

Annual Report Form IPPR: Request for Institutional Peer Profile Report

Current Annual Report Forms survey year

Member School:

Survey Year: 2026 - 2027

Would you like one or more Institutional Peer Profile Reports for your institution?

☐ No, we do not want to request an IPPR at this time.

☐ Yes, send a report for each active peer profile.

Give each profile a name that is distinctive and descriptive, identifying the common thread that links the peer schools selected.

Profile Name:

Line	Peer Schools (List a minimum of five to a maximum of fifteen member schools for your peer profile. A list of member schools can be found on the ATS website.)
1	
2	
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13	
14	
15	

Respondent

Respondent:		Phone:		Email:	
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ATS offers one free Institutional Peer Profile Report (based on member schools selected in the peer profile; [click here](#) for sample report) to its member schools for each survey year data set. Additional reports using different sets of peer schools (identified by the school using additional IPPR Forms) are available for \$100 each. Member schools may identify *no fewer than five and no more than fifteen* member schools that they consider to be "peers" based on various institutional characteristics (e.g., size of enrollment, annual operating budget, denominational affiliation, etc.). The report is presented in a format that maintains the confidentiality of the peer schools' information by providing the peer group figures as a total, average, or median. This specially designed report will be emailed to the member school's Chief Executive Officer at the end of March or April.

Annual Report Form RF-1: Respondent Form

Current Annual Report Forms survey year

Member School:

Survey Year: 2026 - 2027

Form		Administrator Responsible Title	Phone Email
AF-1a	Admissions - Applicants (Race and Gender)		
AF-1b	Admissions - Acceptances (Race and Gender)		
AF-1c	Admissions - New Enrollments (Race and Gender)		
CF-1	Completions (Race and Gender)		
CF-2	Completions (Time and Race)		
CF-3	Completions (Placement and Gender)		
CF-4	Completions (Graduation and Persistence Rate)		
DF-1	Development		
EF-1	Enrollment (Race and Gender)		
EF-3	Enrollment (Denomination)		
EF-4	Enrollment (Previous Year)		
EF-5	Enrollment (Offsite and Online)		
FF-1	Financial Data		
FF-2	Financial Data (Technology Expenditures)		
IC-1	Institutional Characteristics		
IPPR	IPPR Request		
LF-1	Library		
PF-1	Personnel (Administrators and Full-Time Faculty)		
PF-2	Personnel (Part-Time Faculty)		
SF-1	Salary (Full-Time Personnel)		
X-3	Submit Data		

For each form provide the first and last name, title and contact information for the administrator responsible for the form's data. One person can be recorded for multiple forms, however only one person can be recorded per form.

*** Phone**, enter North American phone numbers as 10 digits in the format of 3-3-4 separated by dashes. For non-North American phone numbers, enter the number as appropriate for dialing from North America. Enter extensions at the end of the phone number preceded with Ext.

Annual Report Form AF-1a: Admissions - Applicants by Race and Gender

Fall data for the current academic year (include only those who completed the application process)

Member School: **Survey Year: 2026 - 2027**

Part A.1: Unduplicated Headcount by Race/Ethnicity and Known Gender

Male Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Male Applicants										
Female Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Female Applicants										
All Other Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total All Other Applicants										

Part A.2: Unduplicated Headcount for Unknown Race/Ethnicity and Unknown Gender

Unknown Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Not Available										

Annual Report Form AF-1a: Admissions - Applicants by Race and Gender

Fall data for the current academic year (include only those who completed the application process)

Member School:

Survey Year: 2026 - 2027

Part A: Unduplicated Headcount by Race/Ethnicity Totals

Total Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Part A Total Applicants										

Part B: Unduplicated Headcount by International and Domestic

Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
International										
Domestic										
Part B Total Applicants										

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Annual Report Form AF-1a: Admissions - Applicants by Race and Gender

Fall data for the current academic year (include only those who completed the application process)

Member School:

Survey Year: 2026 - 2027

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Applicants: Count the number of completed applications received for persons seeking admission in the fall of the current academic year. A completed application is one in which all required materials have been submitted.

Unduplicated Headcount: Count students only once. If students applied for more than one degree, count them only in the longer or more advanced program.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian member schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Non-Degree Programs: refer to any programs and courses offered for credit that do not result in an ATS-approved degree. Canadian member schools should include Bachelor of Theology students here; Roman Catholic member schools should include pontifical degree programs here. Note: The 2020 *Standards of Accreditation* (Standard 3.15) describes these programs as with or without credit, report here only the for-credit non-degree programs.

Male, Female, All Other, Unknown: For students whose gender is known, report male and female students in the sections labeled as such; for all other students including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female, report in the section labeled All Other. For students whose gender is unknown or prefer not to disclose, report in the section labeled Unknown.

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

- **Asian or PI:** A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or Pacific Islands. This includes people from Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; or people from American Samoa, Guam, Hawaii, or other Pacific Islands.
- **Black (Non-Hispanic):** A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
- **Hispanic:** A person of Latin descent, including Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin.
- **Indigenous:** A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
- **White (Non-Hispanic):** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

International/Domestic Students: Not listed as a category of race is the former "Visa or Nonresident Alien," which referred to international students of any race. That former category is now treated separately in Part B as "International" (vs. "Domestic"). Include in the "International" count anyone who is considered by the member school to be an international student. Include in the "Domestic" count all others. The Part B total should equal the Part A total, since Part A counts all students (including international students), while Part B counts the same by international/domestic student status.

Annual Report Form AF-1b: Admissions - Acceptances by Race and Gender Fall data for the current academic year (include only those applicants who were officially accepted)										
Member School:								Survey Year: 2026 - 2027		

Part A.1: Unduplicated Headcount by Race/Ethnicity and Known Gender										
Male Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Male Acceptances										
Female Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Female Acceptances										
All Other Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total All Other Acceptances										

Part A.2: Unduplicated Headcount by Unknown Race/Ethnicity and Unknown Gender										
Unknown Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Not Available										

Annual Report Form AF-1b: Admissions - Acceptances by Race and Gender										
Fall data for the current academic year (include only those applicants who were officially accepted)										
Member School:									Survey Year: 2026 - 2027	

Part A: Unduplicated Headcount by Race/Ethnicity Totals										
Total Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Part A Total Acceptances										

Part B: Unduplicated Headcount by International and Domestic										
Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
International										
Domestic										
Part B Total Acceptances										

Respondent and Comments					
Respondent:		Phone:		Email:	
Comments:					

Annual Report Form AF-1b: Admissions - Acceptances by Race and Gender

Fall data for the current academic year (include only those applicants who were officially accepted)

Member School:

Survey Year: 2026 - 2027

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Acceptances: Of the applicants, count the number of students who were officially accepted.

Unduplicated Headcount: Count students only once. If students applied for more than one degree, count them only in the longer or more advanced program.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian member schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Non-Degree Programs: refer to any programs and courses offered for credit that do not result in an ATS-approved degree. Canadian member schools should include Bachelor of Theology students here; Roman Catholic member schools should include pontifical degree programs here. Note: The 2020 *Standards of Accreditation* (Standard 3.15) describes these programs as with or without credit, report here only the for-credit non-degree programs.

Male, Female, All Other, Unknown: For students whose gender is known, report male and female students in the sections labeled as such; for all other students including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female, report in the section labeled All Other. For students whose gender is unknown or prefer not to disclose, report in the section labeled Unknown.

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

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- **Black (Non-Hispanic):** A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
- **Hispanic:** A person of Latin descent, including Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin.
- **Indigenous:** A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
- **White (Non-Hispanic):** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

International/Domestic Students: Not listed as a category of race is the former "Visa or Nonresident Alien," which referred to international students of any race. That former category is now treated separately in Part B as "International" (vs. "Domestic"). Include in the "International" count anyone who is considered by the member school to be an international student. Include in the "Domestic" count all others. The Part B total should equal the Part A total, since Part A counts all students (including international students), while Part B counts the same by international/domestic student status.

Annual Report Form AF-1c: Admissions - New Enrollments by Race and Gender

Fall data for the current academic year (include only those accepted applicants who actually enrolled)

Member School:

Survey Year: 2026 - 2027

Part A.1: Unduplicated Headcount by Race/Ethnicity and Known Gender

Male New Enrollments	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Male New Enrollments										
Female New Enrollments	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Female New Enrollments										
All Other New Enrollments	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total All Other New Enrollments										

Part A.2: Unduplicated Headcount for Unknown Race/Ethnicity and Unknown Gender

Unknown New Enrollments	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Not Available										

Annual Report Form AF-1c: Admissions - New Enrollments by Race and Gender

Fall data for the current academic year (include only those accepted applicants who actually enrolled)

Member School:

Survey Year: 2026 - 2027

Part A: Unduplicated Headcount by Race/Ethnicity Totals

Total New Enrollments	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Part A Total New Enrollments										

Part B: Unduplicated Headcount by International and Domestic

New Enrollments	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
International										
Domestic										
Part B Total New Enrollments										

Part C: Additional Questions on New Enrollments in MDiv/MA and DMin Degrees

1. Number of new enrollments this fall in MDiv and MA programs who do not have a baccalaureate degree (see 2020 Standard 7.4)	
2. Number of new enrollments this fall in DMin program who do not have an MDiv degree (see 2020 Standard 5.5)	

These two questions were first asked in fall 2021 on ATS Annual Report Form AF-1 considering new *Standards of Accreditation*. Those standards, adopted in 2020, eliminate a maximum percentage for admitting non-baccalaureate-holding MDiv/MA students (see Standard 7.4) and provide more flexibility for admitting non-MDivs in the DMin (see Standard 5.5). The ATS Board of Commissioners monitors these areas annually (see *ATS Policies and Procedures* III.M.1).

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Annual Report Form AF-1c: Admissions - New Enrollments by Race and Gender

Fall data for the current academic year (include only those accepted applicants who actually enrolled)

Member School:

Survey Year: 2026 - 2027

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New Enrollments: Of the accepted applicants, count the number of students who actually enrolled.

Unduplicated Headcount: Count students only once. If students applied for more than one degree, count them only in the longer or more advanced program.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian member schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Non-Degree Programs: refer to any programs and courses offered for credit that do not result in an ATS-approved degree. Canadian member schools should include Bachelor of Theology students here; Roman Catholic member schools should include pontifical degree programs here. Note: The 2020 *Standards of Accreditation* (Standard 3.15) describes these programs as with or without credit, report here only the for-credit non-degree programs.

Male, Female, All Other, Unknown: For students whose gender is known, report male and female students in the sections labeled as such; for all other students including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female, report in the section labeled All Other. For students whose gender is unknown or prefer not to disclose, report in the section labeled Unknown.

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

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- **Black (Non-Hispanic):** A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
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- **White (Non-Hispanic):** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

International/Domestic Students: Not listed as a category of race is the former "Visa or Nonresident Alien," which referred to international students of any race. That former category is now treated separately in Part B as "International" (vs. "Domestic"). Include in the "International" count anyone who is considered by the member school to be an international student. Include in the "Domestic" count all others. The Part B total should equal the Part A total, since Part A counts all students (including international students), while Part B counts the same by international/domestic student status.

Annual Report Form CF-1: Completions by Race and Gender

Previous academic year (including any summer graduates)

Member School:

Survey Year: 2026 - 2027

Part A.1: Unduplicated Headcount by Race/Ethnicity and Known Gender

Male Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Asian or PI									
Black (Non-Hispanic)									
Hispanic									
Indigenous									
White (Non-Hispanic)									
Multiracial									
Not Available									
Total Male Completions									
Female Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Asian or PI									
Black (Non-Hispanic)									
Hispanic									
Indigenous									
White (Non-Hispanic)									
Multiracial									
Not Available									
Total Female Completions									
All Other Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Asian or PI									
Black (Non-Hispanic)									
Hispanic									
Indigenous									
White (Non-Hispanic)									
Multiracial									
Not Available									
Total All Other Completions									

Part A.2: Unduplicated Headcount by Unknown Race/Ethnicity and Unknown Gender

Unknown Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Not Available									

Annual Report Form CF-1: Completions by Race and Gender Previous academic year (including any summer graduates)									
Member School:								Survey Year: 2026 - 2027	

Part A: Unduplicated Headcount by Race/Ethnicity Totals									
Total Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Asian or PI									
Black (Non-Hispanic)									
Hispanic									
Indigenous									
White (Non-Hispanic)									
Multiracial									
Not Available									
Part A Total Completions									

Part B: Unduplicated Headcount by International and Domestic									
Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
International									
Domestic									
Part B Total Completions									
List here the to three countries of your International students who completed a degree				1.	2.	3.			

Part C: Duplicated Headcount									
Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Duplicated Headcount									

Respondent and Comments					
Respondent:		Phone:		Email:	
Comments:					

Annual Report Form CF-1: Completions by Race and Gender

Previous academic year (including any summer graduates)

Member School:

Survey Year: 2026 - 2027

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Completions: Count how many students in each category completed their degree in the previous academic year (including those who completed their degree requirements in the summer).

Unduplicated Headcount: Count students only once. If students completed more than one degree, count them only in the longer or more advanced program.

Duplicated Headcount (Part C only): For each category count students completing one or more degree programs. Unlike Unduplicated Headcount, students completing more than one degree should be counted in each program.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Male, Female, All Other, Unknown: For students whose gender is known, report male and female students in the sections labeled as such; for all other students including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female, report in the section labeled All Other. For students whose gender is unknown or prefer not to disclose, report in the section labeled Unknown.

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

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- **Indigenous:** A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
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- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

International/Domestic Students: Not listed as a category of race is the former "Visa or Nonresident Alien," which referred to international students of any race. That former category is now treated separately in Part B as "International" (vs. "Domestic"). Include in the "International" count anyone who is considered by the member school to be an international student. Include in the "Domestic" count all others. The Part B total should equal the Part A total, since Part A counts all students (including international students), while Part B counts the same by international/domestic student status.

Annual Report Form CF-2: Completions by Time and Race

Previous academic year (including any summer graduates) Complete form CF-1, Completions (Race and Gender) before completing this form.

