

About the *VSE Survey and Data Miner Guide*

This guide is intended to help participants in the Voluntary Support of Education (VSE) Survey and Data Miner users better understand the VSE survey and to serve as an aid to finding survey information in Data Miner.

This guide is not the only way to understand the survey or learn Data Miner. We each learn in a personal way. If you prefer direct assistance by telephone or you have an email question, contact us. We provide free training on the survey and Data Miner upon request. And, if you are doing a specific report, we can give you step-by-step custom directions. Contact us at vse@case.org.

Using This Guide

This guide is divided into the following sections:

Overviews

Overviews provide details about the questions posed in each section of the survey, the definitions of terms, and the differences between the full, partial, and minimal versions of the survey.

Grids

Each grid lays out a section of the full, partial, or minimal version of the survey. Each cell in a grid is mapped to its variable family and variable in Data Miner. Note the cell number – that is, its corresponding row and column numbers – and then click on the **Map** link in a cell to jump to the page of families and variables for that survey section. Alternately, use the Adobe Reader bookmarks at left to move between the sections of this guide.

When you reach the page of families and variables, locate the exact variable by the cell number.

See [Example 1](#) on the next page.

Example 1

To find the Family and Variable for unrestricted contributions from parents of current or former students, click the **Map** link in cell 1B and locate the corresponding family and variable.

Section 3A Full Grid: Outright Giving for Current Operations

	A. Alumni	B. Parents	C. Other Individuals	D. Foundations	E. Corporations	F. R O
1. Unrestricted	Map	Map	Map	Map	Map	

Restricted to:

2. Academic Divisions	Map	Map	Map	Map	Map	
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Section 3A Full / Families & Variables / 1B-12B

	Family	Variable
1B	Parents Major Subtotals	Parents: Current Ops/Unrestricted Total
2B	Parents Subtotal Details (HE Only)	Parents: Curr Ops/Academic Divisions

Data Miner Variable Families & Variables

Each cell on the VSE survey is assigned a variable based on the set of values that determine it. Related variables are grouped into “Families.” For example, the family called “Alumni Major Subtotals” contains more than ten variables related to purposes of gifts from alumni, including the total amount alumni contributed.

In the longest (full) version of the survey, this structure leads to almost 175 variables in Section 3 alone, and there are other sections! Data Miner allows users to benchmark on each variable separately or in combinations. Obviously, it takes time to get to know the database and how to find the variables.

You can find variables for each VSE survey section by using the **Map** links in the [grids](#) in this guide or use the Adobe Reader bookmarks at left to move between the sections of this guide.

Definitions

You can find definitions and additional information for VSE survey terms by clicking on the hyperlinked terms the [grids](#) in this guide or use the Adobe Reader bookmarks at left to move between the sections of this guide.

The definitions of some VSE terms may seem self-evident, but actually, there is some nuance. For example, how does the survey define alumni? An alumnus is anyone who took even one course that could be counted toward a degree, even if he did not receive a degree. An alumnus may have taken graduate or undergraduate courses and received either type of degree, or neither. Further, if the alumnus gave via a foundation, donor-advised fund, company, or other such indirect method, the gift is not considered a gift from an alumnus, but, rather, a gift from an organization. Bequests count. Pledges do not count.

Contact AMAAtlas Staff

If you have questions about the VSE survey or Data Miner, you need directions on how to create a specific report, or you would like to schedule training, contact the AMAAtlas team at vse@case.org.

Overviews

Section 1 Overview

This section of the survey is optional. The response rate varies from year to year. This section is designed to capture new pledges, both lifetime gifts and bequest intentions. Data do not represent the entire outstanding pledge balance. Rather, the section includes data about pledges and bequest intentions promised in the current fiscal year that were not yet paid by the end of that same fiscal year. If part of a pledge is paid and part is not, then the unpaid balance is included in this section.

In the first question, respondents are asked to distinguish between pledges for current operations and pledges for capital purposes (endowments, property, buildings, equipment, and loan funds).

The second question addresses bequest intentions. In this section, respondents are asked to include only such intentions where there was a formal agreement and where the bequest intention was in a dollar amount (as opposed to a percentage of an estate or some other residual value). If possible, respondents are asked to give the face value of the promise and then discount that to account for its future value.

Section 2 Overview

This section of the survey is required. It asks for four figures from higher education institutions and four from precollege institutions. All institutions are asked for their enrollment on the opening day of the fall semester, their endowment as of the last day of the fiscal year, and their total educational and general expenditures.

Higher education institutions are asked to supply the full-time equivalent enrollment at the start of the first semester. (This is approximately the full-time students plus one-third of the part-time students.)

Precollege institutions are asked to provide their advancement program expenditures, including marketing, communications, alumni development and relations, fundraising, and other advancement expenditures. Higher education institutions may (but are not required to) report this activity in detail in an optional section (2b).

Section 2b Overview

Section 2b was first offered in 2010. Participation in section 2b is not required. It is designed for higher education institutions to report their advancement program expenditures, staffing for the advancement functions, and details about whether or not they are in a capital campaign.

The first question focuses on expenditures. It asks for salaries, benefits, current operations expenditures (other than salaries and benefits) and, if any, capital investments in equipment or other such items. These expenditures are divided across five functional areas.

The second question requires institutions to include the full-time equivalent staffing for each of the five functional areas. The salaries and benefits in the first question should correspond to the staffing figures in the second question.

The respondents are then asked if they are in campaign and, if so, the start and projected end dates of the campaign.

Section 3 Overview

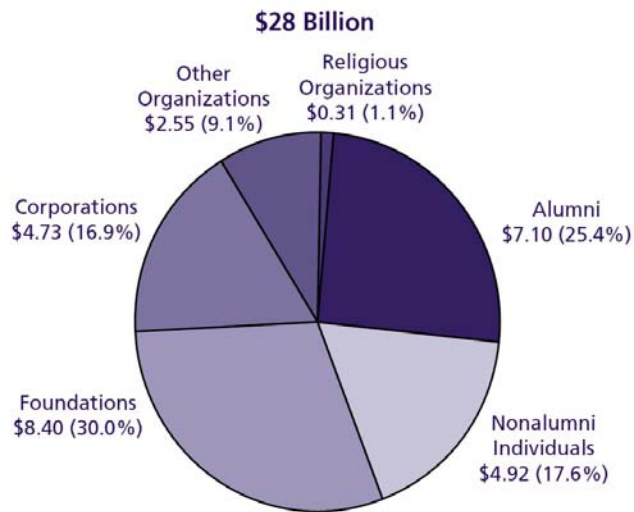
This section covers the variables in Section 3 of the VSE survey. Section 3 leads to the total amount raised by each institution.

The total is divided into types of donors (Alumni, Parent, Other Individuals, Foundation, Corporations, Religious Organizations, Fundraising Consortia, and Other Organizations.)

The total is also divided into purposes of contributions designated by donors (Current Operations/Unrestricted, Current Operations/Restricted, Property, Buildings and Equipment, Endowment/Income Unrestricted, Endowment/Income Restricted, Loan Funds, and Deferred Gifts).

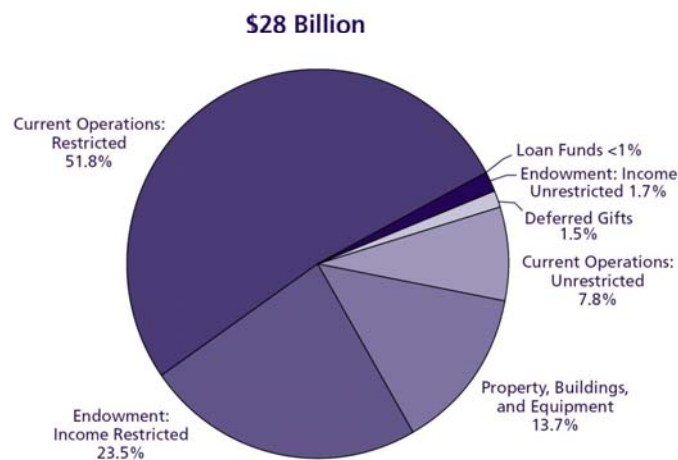
Both series add to the same total and can be thought of as two pie charts.

By Source



Dollar amounts do not add to total and percentages do not add to 100 due to rounding.

By Purpose



Section 3 Overview (cont.)

In the longer versions of the survey (called Full and Partial), these categories form a grid, with the donor types across the top, heading columns, and the purposes of the gifts along the left, defining rows. Each cell of this grid contains the dollar amount a type of donor gave to support a particular purpose. For example, one cell contains the amount corporations contributed for property, buildings, and equipment.

In the shortest version of the survey (called Minimal), the categories are in a single column, with donor totals adding to total giving and then gift purposes adding to the same total giving dollar amount.

In the Full and Partial versions there is a separate grid for *newly established* (not realized) deferred gifts (charitable remainder trusts, gift annuities, and pooled income funds), not to be confused with pledges or bequests. In the Minimal version, this information is included in the single column of numbers.

Section 4 Overview

Section 4 of the survey requests details about section 3. None of the data in section 4 are used to derive measures of total support. Rather, they are used to drill down within the totals. For example, the three largest gifts from four types of donors are requested in section 4. These 12 gifts are subsets of all the gifts as reported in section 3.

Section 4 also asks for participation data. Data about alumni participation are required, and there are optional questions about non-alumni individual participation. The section has questions about bequest giving, board of trustees giving, family foundation and donor-advised fund support, athletic giving, and other subsets of total giving.

The minimal survey only includes the required questions in section 4. The full and partial surveys have two sections – 4A and 4B – most of the questions in which are optional. These two sections also contain all the required questions found on the minimal survey. Even though responses to many questions are not required, participation in these questions tends to be high enough to provide useful results.

Grids

Section 1 / Grid

Outstanding Pledges & Testamentary Commitments (Bequest Intentions)

A. Outstanding Pledges			
	a. No. of Pledges	b. Amount \$	
1. Current Operations	Map	Map	
2. Capital Purposes	Map	Map	
3. Total	Map	Map	
	a. Number of Provisions	b. Face Value of Provisions \$	c. Present Value of Provisions \$
B. Testamentary Commitments (Bequest Intentions)	Map	Map	Map

Section 2 / Grid

Enrollment, Endowment, Expenditures

1. Enrollment Total Head Count	Map
2. Enrollment Full-Time Equivalent (Higher Education Only)	Map
3. Endowment Market Value	Map
4. Expenditures \$	Map
5. Advancement Program Expenditures (Precollege Only)	Map

Section 2b / Question I / Grid

Advancement Investment: Expenditures by Function

	A. Development/ Fundraising	B. Alumni Relations/ Affairs	C. Communications/ Marketing	D. Advancement Services	E. Advancement Management	F. Total Expenditures
1. Salaries	Map	Map	Map	Map	Map	Map
2. Benefits	Map	Map	Map	Map	Map	Map
3. Current Operations Expenditures	Map	Map	Map	Map	Map	Map
4. Capital Expenditures	Map	Map	Map	Map	Map	Map
5. Total Expenditures	Map	Map	Map	Map	Map	Map

Section 2b / Question II / Grid

Advancement Investment: FTEs of Paid Staff by Function

	A. Development/ Fundraising	B. Alumni Relations/ Affairs	C. Communications/ Marketing	D. Advancement Services	E. Advancement Management	F. Total Staff
6. Staff (FTE)	Map	Map	Map	Map	Map	Map

Section 2b / Question III / Grid

Advancement Investment: Capital Campaigns

Capital Campaign Status	<p>There are no variables for these data. To view these data go to Data Miner tab > Views Surveys > Select Focus Institution > View Survey Data.</p> <p>The data appear in the survey only for Advancement Investment respondents, who can be found under Data Miner tab > Comparison Groups > Public Groups.</p>
Capital Campaign Silent Phase Start Date	
Capital Campaign Official Start Date	
Capital Campaign End Date	
Comments/Explanatory Notes	

Section 3A Full / Grid

Outright Giving for Current Operations

	A. Alumni	B. Parents	C. Other Individuals	D. Foundations	E. Corporations	F. Religious Organizations	G. Fundraising Consortia	H. Other Organizations	I. Total
1. Unrestricted	Map	Map	Map	Map	Map	Map	Map	Map	Map

Restricted to:

2. Academic Divisions	Map	Map	Map	Map	Map	Map	Map	Map	Map
3. Faculty & Staff Compensation	Map	Map	Map	Map	Map	Map	Map	Map	Map
4. Research	Map	Map	Map	Map	Map	Map	Map	Map	Map
5. Public Service & Extension	Map	Map	Map	Map	Map	Map	Map	Map	Map
6. Library	Map	Map	Map	Map	Map	Map	Map	Map	Map
7. Operation & Maintenance of Physical Plant	Map	Map	Map	Map	Map	Map	Map	Map	Map
8. Student Financial Aid	Map	Map	Map	Map	Map	Map	Map	Map	Map
9. Athletics	Map	Map	Map	Map	Map	Map	Map	Map	Map
10. Other Restricted	Map	Map	Map	Map	Map	Map	Map	Map	Map
11. Total Restricted (Sum of 2-10)	Map	Map	Map	Map	Map	Map	Map	Map	Map
12. Total Outright for Current Operations (1+11)	Map	Map	Map	Map	Map	Map	Map	Map	Map

Section 3A Partial / Grid

Outright Giving for Current Operations

	A. <u>Alumni</u>	B. <u>Parents</u>	C. <u>Other Individuals</u>	D. <u>Foundations</u>	E. <u>Corporations</u>	F. <u>Religious Organizations</u>	G. <u>Fundraising Consortia</u>	H. <u>Other Organizations</u>	I. Total
1. <u>Unrestricted</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>
2. Total <u>Restricted</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>
3. <u>Total Outright for Current Operations (1+2)</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>	<u>Map</u>

Section 3B Full & Partial / Grid

Outright Giving for Capital Purposes

Capital Purposes include, but are not limited to, gifts for buildings and gifts of property. Gifts to endowment are also considered capital purpose gifts. There is also a line for gifts to loan funds. These are very specific funds and do not include gifts to retire university debt (which go on row 3). Please read section definitions for more information.

