

 <p>Category: Financial</p> <p>Responsible Office: <a href="#">University Controller</a></p>	<p>Procedure Title: Fundraising Reporting Instructions</p> <p>Document Number: 7005</p> <p>Effective Date: May 11, 2026</p> <p>This procedure item applies to: Community Colleges State-Operated Campuses Statutory Colleges</p>
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Summary

The State University of New York (SUNY) prepares and publishes the SUNY Fundraising Survey Report on an annual basis. The report is based on the Council for Advancement and Support of Education (CASE) Global Reporting Standards and Management Guidelines utilizing the CASE database for accumulating and reporting fundraising information. There are three versions of the Voluntary Support of Education (VSE) survey available on the CASE Web site: (1) full, (2) partial and (3) minimal. Campuses can complete either the full or partial survey. The minimal survey should not be used because it does not provide sufficient information for compiling the SUNY Fundraising Survey Report. Familiarity with the CASE website and CASE Global Reporting Standards and Management Guidelines will aid the completion of the VSE survey.

Process

Obtaining a username and password

To complete the VSE survey, a campus must first obtain usernames and passwords for each user who will have access to the VSE survey for the campus. The individual with permission to complete surveys is called the “contact person”.

A username and password can be obtained for the contact person by sending an e-mail message to [vse@case.org](mailto:vse@case.org) that includes the name, title, and institution to which the user belongs. The word “SUNY” should appear in the subject line. CASE will return a username and password.

Accessing and inputting information into the Council for Advancement and Support of Education database

1. Surveys can be accessed through the CASE Insights on Voluntary Support of Education Survey website. [Insightsdata.case.org](https://insightsdata.case.org)
2. Click on “Login to the CASE Insights survey”.
3. Enter username and password, **click “Log In”**
4. Click on “Surveys” at the top of the page, then “survey menu” This will bring up the appropriate institution.
5. Click on the fiscal year being entered “FY20XX.” This will bring up the fundraising survey document for inputting the campus’s information. Before entering the data, the contact person should indicate that the institution plans to complete the survey by clicking on the box next to “we will complete the survey this year.”

Detailed instructions for completing the survey in accordance with CASE standards can be found on the CASE website.

A reconciliation should be completed of amounts reported in the survey to amounts reported in the certified financial statements of the campus-related foundation (Form A - Gift Reconciliation). At the bottom of this form provide the total unconditional outstanding pledges at the end of the fiscal year. (Note: The CASE survey requests only those pledges made in the current fiscal year outstanding at year-end.)

The deadline for completing the survey and reconciliation is November 1. For those foundations that have a different year-end than June 30, the most recently completed fiscal year should be used for reporting purposes (e.g., December 31, 2025 for fiscal year 2025-26).

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#### Forms

[Form A](#) - Gift Reconciliation Form

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#### Related Procedures

There are no related procedures relevant to this procedure.

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#### Other Related Information

Voluntary Support of Education Survey

Instructions for the Voluntary Support of Education Survey

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#### Authority

The Office of the University Controller - Accounting Requirements

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## History

Amended May 11, 2026, to make various administrative updates.

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## Appendices

There are no appendices relevant to this procedure.