Member School:

Survey Year: 2026 - 2027

Unduplicated Headcount by Time and Race/Ethnicity

Asian or PI Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Asian or PI Completions									
Black (Non-Hispanic) Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Black (Non-Hispanic) Completions									
Hispanic Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Hispanic Completions									
Indigenous Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Indigenous Completions									

Annual Report Form CF-2: Completions by Time and Race

Previous academic year (including any summer graduates) Complete form CF-1, Completions (Race and Gender) before completing this form.

Member School:

Survey Year: 2026 - 2027

White (Non-Hispanic) Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total White (Non-Hispanic) Completions									
Multiracial Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Multiracial Completions									
Not Available Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Not Available Completions									
Time Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
< 2 years									
2 to < 3 years									
3 to < 4 years									
4 to < 5 years									
5 to < 6 years									
6+ years									
Total Completions									

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Annual Report Form CF-2: Completions by Time and Race

Previous academic year (including any summer graduates) Complete form CF-1, Completions (Race and Gender) before completing this form.

Member School:

Survey Year: 2026 - 2027

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Completions: Count how many students in each category completed their degree in the previous academic year (including those who completed their degree requirements in the summer).

Unduplicated Headcount: Count students only once. If students completed more than one degree, count them only in the longer or more advanced program.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

- **Asian or PI:** A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or Pacific Islands. This includes people from Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; or people from American Samoa, Guam, Hawaii, or other Pacific Islands.
- **Black (Non-Hispanic):** A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
- **Hispanic:** A person of Latin descent, including Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin.
- **Indigenous:** A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
- **White (Non-Hispanic):** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

Annual Report Form CF-3: Completions by Placement and Gender

Previous academic year (including any summer graduates) Complete form CF-1, Completions (Race and Gender) before completing this form.

Member School:

Survey Year: 2026 - 2027

Unduplicated Headcount by Placement and Known Gender

Male Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Vocational placement									
Non-vocational placement									
Further study									
Seeking placement									
Other									
Unknown									
Total Male Completions									
Female Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Vocational placement									
Non-vocational placement									
Further study									
Seeking placement									
Other									
Unknown									
Total Female Completions									
All Other Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Vocational placement									
Non-vocational placement									
Further study									
Seeking placement									
Other									
Unknown									
Total All Other Completions									

Part A.2: Unduplicated Headcount by Unknown Race/Ethnicity and Unknown Gender

Unknown Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Not Available									

Annual Report Form CF-3: Completions by Placement and Gender

Previous academic year (including any summer graduates) Complete form CF-1, Completions (Race and Gender) before completing this form.

Member School:

Survey Year: 2026 - 2027

Unduplicated Headcount by Placement Totals

Total Completions	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Vocational placement									
Non-vocational placement									
Further study									
Seeking placement									
Other									
Unknown									
Total Completions									

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Completions: The data being reported on this form (corresponding to the numbers reported in CF-1 Completions by Race and Gender) reflect the placement of graduates before, at, or following their graduation. Schools can collect placement data anytime between six months before the last graduation (in the previous academic year) and six months after the last graduation, though collecting information just before graduation may provide better results.

Unduplicated Headcount: Count students only once. If students completed more than one degree, count them only in the longer or more advanced program.

The placement categories are described below (the first three of which are considered "positive" placements):

- Vocational placement:** Graduates are in positions for which the degree program prepared them, regardless of whether those positions are compensated or volunteer. Include here any graduates who were placed prior to graduation, at graduation, or following graduation.
- Non-vocational placement:** Graduates received degrees in programs which they sought for non-vocational reasons, such as for personal enrichment. Include here any graduates not seeking vocational placement, regardless of whether they were placed vocationally.
- Further study:** Graduates are pursuing additional education—at any level. Any students pursuing further study who are also vocationally or non-vocationally placed should be listed there, not here.
- Seeking placement:** Graduates are actively seeking appropriate placement. Any students seeking placement who are also pursuing further study should be listed there, not here.
- Other:** Graduates have positions or placements that do not fall within any of the above categories.
- Unknown:** The placement status of graduates is not known. Schools should not use this category to justify not tracking their graduates' placements, since doing so is required. However, schools may use this category when, despite their best efforts, some graduates' placement status remains unknown. Schools reporting at least 50% as "Unknown" will be monitored by the ATS Board of Commissioners (see ATS [Policies and Procedures](#) III.M.1).

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Male, Female, All Other, Unknown: For students whose gender is known, report male and female students in the sections labeled as such; for all other students including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female, report in the section labeled All Other. For students whose gender is unknown or prefer not to disclose, report in the section labeled Unknown.

Annual Report Form CF-4: Completions, Graduation and Persistence Rate

Fall data for students who entered at the time listed for each program

Member School:

Survey Year: 2026 - 2027

Degree Program (Count only degree-seeking students)	Entered	Still Enrolled	Graduated with Degree Began	Graduated with Another Degree	Graduation Rate (degree began)	Persistence Rate
	# who entered at time listed	# Entered still enrolled in this degree or in another degree	# Entered who graduated with degree began	# Entered who graduated with another degree	# Graduated with Degree Began divided by # Entered (can't exceed 100%)	# Graduated (both columns) plus # Still Enrolled divided by # Entered (can't exceed 100%)
MDiv students who entered 6 years ago this fall						
MA (prof) students who entered 4 years ago this fall						
MA (acad) students who entered 4 years ago this fall						
MA (both) students who entered 4 years ago this fall						
ThM/STM students who entered 2 years ago this fall						
DMin students who entered 6 years ago this fall						
Other Prof Dr students who entered 6 years ago this fall						
PhD/ThD students who entered 8 years ago this fall						
Total Numbers for the Member School						

Overall Graduation Rate for the Member School

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Annual Report Form CF-4: Completions, Graduation and Persistence Rate

Fall data for students who entered at the time listed for each program

Member School:	Survey Year: 2026 - 2027
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Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Instructions: Complete only the lines for those degree programs that the member school offers, leaving blank any that are not offered or are too new to have graduates. The number of years allotted to complete each degree below represents *about twice the usual amount of time* that degree takes to complete by a full-time student. That means the "Graduation Rate" is based upon a *200% completion rate* to account for the high percentage of part-time students in graduate theology programs. This form also adds new columns to account for students who are *Still Enrolled* or who *Graduated with Another Degree*.

Still Enrolled, indicates students who are still enrolled in the member school, even if they switched to another degree (to prevent the "Persistence Rate" for the other degree from exceeding 100%).

Graduated with Degree Began, indicates students who graduated with the degree in which they began in the specified time.

Graduated with Another Degree, indicates students who originally began in one degree but switched to and graduated with another degree. Be sure to list such students in the row of their original degree; otherwise, the "Graduation Rate (degree began)" could exceed 100% if put in another row.

Graduation Rate (degree began) measures those who completed their original degree in the time specified. Graduation Rate (degree began) in the Total Number for the Member School row represents the overall graduation rate for students that completed their original degree and is calculated as the total of "Graduated with Degree Began" divided by the total of "Entered".

Persistence Rate measures all those who graduated (with degree began or another degree) and all those who are still enrolled (in degree began or another degree). While the term "persistence rate" has varying definitions in higher education, it is used here to indicate those who are still enrolled in the member school (in any program), along with those who already graduated (with any degree). Persistence Rate in the Total Numbers for the Member School row represents the overall persistence rate and is the total Graduated (both columns) plus the total Still Enrolled divided by the total Entered.

Overall Graduation Rate for the Member School (vs. a graduation rate *for each degree*) includes students that graduated with any degree not just the program in which they began. This value is auto calculated as the Total Numbers for the Member School row is the total of "Graduated with Degree Began" plus the total of "Graduated with Another Degree" divided by the total of "Entered".

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Annual Report Form EF-1: Enrollment by Race and Gender

Fall data for current academic year

Member School:

Survey Year: 2026 - 2027

Part A.1: Unduplicated Headcount by Race/Ethnicity and Known Gender

Male Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Male Enrollment										
Female Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total Female Enrollment										
All Other Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Total All Other Enrollment										

Part A.2: Unduplicated Headcount by Unknown Race/Ethnicity and Unknown Gender

Unknown Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Not Available										

Annual Report Form EF-1: Enrollment by Race and Gender

Fall data for current academic year

Member School:

Survey Year: 2026 - 2027

Part A: Unduplicated Headcount by Race/Ethnicity Totals

Total Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Asian or PI										
Black (Non-Hispanic)										
Hispanic										
Indigenous										
White (Non-Hispanic)										
Multiracial										
Not Available										
Part A Total Enrollment										

Part B: Unduplicated Headcount by International and Domestic

Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
International										
Domestic										
Total										
List here the top three countries (by headcount) of all your enrolled international students:				1.	2.			3.		

Part C: Duplicated Headcount

Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Duplicated Headcount										

Part D: Credit Hours and FTE

Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	NonDegree	Total
Credit Hours Total										
FTE (full-time equivalency, auto calculated)										

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Enrollment data for the previous year can be reviewed in the online version of this form by selecting the previous year in the Survey Year pull-down menu.

Enrollment: Count only students taking courses for credit (exclude audit students) during the current fall semester (if the member school has a DMin program that offers summer courses instead of fall courses, then include those DMin summer enrollments in this form). Students in internships are counted only if awarded credit. Students enrolled in a cluster or consortium should be counted in the cluster or consortium if it is a separately accredited member of ATS; if it is not, count only those students whose primary registration is at the member school.

Unduplicated Headcount: Count students only once. If students enrolled in more than one degree, count them only in the longer or more advanced program.

Duplicated Headcount (Part C only): For each category count students enrolled in one or more degree programs. Unlike Unduplicated Headcount, students enrolled in more than one degree should be counted in each program.

Credit Hours refers to the total number of *semester* credit hours taken by students in that program this fall. If using *quarter* hours, divide by 1.5 to get semester credits. Schools using any other system should convert to semester credits using a reasonable method (e.g., Canadian schools that use the “course” system could count each course as 3 semester credits).

FTE (full-time equivalency) is a field automatically calculated by ATS, using the following formulae: (1) total credit hours divided by 12 for master's programs (based on an average of data submitted by member schools over the last five years), (2) total credit hours divided by 6 for doctoral programs (the lower number recognizes that doctoral students typically take fewer hours), and (3) total credit hours divided by 10 for non-degree programs.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees: those that focus primarily on professional vocations (prof), those that focus primarily on academic study (acad), and those that focus on both (both). Canadian schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (prof). “Other Prof Dr” refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Non-Degree Programs: refer to any programs and courses offered for credit that do not result in an ATS-approved degree. Canadian member schools should include Bachelor of Theology students here; Roman Catholic member schools should include pontifical degree programs here. Note: The 2020 *Standards of Accreditation* (Standard 3.15) describes these programs as with or without credit, report here only the for-credit non-degree programs.

Male, Female, All Other, Unknown: For students whose gender is known, report male and female students in the sections labeled as such; for all other students including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female, report in the section labeled All Other. For students whose gender is unknown or prefer not to disclose, report in the section labeled Unknown.

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

- **Asian or PI:** A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or Pacific Islands. This includes people from Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; or people from American Samoa, Guam, Hawaii, or other Pacific Islands.
- **Black (Non-Hispanic):** A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
- **Hispanic:** A person of Latin descent, including Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin.
- **Indigenous:** A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
- **White (Non-Hispanic):** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

International/Domestic Students: Not listed as a category of race is the former “Visa or Nonresident Alien,” which referred to international students of any race. That former category is now treated separately in Part B as “International” (vs. “Domestic”). Include in the “International” count anyone who is considered by the member school to be an international student. Include in the “Domestic” count all others. The Part B total should equal the Part A total, since Part A counts all students (including international students), while Part B counts the same by international/domestic student status.

Fall data for current academic year Complete form EF-1, Enrollment (Race and Gender) before completing this form.

Survey Year: 2026 - 2027

The online version of this form is pre-populated with the denominations for which students were reported on last year's form. (Only first-time completers will see a blank form.) Add additional denominations from the ATS denomination list as needed. Report as "Other" if the ATS list does not have the student's denomination and "Not Available" for students who prefer not to disclose such data or when denomination data is not known.

[illegible]

Respondent:		Phone:		Email:	
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Comments:

This form is pre-populated with the denominations for which students were reported on last year's form. (Only first-time completers will see a blank form.) Add additional denominations from the ATS denomination list as needed. Report as "Other" if the ATS list does not have the student's denomination and "Not Available" for students who prefer not to disclose such data or when denomination data is not known.