	A. Alumni	B. Parents	C. Other Individuals	D. Foundations	E. Corporations	F. Religious Organizations	G. Fundraising Consortia	H. Other Organizations	I. Total
1. Property, Buildings, and Equipment	Map	Map	Map	Map	Map	Map	Map	Map	Map
2. Endowment-Unrestricted	Map	Map	Map	Map	Map	Map	Map	Map	Map
3. Endowment-Restricted	Map	Map	Map	Map	Map	Map	Map	Map	Map
4. Loan Funds	Map	Map	Map	Map	Map	Map	Map	Map	Map
5. Total Outright for Capital Purposes	Map	Map	Map	Map	Map	Map	Map	Map	Map

Section 3C Full & Partial Grid / Grid

Deferred Giving

This section of the survey is for reporting ONLY the following: Newly established (not realized): Charitable Remainder Trusts, Charitable Gift Annuities, Pooled Income funds, Remainder Interest in Property. Two values are reported for each: Present Value (PV) (the tax deduction the IRS allows for the gift, which is the official value counted in the VSE survey since 2004), and Face Value (FV) (the amount of assets funding the gift, which was the official value counted in the VSE survey before 2004.)

	A. Alumni - FV	B. Alumni - PV	C. Parents - FV	D. Parents - PV	E. Other Individuals - FV	F. Other Individuals - PV	G. Total (Face Value) A+C+E	H. Total (Present Value) B+D+F
1. Endowment-Unrestricted	Map	Map	Map	Map	Map	Map	Map	Map
2. Endowment-Restricted	Map	Map	Map	Map	Map	Map	Map	Map
3. Other Purposes	Map	Map	Map	Map	Map	Map	Map	Map
4. Total Deferred Giving (1+2+3)	Map	Map	Map	Map	Map	Map	Map	Map

[FV=Face Value](#) [PV=Present Value](#)

Section 3D Full & Partial / Grid
Gift Income Summary

	A. Alumni	B. Parents	C. Other Individuals	D. Foundations	E. Corporations	F. Religious Organizations	G. Fundraising Consortia	H. Other Organizations	I. Total
1. Total Outright for Current Operations	Map	Map	Map	Map	Map	Map	Map	Map	Map
2. Total Outright for Capital Purposes	Map	Map	Map	Map	Map	Map	Map	Map	Map
3. Total Deferred at Present Value	Map	Map	Map	N/A	N/A	N/A	N/A	N/A	Map
4. Official Total Using Present Value	Map	Map	Map	Map	Map	Map	Map	Map	Map
5. Total Deferred Using Face Value	Map	Map	Map	N/A	N/A	N/A	N/A	N/A	Map
6. Total Using Face Value	Map	Map	Map	N/A	N/A	N/A	N/A	N/A	Map

Section 3 Minimal / Grid

The minimal is a simplified version of the VSE survey. Everything in the Minimal is also in the Full and Partial.

Totals by Source: Current Operations + Capital Purposes (Outright) + Deferred Gifts (at Present Value: IRS Tax Deduction)

1. Alumni	Map
2. Parents	Map
3. Other Individuals	Map
4. Foundations	Map
5. Corporations	Map
6. Religious Organizations	Map
7. Fundraising Consortia	Map
8. Other Organizations	Map
9. Official Grand Total by Source (Sum of 1-8)	Map

Totals by Purpose

10. Current Operations: Unrestricted	Map
11. Current Operations: Restricted	Map
12. Total Current Operations (10+11)	Map
13. Property, Buildings, and Equipment	Map
14. Outright to Endowment: Unrestricted	Map
15. Outright to Endowment: Restricted	Map
16. Loan Funds	Map
17. Total Outright for Capital Purposes (Sum of 13-16)	Map
18. Total Deferred Gifts at Present Value (IRS Tax Deduction)	Map
19. Official Grand Total by Purpose (12+17+18)	Map

Totals by Source: Current Operations + Capital Purposes (Outright) + Deferred Gifts (at Face Value)

20. Alumni (Same as 1 but with Deferred at Face Value)	Map
21. Parents (Same as 2 but with Deferred at Face Value)	Map
22. Other Individuals (Same as 3 but with Deferred at Face Value)	Map
23. Alternate Grand Total (4+5+6+7+8+20+21+22)	Map

Section 4a / 1 / Question A / Grid

Contributions from Individuals for All Purposes

All Purposes means the combination of Current Operations (Section 3A) + Capital Purposes (3B) + Deferred Gifts (at [Present Value](#)) (3C)

	A. Number of Record	B. Number solicited	C. Number of Donors	D. Amount \$
1a. Alumni undergraduate degree or diploma holders	Map	Map	Map	Map
1b. Alumni with graduate degrees only	Map	Map	Map	Map
1c. Alumni without a degree or diploma	Map	Map	Map	Map
1d. Totals only (if you left 1a, 1b, and 1c blank)	Map	Map	Map	Map
1e. Alumni Total (either 1a +1b+ 1c OR 1d)	Map	Map	Map	Map
2. Parents	Map	Map	Map	Map
3. Faculty and Staff	Map	Map	Map	Map
4. Students	Map	Map	Map	Map
5. All Others (anyone not included in 1-4)	Map	Map	Map	Map
6. \$ Total of 3+4+5 (these will equal " Other Individuals " from sections 3A, 3B and 3C of the survey.)				Map

Section 4a / 1 / Question B / Grid

Contributions from Individuals for Current Operations Only

Does not include Capital Purposes (3B) and Deferred Gifts (at Present Value) (3C)

Note: Column A (Number of Record) is the same for All Purposes (Section 4a-1.Question A) as for Current Operations Only. So, this column does not appear on the survey for this question.

	B. Number solicited	C. Number of Donors	D. Amount \$
1a. Alumni undergraduate degree or diploma holders	Map	Map	Map
1b. Alumni with graduate degrees only	Map	Map	Map
1c. Alumni without a degree or diploma	Map	Map	Map
1d. Totals only (if you left 1a, 1b, and 1c blank)	Map	Map	Map
1e. Alumni Total (either 1a +1b+ 1c OR 1d)	Map	Map	Map
2. Parents	Map	Map	Map
3. Faculty and Staff	Map	Map	Map
4. Students	Map	Map	Map
5. All Others (anyone not included in 1-4)	Map	Map	Map
6. \$ Total of 3+4+5 (these will equal " Other Individuals " from sections 3A, 3B and 3C of the survey.)			Map

Section 4a / 1 / Question C / Grid

Bequests

	A. No. of Donors	B. Amount \$
1. Bequests for Current Operations	Map	Map
2. Bequests for Capital Purposes	Map	Map
3. Total Bequests (Sum of 1+2)	Map	Map

Section 4a / 1 / Question D / Grid

Three Largest Donor Totals from Individuals

	A. Largest	B. 2nd Largest	C. 3rd Largest
1. Living Individuals	Map	Map	Map
2. Through Estate Settlements (Bequests)	Map	Map	Map

Section 4a / 1 / Question E / Grid

Governing Board Giving

	A. No. of Donors	B. Amount \$
1. Governing Board Giving	Map	Map
2. Additional Soft Credit	Map	Map

Section 4a / 1 / Question F / Grid

Deferred Giving

	A. Number Established or Added to During Reporting Period
1. Deferred gifts	Map

Section 4a / 1 / Question G / Grid

Appreciated Property Giving

	A. No. of Gifts	B. Amount \$
1. Securities	Map	Map
2. Real Estate	Map	Map
3. Other Real Property	Map	Map
4. Total	Map	Map

Section 4a / 1 / Question H / Grid

Personal Giving Additional Details

	A. No. of Gifts	B. Amount \$
1. Donor-Advised Funds	Map	Map
2. Businesses	Map	Map
3. Other Organizations (Including Federated Funds)	Map	Map

Section 4b / 2 / Question A / Grid

Foundations - Details

	A. No. of Gifts	B. Amount \$
1. Personal and Family	Map	Map
2. Other Foundations and Trusts, Excluding Corporate	Map	Map
3. Total	Map	Map

Section 4b / 2 / Questions B & D / Grid

Three Largest Donor Totals from Organizations

	A. Largest	B. 2nd Largest	C. 3rd Largest
1. Foundations	Map	Map	Map
2. Corporations	Map	Map	Map
3. Total	Map	Map	Map

Section 4b / 2 / Question C / Grid

Corporations - Details

	A. No. of Gifts	B. Amount \$
1. Cash and Securities (Exclusive of Matching Gifts)	Map	Map
2. Company Products	Map	Map
3. Other Company Property	Map	Map
4. Matching Gifts	Map	Map
5. Total		Map

Additional Matching Gift Details

6. Matching Gifts Not Directly from a Corporation	Map	Map
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Section 4b / 3 / Question A / Grid

Purposes of Gifts to Endowment: Income Restricted

(Include both outright and deferred gifts, and use the PRESENT value of deferred gifts.)

	Amount \$
1. Academic Divisions	Map
2. Faculty and Staff Compensation	Map
3. Research	Map
4. Public Service and Extension	Map
5. Library	Map
6. Operation and Maintenance of Plant	Map
7. Student Financial Aid	Map
8. Athletics	Map
9. Other	Map
10. Total	Map

Section 4b / 3 / Question B / Grid

Support of [Extramural Athletics](#)

	A. No. of Donors	B. \$ Amount
1. Support for Current Operations	Map	Map
2. Support for Capital Purposes	Map	Map
3. Total	Map	Map

Section 4 Minimal / Grid

A. Contributions from Alumni for All Purposes

	a. Number of Record	b. Number Solicited	c. Number of Donors
	Map	Map	Map

Note: [Alumni Participation](#) is calculated in Data Miner as Number of Donors divided by Number of Record.

