Summary

The State University of New York (University) utilizes the Council for Aid to Education (CAE) database for accumulating and reporting fundraising information. There are three versions of the Voluntary Support of Education (VSE) survey available on the CAE 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 University-wide fundraising report. Familiarity with the CAE website and CASE Management Reporting Standards will aid the completion of the VSE survey.

Process

Obtaining a username and password

In order 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 user name and password can be obtained for the contact person by sending an e-mail message to the Webmaster at CAE that includes the name, title, and institution to which the user belongs. The word “SUNY” should appear in the subject line. CAE will return a username and password.

Accessing and inputting information into the Council for Aid to Education database

1. Surveys can be accessed through the Voluntary Support of Education Survey website.
2. Click on “Login VSE Survey/Data Miner.”
3. Enter username and password.
4. After entering username and password, click on “Log In.”
5. Click on “Surveys” at the top of the page. This will bring up the appropriate institution.
6. Click on “Go” to the right of the fiscal year being entered “FY200X.” 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 using CASE standards can be found at the CAE 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 Form). At the bottom of this form provide the total unconditional outstanding pledges at the end of the fiscal year. (Note: the CAE survey requests only those pledges made in the current fiscal year outstanding at year-end.)

The deadline for completing the survey and reconciliation is October 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, 2003 for 2003-04).

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**Forms**

*Form A* - Gift Reconciliation Form

**Related Procedures**

There are no related procedures relevant to this procedure.

**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

**History**

There is no history relevant to this procedure.

**Appendices**

There are no appendices relevant to this procedure.