Denomination List		
<u>Adventist Bodies</u> Advent Christian Church Seventh-day Adventist <u>Anglican</u> Anglican Church of Canada Episcopal Church Reformed Episcopal Church Anglican, Other Associated Gospel Churches of Canada <u>Baptist</u> American Baptist Churches USA Baptist Convention of Ontario and Quebec Baptist General Association of Virginia Baptist General Convention of Texas Baptist Missionary Association of America Baptist State Convention of North Carolina Canadian Baptists of Atlantic Canada Canadian Baptists of Western Canada Canadian National Baptist Convention Convention of Atlantic Baptist Churches Converge Worldwide Cooperative Baptist Fellowship Fellowship of Evangelical Baptist Churches in Canada General Association of General Baptists General Association of Regular Baptist Churches General Baptist State Convention of North Carolina Independent Baptist National Baptist Convention of America, Intl. Inc. National Baptist Convention, USA Inc. North American Baptist Conference Progressive National Baptist Convention Seventh Day Baptist General Conference South Carolina Baptist Convention Southern Baptist Convention Union d'Eglises Baptistes Francaises au Canada Venture Church Network Baptist, Other <u>Brethren</u> Brethren Church (Ashland, Ohio) Brethren in Christ Church Christian Brethren (Plymouth Brethren) Church of the Brethren Fellowship of Grace Brethren Churches Brethren, Other Buddhist <u>Catholic</u> Byzantine Catholic Roman Catholic Catholic, Other Christian and Missionary Alliance Church of God (Anderson, Indiana) Church of the Nazarene <u>Churches of Christ-Christian Churches</u> Christian Church (Disciples of Christ) Christian Churches and Churches of Christ	<u>Churches of Christ-Christian Churches</u> Churches of Christ Churches of Christ-Christian Churches, Other <u>Churches of God, General Conference</u> Church of God in Western Canada Evangelical Church in Canada Evangelical Congregational Church Evangelical Covenant Church Evangelical Formosan Church Evangelical Free Church of America Evangelical Free Church of Canada <u>Interdenominational/Multidenominational</u> Inter/Multidenominational Jewish Korean Evangelical Holiness Church <u>Lutheran</u> Augsburg Lutheran Churches Canadian Association of Lutheran Congregations Evangelical Lutheran Church in America Evangelical Lutheran Church in Canada Lutheran Church-Canada Lutheran Church-Missouri Synod Lutheran Congregations in Mission for Christ North American Lutheran Church Wisconsin Evangelical Lutheran Synod Lutheran, Other <u>Mennonite</u> Conference of Mennonites Mennonite Brethren Church in North America Mennonite Church Canada Mennonite Church USA Mennonite, Other <u>Methodist</u> African Methodist Episcopal African Methodist Episcopal Zion Christian Methodist Episcopal Free Methodist Church Global Methodist Church Independent Methodist Korean Methodist Church in America United Methodist Church Wesleyan Church Methodist, Other Missionary Church in Canada Moravian Church in North America Muslim National Association of Congregational Christian Churches Nondenominational Not Available <u>Orthodox</u> Antiochian Orthodox Christian Archdiocese of North America Greek Orthodox Archdiocese of America Orthodox Church in America Ukrainian Orthodox Church of the USA	<u>Orthodox</u> Orthodox, Other <u>Pentecostal</u> Assemblies of God Church of God (Cleveland, Tennessee) Church of God in Christ Foursquare Gospel Church Pentecostal Assemblies of Canada The Foursquare Church United Pentecostal Church International Pentecostal, Other <u>Presbyterian</u> Associate Reformed Presbyterian Church Cumberland Presbyterian Church ECO: A Covenant Order of Evangelical Presbyterians Evangelical Presbyterian Church General Assembly of World Presbyterian Church Korean American Presbyterian Church Korean Presbyterian Church Abroad Korean Presbyterian Church in America (Kosin) Orthodox Presbyterian Presbyterian Church (U.S.A.) Presbyterian Church in America Presbyterian Church in Canada Presbyterian Church International Reformed Presbyterian Presbyterian, Other <u>Reformed</u> Canadian Reformed Churches Christian Reformed Church Heritage Reformed Congregations (USA and Canada) Reformed Church in America Reformed Church in Canada Reformed, Other <u>Religious Society of Friends</u> Friends, Quaker Religious Society of Friends, Other Salvation Army <u>Swedenborgian Church</u> General Church of New Jerusalem Swedenborgian Church, General Convention Unitarian Universalist United Church of Canada United Church of Christ Other

Annual Report Form EF-4: Previous Year Enrollment

Previous academic year

Member School:

Survey Year: 2026 - 2027

Degree Program	Unduplicated Total	Total Credit Hours
MDiv		
MA (all types)		
ThM/STM		
DMin		
Other Prof Dr		
PhD/ThD		
Non-Degree		
Total Enrollment for Previous Academic Year		

Respondent and Comments

Respondent:		Phone:		Email:	
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Comments:

Legend: Total rows/columns are auto calculated and visually indicated with blue stripes in the online application and light blue shading in the print forms. Non-approved degree categories, those for which the member school does not have an ATS-approved degree, are visually indicated with a yellow zig-zag pattern in the online application and gray shading in the print forms. Report data for non-approved degrees where applicable and provide an explanation in the form comments.

Previous Year Enrollment: Count only students taking courses for credit (exclude audit students) during the previous academic year (fall, spring, and summer terms, i.e., 12 months). Students in internships are counted only if awarded credit. Students enrolled in a cluster or consortium should be counted in the cluster or consortium if it is a separately accredited member of ATS; if it is not, count only those students whose primary registration is at the member school.

Unduplicated Headcount: Count students only once. If students enrolled in more than one degree, count them only in the longer or more advanced program.

Degree Categories: The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees, all of which are included in MA (all types). Canadian schools offering the BRE for which a completed bachelor's degree is normally required should report those students under MA (all types). "Other Prof Dr" refers to degrees like the EdD, DMiss, DMA, etc. (see Standards 5.-7-10 of 2020 *Standards of Accreditation*).

Non-Degree Programs: refer to any programs and courses offered for credit that do not result in an ATS-approved degree. Canadian member schools should include Bachelor of Theology students here; Roman Catholic member schools should include pontifical degree programs here. Note: The 2020 *Standards of Accreditation* (Standard 3.15) describes these programs as with or without credit, report here only the for-credit non-degree programs.

Annual Report Form EF-5: Enrollment Offsite and Online

Fall data for current academic year

Member School:

Survey Year: 2026 - 2027

PART A: OFFSITE ENROLLMENT (Additional locations offering at least one-fourth of a degree)

Complete this section for all additional locations offering one-fourth or more of a degree. If students at any such offsite locations complete *some of their class sessions online*, **count them here only if they take the majority of their class sessions offsite** (i.e., in person at that site, not online). For example, if they take 8 of 15 class sessions in person at the additional location and take 7 of those 15 sessions online, then count them here (per *ATS Policies and Procedures*, IV.F.2). Do not count any student more than once, if no students take the majority of their class sessions offsite enter zero. NOTE: ATS [Policies and Procedures](#) (IV.E.1-3) require permission to offer courses at offsite locations that offer at least one-fourth (25%) of a degree.

Name of location (e.g. Orlando Center, Indy Site)	Site location (City, State/Province)	# of students enrolled this Fall	Percent of degree offered at site*

*For each location report the percent of degree based on the highest portion of any degree offered. Report as 25% - 49%, 50% - 99%, or 100%

Part B: ONLINE ENROLLMENT (Distance Education)

1. How many students this fall are enrolled only online?	
2. How many students this fall are enrolled partly online?	
3. How many students this fall are enrolled in no online courses?	
Total (auto calculated):	

The "Total" above must be the same as the total fall enrollment from EF-1, i.e., include all on-campus, off-campus, and online students.

4. What percentage of each program is offered online?					
MDiv	MA	ThM/STM	DMIN	Other Prof Dr	PHD/ThD

5. What percent of your courses this fall CAN be taken **completely** online? ☐ 0% ☐ < 50% ☐ ≥ 50% ☐ 100%

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Enrollment: Count only students taking courses for credit (exclude audit students) during the current fall semester (if the member school has a DMin program that offers summer courses instead of fall courses, then include those DMin summer enrollments in this form). Students in internships are counted only if awarded credit. Students enrolled in a cluster or consortium should be counted in the cluster or consortium if it is a separately accredited member of ATS; if it is not, count only those students whose primary registration is at the member school.

Unduplicated Headcount: Count students only once. If students enrolled in more than one degree, count them only in the longer or more advanced program.

Part B: Online Enrollment (Distance Education):

Completely online courses are courses that CAN be completed entirely online, even if those same courses are also available to be completed onsite by other students.

Partly online/"hybrid" courses are courses that CAN be completed partly online, even if those same courses are also available to be completed onsite by other students; however, these courses CANNOT be completed entirely online.

Enrolled **only** online (B.1) = students enrolled only in completely online courses.

Enrolled **partly** online (B.2) = students enrolled only in partly online/"hybrid" courses OR enrolled in two or more course types: onsite, partly online, completely online.

Enrolled in **no online** courses (B.3) = students not enrolled in any online courses (whether they are offered fully online or partly online).

Completely online degree

Annual Report Form PF-1: Personnel: Select Administrators and Full-Time Faculty

Fall data for current academic year (for member school only)

Member School:

Survey Year: 2026 - 2027

This form is pre-populated with the personnel information we currently have on file for the member school including previously reported and new personnel information we acquired throughout the year from communications, event registrations, and other surveys.

Review each person's details for accuracy and delete any personnel that do not meet the form criteria. Details listed are an extract of the requested information please open each person's record to review the details in full.

A. Name and Contact Information

What is this person's formal name? note: there is a separate field for their preferred "goes by" name.

1a. First Name:	1b. MI:	1c. Last Name:	1d. Suffix:
2. What is this person's preferred form of address (i.e., Dr., Rev., etc.)?		3. If this person goes by another name, what is that name?	
4. Business Email	5a. Business Phone	5b. Ext.	5c. Check if number is NOT North American
			[]

B. Personnel Profile

1. Does the member school share this person with another entity?		
Member schools related to another entity (e.g., department in a university) may "share" certain personnel with the other entity. For <i>shared faculty</i> , include here only those who teach at least half-time in the member school; include those who teach less than half-time in form PF-2 Part-Time Faculty, even if they are considered full-time by the other entity. For <i>shared administrators</i> , include only those who have significant responsibility for the member school.		
2. Is this person new to the member school this year?		
3. Is this person a full-time employee?		
"Full-time" status is defined by the member school in keeping with its own policies and with any applicable state, provincial, or federal regulations.		
4. Does this person have one or more of the tracked administrative responsibilities? See instructions for list.		
4a. If yes, what is their administrative title?		
4b. What is this person's primary administrative role?		
4c. If this person has additional administrative responsibilities, list them here:		
5. Does this person have faculty status?		
5a. Is this person considered full-time faculty?		
5b. What is this person's faculty rank? If they do not have faculty status select Not Applicable.		
☐ Professor ☐ Associate Professor ☐ Assistant Professor		☐ Instructor ☐ Lecturer ☐ Not Ranked
		☐ School does not have faculty ranking ☐ Not Applicable (i.e., does not have faculty status)
5c. What is this person's tenure status? If they do not have faculty status select Not Applicable.		
For schools with tenure: ☐ Tenured ☐ Tenure Track ☐ Not tenure track		For schools without tenure: ☐ Multi-year contract/status ☐ One-year contract/status
		☐ Not Applicable (i.e., does not have faculty status)
6. What percent of this person's time is typically spent teaching? ☐ 0% ☐ 1 - 24% ☐ 25 - 49% ☐ 50 - 74% ☐ 75 - 99% ☐ 100%		
6a. If this person has teaching responsibilities, list that title here:		
6b. If this person has teaching responsibilities, what is(are) this person's teaching field(s)? Choose all that apply.		

C. Demographic Information Please supply as much information as is known (if not known, choose Not Available or leave blank)

1. Gender	2. Race	3. Denomination	4. Year of Birth	5. Ordained

D. Education Information

1. Does this person have an MDiv or equivalent?				
Complete the following for this person's highest degree earned:				
2a. Degree level	2b. Area of study	2c. Year earned	2d. School where degree earned	

Comment

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Annual Report Form PF-1: Personnel: Select Administrators and Full-Time Faculty

Fall data for current academic year (for member school only)

Member School:

Survey Year: 2026 - 2027

Respondent

Respondent:

Phone:

Email:

The "**administrative responsibilities**" refer to that administrator's primary function, not specific title, which may vary among ATS schools. For example, the chief executive officer (CEO) may be called president, principal, rector, or dean (for member schools related to another entity). If a person carries more than one administrative responsibility (e.g., the president is also the chief development officer), select both responsibilities for that person and indicate that person's primary responsibility in the online form following the instructions there.

Since ATS deals most frequently with the three contacts listed below as Member School Primary Contacts, it is especially important to list the persons with these administrative responsibilities (which may be the same person), but do not list more than one person for each.

Member School Primary Contacts:

- Chief Executive Officer (CEO), e.g., President, Principal, Rector, Dean*
- Chief Academic Officer (CAO), e.g., VP Academics or Academic Dean*
- Accreditation Liaison Officer (ALO), i.e., point person for accrediting matters

*The CEO and CAO are required; these responsibilities must be assigned to at least one person.

Additional Administrative Roles:

Academic Dean - Other	Director of Advancement	Director of Student Services/Affairs
Accounting Staff	Director of Assessment	Director/Chair of Academic Degree Program
Accreditation Liaison Officer (ALO)	Director of Career/Placement Services	Educational Technology Staff
Admissions Officer	Director of Communications	Executive Vice President
Alum Officer	Director of Continuing Education/Lifelong Learning	Facilities Director
Business Office Manager	Director of Doctor of Ministry	Financial Aid Officer
Business Office Staff	Director of Enrollment Management	HR Staff
Chief Academic Officer (CAO)	Director of Field Education	IT Help Desk Support
Chief Development Officer	Director of Financial Aid	Library Staff
Chief Diversity Officer	Director of Formation	Network Administrator
Chief Executive Officer (CEO)	Director of Graduate Studies	PC Technician
Chief Information Officer (CIO)	Director of Housing/Student Life	Recruitment Staff
Communications Staff	Director of Institutional Effectiveness	Registrar
Data Specialist	Director of Institutional Research	Title IX Coordinator
Dean of Chapel/Chaplain	Director of IT	VP-Administration
Dean of International Student Services	Director of Library	VP-Finance (CFO)
Dean of Students	Director of Marketing	VP-Operations/Facilities (COO)
Developer	Director of Online Education/Distance Learning/Digital Learning	VP/Director-HR
Development Professional Staff	Director of Recruitment/Retention	
Director of Admissions	Director of Relations (Alum, External, Church)	

Annual Report Form PF-1: Personnel: Select Administrators and Full-Time Faculty

Fall data for current academic year (for member school only)

Member School:

Survey Year: 2026 - 2027

Demographic Information:

Gender: For personnel whose gender is known, report as Male, Female, or All Other for personnel including but not limited to nonbinary, gender-fluid, and those who do not identify as either male or female. For personnel whose gender is unknown or prefer not to disclose, report as Not Available.

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

Asian or PI: A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or Pacific Islands. This includes people from Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; or people from American Samoa, Guam, Hawaii, or other Pacific Islands.

- **Black (Non-Hispanic):** A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
- **Hispanic:** A person of Latin descent, including Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin.
- **Indigenous:** A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
- **White (Non-Hispanic):** A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- **Multiracial:** A person whose origins are of two or more races.
- **Not Available:** A person whose race or ethnic identity is either unknown or information about that person is unavailable.

Denomination is the same list used for ATS Annual Report Forms EF-3 and IC-1.

Highest Degree Earned:

Degree level includes the degree levels of Associate's, Bachelor's, Master's, Professional Doctorate (e.g., DMin), and Research Doctorate (e.g., PhD).

Area of study refers to high-level disciplinary areas, rather than specific subjects, e.g., arts, business, education, science and engineering, social science, theology.