B. Bequests

	a. No. of Donors	b. Amount \$
1. Bequests for Current Operations	Map	Map
2. Bequests for Capital Purposes	Map	Map
3. Total Bequests (Sum of 1+2)	Map	Map

C. Three Largest Donor Totals from Individuals

	a. Largest	b. 2nd Largest	c. 3rd Largest
1. Living Individuals	Map	Map	Map
2. Bequests (realized wills/estates)	Map	Map	Map

D. [Deferred Giving](#)

	Number of newly established charitable remainder trusts, gift annuities, and pooled income funds whose dollar amount is reflected in Section 3/Row 18.
	Map

E. Three Largest Donor Totals from Organizations

	a. Largest	b. 2nd Largest	c. 3rd Largest
1. Foundations	Map	Map	Map
2. Corporations	Map	Map	Map

Families & Variables

Section 1 / Families & Variables

Family	Variable
A. Outstanding Pledges	
1a Pledges and Testamentary Commitments (1998 forward)	Pledges/Curr Ops (#)
1b Pledges and Testamentary Commitments (1998 forward)	Pledges/Curr Ops (\$)
2a Pledges and Testamentary Commitments (1998 forward)	Pledges/Cap Purp (#)
2b Pledges and Testamentary Commitments (1998 forward)	Pledges/Cap Purp (\$)
3a Pledges and Testamentary Commitments (1998 forward)	Pledges (Total #)
3b Pledges and Testamentary Commitments (1998 forward)	Pledges (Total \$)
B. Testamentary Commitments (Bequest Intentions)	
a Pledges and Testamentary Commitments (1998 forward)	Testamentary Commitments (#)
b Pledges and Testamentary Commitments (1998 forward)	Testamentary Commitments Face Value (\$)
c Pledges and Testamentary Commitments (1998 forward)	Testamentary Commitments Present Value (\$)

Section 2 / Families & Variables

Family	Variable
1 Enroll, Endow., Expend, Advancement Program Expend	Enrollment: Total Headcount
2 Enroll, Endow., Expend, Advancement Program Expend	Enrollment: FTE (Higher Education Only)
3 Enroll, Endow., Expend, Advancement Program Expend	Endowment Market Value
4 Enroll, Endow., Expend, Advancement Program Expend	Expenditures
5 Enroll, Endow., Expend, Advancement Program Expend	Advancement Program Expenditures (Precollege only)

Section 2b / Question I / Families & Variables

Family	Variable
1A Advancement Investment	Fund-Raising/Development Salaries
2A Advancement Investment	Fund-Raising/Development Benefits
3A Advancement Investment	Fund-Raising/Development Current Operations Expenditures
4A Advancement Investment	Fund-Raising/Development Capital Expenditures
5A Advancement Investment	Fund-Raising/Development Total Expenditures

Family	Variable
1B Advancement Investment	Alumni Relations/Affairs Salaries
2B Advancement Investment	Alumni Relations/Affairs Benefits
3B Advancement Investment	Alumni Relations/Affairs Current Operations Expenditures
4B Advancement Investment	Alumni Relations/Affairs Capital Expenditures
5B Advancement Investment	Alumni Relations/Affairs Total Expenditures

Family	Variable
1C Advancement Investment	Communications/Marketing Salaries
2C Advancement Investment	Communications/Marketing Benefits
3C Advancement Investment	Communications/Marketing Current Operations Expenditures
4C Advancement Investment	Communications/Marketing Capital Expenditures
5C Advancement Investment	Communications/Marketing Total Expenditures

Family	Variable
1D Advancement Investment	Advancement Services Salaries
2D Advancement Investment	Advancement Services Staff Benefits
3D Advancement Investment	Advancement Services Current Operations Expenditures
4D Advancement Investment	Advancement Services Capital Expenditures
5D Advancement Investment	Advancement Services Total Expenditures

Section 2b / Question I / Families & Variables (cont.)

Family	Variable
1E Advancement Investment	Advancement Management Salaries
2E Advancement Investment	Advancement Management Benefits
3E Advancement Investment	Advancement Management Current Operations Expenditures
4E Advancement Investment	Advancement Management Services Capital Expenditures
5E Advancement Investment	Advancement Management Total Expenditures

Family	Variable
1F Advancement Investment	Advancement Salaries (Grand Total)
2F Advancement Investment	Advancement Benefits (Grand Total)
3F Advancement Investment	Advancement Current Operations Expenditures (Grand Total)
4F Advancement Investment	Advancement Expenditures Capital Expenditures (Grand Total)
5F Advancement Investment	Advancement Total Expenditures (Grand Total)

Section 2b / Question II / Families & Variables

Family	Variable
6A Advancement Investment	Fund-Raising/Development Staff FTEs
6B Advancement Investment	Alumni Relations/Affairs Staff FTEs
6C Advancement Investment	Communications/Marketing Staff FTEs
6D Advancement Investment	Advancement Services Staff FTEs
6E Advancement Investment	Advancement Management Staff FTEs
6F Advancement Investment	Advancement Staff FTEs (Grand Total)

Section 3A Full / 1A-12A / Families & Variables

Family	Variable
1A Alumni Major Subtotal	Alumni: Current Ops/Unrestricted Total
2A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Academic Divisions
3A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Fac-Staff Comp
4A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Research
5A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Pub Serv & Ext
6A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Libraries
7A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Physical Plant O&M
8A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Student Aid
9A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Athletics
10A Alumni Subtotal Details (HE Only)	Alumni: Curr Ops/Other Purposes
11A Alumni Major Subtotals	Alumni: Curr Ops/Restricted Total
12A Alumni Major Subtotals	Alumni: Curr Operations Total

Section 3A Full / 1B-12B / Families & Variables

Family	Variable
1B Parents Major Subtotals	Parents: Current Ops/Unrestricted Total
2B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Academic Divisions
3B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Fac-Staff Comp
4B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Research
5B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Pub Serv & Ext
6B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Libraries
7B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Physical Plant O&M
8B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Student Aid
9B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Athletics
10B Parents Subtotal Details (HE Only)	Parents: Curr Ops/Other Purposes
11B Parents Major Subtotals	Parents: Curr Ops/Restricted Total
12B Parents Major Subtotals	Parents: Curr Operations Total

Section 3A Full / 1C-12C / Families & Variables

Family	Variable
1C Other Individual Major Subtotals	Other Indiv: Current Ops/Unrestricted Total
2C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Academic Divisions
3C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Fac-Staff Comp
4C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Research
5C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Pub Serv & Ext
6C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Libraries
7C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Physical Plant O&M
8C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Student Aid
9C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Athletics
10C Other Individual Subtotal Details (HE Only)	Other Indiv: Curr Ops/Other Purposes
11C Other Individual Major Subtotals	Other Indiv: Curr Ops/Restricted Total
12C Other Individual Major Subtotals	Other Indiv: Curr Operations Total

Section 3A Full / 1D-12D / Families & Variables

Family	Variable
1D Foundation Major Subtotals	Foundations: Current Ops/Unrestricted Total
2D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Academic Divisions
3D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Fac-Staff Comp
4D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Research
5D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Pub Serv & Ext
6D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Libraries
7D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Physical Plant O&M
8D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Student Aid
9D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Athletics
10D Foundation Subtotal Details (HE Only)	Foundations: Curr Ops/Other Purposes
11D Foundation Major Subtotals	Foundations: Curr Ops/Restricted Total
12D Foundation Major Subtotals	Foundations: Curr Operations Total

Section 3A Full / 1E-12E / Families & Variables

Family	Variable
1E Corporation Major Subtotals	Corporations: Current Ops/Unrestricted Total
2E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Academic Divisions
3E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Fac-Staff Comp
4E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Research
5E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Pub Serv & Ext
6E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Libraries
7E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Physical Plant O&M
8E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Student Aid
9E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Athletics
10E Corporation Subtotal Details (HE Only)	Corporations: Curr Ops/Other Purposes
11E Corporation Major Subtotals	Corporations: Curr Ops/Restricted Total
12E Corporation Major Subtotals	Corporations: Curr Operations Total

Section 3A Full / 1F-12F / Families & Variables

Family	Variable
1F Religious Organization Major Subtotals	Religious Orgs: Current Ops/Unrestricted Total
2F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Academic Divisions
3F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Fac-Staff Comp
4F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Research
5F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Pub Serv & Ext
6F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Libraries
7F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Physical Plant O&M
8F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Student Aid
9F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Athletics
10F Religious Organization Subtotal Details (HE Only)	Religious Orgs: Curr Ops/Other Purposes
11F Religious Organization Major Subtotals	Religious Orgs: Curr Ops/Restricted Total
12F Religious Organization Major Subtotals	Religious Orgs: Curr Operations Total

Section 3A Full / 1G-12G / Families & Variables

Family	Variable
1G Fund-Raising Consortia Major Subtotals	F-R Consortia: Current Ops/Unrestricted Total
2G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Academic Divisions
3G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Fac-Staff Comp
4G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Research
5G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Pub Serv & Ext
6G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Libraries
7G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Physical Plant O&M
8G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Student Aid
9G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Athletics
10G Fund-Raising Consortia Subtotal Details (HE Only)	F-R Consortia: Curr Ops/Other Purposes
11G Fund-Raising Consortia Major Subtotals	F-R Consortia: Curr Ops/Restricted Total
12G Fund-Raising Consortia Major Subtotals	F-R Consortia: Curr Operations Total

Section 3A Full / 1H-12H / Families & Variables

Family	Variable
1H Other Organizations Major Subtotals	Other Orgs: Current Ops/Unrestricted Total
2H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Academic Divisions
3H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Fac-Staff Comp
4H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Research
5H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Pub Serv & Ext
6H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Libraries
7H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Physical Plant O&M
8H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Student Aid
9H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Athletics
10H Other Organizations Subtotal Details (HE Only)	Other Orgs: Curr Ops/Other Purposes
11H Other Organizations Major Subtotals	Other Orgs: Curr Ops/Restricted Total
12H Other Organizations Major Subtotals	Other Orgs: Curr Operations Total

Section 3A Full / 11-12I / Families & Variables

Family	Variable
1I Grand Total and Major Purpose Subtotals	Total Curr Ops/Unrestricted Total
2I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Academic Divisions
3I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Fac-Staff Comp
4I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Research
5I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Pub Serv & Ext
6I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Libraries
7I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Physical Plant O&M
8I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Student Aid
9I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Athletics
10I Current Operations Totals by Purpose Details (HE Only)	Total Curr Ops/Other Purposes
11I Grand Total and Major Purpose Subtotals	Total Curr Ops/Restricted Total
12I Grand Total and Major Purpose Subtotals	Total Curr Operations Total

Section 3A Partial / 1A-3A / Families & Variables

Family	Variable
1A Alumni Major Subtotals	Alumni: Current Ops/Unrestricted Total
2A Alumni Major Subtotals	Alumni: Curr Ops/Restricted Total
3A Alumni Major Subtotals	Alumni: Curr Operations Total

Section 3A Partial / 1B-3B / Families & Variables

Family	Variable
1B Parents Major Subtotals	Parents: Current Ops/Unrestricted Total
2B Parents Major Subtotals	Parents: Curr Ops/Restricted Total
3B Parents Major Subtotals	Parents: Curr Operations Total

Section 3A Partial / 1C-3C / Families & Variables

Family	Variable
1C Other Individual Major Subtotals	Other Indiv: Current Ops/Unrestricted Total
2C Other Individual Major Subtotals	Other Indiv: Curr Ops/Restricted Total
3C Other Individual Major Subtotals	Other Indiv: Curr Operations Total

Section 3A Partial / 1D-3D / Families & Variables

Family	Variable
1D Foundation Major Subtotals	Foundations: Current Ops/Unrestricted Total
2D Foundation Major Subtotals	Foundations: Curr Ops/Restricted Total
3D Foundation Major Subtotals	Foundations: Curr Operations Total

Section 3A Partial / 1E-3E / Families & Variables

Family	Variable
1E Corporation Major Subtotals	Corporations: Current Ops/Unrestricted Total
2E Corporation Major Subtotals	Corporations: Curr Ops/Restricted Total
3E Corporation Major Subtotals	Corporations: Curr Operations Total

Section 3A Partial / 1F-3F / Families & Variables

Family	Variable
1F Religious Organization Major Subtotals	Religious Orgs: Current Ops/Unrestricted Total
2F Religious Organization Major Subtotals	Religious Orgs: Curr Ops/Restricted Total
3F Religious Organization Major Subtotals	Religious Orgs: Curr Operations Total

Section 3A Partial / 1G-3G / Families & Variables

Family	Variable
1G Fund-Raising Consortia Major Subtotals	F-R Consortia: Current Ops/Unrestricted Total
2G Fund-Raising Consortia Major Subtotals	F-R Consortia: Curr Ops/Restricted Total
3G Fund-Raising Consortia Major Subtotals	F-R Consortia: Curr Operations Total

Section 3A Partial / 1H-3H / Families & Variables

Family	Variable
1H Other Organizations Major Subtotals	Other Orgs: Current Ops/Unrestricted Total
2H Other Organizations Major Subtotals	Other Orgs: Curr Ops/Restricted Total
3H Other Organizations Major Subtotals	Other Orgs: Curr Operations Total

