless of the promised payment date. Do not include pledges made in a previous year. Do not include pledge amounts paid during the reporting year. Pledges (unconditional promises) should not be counted in gift totals in Sections 3 and 4 of the VSE Survey.

	No. of Pledges	Amount \$
1. For current operations		
2. For capital purposes		

B. New Testamentary Commitments Report provisions made in wills (or through revocable trusts) during the fiscal year for which the institution has documentation. Documentation might include a photocopy of the pertinent portion of the will or trust document or a letter describing the commitment and its ultimate financial value to the institution. Do not include provisions that name the institution as a contingent beneficiary. Testamentary commitments (bequest intentions) should not be counted in gift totals in Sections 3 and 4 of the VSE Survey.

	Number of provisions	Face value of provisions \$	Present value of provisions \$
New Testamentary Commitments			

**Sample Survey
FY2010 Precollegiate Survey
Section 2. Finances & Enrollment**

This entire section must be filled out in order to be listed in the VSE Report and be eligible for the CASE Award Program.

ENROLLMENT Count enrollment as of the beginning of the academic year being reported (i.e., fall of 2004 for the report covering the 2004-05 fiscal year). **ENDOWMENT** Endowment includes: - True endowment: funds provided the institution, the principal of which is not expendable by the institution under the terms of the agreement that created the fund. - Term endowment: similar to true endowment except that all or part of the funds may be expended after a stated period or upon the occurrence of a certain event as stated in the terms governing the funds. - Quasi-endowment: funds functioning as endowment - funds given to the institution "with no strings attached" or surplus funds that have been added to the endowment fund, the principal of which may be spent at the discretion of the governing board. **EXPENDITURES** Include all expenditures for instruction, libraries, other academic support, student services, institutional support, scholarships, and operation and maintenance of physical plant. **ADVANCEMENT PROGRAM EXPENDITURES** Include salaries, benefits, and other expenses related to advancement program activities. Include communications figures, as well. Advancement program expenditures should also be included the Total Expenditures figure (3).

	FY2009	FY2010
1. Enrollment - total headcount		
2. Endowment market value \$		
3. Expenditures \$		
4. Advancement Program Expenses (also include this amount in 3. Expenditures above)		

Notes on Endowment, Expenditures, or Advancement Expenditures

**Sample Survey
FY2010 Precollegiate Survey
Sections 3 & 4 Minimal Survey**

There are two options for completing Section 3: Full and Minimal. All forms of the survey count as full participation in the program. So, complete the version where the level of detail corresponds to the level of detail in your records. You might also want to do a shorter version because of time constraints. This is the "Minimal" version, requiring the least detail. Every required question is either here or in Section 2. You do not have to complete Section 1. Please enter 0 where no gift income was received for a particular cell. Every cell below should have a number in it when you are finished.

In this Minimal survey form, you report your sub-totals by Source and by Purpose. Though you report these sub-totals independently, they must both total to the same amount. When you answer the survey online, there is an automatic validation box that will tell you by how much your numbers are off, if they do not match. Remember to include deferred giving at present (discounted) value both in the "Sources" part of the grid and then below, on its own line, in the "Purposes" part of the grid.

	TOTAL
TOTALS BY SOURCE (Include Deferred Gifts at Present Value) Alumni	
Parents	
Grandparents	
Other Individuals	
Foundations	
Corporations	
Religious Organizations	
Fundraising Consortia	
Other Organizations	
OFFICIAL GRAND TOTAL by Source	
TOTALS BY PURPOSE Outright to Current Operations: Unrestricted	
Outright to Current Operations: Restricted	
Total Outright to Current Operations	
Outright to Capital Purposes: Prop., Build., & Equip.	
Outright to Endow.: Unrestricted	
Outright to Endow.: Restricted	
Outright to Loan Funds	
Total Outright to Capital Purposes	
Total Deferred Giving at Present Value	
OFFICIAL GRAND TOTAL by Purpose	
USE ROWS BELOW TO REPORT TOTAL GIVING WITH DEFERRED GIFTS AT FACE VALUE.	
Alumni Giving Using Deferred Gifts at Face Value	
Parent Giving Using Deferred Gifts at Face Value	
Grandparent Giving Using Deferred Gifts at Face Value	
Other Individual giving Deferred Gifts at Face Value	
Alternate Grand Total Using Face Vaue	

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Section 4 - Details on Giving by Individuals and Organizations Report the number of individuals or organizations who have contributed and the total amount they contributed, not the number of payments or multiple contributions from those individuals or organizations. Please enter zeros (0) where the dollar amount contributed is 0. All questions must be answered to be listed in the VSE Report and to be eligible for the CASE Circle of Excellence award program (open to CASE Member institutions).

A. Contributions from Alumni for All Purposes

	Number of Record	Number Solicited	Number of Donors
Alumni Details			

B. Bequests Report realized bequests. Bequest intentions are only reported in Section 1.

	No. of Donors	Amount \$
1. Bequests for Current Operations		
2. Bequests for Capital Purposes		
3. Enter Totals here ONLY if you have left lines 1 & 2 above blank		
4. Total Bequests		

C. Three Largest Donor Totals from Individuals Use PRESENT value if any of these are deferred gifts.

	Largest \$	2nd Largest \$	3rd Largest \$
1. From living individuals			
2. Through estate settlements (bequests)			

D. Deferred Giving Number of gifts (Charitable Remainder Trusts, Pooled Income Funds, Gift Annuities, and the like) whose dollar amount is reflected above in Section 3. "Total Deferred Giving at Present Value."

	Number established or added to during reporting period
Deferred Giving	

E. Three Largest Donor Totals from Foundations and from Corporations The sums of the three largest donor totals from Foundations and from Corporations below must not exceed the total dollar amounts reported from Foundations and from Corporations respectively. These largest donor totals must be included in the total amounts reported above in Section 3.

	Largest \$	2nd Largest \$	3rd Largest \$
1. Foundations			
2. Corporations			