Higher Education

Behavioral and Social Sciences

Biology and Health

Business and Economics

Communication

Computer Science and Math

Education

Humanities and Cultures

Law

Leadership and Management

Other Higher Education

Performing Arts

Physical Science and Engineering

Political Science

Social Work

Visual Arts and Design

Theological Education

Area Studies (e.g., Black Church, Hispanic, Urban, Women's studies)

Arts (e.g., Religion and Literature, Church Music, Liturgical Theology)

Bible

Education

Ethics (e.g., Christian Ethics, Comparative Ethics, Moral Theology)

Formation (e.g., Spiritual Formation, Spiritual Theology)

History (e.g., Church History, Patristics)

Human Science (e.g., Sociology of Religion, Religion and Society)

Methods and Tools (e.g., Theological Bibliography)

Ministry-Counseling and Psychology

Ministry-Evangelism and Missiology

Ministry-Pastoral Formation (e.g., Church Administration, CPE, Pastoral Theology, Preaching)

Ministry-Practical Theology General

Other Theological Education

Religion (e.g., Buddhism, Comparative World Religions, History of Religions)

Theology (e.g., Philosophical Theology, Science and Religion, Systematic Theology)

School where degree earned includes an extensive list of the schools cited by personnel at member schools. This list is alphabetical and searchable by keyword, e.g., search "Chicago" for the University of Chicago or the University of Chicago Divinity School (in this example, be sure to choose the most appropriate listing for schools with more than one listing)

Annual Report Form PF-2: Personnel: Part-Time Faculty

Current academic year (for member school only, estimate as needed)

Member School:

Survey Year: 2026 - 2027

1. Does the member school employ part-time faculty? (If "No," please skip the rest of this form.)

ATS defines part-time faculty as anyone who teaches less than half-time (using the member school's own definition of full-time teaching load; see instructions to #3 below). That includes adjunct, affiliate, and sessional faculty who teach less than half-time but excludes field supervisors. Member schools related to another entity (e.g., a department in a university) should count as "part-time faculty" any faculty considered full-time by the other entity if they teach less than half-time in the member school.

2. Total Number of Part-Time Faculty (all part-time, plus any who teach full-time but only for part of the year)

Do not include here any full-time faculty on sabbatical who may be teaching part-time. In general, do not count here anyone who is also listed in ATS Salary Form SF-1 since those listed there are considered full-time faculty. Count here any administrators listed in SF-1 if they also teach less than half-time (excluding any administrators with faculty status since they are considered full-time faculty by position).

3. Full-Time Equivalent (FTE) for Part-time Faculty (divide the total number of credits taught by the part-time faculty listed in line 2 by the member school's definition of a full-time teaching load)

For example, if the member school employs 10 part-time faculty who teach a total of 45 credits for the full academic year and you define a full-time teaching load as 18 credits per year, then your part-time faculty FTE would be 2.5 (45/18). Schools that do not use credit hours to calculate full-time teaching load should use their own formula (e.g., some Canadian schools might use courses instead of credits to calculate FTE).

Respondent and Comments

Respondent:

Phone:

Email:

Comments:

Full data for current academic year (Includes only those personnel on the completed form PF-1) Complete form PF-1, Personnel (Administrators and Full-Time Faculty) before completing this form.

Survey Year: 2026 - 2027

[illegible]

For personnel shared with one or more member schools report the salary at 100% in only one member school's form, the other school(s) should check Paid by Another Entity. Which school is to report the data should be decided among the schools and should be consistent year to year.

Contract Salary: Enter the dollar amount of the current contract salary as of the fall reporting date. Include those on sabbatical leave, entering what salary and other remuneration would be given on a full-year basis (i.e., what the individual would receive if not on leave). List this as salary and not as a benefit. Exclude remuneration beyond the base contract salary for services rendered for overload teaching or administrative responsibilities. Exclude compensation for additional responsibilities.

Contributed Services: (This applies primarily to Roman Catholic institutions.) Enter the dollar amount of the value of contributed services. The value of such services should be determined by relating the contract salary of the individual to equivalent salaries and wages for similarly ranked personnel at the same or similar schools. If a faculty member teaches full-time at a reduced contract salary, an amount comparable to the reduction should be reported as contributed services so that the total salary is equivalent to similarly ranked personnel.

Housing: Enter the dollar amount paid for housing if this figure is in addition to the contract salary. Do not report the amount of the total salary that is designated as "housing allowance" for U.S. tax purposes for eligible (ordained) employees. Include this amount as part of the total Contract Salary. If a house itself is provided, a fair estimate of equivalent rent should be entered. Housing should be expressed in dollar values, not as a percentage of salary contract. Housing value does NOT refer to the portion of salary that is nonreportable for tax purposes. If room and board are provided, include their value as a dollar amount.

Added Benefits: Enter the dollar amount of all added benefits except pension. Added Benefits consist of such items as an automobile furnished by the member school for personal use of the administrator, health and life insurance programs, and all other benefits that are paid by the school. Do not include in Added Benefits compensation for services rendered for overload teaching or administrative responsibilities. Do not include remuneration for which there is no contract obligation. Do not include entertainment or travel reimbursement of officially incurred expenses.

Pension: Enter the dollar amount of the school's contribution to pension programs, including social security/social insurance. Do not include the individual's contributions to social security or to pensions by salary reduction.

TOTAL: The total compensation is auto calculated as the sum of Contract Salary, Contributed Services, Housing Value, Added Benefits, and Pension Payments.

Annual Report Form DF-1: Development data Most recently completed fiscal year (for member school only)	
Member School:	Survey Year: 2026 - 2027

PART I: SUMMARY OF ALL GIFT INCOME (Cash, Securities, Property, Products)								
NOTE: If the member school is related to another entity (e.g., a department in a university), report only for the member school, not for the total institution; see line 11).								
Line	Donor Purpose	\$s from INDIVIDUALS		Foundation (C)	\$s from ORGANIZATIONS		Other Orgs (F)	TOTAL (auto calculated)
		Alumns (A)	Friend (B)		Corporations (D)	Religious Orgs (E)		
A. Gifts for Current Operations (Annual Fund Gifts)								
1	Unrestricted							
2	Restricted (e.g., for student scholarships)							
3	Total Gifts for Current Operations (auto calculated)							
B. Gifts for Other Purposes (Not Annual Fund Gifts)								
4	Property, Buildings and Equipment							
5	Endowment: Unrestricted Income (including quasi-endowment or similar funds)							
6	Endowment: Restricted Income (including quasi-endowment or similar funds)							
7	Total Gifts for Other Purposes (auto calculated)							
C Total Gifts for All Purposes								
8	GRAND TOTAL OF ALL GIFTS (auto calculated, lines 3 + 8)							
9	Do the gifts reported above reflect the member school's engagement in a capital or comprehensive campaign?							
10	Is the development office focused exclusively on the member school or does it serve another entity?							
11	How many FTE development officers are focused on the member school (using school's own definition of FTE)?							

PART II - DETAILS ABOUT SELECTED GIFTS REPORTED IN PART I			
A. Donor Retention, Recapture, and Acquisition (include all donors, not just individuals)		Number of Donors	Percent of Donors
1 Number and percentage of donors this past year who also gave the previous year (donor retention)			
2 Number and percentage of donors this past year who have given before but not the previous year (donor recapture)			
3 Number and percentage of donors this past year who have never given before (donor acquisition)			
B. Alum Giving			Number of Alums
1 Number of alums on record (those for whom the member school has current contact information and may legally contact)			
		Number of Donors	\$ Amount
2 Number of alum donors and \$ amount given for all purposes (current operations and capital or endowment purposes)			
3 Number of alum donors and \$ amount given for only current operations			

Annual Report Form DF-1: Development data				
Most recently completed fiscal year (for member school only)				
Member School:			Survey Year: 2026 - 2027	
C. Board Giving (Include current, honorary, emeritus board members, as well as members of foundations and advisory boards*)			Number of Donors	\$ Amount
1. Number of board donors and \$ amount given for all purposes (current operations and capital or endowment purposes)				
2. Number of board donors and \$ amount given for only current operations				
3. Percent of board members giving (if related to another entity, do not include governing board members of the other entity; see instructions)				
D. Faculty/Staff Giving (For all purposes)			Number of Donors	\$ Amount
1. Number of faculty/staff donors (count only those serving at least half-time in the member school) and \$ amount given				
2. Percent of faculty/staff giving (count only those serving at least half-time in the member school)				
E. Giving by Size of Gifts (for all purposes)	Number of Gifts by Living Individuals	\$ Amount Given by Living Individuals	Number of Bequests by Deceased Individuals	\$ Amount from Bequests
1. \$1 million or more (7-figure gifts)				
2. \$100,000-\$999,999 (6-figure gifts)				
3. \$10,000-\$99,999 (5-figure gifts)				
4. \$1,000-\$9,999 (4-figure gifts)				
5. under \$1,000				
6. Total All Gifts (auto calculated, total of lines 1-5)				
* Unlike previous versions of this form, member schools related to another entity <i>should</i> include giving by advisory board members (see Standard 9.1 of the 2020 ATS Standards of Accreditation).				
Respondent and Comments				
Respondent:		Phone:	Email:	
Comments:				
INSTRUCTIONS FOR OVERALL FORM				
Data for the previous fiscal year (or in some cases, calendar year) are to be reported only for the member school. The member school may be related to another entity (e.g., a department in a university; see lines 11-12 in Part I.C), and some figures may be maintained for only the total institution as opposed to the individual school. In this instance, a formal designation should be agreed upon for the assignment of funds. We recommend that the member school develop a ratio of the budget of the school to the entire budget of the other entity.				
Round all figures to the nearest dollar. Zero (0) will be the equivalent of not applicable or no support was received, and "NA" (Not Available) will be where the information is not available.				
NOTE: The Voluntary Support of Education (VSE) Survey conducted by the Council for Advancement and Support of Education (CASE) is mirrored in many of the items requested in this form, since many ATS member schools complete the VSE Survey each year. If the member school wishes to participate in the VSE, please visit the VSE website .				
Include as voluntary support (all gift and grant income):				
• Gifts and grants to the member school, both restricted and unrestricted for current operations and capital purposes, regardless of form (cash, products, property, securities, life insurance contracts, etc.) • Gifts and grants to affiliated foundations and organizations created to raise funds for the member school • Cash payments returned as contributions from salaried staff • Insurance premiums paid by donors				
Do <u>not</u> include as voluntary support:				
• Pledges or commitments of financial support made but not received during the year • Gifts from affiliated foundations and organizations to the member school (because they are counted when RECEIVED by the affiliated foundation or organization, not when passed to the school itself)				

- Non-gift revenue earned by the fundraising function (e.g., from advertisements in alum magazines or event programs, sales of alum memorabilia, sales, raffles, etc.)
- Bequests not yet received from estate executors or administrators
- Revenue from contract research and other contracts (see “Nongovernment Grants and Contracts” below)
- Revenue from special education programs
- Membership fees for industrial liaison programs, corporate affiliate or associate programs, and the like
- Any public funds (e.g., government grants or contracts)
- Income from trusts, endowment, and other investments
- Student financial aid when the gift is in support of a specific student identified by name
- Contributed services, unless cash payments are returned as contributions
- Value of deferred giving contracts terminated due to the death of the income beneficiary during the year
- Tuition payments
- Governmental funds

Nongovernment Grants and Contracts

A differentiation must be made between grants and contracts when reporting a member school's gifts. Grant income from private, nongovernment sources should be included in a school's gift totals. **Contract revenue should not be included.** Both private grants and contracts may be awarded based on an unsolicited proposal. Both may be based on line-item budgets submitted to the awarding agency and may involve the school in at least the responsibility of periodic and final reports on the uses made of the funds. **The difference, however, between a private grant and contract** may be judged on the intention of the awarding agency and the legal obligation incurred by a school in accepting the award. For purposes of this form, a private grant, like a gift, is bestowed voluntarily and without expectation of any tangible compensation; it is donative in nature. A contract, on the other hand, is a written agreement, often negotiated, between the school and the awarding agency and is enforceable by law. Whereas a school has the legal responsibility for using funds received as gifts and private grants for the purpose specified by its donors, its obligation to the donor usually does not, and probably should not, exceed that limit. Its responsibility under a contract, on the other hand, normally involves the generation of some specified, tangible product or service, such as a report or research, often for the exclusive, first, or proprietary use of the contracting agency and is subject to certain standards of performance and the expectation of economic benefit on the part of the grantor. It is noted here again that government grants and other awards—whether local, state, federal, or foreign—should not be included in these reports.

Gift Valuation

- **Securities:** Member schools should report gifts of securities at market value on the date the donor relinquished control of the assets in favor of the school. Neither losses nor gains realized by the school's sale of the securities after their receipt nor brokerage fees or other expenses associated with this transaction should affect the value reported.
- **Real and Personal Property:** Major gifts of real and personal property—such as land, houses, paintings, antiques, and rare books—should be reported at the fair market value placed on them by an independent, expert appraiser. Gifts of real and personal property—such as rare books and prints—with an apparent worth of less than \$5,000 may be valued by a staff member of the member school with some expertise—such as a librarian or professor of art—and that informal valuation may be used for school reporting purposes. Ideally, gifts made for AUCTION should be treated as any other property gift and be valued when and as received, not when they are auctioned off for more or less than their appraised value. Where dollar amounts are relatively insignificant, this standard can be relaxed, and auction proceeds can be used to value the gifts.
- **Charitable Remainder Trusts, Pooled Income Funds, and Gift Annuities:** Gifts made to establish charitable remainder trusts, contributions to pooled income funds, and gift annuities should generally be credited at fair market value (i.e., the full amount of the assets given). In those instances where it is anticipated that a portion of the principal will be returned to the beneficiary to meet a payout obligation, the gift's net realizable value (i.e., the remainder interest, as calculated by the member school for financial statement purposes) should also be reported on the line provided. For the purposes of this report, charitable remainder trusts should be reported as gifts for capital purposes (endowment and similar funds—restricted income) whether the remainder interest has been restricted for endowment.
- **Charitable Lead Trusts:** In reporting the value of a charitable lead trust, only the income received from it each year during the period of operation of the trust should be included in a member school's gift totals.
- **Trust Administered by Others:** The value of the assets of gifts in trust that the member school or the donor has chosen to have administered by others (not the school itself) should be included in the school's gift totals in the year given—provided the school has an irrevocable right to all or a predetermined portion of the income or remainder interest. **Caveat:** When a school is in the position to report the value of a newly established gift in trust, the source cited would be individuals, not other foundations and trusts. Also, once the value of the assets has been reported, neither it nor the interest earned should be included again in a subsequent report—for example, after the death of an individual who set up a charitable remainder trust.
- **Insurance:** A member school must be named both beneficiary and irrevocable owner of an insurance policy before a policy can be recorded as a gift. Schools should report the cash surrender value of the policy when given, rather than its face value, as the amount of the gift. If the donor pays further premiums on the policy, the school should include the entire amount of the premium payments in its gift totals. If the school elects to pay the premiums, it should consider those payments as operating expenditures and not report increases in the cash surrender value as gifts. The difference between the cash value of a policy at the time it is given to the school and the insurance company's settlement at the death of the donor should NOT be reported as a gift. However, when a school receives the proceeds of an insurance policy in which it was named beneficiary but not owner, the full amount received should be reported as a gift on the date received.