Section 3A Partial / 1I-3I / Families & Variables

Family	Variable
1I Grand Total and Major Purpose Subtotals	Total Curr Ops/Unrestricted Total
2I Grand Total and Major Purpose Subtotals	Total Curr Ops/Restricted Total
3I Grand Total and Major Purpose Subtotals	Total Curr Operations Total

Section 3B Full & Partial / 1A-5A / Families & Variables

Family	Variable
1A Alumni Major Subtota	Alumni: Cap Purp/PropBldgsEquip
2A Alumni Major Subtotals	Alumni: Cap Purp/End/Unrestricted
3A Alumni Major Subtotals	Alumni: Cap Purp/End/Restricted/Outright *
4A Alumni Major Subtotals	Alumni: Cap Purp/Loan Funds
5A Alumni Major Subtotals	Alumni: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1B-5B / Families & Variables

Family	Variable
1B Parents Major Subtotals	Parents: Cap Purp/PropBldgsEquip
2B Parents Major Subtotals	Parents: Cap Purp/End/Unrestricted
3B Parents Major Subtotals	Parents: Cap Purp/End/Restricted/Outright *
4B Parents Major Subtotals	Parents: Cap Purp/Loan Funds
5B Parents Major Subtotals	Parents: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1C-5C / Families & Variables

Family	Variable
1C Other Individual Major Subtotals	Other Indiv: Cap Purp/PropBldgsEquip
2C Other Individual Major Subtotals	Other Indiv: Cap Purp/End/Unrestricted
3C Other Individual Major Subtotals	Other Indiv: Cap Purp/End/Restricted/Outright *
4C Other Individual Major Subtotals	Other Indiv: Cap Purp/Loan Funds
5C Other Individual Major Subtotals	Other Indiv: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1D-5D / Families & Variables

Family	Variable
1D Foundation Major Subtotals	Foundations: Cap Purp/PropBldgsEquip
2D Foundation Major Subtotals	Foundations: Cap Purp/End/Unrestricted
3D Foundation Major Subtotals	Foundations: Cap Purp/End/Restricted/Outright *
4D Foundation Major Subtotals	Foundations: Cap Purp/Loan Funds
5D Foundation Major Subtotals	Foundations: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1E-5E / Families & Variables

Family	Variable
1E Corporation Major Subtotals	Corporations: Cap Purp/PropBldgsEquip
2E Corporation Major Subtotals	Corporations: Cap Purp/End/Unrestricted
3E Corporation Major Subtotals	Corporations: Cap Purp/End/Restricted/Outright *
4E Corporation Major Subtotals	Corporations: Cap Purp/Loan Funds
5E Corporation Major Subtotals	Corporations: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1F-5F / Families & Variables

Family	Variable
1F Religious Organization Major Subtotals	Religious Orgs: Cap Purp/PropBldgsEquip
2F Religious Organization Major Subtotals	Religious Orgs: Cap Purp/End/Unrestricted
3F Religious Organization Major Subtotals	Religious Orgs: Cap Purp/End/Restricted/Outright *
4F Religious Organization Major Subtotals	Religious Orgs: Cap Purp/Loan Funds
5F Religious Organization Major Subtotals	Religious Orgs: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1G-5G / Families & Variables

Family	Variable
1G Fund-Raising Consortia Major Subtotals	F-R Consortia: Cap Purp/PropBldgsEquip
2G Fund-Raising Consortia Major Subtotals	F-R Consortia: Cap Purp/End/Unrestricted
3G Fund-Raising Consortia Major Subtotals	F-R Consortia: Cap Purp/End/Restricted/Outright *
4G Fund-Raising Consortia Major Subtotals	F-R Consortia: Cap Purp/Loan Funds
5G Fund-Raising Consortia Major Subtotals	F-R Consortia: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1H-5H / Families & Variables

Family	Variable
1H Other Organizations Major Subtotals	Other Orgs: Cap Purp/PropBldgsEquip
2H Other Organizations Major Subtotals	Other Orgs: Cap Purp/End/Unrestricted
3H Other Organizations Major Subtotals	Other Orgs: Cap Purp/End/Restricted/Outright *
4H Other Organizations Major Subtotals	Other Orgs: Cap Purp/Loan Funds
5H Other Organizations Major Subtotals	Other Orgs: Cap Purp Total Outright
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3B Full & Partial / 1I-5I / Families & Variables

Family	Variable
1I Grand Total and Major Purpose Subtotals	Total Cap Purp/Prop, Bldgs, Equip
2I Grand Total and Major Purpose Subtotals	Total Cap Purp/Endowment/Unrestricted
3I Grand Total and Major Purpose Subtotals	Total Cap Purp/Endowment/Restricted/Outright *
4I Grand Total and Major Purpose Subtotals	Total Cap Purp/Loan Funds
5I Grand Total and Major Purpose Subtotals	Total Capital Purposes (Outright Gifts Only)
* Deferred gifts, reported in 3C, are also gifts to endowment. Those reported in here in 3B are "outright."	

Section 3C Full & Partial / 1A-4A / Families & Variables

Family	Variable
1A Outright and Deferred (FV and PV) Details	Alumni: Endowment/Unrestr/Deferred/PV
2A Outright and Deferred (FV and PV) Details	Alumni: Endowment/Restr/Deferred/PV
3A Outright and Deferred (FV and PV) Details	Alumni: Other Purposes/Deferred/PV
4A Alumni Major Subtotals	Alumni: Deferred/PV

Section 3C Full & Partial / 1B-4B / Families & Variables

Family	Variable
1B Outright and Deferred (FV and PV) Details	Alumni: Endowment/Unrestr/Deferred/FV
2B Outright and Deferred (FV and PV) Details	Alumni: Endowment/Restr/Deferred/FV
3B Outright and Deferred (FV and PV) Details	Alumni: Other Purposes/Deferred/FV
4B Alumni Major Subtotals	Alumni: Deferred/FV

Section 3C Full & Partial / 1C-4C / Families & Variables

Family	Variable
1C Outright and Deferred (FV and PV) Details	Parents: Endowment/Unrestr/Deferred/PV
3C Outright and Deferred (FV and PV) Details	Parents: Endowment/Restr/Deferred/PV
3C Outright and Deferred (FV and PV) Details	Parents: Other Purposes/Deferred/PV
4C Parent Major Subtotals	Parents: Deferred/PV

Section 3C Full & Partial / 1D-4D / Families & Variables

Family	Variable
1D Outright and Deferred (FV and PV) Details	Parents: Endowment/Unrestr/Deferred/FV
2D Outright and Deferred (FV and PV) Details	Parents: Endowment/Restr/Deferred/FV
3D Outright and Deferred (FV and PV) Details	Parents: Other Purposes/Deferred/FV
4D Parent Major Subtotals	Parents: Deferred/FV

Section 3C Full & Partial / 1E-4E / Families & Variables

Family	Variable
1E Outright and Deferred (FV and PV) Details	Other Indiv: Endowment/Unrestr/Deferred/PV
2E Outright and Deferred (FV and PV) Details	Other Indiv: Endowment/Restr/Deferred/PV
3E Outright and Deferred (FV and PV) Details	Other Indiv: Other Purposes/Deferred/PV
4E Other Individual Major Subtotals	Other Indiv: Deferred/PV

Section 3C Full & Partial / 1F-4F / Families & Variables

Family	Variable
1F Outright and Deferred (FV and PV) Details	Other Indiv: Endowment/Unrestr/Deferred/FV
2F Outright and Deferred (FV and PV) Details	Other Indiv: Endowment/Restr/Deferred/FV
3F Outright and Deferred (FV and PV) Details	Other Indiv: Other Purposes/Deferred/FV
4F Other Individual Major Subtotals	Other Indiv: Deferred/FV

Section 3C Full & Partial / 1G-4G / Families & Variables

Family	Variable
1G Outright and Deferred (FV and PV) Details	Total: Endowment/Unrestr/Deferred/PV
2G Outright and Deferred (FV and PV) Details	Total: Endowment/Restr/Deferred/PV
3G Outright and Deferred (FV and PV) Details	Total: Other Purposes/Deferred/PV
4G Grand Total and Major Purpose Subtotals	Total: Deferred/Present Value

Section 3C Full & Partial / 1H-4H / Families & Variables

Family	Variable
1H Outright and Deferred (FV and PV) Details	Total: Endowment/Unrestr/Deferred/FV
2H Outright and Deferred (FV and PV) Details	Total: Endowment/Restr/Deferred/FV
3H Outright and Deferred (FV and PV) Details	Total: Other Purposes/Deferred/FV
4H Grand Total and Major Purpose Subtotals	Total: Deferred/Face Value

Section 3D Full & Partial / 1A-6A / Families & Variables

Family	Variable
1A Alumni Major Subtotals	Alumni: Current Operations Total
2A Alumni Major Subtotals	Alumni: Cap Purp Total Outright
3A Alumni Major Subtotals	Alumni: Deferred/PV
4A Alumni Major Subtotals	Alumni: Total Using Present Value
5A Alumni Major Subtotals	Alumni: Deferred/FV
6A Alumni Major Subtotals	Alumni: Total Using Face Value

Section 3D Full & Partial / 1B-6B / Families & Variables

Family	Variable
1B Parent Major Subtotals	Parents: Current Operations Total
2B Parent Major Subtotals	Parents: Cap Purp Total Outright
3B Parent Major Subtotals	Parents: Deferred/PV
4B Parent Major Subtotals	Parents: Total Using Present Value
5B Parent Major Subtotals	Parents: Deferred/FV
6B Parent Major Subtotals	Parents: Total Using Face Value

Section 3D Full & Partial / 1C-6C / Families & Variables

Family	Variable
1C Other Individual Major Subtotals	Other Indiv: Current Operations Total
2C Other Individual Major Subtotals	Other Indiv: Cap Purp Total Outright
3C Other Individual Major Subtotals	Other Indiv: Deferred/PV
4C Other Individual Major Subtotals	Other Indiv: Total Using Present Value
5C Other Individual Major Subtotals	Other Indiv: Deferred/FV
6C Other Individual Major Subtotals	Other Indiv: Total Using Face Value

Section 3D Full & Partial / 1D-6D / Families & Variables

Family	Variable
1D Foundation Major Subtotals	Foundations: Current Operations Total
2D Foundation Major Subtotals	Foundations: Capital Purposes Total
3D	Organizations do not make deferred gifts.
4D Foundation Major Subtotals	Foundations: Total
5D	Organizations do not make deferred gifts.
6D	Organizations do not make deferred gifts.

Section 3D Full & Partial / 1E-6E / Families & Variables

Family	Variable
1E Corporation Major Subtotals	Corporations: Current Operations Total
2E Corporation Major Subtotals	Corporations: Capital Purposes Total
3E	Organizations do not make deferred gifts.
4E Corporation Major Subtotals	Corporations: Total
5E	Organizations do not make deferred gifts.
6E	Organizations do not make deferred gifts.

Section 3D Full & Partial / 1F-6F / Families & Variables

Family	Variable
1F Religious Organization Major Subtotals	Religious Orgs: Current Operations Total
2F Religious Organization Major Subtotals	Religious Orgs: Capital Purposes Total
3F	Organizations do not make deferred gifts.
4F Religious Organization Major Subtotals	Religious Orgs: Total
5F	Organizations do not make deferred gifts.
6F	Organizations do not make deferred gifts.

Section 3D Full & Partial / 1G-6G / Families & Variables /

Family	Variable
1G Fund-Raising Consortia Major Subtotals	F-R Consortia: Current Operations Total
2G Fund-Raising Consortia Major Subtotals	F-R Consortia: Capital Purposes Total
3G	Organizations do not make deferred gifts.
4G Fund-Raising Consortia Major Subtotals	F-R Consortia: Total
5G	Organizations do not make deferred gifts.
6G	Organizations do not make deferred gifts.

Section 3D Full & Partial / 1H-6H / Families & Variables

Family	Variable
1H Other Organization Major Subtotals	Other Orgs: Current Operations Total
2H Other Organization Major Subtotals	Other Orgs: Capital Purposes Total
3H	Organizations do not make deferred gifts.
4H Other Organization Major Subtotals	Other Orgs: Total
5H	Organizations do not make deferred gifts.
6H	Organizations do not make deferred gifts.

