



# 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: 2023 - 2024

Part A: Race/Ethnicity Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
Black, African American, African Canadian										
Native North American, First Nation, Indigenous										
Asian-descent or Pacific Islander										
Hispanic, Latino(a), Latin@										
White, Caucasian										
Multiracial										
Not Available										
<b>Part A Total Applicants</b>										

Part B: Unduplicated Headcount by International and Domestic										
Applicants	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
International										
Domestic										
<b>Part B Total Applicants</b>										

Respondent and Comments			
Respondent:	[FullName], [Title]	Phone:	Email:
Comments:			

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have approved degrees; continue to report in these categories where applicable.

**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*). [\[revised note based on new standards\]](#)

Non-Degree Programs refer 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 *Standards of Accreditation*). Canadian member schools should include Bachelor of Theology students here; Roman Catholic member schools should include pontifical degree programs here. [\[revised note based on new standards\]](#)

**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. [\[new labels and descriptions for categories of race\]](#)

**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: 2023 - 2024

Part A: Race/Ethnicity Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
Black, African American, African Canadian										
Native North American, First Nation, Indigenous										
Asian-descent or Pacific Islander										
Hispanic, Latino(a), Latin@										
White, Caucasian										
Multiracial										
Not Available										
<b>Part A Total Acceptances</b>										

## Part B: Unduplicated Headcount by International and Domestic

Acceptances	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
International										
Domestic										
<b>Part B Total Acceptances</b>										

## Respondent and Comments

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

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

**Unduplicated Headcount:** Count students only once. If students were accepted 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: 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*). [\[revised note based on new standards\]](#)

Non-Degree Programs refer 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 *Standards of Accreditation*). Canadian schools should include Bachelor of Theology students here; Roman Catholic schools should include pontifical degree programs here. [\[revised note based on new standards\]](#)

**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. [\[new labels and descriptions for categories of race\]](#)

**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: 2023 - 2024

Part A: Race/Ethnicity Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
Black, African American, African Canadian										
Native North American, First Nation, Indigenous										
Asian-descent or Pacific Islander										
Hispanic, Latino(a), Latin@										
White, Caucasian										
Multiracial										
Not Available										
<b>Part A Total New Enrollments</b>										

### 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	Non-Degree	Total
International										
Domestic										
<b>Part B Total New Enrollments</b>										

### 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

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

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

**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: 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*). [\[revised note based on new standards\]](#)

Non-Degree Programs refer 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 *Standards of Accreditation*). Canadian schools should include Bachelor of Theology students here; Roman Catholic schools should include pontifical degree programs here. [\[revised note based on new standards\]](#)

**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. [\[new labels and descriptions for categories of race\]](#)

**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: 2023 - 2024

Part A: Race/Ethnicity Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Total
Black, African American, African Canadian									
Native North American, First Nation, Indigenous									
Asian-descent or Pacific Islander									
Hispanic, Latino(a), Latin@									
White, Caucasian									
Multiracial									
Not Available									
<b>Part A Total Completions</b>									

## 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									
<b>Part B Total Completions</b>									
List here the top three countries of your international students who completed a degree: [Added at request of member schools; online form will have drop-down list of countries]				1.	2.		3.		

## Part C: Duplicated Headcount

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

## Respondent and Comments

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

**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):** If students completed more than one degree, count them in each degree. [Previous versions counted only one degree (the longer one), but that led to undercounting of completed degrees.]

**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*). [revised note based on new standards]

**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. [new labels and descriptions for categories of race]

**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 [was Time and Gender]

Previous academic year (including any summer graduates)

Member School:

Survey Year: 2023 - 2024

White, Caucasian	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									
<b>Total White, Caucasian</b>									
Multiracial	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									
<b>Total Multiracial</b>									
Not Available	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									
<b>Total Not Available</b>									
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									
<b>Total Completions</b>									

## Respondent and Comments

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

## Annual Report Form CF-2: Completions by Time and Race [was Time and Gender]

Previous academic year (including any summer graduates)

Member School:

Survey Year: 2023 - 2024

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

**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). For students starting in one master's degree and finishing in another, use the start date of the original master's degree.

**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*). [\[revised note based on new standards\]](#)

**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. [\[new labels and descriptions for categories of race\]](#).



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

Previous Academic Year (including any summer graduates)

Member School:

Survey Year: 2023 - 2024

## Respondent and Comments

Respondent: [FullName], [Title]

Phone:

Email:

Comments:

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

**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](#)).

[The six categories above were developed in 2012 to address US Department of Education concerns; they correspond roughly to Q15.f in the ATS Graduating Student Questionnaire (GSQ), though they are not as detailed as those in the GSQ.]