INSTRUCTIONS FOR PART I - SUMMARY OF ALL GIFT INCOME

All (100%) of your gift income should be reported somewhere in Part I. These instructions provide detailed definitions for the column and row/line categories used in Part I.

Enter bequests only under Individuals in columns A or B of Part I. Bequests given by donors without any restriction, regardless of any subsequent designation by the member school, should be reported on line 1 of the summary of all gift income as unrestricted gifts for current operations.

Include corporate foundation gifts, corporate matching gift dollars, and corporate product and property gifts in column D, Corporations, in Part I

Definitions of Sources (columns in Part I.A-B)

Sources of gifts are defined as those individuals or organizations, by type, that transmit the gift or grant to the member school or its foundation or affiliated fundraising organization. In those cases when a contribution passes through several entities—such as from an individual to an organization to the school or from one organization to another organization to the school—the last of the entities through which it passes before being received by the school should be cited as the gift source. Examples: A gift from the personal foundation of an alumnus should be identified as coming from foundations. Contributions made by individuals to a church, and then by the church to a school, should be recorded as a gift from religious organizations rather than as a number of gifts from individuals. **Caveat:** For this report, contributions from business firms made through their sponsored foundations, such as the Exxon Education Foundation and the General Electric Foundation, should be recorded as coming from corporations and businesses.

Individuals (columns A-B): "Individuals" may be categorized as "Alums" or "Friends." ATS defines "alums" as former students who have earned some credit toward an ATS-approved degree offered by the member school, though schools may choose to define this term differently if they wish (e.g., only former students *who earned a degree* from the school). ATS defines "Friends" as any non-alum individuals who give to the member school.

Organizations (columns C-F): See definitions below.

- **Foundations (column C):** Private tax-exempt entities, whether corporate or trust in legal form, that have been established and are operated exclusively for charitable purposes. **Caveat:** Not all grant-making organizations that use the word "foundation" in their titles should be included in this category. The National Science Foundation, for example, is not a private tax-exempt entity.
- **Corporations (column D):** Corporations, partnerships, and cooperatives that have been organized for profit-making purposes include corporations owned by individuals and families and other closely held companies. Also included in this category are business sponsored foundations (i.e., those organizations that have been created by business corporations and that have been funded exclusively by their companies). Also included are industry trade associations. **Caveat:** A distinction should be made between a gift paid from the business account and one from the personal account of a person who operates a personal or family-owned business or is a participant in a partnership or cooperative. A check drawn from a business account should be credited to the corporation category for the purpose of this report. Also, certain private foundations carry names that may cause them to be confused with corporations and businesses. As an example, the Ford Foundation was established with the personal gifts of Henry and Edsel Ford, not by the Ford Motor Company; therefore, gifts from the Ford Foundation should be included in the totals reported under foundations and trusts. Gifts from the Ford Motor Company Fund, as well as those from the General Electric Foundation and the Quaker Oats Foundation, are from business-sponsored foundations and should be reported under corporations and businesses. Guidance may be obtained from the [Foundation Directory](#), which cites the principal donor of each foundation's assets.
- **Religious Organizations (column E):** Includes churches, synagogues, and temples and their denominational entities, hierarchies, orders, and service groups. Sources from religious organizations should include gifts as well as ecclesial assessments, subsidies, and apportionments used for operations.
- **Other Organizations (column F):** All organizations not defined above as foundations, corporations and businesses, or religious organizations. Examples include fraternal organizations. Alumni/ae association gifts should be counted as coming from alums. **Caveat:** Seminary or divinity member school-affiliated foundations and associations (as well as alumni/ae association chapters) that have been organized solely for the support of the school with which they are affiliated should be considered a part of the school itself. As an example, a gift made by an alum to a chapter of her school's alumnae organization should be recorded as a gift from alums rather than from other organizations.

Definitions of Purposes (rows/lines in Part I.A-B)

With one exception, report a gift's purpose as it was specified by the donor. In other words, how the member school chooses to use unrestricted gifts has no bearing on their status as unrestricted gifts—they should be reported as UNRESTRICTED. The one exception is Charitable Remainder Trusts. Regardless of any donor-specified restriction, these gifts should be included on Endowment: Income Restricted (line 6) because, by their nature, this is how they effectively must be treated by the school, given the form in which they were provided by the donor.

Part I.A Gifts for Current Operations (Annual Fund Gifts)

- **Unrestricted (line 1):** Gifts in any form given as part of the member school's annual fund efforts, given by donors without any restriction, regardless of any subsequent designation by the school for current operations (gifts for endowment or to construct facilities are report in Part I.B). In cases where the donor expresses a preference but leaves usage decision to the school, the gift should be reported as unrestricted. For purposes of this report, matching gifts from corporations should be reported as unrestricted unless company-specified terms of the matching gift state otherwise.
- **Restricted (line 2):** Gifts for current operations that have been restricted by the donor for a particular purpose, e.g., student scholarships. Formerly, this section of DF-1 listed a half dozen or more specific purposes (e.g., academic divisions or research) but those specific purposes were rarely used by member schools so are deleted here.

Part I.B Gifts for Other Purposes (Not Annual Fund Gifts)

- **Property, Buildings, and Equipment (line 4):** Gifts of both real and personal property for the use of the member school, as well as gifts made for the purpose of purchasing buildings and other facilities (e.g., library) or land for use of the school; constructing or providing major renovations of building and other facilities (e.g., library); and retirement of indebtedness. As an accounting convenience, gifts of \$10,000 or less used to purchase, renovate, or construct a facility may be considered as restricted for Current Operations: Operation and Maintenance of Physical Plant.
- **Endowment: Unrestricted Income (line 5):** Gifts restricted by donors for endowment but not bearing any restriction from the donor as to the use of the income the endowment produces. Include here unrestricted funds considered to be "quasi-endowment" or similar funds.
- **Endowment: Restricted Income (line 6):** Those gifts added to the endowment funds of the member school by donor direction, from which the income is limited by the donor for specific purposes or programs. Charitable remainder trusts should be included in this category whether the remainder interest has been restricted for endowment or not. The endowment funds are those that are required by donors to be retained and invested for income-producing purposes. A gift of property that is not used for institutional purposes but rather to produce income available to the education program should be considered endowment. Also, a gift of property that is retained for future sale or development should be considered endowment, even though income from it may be deferred until its sale or development. Include here unrestricted funds considered to be "quasi-endowment" or similar funds. **Examples:** A local businessman donates a motel he owns with the understanding that it will be sold, and the proceeds used to create an endowment honoring his deceased wife. A second businessman donates a motel, located near campus, but specifies that it is to be used as dormitory space. The first gift should be reported here under Endowment: Restricted Income; the second under Property, Buildings, and Equipment (line 4).

Part I.C Total Gifts for All Purposes

- **Line 8 (Grand Total of All Gifts):** This field is automatically calculated by adding the totals from line 3 in Part I.A and line 7 in Part I.B.
- **Line 9 (Capital/Comprehensive Campaign):** This question allows comparative data among member schools to be filtered by whether the school is actively engaged in a capital or comprehensive campaign, since such campaigns typically generate unusually high donations.
- **Line 10 (Development Office Focus):** This question allows data comparisons to be made based upon whether the development office represents only the member school or represents another entity (e.g., university advancement office or diocesan advancement office).
- **Line 11 (Development Office Size):** This question helps interpret the development data in light of the size of the development office (in staff FTE, using the member school's definition of full-time equivalency). For example, if the school has a full-time development officer, two half-time development staff, and the president spends half of his/her time on development, the FTE would be 2.5.

INSTRUCTIONS FOR PART II—SELECTED DETAILS ABOUT GIFTS REPORTED IN PART II

A. Donor Retention, Recapture, and Acquisition

1. **Number and percentage of donors this past year who also gave the previous year (donor retention):** Count those donors who meet the label description.
2. **Number and percentage of donors this past year who have given before but not the previous year (donor recapture):** Count those donors who meet the label description.
3. **Number and percentage of donors this past year who have never given before (donor acquisitions):** Count those donors who meet the label description.

B. Alum Giving

Alums are defined in the note (*) in Part I) as former students who have earned some credit toward an ATS-approved degree offered by the member school, though schools may choose to define this term differently if they wish (e.g., only former students who earned a degree from the school).

1. **Number of alums on record:** Count those living alums for whom the member school has current contact information and whom the school may legally contact.
2. **Number of alum donors for all purposes:** Count those living alums who donated to the member school for any purposes—both current operations and for capital or endowment purposes.
3. **Number of alum donors for only current operations:** Count those living alums who donated to the member school only for current operations.

C. Board Giving

Members of the governing board (current, honorary, emeritus, or advisory—both for the member school itself and for any foundation) contributing gifts for either current operations or for capital purposes (lines C.1 and C.2). Count the number of board members making one or more gifts (not the number of gifts) and the total dollar amount of all those gifts. Do not count here gifts that the board member may have “caused” to be given by a corporation or foundation over which they exert influence (see Part III).

1. **Number of board donors for all purposes:** Count those board members (as defined above) who donated to the member school for any purposes—both current operations and for capital or endowment purposes. Also count the total dollar amount of their giving.
2. **Number of board donors for only current operations:** Count those board members (as defined above) who donated to the member school only for current operations. Also count the dollar amount of their giving for current operations.
3. **Percent of board giving:** Count only those board members whom the member school would normally consider in this category (as defined above). For example, a stand-alone school that has a 15-member governing board, but no advisory board, would use 15 as the denominator to calculate this percentage. A school related to another entity with a 30-member governing board for the total institution and a 10-member advisory board for the school would use 10 as the denominator to calculate this percentage. If a stand-alone school with a 15-member governing board also has 5 emeritus trustees, then the school might use 20 as the denominator to calculate this percentage. In no cases should the percentage exceed 100%.

D. Faculty/Staff Giving (for all purposes)

1. **Number of faculty/staff donors (for all purposes):** As noted in the form itself, count only those who serve at least half-time in the member school (which is the definition of “full-time” used in the ATS Annual Report Forms; see Form PF-1). Also count the total dollar amount of their giving for all purposes.
2. **Percentage of faculty/staff giving:** As noted in the form itself, count only those faculty and staff who serve at least half-time in the member school when calculating this percentage.

E. Giving by Size of Gifts (for all purposes)

Lines 1-5: The ranges of gifts (“gift bands”) listed here are an attempt to provide a reasonable breakdown of gift sizes without being too detailed. The first two columns (# and \$) request data for living donors, while the last two columns request the same data for donations (“bequests”) from deceased individuals via wills or other types of testamentary gifts.

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Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

Are member school's finances integrally related to another entity?

Section 1.A applies to member schools whose finances are NOT integrally related to another entity (called here stand-alone schools). Section 1.B applies to member schools whose finances ARE integrally related to another entity, e.g., member schools that are part of a university. Complete only one of these two sections, the one most appropriate to the school's financial structure.

Section 1.A - Statement of Financial Position for Stand-alone Schools (if not, see Section 1.B below)

Line	Assets:	
1	Cash and equivalents	
2	Student accounts receivable, net of allowance	
3	Other receivables, net of allowance	
4	Contributions receivable (amounts due to member school for voluntary nonreciprocal transfers of cash or other assets; only legally enforceable promises are recorded as receivable, not intentions)	
5	Short-term investments	
6	Prepaid expenditures and inventories	
7	Notes receivable, net of allowance	
8	Property, plant and equipment, net	
9	Investments held for long-term purposes	
10	Total Assets (auto calculated from lines 1-9; must be the same as line 25 below)	
Line	Liabilities:	
11	Accounts payable	
12	Accrued expenditures	
13	Deferred revenue (follow current financial accounting standards and your audit; grant revenues are recognized when the promise is received, and amounts should be released from restriction when the expenditure for the grant is incurred)	
14	Student deposits	
15	Notes payable	
16	Annuity and split-interest obligations	
17	Grants refundable	
18	Long-term debt	
19	Liabilities other than those listed above (e.g., defined benefit plans)	
20	Total Liabilities (auto calculated from lines 11-19)	
Line	Net Asset:	
21	Without donor restrictions	
22	With donor restrictions - by time or purpose	
23	With donor restrictions - in perpetuity	
24	Total Net Assets (auto calculated from lines 21-23; must be same as Section 2, Part C, line 4, column D)	
25	Total Liabilities and Net Assets (auto calculated by adding lines 20 and 24; must be same as line 10 above)	

Section 1.B - Statement of Financial Position for Member Schools Related to Another Entity (e.g., part of a university)

Line	If the member school's finances are integrally related to another entity (e.g., part of a university), please respond to the following questions.	
1	Which one of the following best describes the expectations the other entity has for the member school in terms of annual operating results? ☐ A. End each fiscal year with any surplus (revenues in excess of expenses) ☐ B. End each fiscal year with a surplus sufficient to cover all or a portion of shared expenses from the other entity ☐ C. End each fiscal year with a balanced budget, but no surplus is expected ☐ D. There are no financial expectations for the member school from the other entity	
2	Is the member school expected to pay an annual fee allocated to it by the other entity to cover all or a portion of central costs?	
	A. If yes, what is the dollar amount of the fee?	
	B. If yes, how is the annual fee determined? ☐ fixed dollar amount ☐ percentage of revenues ☐ percentage of expenses	
3	What is the dollar amount that the member school has in investments that are held for long-term purposes (if none, put \$0):	
4	What is the dollar amount that the member school is responsible for in long-term debt (if none, put \$0):	

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Member School:

Survey Year: 2026 - 2027

Section 2 - Statement of Activities (All Member Schools, except Part C for Stand-alone Schools Only)

Part A and Part B apply to all member schools. Part C applies to member schools whose finances are NOT integrally related to another entity (called here stand-alone schools). If the member school's finances are integrally related to another entity (e.g., part of a university) report data only for the member school in a manner that fully reflects its complete operation. See additional instructions for Section 2 at the end of this form.