Section 3D Full & Partial / 1I-6I / Families & Variables

Family	Variable
1I Grand Total and Major Purpose Subtotals	Total: Current Operations
2I Grand Total and Major Purpose Subtotals	Total: Capital Purposes (Outright Gifts Only)
3I Grand Total and Major Purpose Subtotals	Total: Deferred/Present Value
4I Grand Total and Major Purpose Subtotals	Grand Total: (2004 and after)
5I Grand Total and Major Purpose Subtotals	Total: Deferred/Face Value
6I Grand Total and Major Purpose Subtotals	Grand Total: (2003 and earlier)

Section 3 Minimal / Totals by Source (Present Value) / Families & Variables

Family	Variable
1 Alumni Major Subtotals	Alumni: Total (Using Present Value, 2003+)
2 Parent Major Subtotals	Parents: Total (Using Present Value, 2003+)
3 Other Individual Major Subtotals	Other Individuals: Total (Using Present Value, 2003+)
4 Foundation Major Subtotals	Foundations: Total
5 Corporation Major Subtotals	Corporations: Total
6 Religious Organization Major Subtotals	Religious Organizations: Total
7 Fundraising Consortia Major Subtotals	Fundraising Consortia: Total
8 Other Organization Major Subtotals	Other Organizations: Total
9 Grand Total and Major Purpose Subtotals	Grand Total (2004 and after)

Section 3 Minimal / Totals by Purpose / Families & Variables

Family	Variable
10 Grand Total and Major Purpose Subtotals	Total Curr Ops/Unrestricted Total
11 Grand Total and Major Purpose Subtotals	Total Curr Ops/Restricted Total
12 Grand Total and Major Purpose Subtotals	Total Current Operations
13 Grand Total and Major Purpose Subtotals	Total Cap Purp/Prop, Bldgs, Equip
14 Grand Total and Major Purpose Subtotals	Total Cap Purp/Endowment/Unrestricted
15 Grand Total and Major Purpose Subtotals	Total Cap Purp/Endowment/Restricted Outright
16 Grand Total and Major Purpose Subtotals	Total Cap Purp/Loan Funds
17 Grand Total and Major Purpose Subtotals	Total Capital Purposes (Outright Gifts Only)
18 Grand Total and Major Purpose Subtotals	Total Deferred/Present Value
19 Grand Total and Major Purpose Subtotals	Grand Total (2004 and after)

Section 3 Minimal / Totals by Source (Face Value) / Families & Variables

Family	Variable
20 Alumni Major Subtotals	Alumni: Total (Using Face Value)
21 Parent Major Subtotals	Parents: Total (Using Face Value)
22 Other Individual Major Subtotals	Other Individuals: Total (Using Face Value)
23 Grand Total and Major Purpose Subtotals	Grand Total (2003 and earlier)

Section 4a / 1 / Question A / 1a-1e, A-D / Families & Variables

	Family	Variable
1a / A	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Undergrad Degree: Record #
1a / B	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Undergrad Degree: Solicited #
1a / C	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Undergrad Degree: Donors #
1a / D	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Undergrad Degree: Total \$

	Family	Variable
1b / A	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Grad Degree: Record #
1b / B	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Grad Degree: Solicited #
1b / C	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Grad Degree: Donors #
1b / D	Alumni Giving Statistics/All Purposes (HE only)	Alumni/Grad Degree: Total \$

	Family	Variable
1c / A	Alumni Giving Statistics/All Purposes (HE only)	Alumni/NonDegree: Record #
1c / B	Alumni Giving Statistics/All Purposes (HE only)	Alumni/NonDegree: Solicited #
1c / C	Alumni Giving Statistics/All Purposes (HE only)	Alumni/NonDegree: Donors #
1c / D	Alumni Giving Statistics/All Purposes (HE only)	Alumni/NonDegree: Total \$

	Family	Variable
1d and 1e / A	Alumni Giving Statistics	# Alumni of Record
1d and 1e / B	Alumni Giving Statistics	# Alumni Solicited
1d and 1e / C	Alumni Giving Statistics	# Alumni Donors
1d and 1e / D	Alumni Giving Statistics	Alumni: Total Giving (\$ from Details) Note: This should equal: Alumni Major Subtotals / Alumni Total 2003+

Section 4a / 1 / Question A / 2A-2D / Families & Variables

	Family	Variable
2A	Non-Alumni Giving Statistics/All Purposes	Parents: Record (#)
2B	Non-Alumni Giving Statistics/All Purposes	Parents: Solicited (#)
2C	Non-Alumni Giving Statistics/All Purposes	Parents: Donors (#)
2D	Non-Alumni Giving Statistics/All Purposes	Parents: Total Giving (\$ from Details) Note: This should equal: Parent Major Subtotals / Parents: Total 2003+

Section 4a / 1 / Question A / 3A-3D / Families & Variables

	Family	Variable
3A	Non-Alumni Giving Statistics/All Purposes	Faculty & Staff: Record (#)
3B	Non-Alumni Giving Statistics/All Purposes	Faculty & Staff: Solicited (#)
3C	Non-Alumni Giving Statistics/All Purposes	Faculty & Staff: Donors (#)
3D	Non-Alumni Giving Statistics/All Purposes	Faculty & Staff: Total Giving (\$ from Details)

Section 4a / 1 / Question A / 4A-4D / Families & Variables

	Family	Variable
4A	Non-Alumni Giving Statistics/All Purposes	Students: Record (#)
4B	Non-Alumni Giving Statistics/All Purposes	Students: Solicited (#)
4C	Non-Alumni Giving Statistics/All Purposes	Students: Donors (#)
4D	Non-Alumni Giving Statistics/All Purposes	Students: Total Giving (\$ from Details)

Section 4a / 1 / Question A / 5A-5D

	Family	Variable
5A	Non-Alumni Giving Statistics/All Purposes	Other Indiv: Record (#)
5B	Non-Alumni Giving Statistics/All Purposes	Other Indiv: Solicited (#)
5C	Non-Alumni Giving Statistics/All Purposes	Other Indiv: Donors (#)
5D	Non-Alumni Giving Statistics/All Purposes	Other Indiv: Total Giving (\$ from Details)

Section 4a / 1 / Question A / 6D / Families & Variables

	Family	Variable
6D	Other Individual Major Subtotals	Other Individuals: Total (Using Present Value, 2003+)

Section 4a / 1 / Question B / 1a-1e, B-D / Families & Variables

	Family	Variable
1a / B	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/Undergrad Degree: Solicited for Curr Ops (#)
1a / C	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/Undergrad Degree: Donors for Curr Ops (#)
1a / D	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/Undergrad Degree: Curr Ops Total (\$)
	Alumni Giving Statistics Details/Current Ops (HE only)	
1b / B	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/Grad Degree: Solicited for Curr Ops (#)
1b / C	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/Grad Degree: Donors for Curr Ops (#)
1b / D	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/Grad Degree: Curr Ops Total (\$)
1c / B	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/NonDegree: Solicited for Curr Ops (#)
1c / C	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/NonDegree: Donors for Curr Ops (#)
1c / D	Alumni Giving Statistics Details/Current Ops (HE only)	Alumni/NonDegree: Curr Ops Total (\$)
1d and 1e / B	Alumni Giving Statistics	# Alumni Solicited for Current Purposes
1d and 1e / C	Alumni Giving Statistics	# Alumni Donors for Current Purposes
		Alumni: Total Giving - Curr Ops Only (\$ from Details)
1d and 1e / D	Alumni Giving Statistics	Note: Should Equal: Alumni Major Subtotals: Alumni: Current Operations Total

Section 4a / 1 / Question B / 2B-2D / Families & Variables

Family	Variable
2B	Non-Alumni Giving Statistics/Current Ops (HE only) Parents: Solicited for Curr Ops Only (#)
2C	Non-Alumni Giving Statistics/Current Ops (HE only) Parents: Donors for Curr Ops Only (#)
2D	Non-Alumni Giving Statistics/Current Ops (HE only) Parents: Total Giving for Curr Ops Only (\$ from Details) Note: This should equal: Parent Major Subtotals / Parents: Current Operations Total

Section 4a / 1 / Question B / 3B-3D / Families & Variables

Family	Variable
3B	Non-Alumni Giving Statistics/Current Ops (HE only) Faculty & Staff: Solicited for Curr Ops Only (#)
3C	Non-Alumni Giving Statistics/Current Ops (HE only) Faculty & Staff: Donors for Curr Ops Only (#)
3D	Non-Alumni Giving Statistics/Current Ops (HE only) Faculty & Staff: Giving for Curr Ops Only (\$)

Section 4a / 1 / Question B / 4B-4D / Families & Variables

Family	Variable
4B	Non-Alumni Giving Statistics/Current Ops (HE only) Students: Solicited for Curr Ops Only (#)
4C	Non-Alumni Giving Statistics/Current Ops (HE only) Students: Donors for Curr Ops Only (#)
4D	Non-Alumni Giving Statistics/Current Ops (HE only) Students: Total Giving for Curr Ops Only (\$, from Details)

Section 4a / 1 / Question B / 5B-5D / Families & Variables

	Family	Variable
5B	Non-Alumni Giving Statistics/Current Ops (HE only)	Other Individ: Solicited for Curr Ops Only (#)
5C	Non-Alumni Giving Statistics/Current Ops (HE only)	Other Individ: Donors for Curr Ops Only (#)
5D	Non-Alumni Giving Statistics/Current Ops (HE only)	Other Individ: Total Giving for Curr Ops Only (\$, from Details)

Section 4a / 1 / Question B / 6D / Families & Variables

	Family	Variable
6D	Other Individual Major Subtotals	Other Individuals: Total (Using Present Value, 2003+)

Section 4a / 1 / Question C / Families & Variables

	Family	Variable
1A	Bequests and Deferred Gifts	Bequests/Curr Ops #
1B	Bequests and Deferred Gifts	Bequests/Curr Ops \$
2A	Bequests and Deferred Gifts	Bequests/Capital #
2B	Bequests and Deferred Gifts	Bequests/Capital \$
3A	Bequests and Deferred Gifts	Bequests Total #
3B	Bequests and Deferred Gifts	Bequests Total \$

Section 4a / 1 / Question D / Families & Variables

Family	Variable
1A Largest Donor Totals	Largest Gift from Living Individual
1B Largest Donor Totals	2nd Largest Gift from Living Individual
1C Largest Donor Totals	3rd Largest Gift from Living Individual
2A Largest Donor Totals	Largest Gift Bequest
2B Largest Donor Totals	2nd Largest Gift Bequest
3C Largest Donor Totals	3rd Largest Gift Bequest

Section 4a / 1 / Question E / Families & Variables

Family	Variable
1a Governing Board Giving	Number of Governing Board Donors #
1b Governing Board Giving	Total Direct Gov Board Giving
2a Governing Board Giving	Number of Additional Gov. Bd. Soft-Credit Donors
2b Governing Board Giving	Additional Gov. Bd. Soft Dollars

Section 4a / 1 / Question F / Families & Variables

Family	Variable
1A Bequests and Deferred Gifts	Deferred Gifts (#)

Section 4a / 1 / Question G / Families & Variables

Family	Variable
1A Appreciated Property Giving	Apprec. Property Giving Securities (#)
1B Appreciated Property Giving	Apprec. Property Giving Securities (\$)
2A Appreciated Property Giving	Apprec. Property Giving Real Property (#)
2B Appreciated Property Giving	Apprec. Property Giving Real Property (\$)
3A Appreciated Property Giving	Apprec. Property Giving Other (#)
3B Appreciated Property Giving	Apprec. Property Giving Other (\$)
4A Appreciated Property Giving	Apprec. Property Giving Total (#)
4B Appreciated Property Giving	Apprec. Property Giving Total (\$)

Section 4a / 1 / Question H / Families & Variables

Family	Variable
1A Personal Gifts Via Organizations	Donor-Advised Funds: No. of Donors
1B Personal Gifts Via Organizations	Donor-Advised Funds: Dollars
2A Personal Gifts Via Organizations	Businesses: No. of Donors
2B Personal Gifts Via Organizations	Businesses: Dollar Amount
3A Personal Gifts Via Organizations	Other Orgs: No. of Donors
3B Personal Gifts Via Organizations	Other Orgs: Dollar Amount