**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*). [\[revised note based on new standards\]](#)

## Public Draft of Revised ATS Annual Report Form CF-4 on Graduation and Persistence Rates

SUMMARY: Form CF-4 has been revised to address member school concerns that the previous form did not adequately account for students who switched to a different degree and/or were still enrolled and intending to graduate, since such students are not really “attritions.” This revision still calculates a “Graduation Rate” as before but adds new columns to account for those still enrolled or who graduated from another degree. For this and all ARF modules, instructions are included with the form, rather than in a separate document. **Key changes are highlighted in red font; [bracketed items in green font]** are explanations only for this public draft and will not appear in the final form.

Annual Report Form CF-4: Completions, Graduation and Persistence Rate	
Fall data for students who entered at the time listed for each program	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

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

Respondent and Comments			
<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>	
<b>Comments:</b>			

Total row and Graduation/Persistence Rate columns are auto calculated. Degree rows shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

**Instructions:** [The instructions are revised to account for adding “Persistence Rate,” using the definition below.] 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 This Degree**, 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 for This Degree” could exceed 100% if put in another row.

**Graduation Rate (for this degree)** measures those who completed their original degree in the time specified.

**Persistence Rate** measures all those who graduated (with this or another degree) and all those who are still enrolled (in this 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).

To provide an “overall” graduation rate *for the member school* (vs. a graduation rate *for each degree*), Graduation Rate in the Total Numbers for the Member School row is the total of “Graduated with This Degree” plus the total of “Graduated with Another Degree” divided by the total of “Entered”. Similarly, Persistence Rate in the Total Numbers for the Member School row is the total Graduated (both columns) plus the total Still Enrolled divided by the total 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*). [revised note based on new standards]



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

Fall data for the current academic year

Member School:

Survey Year: 2023 - 2024

Part A: Race/Ethnicity Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
Black, African American, African Canadian										
Native North American, First Nation, Indigenous										
Asian-descent or Pacific Islander										
Hispanic, Latino(a), Latin@										
White, Caucasian										
Multiracial										
Not Available										
<b>Part A Total Enrollment</b>										

## Part B: Unduplicated Headcount by International and Domestic

Enrollment	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
International										
Domestic										
<b>Part B Total Enrollment (Unduplicated)</b>										
List here the top three countries (by headcount) of all your enrolled international students: [Added at request of member schools; online form will have drop-down list of countries]					1.	2.	3.			

## Part C: Duplicated Headcount

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

## Respondent and Comments

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments</b>					

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

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):** Students enrolled in two degrees should be counted in each program. [Input from focus groups suggests there is a growing number of students enrolled in and taking courses each term for two degrees. Enrollment has always been collected as an unduplicated count of students, with those in two degrees counted in only the longer degree. This version addresses the possible undercounting for shorter degrees by asking for duplicated counts in Part C.]



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

Fall data for the current academic year

Member School:

Survey Year: 2023 - 2024

**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) and (2) total credit hours divided by 6 for *doctoral* programs (the lower number recognizes that doctoral students typically take fewer hours). [Prior versions of EF-1 had varying ways to calculate FTE. Master’s degree FTEs were calculated based on duration (in semesters and in credits), which varied widely from degree to degree and from school to school. Doctoral degree FTEs were based on headcount (HC), with 1 HC equaling 1 FTE for all doctoral programs except the DMin, for which 3 HCs equaled 1 FTE. The resulting FTE calculations varied widely among schools and degrees, producing inconsistent results. This revision, based on significant input from member schools, uses standardized FTE calculations that seek to eliminate, or at least greatly reduce, that inconsistency.]

**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*). [revised note based on new standards]

Non-Degree Programs refer 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 *Standards of Accreditation*). Canadian schools should include Bachelor of Theology students here; Roman Catholic schools should include pontifical degree programs here. [revised note based on new standards]

**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. [new labels and descriptions for categories of race]

**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 EF-2: Enrollment by Age and Gender

Fall data for the current academic year (required only in odd-numbered years)

Member School:

Survey Year: 2023 - 2024

Age Totals	MDiv	MA (prof)	MA (acad)	MA (both)	ThM/STM	DMin	Other Prof Dr	PhD/ThD	Non-Degree	Total
Under 22										
22 - 24										
25 - 29										
30 - 34										
35 - 39										
40 - 49										
50 - 64										
65 and Over										
Age Unknown										
<b>Total Enrollment</b>										

### Respondent and Comments

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

Total rows/columns are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

This form is required only every other year (in odd-numbered years). Use the same instructions to count students as specified in the Instructions for Form EF-1, which should be completed before this form, with the "Total Enrollment" on this form matching the "Part A Total Enrollment" on Form EF-1 Enrollment by Race and Gender.