PART A – REVENUES, GAINS AND OTHER SUPPORT

Line	Revenues, gains and other support	A. Without Donor Restrictions	B. With Donor Restrictions (Time/Purpose)	C. With Donor Restrictions (In Perpetuity)	D. Total (auto calculated)
1	Tuition and Fees				
2	Government Grants, Contracts, and Appropriations				
3	Contributions from Religious Organizations				
4	Contributions from other Organizations & Individuals				
5	Value of Contributed Services				
6	Investment Income				
7	Net Realized Gains on Long-Term Investments				
8	Net Unrealized Appreciation (Depreciation)				
9	Other Sources				
10	Auxiliary Enterprises				
11	Net Assets Released from Restrictions (Total must = 0)				
12	Total Revenues, gains and other support (auto calculated from lines 1-11)				

PART B – EXPENDITURES AND LOSSES

Line	Expenditures and Losses	A. Without Donor Restrictions	B. With Donor Restrictions (Time/Purpose)	C. With Donor Restrictions (In Perpetuity)	D. Total (auto calculated)
1	Instruction				
2	Research				
3	Public Service				
4	Library				
5	Academic Support				
6	Student Services				
7	Admissions				
8	Institutional Support				
9	Operation and Maintenance of Plant				
10	Scholarships and Fellowships				
11	Auxiliary Enterprises				
12	Total expenditures and losses (auto calculated from lines 1-11)				

PART C – NET ASSETS (Stand-alone Schools Only)

Line	Net Assets	A. Without Donor Restrictions	B. With Donor Restrictions (Time/Purpose)	C. With Donor Restrictions (In Perpetuity)	D. Total (auto calculated)
13	Change in net assets (auto calculated, see instructions)				
14	Net assets, beginning of year (see instructions)				
15	Other changes to net assets (see instructions)				
16	Net assets, end of year (auto calculated from lines 1-3; must be the same as Section 1.A, line 24)				

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Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

Section 3 - Other Financial Data

Line	Deferred Maintenance						
1	What is the estimated cost of deferred maintenance for the member school's physical plant?						
2	Is this estimate based on a facilities study?			If yes, what year was the facilities study done?			
Line	Tuition Revenue and Scholarship Aid by Program	Masters*	DMin	PhD/ThD	Other Degrees	Non-Degree~	Total (auto calculated)
3	Gross Tuition and Fees Revenue (Total = Total of Section 2, Part A, line 1)						
4	Scholarship Expenses (Total = Total of Section 2, Part B, line 10)						
* Masters = any master's degree [MDiv, MA (prof), MA (acad), MA (both), ThM]; see Standard 4 in 2020 <i>Standards of Accreditation</i>. Canadian schools should include here the BRE for which a completed bachelor's degree is normally required. ~ Non-Degree refers to any programs that do not result in an ATS-approved degree. The most common are certificate programs, which may be taken with or without credit (see Standard 3.15 of 2020 <i>Standards of Accreditation</i>). Canadian schools should include Bachelor of Theology degrees here; Roman Catholic schools should include here any pontifical degree programs since they are not ATS-approved.							
Line	Federal Student Loans (only for member schools that participate in Title IV U.S. federal financial aid programs)						
5	Does the member school (or other entity if related to another entity) participate in US federal financial aid programs (Title IV)? If No, skip the rest of this section.						
6	Is the ATS Commission on Accrediting your "primary/gatekeeper" agency for Title IV funds?						
7	Has the US Dept. of Education notified the member school (or other entity, if related to another entity) of any compliance issues with Title IV?						
8	Number of graduates this past year who took out federal loans during their seminary/graduate program						
9	Percentage of graduates this past year who took out federal loans during their seminary/graduate program						
10	Total \$ amount of federal loans taken out by those who graduated this past year during their seminary/graduate program						

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Instructions for All Sections: Data are to be reported only for the member school in a manner that fully reflects its complete operation. If the school will not have audited figures by the submission deadline, **it may use unaudited data**. Do not submit an audit with this form, though the Commission on Accrediting might request a copy later. The instructions provide guidelines to use when figures need to be estimated or prorated. For any item on the report where exact data do not exist, give estimates.

Dues, periodically approved by the membership, are based on total expenditures, less scholarship and fellowship expenses—as reported in the prior year (e.g., 2022-2023 dues are based on expenditures reported on the fall 2021 Annual Report Forms). Total expenditures equal the amount reported on line 12 of Section 2, Part B of this form. Scholarship and fellowship expense is the amount reported on line 10 of Section 2, Part B.

Generally accepted accounting principles in the U.S. changed in recent years to reflect net assets as "without donor restrictions" and "with donor restrictions". For purposes of the finance forms, **the following definitions should be used** (Canadian schools should follow the instructions below, with explanations attached for any differences):

- **With Donor Restrictions (Time/Purpose):** Assets that have a donor-imposed restriction permitting the recipient organization to use or expend the donated assets as specified and that is satisfied either by passage of time or by organization actions. This was historically known as Temporarily Restricted. Canadian schools should report all restricted activities in this column.
- **With Donor Restrictions (in Perpetuity):** Assets that have a donor-imposed restriction stipulating those resources to be maintained permanently but permitting the use of part of or all the income derived from the donated assets (permanent endowment funds). This was historically known as Permanently Restricted. Canadian schools should report no amounts here.
- **Without Donor Restrictions:** All other assets fall into this category. Any assets that historically were board designated would appear in this net asset classification; only donors can restrict assets. This was historically known as Unrestricted.

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Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

Instructions for Section 2, Part A: Revenues, Gains, and Other Support

See *Instructions for All Sections* for the definitions of With Donor Restrictions (Time/Purpose) (*column B*), With Donor Restrictions (in Perpetuity) (*column C*) and Without Donor Restrictions (*column A*). *Column D, Total* will total the Without Donor Restrictions, With Donor Restrictions (Time/Purpose), and With Donor Restrictions (in Perpetuity) revenues from columns A, B, and C.

Line 1. Tuition and fees: Report all tuition and fees (including student activity fees) assessed against students for educational purposes. Include tuition and fee remissions or exemptions even if there is no intention of collecting from the student. The amounts of such remissions or waivers should also be reported as expenditures in Part B of Section 2 and classified as either scholarships or staff benefits depending upon the appropriate expenditure category to which the personnel relate. (Charges for room, board, and other services rendered by auxiliary enterprises are not reported here—they are reported on line 10.)

Line 2. Government grants, contracts, and appropriations: Include all amounts received by the institution through acts of a legislative body plus grants and contracts received from governmental agencies that are for specific research projects, training programs, and similar activities for which amounts are received or expenditures are reimbursable under the terms of a government grant or contract.

Line 3. Contributions from religious organizations: Report revenues from all religious organizations, including national denominational offices, regional units of denominations such as provinces and dioceses, and local churches. Report all revenues without donor restrictions in column (A), revenues with donor restrictions (time/purpose) in column (B), and revenues with donor restrictions (in perpetuity) in column (C). The entire contribution should be recognized as revenue when received regardless of when funds were expended.

Line 4. Contributions from individuals and others: Report revenues from individuals and others for which no legal consideration is involved, plus private contracts for specific services provided to the funder as stipulation for receipt of funds. Responses to annual appeals to members of churches or religious orders should be reported here as contributions from individuals. Include only those contributions that are directly related to instruction, research, public service, or other institutional purposes.

Line 5. Value of contributed services: Report estimated dollar amount of contributed services here. These services follow current financial accounting standards and are included for comparability to other schools' Educational and General expenditures. The gross value of personnel services should be determined by relating them to equivalent salaries and wages for similarly ranked personnel at the same or similar institutions, including the normal staff benefits such as group insurance and retirement provisions. The net value of such services would then be determined by subtracting the amount for living costs, maintenance, and personal expenditures incurred by the member school that are related to the contributing personnel and have no counterpart in a lay employee relationship. Contributed services also should be recognized according to current financial accounting standards if the services provided create or enhance nonfinancial assets or are provided by individuals possessing the required specialized skills and would normally be purchased if not donated, such as accountants, architects, carpenters, doctors, electricians, lawyers, nurses, plumbers, teachers, and other professionals and craft persons. The value of contributed service will also need to be reported as an expenditure under the appropriate function in Part B of Section 2, Expenditures Without Donor Restrictions.

Line 6. Investment income: Report the income with no restrictions generated from donor-restricted funds as investment income Without Donor Restrictions. Report the income of permanently restricted funds that have donor-imposed restrictions as investment income With Donor Restrictions (Time/Purpose). Do not include capital gains or losses.

Line 7. Net realized gains on long-term investments: Include only realized gains as appropriate.

Line 8. Net unrealized appreciation (depreciation): Report the unrealized appreciation (depreciation) of investments, Without Donor Restrictions, With Donor Restrictions (Time/Purpose), or With Donor Restrictions (in Perpetuity), according to governmental law and donor-imposed restrictions.

Line 9. Other sources: Include all revenues not reported elsewhere. Attach explanation if this line is more than 10 percent of total shown in line 12. Examples might include scholarly publications including university press, miscellaneous rentals and sales, expired term endowments, and terminated annuity or life income agreements, if not material. Include here revenues resulting from the sales and services of internal service departments to persons or agencies external to the institution (e.g., the sale of computer time).

Line 10. Auxiliary enterprises: Report all revenues generated by or collected from the auxiliary/ancillary enterprise operations of the institution that exist to furnish a service to students, faculty, or staff. These enterprises charge a fee that is directly related to, although not necessarily equal to, the cost of the service. Auxiliary/ancillary enterprises are managed as essentially self-supporting activities. Examples are residence halls, food services, student health services, student unions, and bookstores.

Line 11. Net assets released from restrictions: Once expenditures have been made in accordance with the donor's restriction, a release from this restriction is shown as a reduction in net assets With Donor Restrictions (Time/Purpose) or With Donor Restrictions (in Perpetuity) and an increase in net assets Without Donor Restrictions. The net of this transfer should always equal zero.

Line 12. Total revenues, gains, and other support: The program automatically totals here from lines 1–11.

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Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

Instructions for Section 2, Part B: Expenditures and Losses

See *Instructions for All Sections* for the definitions of With Donor Restrictions (Time/Purpose) (*column B*), With Donor Restrictions (in Perpetuity) (*column C*) and Without Donor Restrictions (*column A*). *Column D, Total* will total the Without Donor Restrictions, With Donor Restrictions (Time/Purpose), and With Donor Restrictions (in Perpetuity) revenues from columns A, B, and C.

Expenditures and Losses: These are the costs incurred for goods and services used to conduct the member school's operations, including plant costs and expenditures made to satisfy donor-imposed restrictions. All expenditures should be recorded in the Without Donor Restrictions column. No expenditures should be shown in the With Donor Restrictions (Time/Purpose) or With Donor Restrictions (in Perpetuity) columns. Any satisfaction of restrictions is recorded as a transfer to the Without Donor Restrictions column on line 11 of Part A in Section 2. The total Without Donor Restrictions expenditures from column A should automatically transfer to column D in line 12 of Part B in Section 2.

Line 1. Instruction: This line contains only the audit category of instruction and should include expenditures of the ATS member school for instruction and for departmental research and public service that are not separately budgeted elsewhere. Include expenditures for both credit and noncredit activities.

Line 2. Research: This category includes all funds expended for activities specifically organized to produce research outcomes and commissioned by an agency either external to the member school or separately budgeted by an organizational unit within the institution. Do not report non-research sponsored programs (e.g., training programs).

Line 3. Public service: Report all funds budgeted specifically for church and community service and expended for activities established primarily to provide services beneficial to groups external to the member school. Exclude instructional activities, such as noncredit instructional offerings, which should be included in line 1. Include here conferences, general advisory services, consulting, and similar noninstructional services to the community. Include public broadcasting services that are operated outside the context of instructional programs. Any broadcasting services conducted primarily for instruction should be under auxiliary/ancillary enterprises.

Line 4. Library: This category includes all estimated and true expenditures for organized activities that directly support the operation of the member school's library. See the instructions for Section 2, Part A, line 6, Value of Contributed Services. Total library expenditures should match the total expenditures reported on the ATS Library form (last line of LF-1).

Line 5. Academic support: Academic support should be reported net of Library expenditures.

Line 6. Student services: Report funds expended for activities whose primary purpose is to contribute to students' emotional and physical well-being and to their intellectual, spiritual, cultural, and social development outside the context of the formal instructional program. U.S. schools should **exclude** admissions and registrar activities and should report these separately on line 7. Examples of expenditures to be included on line 6 are career guidance, counseling, financial aid administration, and student health services except when operated as a self-supporting auxiliary enterprise.

Line 7. Admissions: Report funds expended for admissions and registrar activities. Exclude student counseling that should be included on line 6. Admissions has been identified as a separate item of expenditure because U.S. schools normally include this function under Student Services while Canadian schools include it under Institutional Support.

Line 8. Institutional support: Report expenditures for the day-to-day operational support for the member school, *excluding* expenditures for physical plant operations. Canadian schools should *exclude* admissions and registrar activities and should report these separately on line 7 Admissions. Include expenditures for general administrative services; executive direction and planning; legal and fiscal operations; and public relations, development, and all fundraising activities charged to current funds.

Line 9. Operation and maintenance of plant: Report all estimated and actual expenditures for operations established to provide service and maintenance related to grounds and facilities used for educational and general purposes. Also include expenditures for utilities, fire protection, property insurance, and similar items.