Section 4b / 2 / Question A / Families & Variables

Family	
1A Family/Other Foundation Details	Foundations: Pers & Family: Donors (#)
1B Family/Other Foundation Details	Foundations: Pers & Family: Total Amount (\$)
2A Family/Other Foundation Details	Foundations: Other: Donos (#)
2B Family/Other Foundation Details	Foundations: Other: Total Amount (\$)
3A Family/Other Foundation Details	Foundations: All: Donors (#) Foundations: All: Total Amount (\$)
3B Family/Other Foundation Details	Note: This should equal: Foundation Major Subtotals: Foundations Total

Section 4b / 2 / Question B & D / Families & Variables

Family	Variable
1A Largest Donor Totals	Largest Gift from Foundation
1B Largest Donor Totals	2nd Largest Gift from Foundation
2A Largest Donor Totals	3rd Largest Gift from Foundation
2B Largest Donor Totals	Largest Gift from Coporation
3A Largest Donor Totals	2nd Largest Gift from Coporation
3B Largest Donor Totals	3rd Largest Gift from Coporation

Section 4b / 2 / Question C / Families & Variables

Family	Variable
1A Corporate Giving Details	Corporations: Cash & Securities (#)
1B Corporate Giving Details	Corporations: Cash & Securities (\$)
2A Corporate Giving Details	Corporations: Company Products (#)
2B Corporate Giving Details	Corporations: Company Products (\$)
3A Corporate Giving Details	Corporations: Other In-Kind (#)
3B Corporate Giving Details	Corporations: Other In-Kind (\$)
4A Corporate Giving Details	Corporations: Matching (#)
4B Corporate Giving Details	Corporations: Matching (\$)
5B Corporate Giving Details	Corporations: Total (\$, from Section 4)
6A Corporate Giving Details	Indirect Corporate Matching Gifts: Number
6B Corporate Giving Details	Indirect Corporate Matching Gifts: Dollar Amount

Section 4b / 3 / Question A / Families & Variables

Family	Variable
Restricted Endowment Giving by Purpose 1 (HE Only)	Endowment: Restricted to Academic Divs (Deferred at PV)
Restricted Endowment Giving by Purpose 2 (HE Only)	Endowment: Restricted to Fac and Staff Comp (Deferred at PV)
Restricted Endowment Giving by Purpose 3 (HE Only)	Endowment: Restricted to Research (Deferred at PV)
Restricted Endowment Giving by Purpose 4 (HE Only)	Endowment: Restricted to Public Serv & Ext (Deferred at PV)
Restricted Endowment Giving by Purpose 5 (HE Only)	Endowment: Restricted to Library (Deferred at PV)
Restricted Endowment Giving by Purpose 6 (HE Only)	Endowment: Restricted to Op & Maint of Physical Plant (Deferred at PV)
Restricted Endowment Giving by Purpose 7 (HE Only)	Endowment: Restricted to Student Financial Aid (Deferred at PV)
Restricted Endowment Giving by Purpose 8 (HE Only)	Endowment: Restricted to Athletics (Deferred at PV)
Restricted Endowment Giving by Purpose 9 (HE Only)	Endowment: Restricted to Other Purposes (Deferred at PV)
Restricted Endowment Giving by Purpose 10 (HE Only)	Endowment: Restricted to Total, Deferred at PV (From Details Section) Note: This should equal the sum of Total Gifts to Endowment, Income Restricted from both the Outright Section (3B) and the Deferred Section (3C).

Section 4b / 3 / Question B / Families & Variables

Family	Variable
1A Athletics Giving Details (HE Only)	Athletics/Curr Ops: Donors (#)
1B Athletics Giving Details (HE Only)	Athletics/Curr Ops: Total Amount (\$)
2A Athletics Giving Details (HE Only)	Athletics/Cap Purp: Donors (#)
2B Athletics Giving Details (HE Only)	Athletics/Cap Purp (PV): Total Amount (\$)
3A Athletics Giving Details (HE Only)	Athletics/Total: Donors (#)
3B Athletics Giving Details (HE Only)	Athletics/Total (PV): Total Amount (\$)

Section 4 Minimal / Families & Variables

Family	Variable
A Contributions from Alumni for All Purposes	
a Alumni Giving Statistics	# Alumni of Record
b Alumni Giving Statistics	# Alumni Solicited
c Alumni Giving Statistics	# Alumni Donors
B Bequests	
1a Bequests and Deferred Gifts	Bequests/Curr Ops #
1b Bequests and Deferred Gifts	Bequests/Curr Ops \$
2a Bequests and Deferred Gifts	Bequests/Capital #
2b Bequests and Deferred Gifts	Bequests/Capital \$
3a Bequests and Deferred Gifts	Bequests Total #
3b Bequests and Deferred Gifts	Bequests Total \$
C Three Largest Donor Totals from Individuals	
C (1a) Largest Donor Totals	Largest Gift from Living Individual
C (1b) Largest Donor Totals	2nd Largest Gift from Living Individual
C (1c) Largest Donor Totals	3rd Largest Gift from Living Individual
C (2a) Largest Donor Totals	Largest Gift Bequest
C (2b) Largest Donor Totals	2nd Largest Gift Bequest
C (3c) Largest Donor Totals	3rd Largest Gift Bequest
D Deferred Giving	
Bequests and Deferred Gifts	Deferred Gifts #
E Three Largest Donor Totals from Organizations	
1a Largest Donor Totals	Largest Gift from Foundation
1b Largest Donor Totals	2nd Largest Gift from Foundation
1c Largest Donor Totals	3rd Largest Gift from Foundation
2a Largest Donor Totals	Largest Gift from Corporation
2b Largest Donor Totals	2nd Largest Gift from Corporation
2c Largest Donor Totals	3rd Largest Gift from Corporation

Definitions

Term	Definition/Additional Information	Term found in VSE survey section(s):
Academic Divisions	Report gifts that the donor has restricted for use in a particular academic division of the institution – such as a college of medicine, school of law, or department of English – but upon which no further restriction has been placed. Gifts for faculty and department staff salaries should be reported under Faculty and Staff Compensation.	3A Full 4b / 3 / Question A
Additional Soft Credit	Soft-credit gifts would still be counted even though they are also counted under the type of organization that provided the direct gift. A donor might receive recognition for a gift he or she caused to be made, such as a gift from his or her foundation or company, even though these gifts are "hard" credited to the institution. Report under the dollar amount, the sum of outright gifts plus deferred gifts at PRESENT (discounted) value.	4a / 1 / Question E
Advancement Management	The primary purpose of this activity is to provide multi-discipline advancement leadership and operational support. The chief advancement officer and his or her support staff should be included under this category.	2b
Advancement Program Expenditures	Include salaries, benefits, and other expenses related to advancement program activities. Be sure to include communications expenditures in this total. Advancement program expenditures should also be included in Expenditures \$ in Section 2.	2
Advancement Services	Advancement Services functions include database management, reporting, prospect research, and gift processing.	2b
All Purposes	The combination of Current Operations (Section 3A) + Capital Purposes (3B) + Deferred Gifts (at Present Value)	4a / 1 / Question A
Alternate Grand Total	Grand Total as calculated before 2004 using the Face Value of deferred gifts, rather than the Present Value. The only difference between this total and the Official (2004+) Grand Total is how deferred gifts are valued.	3 Minimal
Alumni	Report here giving by former students – full- or part-time, undergraduate or graduate – who have earned some credit toward one of the degrees, certificates, or diplomas offered by the reporting institution. Examples: An individual who completed only one semester or even only one degree-credit course with passing grades may be included in the "Alumni" category. An individual who matriculated but did not complete the semester or who enrolled in a special course that did not carry credit toward a degree, diploma, or certificate should not be included in the "Alumni" category.	3A Full, Partial 3B Full, Partial 3C Full, Partial 3D Full, Partial 3 Minimal
Alumni Participation	Calculated in Data Miner as Number of Donors divided by Number of Record.	4 Minimal

Term	Definition/Additional Information	Term found in VSE survey section(s):
Alumni Relations / Affairs	The primary purpose of this activity is to build long-term relationships with alumni to develop champions of the institution's mission, enhance participation in the institution's activities, and enhance alumni financial support. The alumni relations expenditures include those incurred in institution administered programs, independent alumni associations, and programs administered by academic units.	2b
Athletics	Report gifts that the donor has restricted for the athletic department, including intramural and extramural activities. Note: Gifts to support the academic department of health, physical education, and recreation should be reported under "Academic Divisions." Gifts of athletic scholarships (grants-in-aid) should be reported under "Student Financial Aid."	3A Full 4b / 3 / Question A
Benefits	Report the share of benefits paid by the institution for the salaries and wages reported on the survey. These benefits usually include social security; medical, disability, and life insurance; and retirement plan contributions. Professional staff benefits may also include car allowances, housing subsidies, memberships, and other perquisites. Report these even if they are paid for centrally.	2b
Bequests (Current Operations, Capital Purposes & Total)	Include realized bequests (wills/estate settlements), not bequest intentions, which are reported in Section 1. Make sure the bequests listed are also reported in Section 3, as gifts from alumni, parents, or other individuals. Bear in mind that, usually, bequests are not deferred gifts. In some cases, though, a deferred gift may be established via a will. If any of the reported bequests were reported on Row 18 of Section 3 (Minimal) or Section 3C (Full & Partial), include them as bequests for capital purposes (at their Present Value, not Face Value). Bequests for Current Operations are bequests that the deceased either did not restrict or that were restricted only to a general purpose, rather than to an endowment or other capital purpose. Bequests for Capital Purposes are bequests the deceased restricted to an endowment, gifts in the form of real property, or gifts restricted to another capital purpose, such as a loan fund. Total Bequests are the sum of Bequests for Current Operations + Bequests for Capital Purposes (rows 1+2). If the purposes of the bequests are not known by the survey respondent, the total may be used without supplying data for row 1 and row 2.	4a / 1 / Question C 4 Minimal
Businesses	In some cases, family businesses or other private companies make contributions to an institution. Those contributions are counted on the VSE survey as corporate gifts, but there is sometimes a personal intent behind the transaction. Generally, closely held or family businesses may be the vehicle through which some individuals support institutions. These are quasi-personal gifts, but are not captured as such elsewhere on the survey.	4a / 1 / Question H

Term	Definition/Additional Information	Term found in VSE survey section(s):
Capital Campaign	There is a space to indicate that the institution is in a capital campaign, either in the silent or active phase. This would be expected to affect expenditures and staffing.	2b
Capital Expenditures	Specialized equipment and software supporting the functional activities of advancement, such as calling systems, donor management, planned giving software, public relations software, including licensing and technical support for implementation and upgrades. Do not include renovations, alterations or improvements to office space or standard office equipment found in any well-furnished administrative office – tables, desks, and the like.	2b
Cash and Securities (Exclusive of Matching Gifts)	Direct gifts in the form of either cash or securities.	4b / 2 / Question C
Comments/Explanatory Notes	There is a space available on the survey to provide notes and comments.	2b
Communications / Marketing	The primary purpose of this activity is to keep the institution's external audiences informed of activities, achievements and priorities to build public support.	2b
Company Products	Tangible goods that are created and marketed by the corporations itself.	4b / 2 / Question C
Corporations	Corporations, partnerships, and cooperatives that have been organized for profit-making purposes, including corporations owned by individuals and families and other closely held companies. This should also include gifts from company-sponsored foundations, gifts from industry trade associations, and corporate matching gifts.	3A Full, Partial 3B Full, Partial 3D Full, Partial 3 Minimal 4b / 2 / Questions B & D 4 Minimal
Corporations (Three Largest Donor Totals)	Report gifts received, not the commitment. So, a gift of \$10 million payable over 5 years would be included each of those years at \$2 million only. Report accumulated totals for the year, i.e., if a foundation writes four separate checks to your institution during the year, it is the sum of those four checks that should be used to determine if the foundation is one of the three largest foundation donors.	4b / 2 / Questions B & D 4 Minimal
Current Operations Expenditures	Include the cost of telephone and personal communication devices, printing and duplicating (in-house and contracted), travel, meetings and entertainment, professional fees for fundraising counsel and commercial fundraisers, consultants, wealth screening, attorneys, realtors, escrow agencies, writers, designers, advertising, public relations agencies, and the like. Include office supplies, equipment, and software valued under \$5,000. Include subscriptions, memberships, and training costs.	2b
Deferred Gifts Established or Added to During Reporting Period	The total number of newly established (not realized) deferred gifts the value of which was reported in section 3C. - Charitable remainder trusts - Charitable gift annuities - Pooled income funds - Remainder interest in property	4a / 1 / Question F

Term	Definition/Additional Information	Term found in VSE survey section(s):
Deferred Giving	Report newly established (not realized): charitable remainder trusts, charitable gift annuities, pooled income funds, remainder interest in property. Two values are reported for each: Present Value (PV) (the tax deduction the IRS allows for the gift, which is the official value counted in the VSE survey since 2004), and Face Value (FV) (the amount of assets funding the gift, which was the official value counted in the VSE survey before 2004.)	3C Full, Partial 3 Minimal
Development / Fundraising	The primary purpose of this activity is to secure philanthropic gifts in support of the institution. Advancement units included under this section should include (where present at an institution) the annual fund, major/principal gifts, planned giving, corporate and foundation relations, central development, college-based development, and educational fundraising campaign management. The fundraising costs to be reported include those incurred by central development, campaigns, institutionally related foundations, academic units, athletic associations and their affiliate organizations, and fundraising consortia.	2b
Donor-Advised Funds	Donor-Advised Funds are grantmaking public charities (charitable gift funds) that are typically managed by an institution such as a community foundation or financial services firm. If you receive a grant from a DAF, it technically comes from the institution in which the fund is housed. Yet, the donor does "advise" the institution to make the payment to you. So, the transaction is triggered by the personal intent of an individual even though it isn't counted as a personal gift elsewhere on the survey. Note that Donor-Directed (as opposed to Donor-Advised) Funds are already counted as personal gifts on the survey and should not be counted here.	4a / 1 / Question H

Term	Definition/Additional Information	Term found in VSE survey section(s):
Endowment Market Value	<p>Include all the following:</p> <p>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.</p> <p>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.</p> <p>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.</p> <p>Public institutions should include the combined endowment of the foundation and the institution.</p> <p>As a guideline, institutions should enter the amount reported on the NACUBO endowment survey.</p>	2
Endowment-Restricted	Report outright gifts (3B) and deferred gifts (3C) added to the endowment funds of the institution by donor direction, from which the income is limited by the donor for specific purposes or programs.	3B Full, Partial 3C Full, Partial
Endowment-Unrestricted	Report outright gifts (3B) and deferred gifts (3C) outright gifts (3B) and deferred gifts (3C) gifts added to the endowment funds of the institution by donor direction, but for which the donor has made no restriction regarding the use of the income produced by the endowment, regardless of any subsequent allocation the institution may make.	3B Full, Partial 3C Full, Partial
Enrollment Full-Time Equivalent	Count the FTE enrollment figure as of the beginning of the reporting period, i.e., opening fall FTE enrollment. If the FTE figure is not available, the formula is the sum of all full-time students plus one-third of the number of part-time students (e.g., three part-time students equal one full-time student).	2
Enrollment Total Head Count	Count enrollment at the beginning of the academic year being reported (i.e., fall of 2002 for the report covering the 2002-03 fiscal year). All students (except continuing education) are counted: full-time, part-time, resident, extension, non-degree. DO NOT convert part-time students to full-time equivalents.	2
Expenditures \$	<p>Include all expenditures for Instruction, Research, Public Service, Academic Support, Student Services, Institutional Support, Scholarships and Fellowships, and Operation and Maintenance of Physical Plant. Exclude Auxiliary Enterprises, Hospital Services, and Independent Operations.</p> <p>Public institutions should enter the combined expenditures for the foundation and the institution.</p>	2

Term	Definition/Additional Information	Term found in VSE survey section(s):
Extramural Athletics (Current Operations, Capital Purposes & Total)	Include gifts that are specifically designated for the institution's teams that compete with teams from other institutions. Note that the Total here is not comparable to other Athletics Giving Totals in the VSE Survey. In Section 3A, you report Current Operations gifts that are restricted to Athletics for Intramural and Extramural combined. Here you report only Extramural. Here should also include Extramural Gifts to Endowment, Income Restricted to Athletics that you include in Section 3B (outright) and 3C (deferred). Report the deferred giving restricted to Extramural Athletics at the Present Value, not the Face Value.	4b / 3 / Question B
Face Value	The full value of assets funding a deferred gift. Prior to 2004, the survey counted the face value of the gift. From 2004 to the present, the survey counts the Present Value of the gift (the tax deduction the IRS allows the donor, which is less than the full Face Value).	3C Full, Partial 3D Full, Partial 3 Minimal
Faculty & Staff	Report gifts from individuals employed by the institution as faculty or staff, who are not counted above as Alumni or Parents. The Alumni and Parent categories take precedence over Faculty and Staff. For example, if an individual is a faculty member and an alumnus, count the person under Alumni.	4a / 1 / Question A 4a / 1 / Question B
Faculty & Staff Compensation	Report outright gifts (3A) or both outright and deferred gifts, using the PRESENT value of deferred gifts (4b / 3 / Question A) that the donor has restricted for faculty and staff salaries and employment benefits. This includes gifts in support of sabbatical and other professional leaves for institutional employees. Note: Gifts made to support lecture series and consultants should be reported under "Other Restricted Purposes." As an accounting convenience, funds made available for salaries as part of a larger grant for support of a research project may be credited under the "Research" category.	3A Full 4b / 3 / Question A
Foundations	This column includes personal and family foundations and other foundations and trusts that are private tax-exempt entities operated exclusively for charitable purposes. It does not include company-sponsored foundations, which fall under the category of "Corporations and Businesses." Report accumulated totals for the year, i.e., if a foundation writes four separate checks to your institution during the year, it is the sum of those four checks that should be used to determine if the foundation is one of the three largest foundation donors. The same concept holds for corporations.	3A Full, Partial 3B Full, Partial 3D Full, Partial 3 Minimal 4b / 2 / Questions B & D 4 Minimal

Term	Definition/Additional Information	Term found in VSE survey section(s):
Fundraising Consortia	This category includes entities that have been formed by a group of cooperating institutions or organizations for the purpose of facilitating their fundraising activities. The United Negro College Fund, the Virginia Council of Independent Colleges, the United Way, and combined fund drives are examples of fundraising consortia. Do not include funds from governmental agencies.	3A Full, Partial 3B Full, Partial 3D Full, Partial 3 Minimal
Governing Board Giving	<p>Include current, emeritus, and honorary board members. On row 1 include only gifts that receive legal/hard credit. Gifts that receive soft credit may be reported on row 2.</p> <p>Report under the dollar amount, the sum of outright gifts plus deferred gifts at PRESENT (discounted) value.</p> <p>Count trustees in this section even though they are also counted as alumni, parents, or other individuals. Soft-credit gifts would still be counted even though they are also counted under the type of organization that provided the direct gift.</p>	4a / 1 / Question E
Library	Report outright gifts (3A) or both outright and deferred gifts, using the PRESENT value of deferred gifts (4b / 3 / Question A), the income from which the donor restricted to the acquisition, restoration, and preservation of books, periodicals, manuscripts, maps, audiovisual equipment, and other materials and activities appropriate to a library. Note: Gifts for staff salaries should be reported under "Faculty and Staff Compensation." Gifts for operation and maintenance of the library should be reported under "Operation and Maintenance of Physical Plant."	3A Full 4b / 3 / Question A
Loan Funds	Report gifts restricted by donors to be available for loans to students, faculty, and staff.	3B Full, Partial 3 Minimal
Matching Gifts	Matching gifts: gifts made by businesses that match the voluntary contributions of the firm's employees or other eligible participants. For purposes of this survey, matching gifts should always be credited only to the corporation, not to the individual whose gift is being matched. Report the number of gifts that have been matched and the total dollar amount received. In other words, if Company X matched 20 contributions, count that as 20 matching gifts, not one.	4b / 2 / Question C
Matching Gifts Not Directly from a Corporation	Indirect Matching Gifts: If you can determine that a company matched an individual's contribution to your institution, but the payment came from a third party—for example, a community foundation or a financial services company—and so was counted on the VSE as a foundation grant or a direct corporate gift rather than a corporate matching gift, please report that payment in Section 4b / 2 / Question C. This question is designed to ensure the VSE does not undercount matching gifts.	4b / 2 / Question C

Term	Definition/Additional Information	Term found in VSE survey section(s):
Number of Deferred Gifts	The number of newly established charitable remainder trusts, gift annuities, pooled income funds, and the like that were reported on Row 18 of Section 3.	4 Minimal / D
Number of Donors	Number of alumni who made a direct (not through a foundation, corporation, donor-advised fund or the like) contribution. Include gifts made by bequest (wills). If a married couple, both of whom are alumni, make a joint contribution, credit both with half the total amount contributed and count the couple as two donors.	4 Minimal / A
Number of Record	Number of alumni for whom the institution has a means of contact (address, phone number, email address). Include only living alumni. Include alumni even if they have requested the institution not solicit them. An alumnus is anyone who took a course that could be counted toward a degree or certificate, even if that person did not receive a degree from the institution. Graduate students should also be included.	4 Minimal / A
Number Solicited	Number of alumni the institution formally solicited. Therefore, exclude those requesting they not be solicited and exclude anyone else not solicited for any reason. Number solicited should be lower than number of record.	4 Minimal / A
Official Grand Total by Purpose	Total Giving: Sum of Total Current Operations + Total Outright for Capital Purposes + Total Deferred Gifts at Present Value (IRS Tax Deduction) (rows 12+17+18). Also equal to the sum of Current Operations: Unrestricted + Current Operations: Restricted + Property, Buildings, and Equipment + Outright to Endowment: Unrestricted + Outright to Endowment: Restricted + Loan Funds + Total Deferred Gifts at Present Value (IRS Tax Deduction) (rows 10+11+13+14+15+16+18). Note: Official Grand Total By Purpose is equal to Official Grand Total by Source.	3 Minimal
Official Grand Total By Source	Total Giving: Sum of giving by Alumni + Parents + Other Individuals + Foundations + Corporations + Religious Organizations + Fundraising Consortia + and Other Organizations (rows 1-8) for Current Operations + Capital Purposes (Outright) + Deferred Gifts (at Present Value: IRS Tax Deduction). Note: Official Grand Total By Source is equal to Official Grand Total by Purpose.	3 Minimal
Official Total Using Present Value (Gift Income Summary)	Grand total of all gifts received and reported on the VSE survey, with deferred gifts at the Present Value (the tax deduction the donor is allowed by the IRS). This total will be lower than the Total Using Face Value. This is the VSE OFFICAL TOTAL GIFT INCOME since 2004.	3D Full, Partial

Term	Definition/Additional Information	Term found in VSE survey section(s):
Operation & Maintenance of Physical Plant	Report outright gifts for current operations (3A) or gifts to endowment (4b / 3 / Question A) restricted for the ongoing operation of the physical plant, including its buildings and grounds, other facilities, and equipment. The institution may choose to also include here any gifts of \$10,000 or less for repairs to existing buildings or for new construction, rather than crediting these to "Property, Buildings, and Equipment" under capital purposes. The rationale for this exception is that some institutions may not consider amounts of \$10,000 or less as appropriate for the capital purpose category.	3A Full 4b / 3 / Question A
Other	Report all outright gifts for current operations restricted for specific uses that cannot be classified in one or another of the restricted categories in Rows 1 through 8. Included in this category, among other possibilities, are all gifts to auxiliary enterprises, hospitals, clinics, independent operations, and non-academic units.	4b / 3 / Question A
Other Company Property	Other company property: such things as land, donated equipment that the company does not manufacture and market itself, etc.	4b / 2 / Question C
Other Foundations and Trusts, Excluding Corporate	Other foundations and trusts include all private foundations and charitable trusts, including most of the major private foundations – such as the Rockefeller, Johnson, and Kellogg foundations – and community foundations. Please report gifts from corporate-based foundations under the Corporate sections of the VSE survey.	4b / 2 / Question A
Other Individuals	Report here giving from all persons, including governing board members, who are not classifiable as "Alumni" or "Parents."	3A Full, Partial 3B Full, Partial 3C Full, Partial 3D Full, Partial 3 Minimal
Other Organizations	Report here gifts from all organizations not defined above as "Foundations," "Corporations and Businesses," "Religious Organizations," or "Fundraising Consortia" other than governmental agencies. In addition, for the convenience of schools that handle their auctions and other fundraising events independently of their development accounting system, those schools may report the net proceeds of such events in this category.	3A Full, Partial 3B Full, Partial 3D Full, Partial 3 Minimal
Other Organizations (Including Federated Funds)	In some cases gifts may come from organizations other than Donor-Advised Funds and Businesses, such as a United Way, a private club, or another fund. When such contributions are made due to a recommendation or the advice of an individual, this gift has a personal motivation, even though it technically comes from an institutional donor.	4a / 1 / Question H
Other Purposes	Report those deferred gifts which donors have not restricted to endowment.	3C Full, Partial