Line 10. Scholarships and fellowships: Report all expenditures given in the form of outright grants and trainee stipends to individuals enrolled in formal course work, either for credit or noncredit. Aid to students in the form of tuition or fee remissions should be included. **Exclude** remissions that are granted because of faculty or staff status; charge these to staff benefits. Do not report Work-Study Program expenses here; report these expenses where the student served (e.g., dining hall in line 1, faculty support in line 1).

Line 11. Auxiliary enterprises: This category includes those essentially self-supporting operations of the institution that exist to furnish a service to students, faculty, or staff, and that charge a fee that is directly related to, although not necessarily equal to, the cost of the service. Examples are residence halls, food services, student health services, student unions, and bookstores.

Line 12. Total expenditures and losses: The program automatically totals here from lines 1–11.

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Member School:

Survey Year: 2026 - 2027

Instructions for Section 2, Part C: Change in Net Assets (Stand-alone Schools Only)

Section 2, Part C. applies only to member schools whose finances are **NOT** integrally related to another entity (called here *stand-alone* schools).

See *Instructions for All Sections* for the definitions of With Donor Restrictions (Time/Purpose) (*column B*), With Donor Restrictions (in Perpetuity) (*column C*) and Without Donor Restrictions (*column A*). *Column D, Total* will total the Without Donor Restrictions, With Donor Restrictions (Time/Purpose), and With Donor Restrictions (in Perpetuity) revenues from columns A, B, and C.

Line 1. Change in net assets: The difference between total revenues, gains and other support, and total expenses and losses. The change in net assets is a useful measure to determine whether an organization is maintaining its net assets, drawing upon resources received in past periods, or adding resources that can be used to support future periods. That measure provides information that can be useful in assessing an organization's ability to continue to provide satisfactory levels of service. *Note:* Line 1 is automatically calculated by subtracting Section 2, Part B, line 12 (Total Expenditures and Losses) from Section 2, Part A, line 12 (Total Revenues, Gains and Other Support).

Line 2. Net assets, beginning of year: Enter the balance for each asset classification at the beginning of the fiscal year. Line 2 should equal the previous reporting year's "Net assets, end of year".

Line 3. Other changes to net assets: Include any adjustments to net assets not reported elsewhere. These might include extraordinary items, prior period adjustments, etc. If there are any figures reported in this area, please include an explanation in the form comments.

Line 4. Net assets, end of year: The program automatically totals here from lines 1–3. These amounts should agree with line 24 in Section 1.A, which adds lines 21-23.

Instructions for Section 3: Other Financial Data

Lines 1-2. These lines (formerly line 17 in Section 2, Part B) address the deferred maintenance cost associated with performing the needed repairs and capital renewal projects to keep existing facilities safe and functional. Many member schools have determined these costs through facilities studies; others will need to estimate costs more roughly. Some studies of academic facilities suggest that a typical building requires an expenditure of 2 percent replacement value per year to maintain and renew the facility. The school could use this figure to estimate deferred maintenance costs if no other data are available. Schools that are related to another entity should report the estimated deferred maintenance cost of buildings designated for use by the school.

Lines 3-4. These lines capture revenue and fees that are generated by broad degree programs, as well as non-degree programs, and compares these revenues to scholarship aid provided under these same programs.

Line 5: If the member school has a signed Program Participation Agreement (PPA) with the US Department of Education (USDE), mark "Yes." Member schools related to another entity (e.g., part of a university) should mark "Yes" if the other entity participates in Title IV programs (i.e., has a signed PPA).

Line 6: If the member school participates in Title IV programs, respond as follows: (1) If the school is stand-alone (not related to another entity) and is accredited only by the ATS Commission, mark "Yes." (2) If the school is stand-alone (not related to another entity) and has more than one accreditor (e.g., the ATS Commission and a regional or national accreditor), mark "Yes" or "No," depending on which accreditor the school has chosen as its "primary/gatekeeper" agency for Title IV funds (that information is typically designated by the school on its PPA with the USDE). (3) If the school is related to another entity (e.g., part of a university), mark "No" (ATS cannot serve as "primary/gatekeeper" agency for schools related to another entity).

Line 7: If the member school (or the related entity, if related to another entity) has been notified by the USDE of any compliance issues (e.g., being placed on Heightened Cash Monitoring status), mark "Yes."

Lines 8-10. These questions apply only to schools that participate in Title IV Federal Financial Aid programs operated by the U.S. Department of Education.

Annual Report Form FF-2: Financial Data for Technology Expenditures

Most recently completed fiscal year (for member school only) Complete form FF-1, Financial Data before completing this form

Member School: _____ **Survey Year:** 2026 - 2027

1. Which option best represents the member school's financial structure? ☐ Stand-alone ☐ Related to another entity (e.g., university)	
a. If related to another entity, does the member school rely on that entity for IT services?	
b. If "YES" to 1.a, is the member school charged a fixed fee for IT services? If Yes, report the \$ amount in line 2	
c. If "No" to 1.b, can you estimate the amount for the member school's IT services? If Yes, report the \$ amount in line 2	
2. Total dollars the member school spent on IT this past fiscal year, regardless of where budgeted (see categories in line 5 a-i below):	
3. Does the amount listed in line 2 above represent an unusually high amount due to special projects or special funding?	
4. What percentage of the member school's total expenditures last fiscal year is represented by the total spent on IT last fiscal year (listed in line 2 above): NOTE: If the member school is related to another entity (see 1 above), use the total expenditures only for the member school.	%

5. Allocation of IT expenditures for the following technology categories (leave blank any categories not used):				
Technology Category (if one system covers multiple categories, split if can)	Amount Spent Software/Licensing**	Cloud-based?	Name of Product (See examples below)	
(a) Cybersecurity *				
(b) Student Information System (SIS)			If specific SIS, list here (e.g., Populi, Jenzabar)	
(c) Learning Management System (LMS)			If specific LMS, list here (e.g., Canvas, Moodle)	
(d) Videoconferencing System			If specific one(s), list here (e.g., Zoom, Teams)	
(e) Financial/Accounting System			If specific one(s), list here (e.g., Oracle)	
(f) Student Financial Aid System			If specific one(s), list here (e.g., Banner)	
(g) Development/Fundraising System			If specific one(s), list here (e.g., Blackbaud)	
(h) Library			If specific one(s), list here (e.g., OCLC, EBSCO)	
(i) Other category not listed above (if any)			List here what other category:	

* Cybersecurity includes such things as Managed Detection and Response (MDR), Managed Threat Response (MTR), and/or Security Operations Center as a Service (SOCaaS).

** Do not include here hardware costs, which are covered in item 6 below, nor personnel costs (see item 8 below).

6. Amount spent on IT hardware last fiscal year (estimate, if exact amount not known):	
7. Does the member school have cyber insurance?	
a. If yes, what level of insurance? (Select from: ≤\$1 million, ≤\$5 million, ≤ \$10 million, > \$10 million)	
b. If yes, what amount did the member school spend for the last contract year?	
8. How many of the technology staff are considered full-time? (using school's own definition of full-time)	
9. How many of the technology staff are considered part-time? (number of staff working at least 10 hours per week on average)	
10. What is the technology staff full-time equivalency? (each "Full-time" = 1 FTE; "Part-time" FTE is calculated by dividing total number of part-time hours worked by 40)	
11. How many of the FTE listed in line 10 above are supplied by another entity?	
(For example, if the member school has an FTE of 3 technology staff and all are supplied by an outsourced IT company, then list 3 in both lines 10 and 11; if the school has an FTE of 4 technology staff and 3 of those FTE are supplied by another entity (e.g., a university if the member school is related to it), then list 4 in line 10 and 3 in line 11)	

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Instructions: Technology expenditures includes all forms of digital technology that the member school uses, including the categories listed in 5.a-i above. Please include here any IT expenditures regardless of where budgeted in the member school. For example, if technology for the library is budgeted under the library, please include that amount here also. If exact dollar amounts or percentages are not known for any category, use best estimate.

Annual Report Form IC-1: Institutional Characteristics

Fall data for current academic year (for member school only)

Member School:

Survey Year: 2026 - 2027

PART A – DENOMINATION AND RACE

1. Has the member school changed the denominations(s) to which it is formally related?

If yes, list the denomination(s) below; if more than one, indicate one as primary, if four or more, indicate Inter/Multidenominational as primary. (See denomination list at the end of this form)

Denomination	Primary

2. Has the primary race of the member school's student body changed since last year?

If yes, what is the primary race/ethnicity of enrolled students:

- ☐ **Asian or PI** - A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or Pacific Islands. This includes people from Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam; or people from American Samoa, Guam, Hawaii, or other Pacific Islands.
- ☐ **Black (Non-Hispanic)** - A person having origins in any of the black racial groups of Africa (except those of Hispanic origin).
- ☐ **Hispanic** - A person of Cuban, Mexican, Puerto Rican, Central or South American, or other Spanish culture or origin, regardless of race.
- ☐ **Indigenous** - A person having origins in any of the original peoples of North America and South America (including Central America) who maintains cultural identification through tribal affiliation or community recognition.
- ☐ **White (Non-Hispanic)** - A person having origins in any of the original peoples of Europe, the Middle East, or North Africa (except those of Hispanic origin).
- ☐ **Multiracial** - A person whose origins are of two or more races.
- ☐ **Not Available** - A person whose race or ethnic identity is either unknown or information about that person is unavailable.

3. Are most of the member school's students international?

Race/Ethnicity Categories: The categories of race used in this form (and in other ATS Annual Report Forms) correspond to recent research, with input from ATS members. Report as Multiracial for students whose race/ethnicity includes more than one category. Report as Not Available for students who prefer not to disclose such data, race/ethnicity is not listed, or no racial data is known.

PART B – ACCREDITATION INFORMATION

1. Below is the URL we have on file for the member school's Statement of Educational Effectiveness (see Standard 2.8 of the 2020 Standards of Accreditation). Review the link to confirm it is correct, functional, and current; update as needed.

☐ Reviewed and confirmed URL is correct, function and up to date.

PART C – STUDENT CHARGES PER PROGRAMS (the four programs listed below are most common and exclude ThM and Other Prof Dr)

Degree Program	Total Credits Required (A)	Tuition per Credit Hour (B)	Tuition Amount (C)	Other Fees Amount (D)	Total Annual Tuition and Fees (E)
MDiv					
MA (all types) *					
DMin					
PhD/ThD					

* **MA (all types):** The 2020 *Standards of Accreditation* (Standards 4.6-9) describe three categories of MA degrees, all of which are included in MA (all types). The only column to be completed for the MA (all types) row is "Tuition per Credit Hour (B)" since the other columns vary too much for most MA programs.

(A) Total Credits Required: The number of semester credits (see B below) required to complete that degree. For degree programs with varying lengths (e.g., a 90-credit MDiv and an accelerated 75-credit MDiv), use the one that enrolls the most students.

(B) Tuition per Credit Hour: Dollar amount of tuition charged per semester credit. If the member school uses the quarter hour system, multiply by 1.5. Member schools using other systems should convert to semester credits using a reasonable method (e.g., some Canadian schools using a "course" system might treat each course as the equivalent of 3 semester credits).

(C) Annual Tuition Charged: Dollar amount of tuition charged per academic year for a full-time student, calculated by multiplying the tuition charged per credit hour (column B) by the total credits required in that degree (column A) divided by the number of years a full-time student typically needs to complete that program. For example, if your MDiv program charges \$500 per credit hour and requires 72 credits and a full-time student typically enrolls in 12 credits per semester (24 per year), then the Annual Tuition Charged is \$12,000 (\$500 x 72 / 3 years)

(D) Annual Fees Charged: Dollar amount of fees (excluding tuition) charged per academic year to a full-time student, e.g., student services fee, technology fee, library fee, etc. Include only fees that are generally charged to all (or most all) students in that program every year.

(E) Total Annual Tuition and Fees: This dollar amount is calculated automatically by adding Columns C and D (and provides longitudinal data).

Respondent and Comments					
Respondent:		Phone:		Email:	
Comments:					

DENOMINATION LISTING

Adventist Bodies

Advent Christian Church
Seventh-day Adventist

Anglican

Anglican Church of Canada
Episcopal Church
Reformed Episcopal Church
Anglican, Other

Associated Gospel Churches of Canada

Baptist

American Baptist Churches USA
Baptist Convention of Ontario and Quebec
Baptist General Association of Virginia
Baptist General Convention of Texas
Baptist Missionary Association of America
Baptist State Convention of North Carolina
Canadian Baptists of Atlantic Canada
Canadian Baptists of Western Canada
Canadian National Baptist Convention
Convention of Atlantic Baptist Churches
Converge Worldwide
Cooperative Baptist Fellowship
Fellowship of Evangelical Baptist Churches in Canada
General Association of General Baptists
General Association of Regular Baptist Churches
General Baptist State Convention of North Carolina
Independent Baptist
National Baptist Convention of America, Intl. Inc.
National Baptist Convention, USA Inc.
North American Baptist Conference
Progressive National Baptist Convention
Seventh Day Baptist General Conference
South Carolina Baptist Convention
Southern Baptist Convention
Union d'Eglises Baptistes Francaises au Canada
Venture Church Network
Baptist, Other

Brethren

Brethren Church (Ashland, Ohio)
Brethren in Christ Church
Christian Brethren (Plymouth Brethren)
Church of the Brethren
Fellowship of Grace Brethren Churches
Brethren, Other

Buddhist

Catholic

Byzantine Catholic
Roman Catholic
Catholic, Other

Christian and Missionary Alliance

Church of God (Anderson, Indiana)

Church of the Nazarene

Churches of Christ-Christian Churches

Christian Church (Disciples of Christ)
Christian Churches and Churches of Christ

Churches of Christ-Christian Churches

Churches of Christ
Churches of Christ-Christian Churches, Other

Churches of God, General Conference

Church of God in Western Canada

Evangelical Church in Canada

Evangelical Congregational Church

Evangelical Covenant Church

Evangelical Formosan Church

Evangelical Free Church of America

Evangelical Free Church of Canada

Interdenominational/Multidenominational

Inter/Multidenominational

Jewish

Korean Evangelical Holiness Church

Lutheran

Augsburg Lutheran Churches
Canadian Association of Lutheran Congregations
Evangelical Lutheran Church in America
Evangelical Lutheran Church in Canada
Lutheran Church-Canada
Lutheran Church-Missouri Synod
Lutheran Congregations in Mission for Christ
North American Lutheran Church
Wisconsin Evangelical Lutheran Synod
Lutheran, Other

Mennonite

Conference of Mennonites
Mennonite Brethren Church in North America
Mennonite Church Canada
Mennonite Church USA
Mennonite, Other

Methodist

African Methodist Episcopal
African Methodist Episcopal Zion
Christian Methodist Episcopal
Free Methodist Church
Global Methodist Church
Independent Methodist
Korean Methodist Church in America
United Methodist Church
Wesleyan Church
Methodist, Other

Missionary Church in Canada

Moravian Church in North America

Muslim

National Association of Congregational Christian Churches

Nondenominational

Not Available

Orthodox

Antiochian Orthodox Christian Archdiocese of North America
Greek Orthodox Archdiocese of America
Orthodox Church in America
Ukrainian Orthodox Church of the USA

Orthodox

Orthodox, Other

Pentecostal

Assemblies of God
Church of God (Cleveland, Tennessee)
Church of God in Christ
Foursquare Gospel Church
Pentecostal Assemblies of Canada
The Foursquare Church
United Pentecostal Church International
Pentecostal, Other

Presbyterian

Associate Reformed Presbyterian Church
Cumberland Presbyterian Church
ECO: A Covenant Order of Evangelical Presbyterians
Evangelical Presbyterian Church
General Assembly of World Presbyterian Church
Korean American Presbyterian Church
Korean Presbyterian Church Abroad
Korean Presbyterian Church in America (Kosin)
Orthodox Presbyterian
Presbyterian Church (U.S.A.)
Presbyterian Church in America
Presbyterian Church in Canada
Presbyterian Church International
Reformed Presbyterian
Presbyterian, Other

Reformed

Canadian Reformed Churches
Christian Reformed Church
Heritage Reformed Congregations (USA and Canada)
Reformed Church in America
Reformed Church in Canada
Reformed, Other

Religious Society of Friends

Friends, Quaker
Religious Society of Friends, Other

Salvation Army

Swedenborgian Church

General Church of New Jerusalem
Swedenborgian Church, General Convention

Unitarian Universalist

United Church of Canada

United Church of Christ

Other

Annual Report Form LF-1: Library Information

Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

PART A – LIBRARY STRUCTURE

1. Library Structure:

- ☐ a. Library serves the member school as its primary mission and is not part of a larger library system
☐ b. Library serves the member school as its primary mission as a distinct unit of a larger library system
☐ c. Library serves the member school as part of its mission and is integrated into a larger library system
☐ d. Library serves more than one member school
☐ e. Library has another structure (explain here):

2. The data in PART B and PART C mostly represent: ☐ Library serving the member school ☐ Larger library system

3. To whom does the library director/manager for the ATS-serving entity report (check only one):

- ☐ Chief academic officer
☐ Another academic officer (e.g., associate dean)
☐ Head librarian (if part of/integrated into larger library)
☐ Information technology office
☐ Another office (please specify):

4. Check here if you do NOT want ATS to forward a copy of this information to Atla ☐

PART B – LIBRARY COLLECTIONS, USAGE, SERVICES

1. Library Collections (as of end of recently complete fiscal year)

Category	# Physical Items*	# Digital/Electronic Items*	% of e-collection shared with other libraries~	Total # Items (auto calculated)
Books				
Databases				
Media (AV, microforms, etc.)				
Serials / Periodicals				
Archives / Special Collections / Institutional Repositories				
Total (auto calculated)				

Select the unit of measure for Archives/Special Collections/Institutional Repositories: ☐ Items ☐ Linear Feet

* List number of cataloged titles in each category.

+ Count each database individually, even if access to several databases is gained through same vendor interface.

^ Include here any form of repository (e.g., archives), as well as any special collections, whether circulating or not.

~ Report % of e-collection shared with other libraries as 0%, <50%, = 50%, ~ 100%. "Shared" refers to portion of total digital/electronic titles reported above that are part of shared digital collection.

2. Library Usage (for recently completed fiscal year)

a. Circulation of Physical Items*	
b. Usage of Digital/Electronic Items*	
c. Interlibrary loans and documents <i>sent</i> to other libraries	
d. Interlibrary loans and documents <i>received</i> from other libraries	

* Report circulation of physical items as number of times those items were checked out from general/reserve collections; report usage of digital/electronic items whether viewed, downloaded, or streamed.

3. Library Services (for recently completed fiscal year)

a. Number of information interactions with individuals (onsite/online)*	
b. Number of <i>onsite</i> presentations to groups	
c. Number of <i>online</i> presentations to groups	
d. Number of participants in group presentations (estimate)	

* Include here all information services provided to individuals, e.g., transactions, consultations, and virtual reference services.

e. Check here any responsibilities the library has for the member school as a whole:

- ☐ Information Technology ☐ Repository/archives
☐ Writing/research center ☐ Bookstore
☐ Evaluation/assessment ☐ Other (Describe here):

f. Check here if library serves any constituencies other than the member school:

- ☐ Alumni/ae ☐ Local community ☐ Supporting church(es) ☐ Other (describe here):

Annual Report Form LF-1: Library Information

Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

PART C – LIBRARY STAFFING AND EXPENSES

1. Library Staffing (report number of FTEs, using the member school's definition of full-time)	
a. Librarians	
b. Other professional staff	
c. Total professional staff (auto calculated)	
d. All other paid staff (excluding student assistants)	
e. Student assistants (including any students in US federal aid "work study" program)	
f. Total library staffing in FTE (auto calculated)	
2. Library Compensation	
a. Total spent on library staff <i>salaries</i> (excluding benefits)	
b. Total spent on library staff <i>benefits</i> (include only those charged to library)	
c. Total amount spent on library staff compensation (auto calculated, salaries and benefits)	
3. Library Collection Expenses	
a. One-time purchase of print/digital books, serial backfiles, other materials	
b. Ongoing commitment to <i>print</i> subscriptions (e.g., print periodicals)	
c. Ongoing commitment to <i>online</i> subscriptions (e.g., databases, e-resources)	
d. All other materials expenses (e.g., document delivery, ILL, database search fees)	
e. Total collection expenses (auto calculated)	
4. Library Operations and Maintenance Expenses	
a. Preservation expenses (e.g., binding, digitizing, etc.)	
b. Other operations/maintenance expenses (e.g., renovations, software/hardware*)	
c. Total library operations and maintenance expenses (auto calculated)	
* ATS Annual Report Form FF-2 Financial Data for Technology Expenditures includes items on library technology systems and costs.	
5. Total Library Expenses	
a. Total library staffing expenses (Part C, line 2.c)	
b. Total library collection expenses (Part C, line 3.e)	
c. Total operations and maintenance expenses (Part C, line 4.c)	
d. Total library expenses (auto calculated, sum of three previous lines)	

Respondent and Comments

Respondent:		Phone:		Email:	
Comments:					

Part A – Library Structure

Part A collects information describing the organizational context in which the library operates. Respondents should select the option that best represents the relationship of the library to the member school and to any larger library system. If the library is part of a larger system, respondents should indicate whether the data reported in subsequent sections represent only the portion attributable to the member school or the broader library system. This distinction should be applied consistently throughout the form.

Respondents should also identify the administrative reporting relationship of the library director or manager by selecting the option that most closely reflects current institutional practice.

Library Statistical Records Report

In consultation with the American Theological Library Association (Atla), the ATS Library Form will be the only form that libraries need to complete for the ATLA Statistical Records Report. If you do not want the statistical data from your library included in the ATLA Statistical Records Report, you must check the box on the ATS Library Form that indicates that you do not give permission to send the information to ATLA.

Annual Report Form LF-1: Library Information

Most recently completed fiscal year (for member school only)

Member School:

Survey Year: 2026 - 2027

Part B – Library Collection, Usage, and Services

Library Collections (as of the end of the recently completed fiscal year)

Collection data should represent holdings as of the end of the recently completed fiscal year. In general, report counts of titles rather than volumes or copies. Collections include materials in both physical and digital or electronic formats that are owned, licensed, or otherwise made accessible through the library's catalog or discovery system. Materials that are not cataloged or otherwise discoverable should not be included.

Books are non-serial publications in print or digital format, including monographs and other standalone titles, that are cataloged or otherwise searchable through the library's catalog or discovery system.

Databases are organized collections of electronically stored data, records, or texts that are accessible as a unit through a common interface and retrieval system. Each database should be counted individually.

Media includes materials in physical or digital formats that are not classified as books or serials. This category encompasses audiovisual materials, microforms, cartographic materials, and other non-book formats that are cataloged or otherwise discoverable.

Serials/Periodicals are publications issued in successive parts bearing numerical or chronological designations and intended to continue indefinitely. This category includes journals, magazines, newspapers, annuals, and similar publications in print or digital or electronic format. Serials should be reported as titles rather than subscriptions and may include both current and ceased titles.

Archives/Special Collections/Institutional Repositories include unique or rare materials held by the library, such as manuscripts, archival records, special collections, and institutional repositories. Materials may be reported either as a count of items or in linear feet, depending on institutional practice. Institutional repositories include digital collections created or maintained by the institution to preserve and provide access to scholarly or institutional output.

Physical items refer to materials in tangible, non-digital formats that are held by the library and are cataloged or otherwise searchable through the library's catalog or discovery system. These materials include, but are not limited to, printed books, physical serials, audiovisual formats, microforms, and other non-electronic resources that are part of the library's collections. Counts of physical items should be reported as the number of cataloged titles within each category, rather than as individual copies or units.

Digital or electronic collection (E-collection) consists of all electronically accessible materials reported by the library, including e-books, databases, digital media, and electronic serials. These materials may be owned, licensed, or otherwise made accessible through the library's catalog or discovery systems.

Percentage of E-collection shared represents an estimate of the proportion of the library's digital or electronic collection that is made available through shared access arrangements with other libraries or institutions. These arrangements may include consortial licensing agreements, shared subscriptions, or jointly managed digital platforms.

For purposes of reporting, shared access refers to materials that are not exclusively licensed or controlled by the reporting library but are made available through collaboration, consortium membership, or similar agreements.

Library Usage (for the recently completed fiscal year)

Circulation of physical items refers to the total number of times physical materials are checked out from the library's collections during the reporting fiscal year. This count should include initial checkouts of materials from general and reserve collections. It should exclude renewals, in-house use, and interlibrary loan transactions.

Usage of digital or electronic items refers to the total number of instances in which materials in the digital or electronic collection are accessed during the reporting fiscal year. This includes activities such as viewing, downloading, or streaming content. Usage data are typically derived from vendor-supplied statistics or other locally maintained tracking methods.

Interlibrary loans and documents sent to other libraries refers to the number of fulfilled requests in which materials from the library's collections are provided to other institutions. This includes both returnable and non-returnable items and excludes transfers within the same library system.

Interlibrary loans and documents received from other libraries refers to the number of fulfilled requests in which materials are obtained from other institutions to support local users. This includes both returnable and non-returnable items and excludes internal transfers.

Library Services (for the recently completed fiscal year)

This section captures the instructional and reference services offered by the library in support of access to collections and the use of information resources. Information interactions with individuals should include reference transactions, consultations, and virtual reference services that involve the use or interpretation of library collections or resources. Directional inquiries should not be included.

Respondents should report the number of presentations provided to groups, distinguishing between onsite and online delivery. These presentations may include formal instruction sessions, workshops, or orientation activities. The number of participants should be reported as the count of individuals served; for multi-session courses or programs, each participant should be counted once.

Additional items identify responsibilities carried by the library beyond its collections and services, as well as constituencies served beyond the member school.

Part C – Library Staffing and Expenses

This section collects information concerning the staffing and expenses required to support library collections, services, and operations. All data should reflect actual activity and expenses for the reporting period and should be reported consistently with institutional definitions and accounting practices. Report only those staffing resources and expenses attributable to the library serving the member school.

Library Staffing

Library staffing should be reported in terms of full-time equivalent (FTE) positions. For purposes of this form, FTE is defined as the equivalent of one full-time staff member, with part-time staff expressed as a proportion of full-time hours.

Librarians are professional staff whose duties require education and training in library or information science and whose work directly supports the development, organization, and use of library collections and services.

Other professional staff are individuals who perform professional-level responsibilities in support of library operations, collections, or services but are not classified as librarians.

All other paid staff include employees whose duties do not require professional-level training and who support the ongoing operation of library collections and services.

Student assistants are students employed by the institution whose work supports library operations, including activities related to collections, services, or facilities.

Total library staffing (FTE) represents the sum of all reported staff categories.

Library Compensation

Library staff salaries include expenses for wages and salaries paid to all library staff, before deductions and excluding benefits.

Library staff benefits include expenses for employee benefits funded through the library budget, such as health insurance, retirement contributions, and other forms of non-wage compensation.

Total library staff compensation represents the sum of salaries and benefits.

All amounts should reflect actual expenses during the reporting fiscal year.

Library Collection Expenses

Library collection expenses include all expenses associated with acquiring, maintaining, and providing access to materials in the library's physical and digital or electronic collections.

One-time purchases include expenses for materials acquired with permanent access rights in either physical or digital or electronic format.

Ongoing commitments to subscriptions include expenses for materials and services requiring recurring payments to maintain access to collections.

All other materials expenses include additional costs associated with providing access to collections, including document delivery, interlibrary loan costs, and other resource access fees.

Total collection expenses represents the sum of all collection-related expenses.

Library Operations and Maintenance Expenses

Library operations and maintenance expenses include costs required to support access to collections and the delivery of library services.

Preservation expenses include costs associated with maintaining or extending the usability of library materials, such as binding, conservation, and digitization undertaken for preservation purposes. These expenses should not include staff compensation.

Other operations and maintenance expenses include all remaining costs necessary to support library operations, including technology, facilities, equipment, and infrastructure supporting access to collections and services.

Total operations and maintenance expenses represents the sum of preservation and other operational expenses.

Total Library Expenses

Total library expenses represents the sum of library staffing, collection, and operations and maintenance expenses and reflects the total cost of supporting library collections, services, and operations during the reporting fiscal year.