Term	Definition/Additional Information	Term found in VSE survey section(s):
Other Real Property	Include here non-cash gifts received from individuals that are of a character to appreciate in value over time. Include deferred gifts that meet the conditions of appreciated property. Appreciated property gifts include securities, real estate, and real property such as works of art, antiques, and collectibles. The amounts reported here should be included in Section 3.	4a / 1 / Question G
Other Restricted	Report all outright gifts for current operations restricted for specific uses that cannot be classified in one or another of the restricted categories in Rows 1 through 8. Included in this category, among other possibilities, are all gifts to auxiliary enterprises, hospitals, clinics, independent operations, and non-academic units.	3A Full
Outright for Capital Purposes	<p>Outright gifts, including realized bequests (estate settlements), that the donor has designated for capital purposes use. This includes gifts for buildings and equipment, gifts of property, gifts to endowment, and gifts to loan funds.</p> <p>Report gifts to endowment as Unrestricted if the donor makes no restriction regarding the use of the income produced by the endowment, regardless of any subsequent allocation the institution may make.</p> <p>Report gifts to endowment as Restricted if the donor restricts the use of the income produced by the endowment for specific purposes or programs.</p> <p>Total Outright for Capital Purposes is the sum of outright gifts for property, buildings and equipment, unrestricted and restricted gifts to endowment, and gifts for loan funds.</p>	3B Full, Partial 3D Full, Partial 3 Minimal
Outright for Current Operations	<p>Outright gifts, including realized bequests (estate settlements), that the donor has designated for current use. Report such current operations gifts here regardless of any subsequent designation by the institution to function as endowment, to construct facilities, or for other purposes.</p> <p>Report the gift as Unrestricted if the donor does not specify a purpose for the contribution.</p> <p>For purposes of this report, report matching gifts from organizations as Unrestricted unless the organization states otherwise.</p> <p>Report the gift as Restricted if the donor restricts its use to some specific Current Operations purpose. For example, gifts restricted to the library, scholarships, or athletics (but not restricted to an endowment for those purposes) would be included here.</p> <p>Total Outright for Current Operations is the sum of Current Operations: Unrestricted + Current Operations: Restricted.</p>	3A Full, Partial 3D Full, Partial 3 Minimal

Term	Definition/Additional Information	Term found in VSE survey section(s):
Outright to Endowment: Restricted	Report here those outright gifts added to the endowment funds of the institution by donor direction, from which the income is limited by the donor for specific purposes or programs.	3 Minimal
Outright to Endowment: Unrestricted	Report here those outright gifts added to the endowment funds of the institution by donor direction but for which the donor has made no restriction regarding the use of the income produced by the endowment, regardless of any subsequent allocation the institution may make.	3 Minimal
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.	1
Parents	Report here gifts from persons other than those defined above as "Alumni" who are the parents, guardians, or grandparents of current or former students at the institution. An affiliation as an alumnus takes precedence over that of a parent for the purpose of this report.	3A Full, Partial 3B Full, Partial 3C Full, Partial 3D Full, Partial 3 Minimal
Personal and Family Foundations	Personal and family foundations are those that have been established and continue to operate as the conduits for the charitable donations of an individual or immediate members of a family.	4b / 2 / Question A
Personal Giving Additional Details	Some personal gifts are dispensed through organizations and therefore are not reflected as personal giving data on this survey. Please report below personal gifts that are officially counted as coming from organizations elsewhere on this survey. The amount from family foundations will appear in section 4b, not in this question.	4a / 1 / Question H
Present Value	This is the tax deduction the IRS allows the donor, and it is lower than the full Face Value (FV). The Present Value is the official value used in reporting on the VSE survey. Prior to 2004, the survey counted the Face Value of the gift.	3C Full, Partial 3D Full, Partial 3 Minimal
Property, Buildings, and Equipment	Outright gifts of both real and personal property for the use of the institution; gifts made for the purpose of purchasing buildings, other facilities, equipment, and land for use of the institution; gifts restricted for construction or major renovation of buildings and other facilities; and gifts made for retirement of indebtedness. As an accounting convenience, the institution may choose to report in the category "Operation and Maintenance of Physical Plant" (Section 3) gifts of \$10,000 or less restricted for purchasing, renovating, or constructing facilities, because such gifts may be considered as funds restricted for current operations.	3B Full, Partial 3 Minimal

Term	Definition/Additional Information	Term found in VSE survey section(s):
Public Service & Extension	Report outright gifts for current operations (3A) or gifts to endowment (4b / 3 / Question A) that are restricted for support of activities established primarily to provide non-instructional services to people and groups within or outside the institution. Such activities include community service programs, institutionally affiliated radio and television stations, and cooperative extension services. Note: Gifts for instructional activities for academic credit, even if they are also part of an institution's extension services, should be reported as gifts for "Academic Divisions."	3A Full 4b / 3 / Question A
Purposes of Gifts to Endowment: Income Restricted	Include both outright and deferred gifts, and use the PRESENT value of deferred gifts.	4b / 3 / Question A
Real Estate	Include here non-cash gifts received from individuals that are of a character to appreciate in value over time. Include deferred gifts that meet the conditions of appreciated property. Appreciated property gifts include securities, real estate, and real property such as works of art, antiques, and collectibles. The amounts reported here should be included in Section 3.	4a / 1 / Question G
Religious Organizations	This category includes gifts from churches, synagogues, and temples and their denominational entities, hierarchies, and service groups.	3A Full, Partial 3B Full, Partial 3D Full, Partial 3 Minimal
Research	Report outright gifts for current operations (3A) or gifts to endowment (4b / 3 / Question A) restricted for scientific, technical, and humanistic investigation. This category includes private grants (gifts) for individual and/or project research as well as grants for institutes and research centers. It does not include corporate grants for programs in which the grantor receives a product or service commensurate with the fee paid (contracted sponsored research). It also does not include government grants for sponsored programs. Government grants and awards, whether local, state (including state matching grants), federal, or foreign, should not be included on the VSE survey. Note: For further help distinguishing between contracts and contributions, see the CASE Management Reporting Standards.	3A Full 4b / 3 / Question A
Restricted	Gifts from which the income is limited by the donor for specific purposes or programs.	3A Full, Partial 3B Full, Partial 3C Full, Partial 3 Minimal 4b / 3 / Question A

Term	Definition/Additional Information	Term found in VSE survey section(s):
Salaries	In this row, include the cost of salaries, even if these are paid for centrally. Allocate salary costs by functions described below. So, the salary of a single employee may be spread over multiple functions. The salaries by function should correspond to the FTEs by function. Report the salary costs (exclusive of employment benefits, which are reported separately) of full-time, part-time, and temporary exempt employees. Exclude salaries of presidents and heads of academic units.	2b
Securities	Include here non-cash gifts received from individuals that are of a character to appreciate in value over time. Include deferred gifts that meet the conditions of appreciated property. Appreciated property gifts include securities, real estate, and real property such as works of art, antiques, and collectibles. The amounts reported here should be included in Section 3.	4a / 1 / Question G
Staff (FTE)	You can use up to two decimal places to report personnel distribution. For example, if you have 4 full-time and 3 half-time staff working in a functional area, you would enter 5.50. The time of a single employee may be distributed over more than one functional area. Only include staff who receive W-2s. Do not include outside counsel, but do include those expenditures in the current operations expenditures section.	2b
Student Financial Aid	Report outright gifts for current operations (3A) or gifts to endowment (4b / 3 / Question A) that the donor has restricted for financial aid to students, whether full- or part-time, undergraduate or graduate. For the purpose of this report, such aid includes both need-based and merit scholarships, graduate fellowships, athletic scholarships or athletic grants-in-aid, student awards and prizes, and gifts made in support of student work-study arrangements. Note: If an individual or organization channels funds through the institution to support a student specified by the individual or organization, these funds are not gifts to the institution. They should not be reported as gift income anywhere in the report.	3A Full 4b / 3 / Question A
Students	Report gifts from currently enrolled students, who are not counted above as Alumni, Parents, or Faculty and Staff. The categories above take precedence over Student. For example, if an individual is a currently enrolled student and a staff member, count the person under Faculty and Staff.	4a / 1 / Question A 4a / 1 / Question B
Testamentary Commitments (Bequest Intentions)	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.	1

Term	Definition/Additional Information	Term found in VSE survey section(s):
Three Largest Donor Totals	<p>Report gifts received, not the commitment. So, a gift of \$10 million payable over 5 years would be included each of those years at \$2 million only.</p> <p>Report accumulated totals for the year, i.e., if a foundation writes four separate checks to your institution during the year, it is the sum of those four checks that should be used to determine if the foundation is one of the three largest foundation donors.</p>	<p>4 Minimal 4a / 1 / Question D 4b / 2 / Questions B & D 4 Minimal</p>
Three Largest Donor Totals Through Estate Settlements (Bequests)	<p>Report accumulated totals for the year (including any deferred gifts), i.e., if a living individual writes four separate checks during the year, it is the sum of those four gifts that should be used to determine if the individual is one of the three largest living individual donors.</p>	<p>4a / 1 / Question D 4 Minimal</p>
Three Largest Donor Totals, Living Individuals	<p>Report accumulated totals for the year (including any deferred gifts), i.e., if a living individual writes four separate checks during the year, it is the sum of those four gifts that should be used to determine if the individual is one of the three largest living individual donors. The same concept holds for bequests.</p>	<p>4a / 1 / Question D 4 Minimal</p>
Total Appreciated Property Giving	<p>Include here non-cash gifts received from individuals that are of a character to appreciate in value over time. Include deferred gifts that meet the conditions of appreciated property. Appreciated property gifts include securities, real estate, and real property such as works of art, antiques, and collectibles. The amounts reported here should be included in Section 3.</p>	<p>4a / 1 / Question G</p>
Total Corporate Giving	<p>The total amount should match what was reported earlier in the survey as total corporate giving in Column E in sections 3A+3B.</p>	<p>4b / 2 / Question C</p>
Total Deferred Gifts (Present Value and Face Value)	<p>Total value of newly established (not realized) deferred gifts:</p> <ul style="list-style-type: none"> - Charitable remainder trusts - Charitable gift annuities - Pooled income funds - Remainder interest in property <p>Two values are reported for deferred giving:</p> <p>1) Present Value (PV) - the tax deduction the IRS allows for the gift. This is the official value counted in the VSE survey since 2004.</p> <p>2) Face Value (FV) - The full value of assets funding the gift. This was the official value counted in the VSE survey before 2004.</p> <p>Note: The sources of deferred gifts will be individuals only. Organizations do not make deferred gifts.</p>	<p>3C Full, Partial 3D Full, Partial 3 Minimal</p>
Total Foundation Giving	<p>The Sum of gifts from both types of foundations will equal total foundation giving reported on the survey. This questions allows us to calculate the percentage of foundation giving that may represent the personal intentions of an alumnus or other friend of the school.</p>	<p>4b / 2 / Question A</p>

Term	Definition/Additional Information	Term found in VSE survey section(s):
Total Gifts to Endowment (Present Value)	This is the total of gifts to endowment, both outright and deferred using the Present Value (the tax deduction the IRS allows the donor).	4b / 3 / Question A
Total Using Face Value (Gift Income Summary)	Grand total of all gifts received and reported on the VSE survey with deferred gifts calculated at full Face Value. This total is higher than the Official Total Using Present Value. It was DISCONTINUED as the official total in 2004. Official Total Using Present Value is the VSE OFFICAL TOTAL GIFT INCOME since 2004.	3D Full, Partial
Unrestricted	Gifts given by donors without any restriction. In cases where the donor expresses a preference for the gift's use but leaves the decision to the institution, report the gift as unrestricted. Even if the institution subsequently designates the gift for a particular purpose, the fact that the donor did not restrict its use means it is an unrestricted gift. For purposes of this report, report matching gifts from organizations as unrestricted unless the organization states otherwise.	3A Full, Partial 3B Full, Partial 3C Full, Partial 3 Minimal