**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.

**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*). [\[revised note based on new standards\]](#)

Non-Degree Programs refer 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 *Standards of Accreditation*). Canadian schools should include Bachelor of Theology students here; Roman Catholic schools should include pontifical degree programs here. [\[revised note based on new standards\]](#)

## Public Draft of Revised ATS Annual Report Form EF-3 on Enrollment by Denomination

SUMMARY: Form EF-3 reduces the lengthy list of denominations (ca. 125) by deleting those rarely used (**highlighted below**), though no denomination that serves as a “primary” denomination for at least one school will be removed. Note that this list of denominations also appears in Forms IC-1 and PF-1. Form EF-3 also now pre-populates denominations from the previous year to improve user experience. For this and all ARF modules, instructions are included with the form, rather than in a separate document. **Key changes are highlighted in red font below**; **[bracketed items in green font]** are explanations only for this public draft and will not appear in the final form.

Annual Report Form EF-3: Enrollment by Denomination	
Fall data for the current academic year	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

Unduplicated Headcount by Denomination				
<small>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.</small>				
Denomination	MDiv	MA (all types)	All Others	Total
<b>Total Enrollment</b>				

Respondent and Comments					
<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

Total row and column are auto calculated. Degree columns shaded in gray indicate categories for which the member school does not have any approved degrees; continue to report in these categories where applicable.

Use the same instructions to count students as specified in the Instructions for Form EF-1, which should be completed before this form, with the “Total Enrollment” on this form matching the “Part A Total Enrollment” on Form EF-1 Enrollment by Race and Gender.

**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.

**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). [revised note based on new standards]

“All Others” includes all other degree programs, as well as non-degree programs. [revised note based on new standards and member input]

**DENOMINATION LISTING**

[the lengthy list below is shortened by deleting those rarely used (highlighted here)]

**Adventist Bodies**

Advent Christian Church  
Seventh-day Adventist

**Anglican**

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

**Associated Gospel Churches of Canada**

**Baptist**

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

**Brethren**

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

**Buddhist**

**Catholic**

Byzantine Catholic  
Catholic, Other  
Roman Catholic

**Christian and Missionary Alliance**

**Church of God (Anderson, Indiana)**

**Church of the Nazarene**

**Churches of Christ-Christian Churches**

Christian Churches and Churches of Christ  
Churches of Christ  
Churches of Christ-Christian Churches, Other  
Christian Church (Disciples of Christ)

**Churches of God, General Conference**

**Evangelical Church in Canada**

**Evangelical Congregational Church**

**Evangelical Covenant Church**

**Evangelical Formosan Church**

**Evangelical Free Church of America**

**Evangelical Free Church of Canada**

**Inter/Multidenominational**

**Jewish**

**Korean Evangelical Holiness Church**

**Lutheran**

Evangelical Lutheran Church in America  
Evangelical Lutheran Church in Canada  
Lutheran Church-Canada  
Lutheran Church-Missouri Synod  
Lutheran, Other  
Wisconsin Evangelical Lutheran Synod

**Mennonite**

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

**Methodist**

African Methodist Episcopal  
African Methodist Episcopal Zion  
Christian Methodist Episcopal  
Free Methodist Church

**Independent Methodist**

Korean Methodist Church in America  
Methodist, Other  
United Methodist Church  
Wesleyan Church

**Missionary Church in Canada**

**Moravian Church in North America**

**Muslim**

**National Association of Congregational Christian Churches**

**Nondenominational**

**Orthodox**

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

**Pentecostal**

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

**Presbyterian**

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

**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  
**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**

**Not Available**

## Public Draft of Revised ATS Annual Report Form EF-4 on Enrollment for Previous Year

SUMMARY: Form EF-4 is slightly revised (in how degree programs are listed). For this and all ARF modules, instructions are included with the form, rather than in a separate document. **Key changes are highlighted in red font below; [bracketed items in green font]** are explanations only for this public draft and will not appear in the final form.

Annual Report Form EF-4: Enrollment for Previous Year	
Previous academic year	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

Degree Program	Unduplicated Total
MDiv	
MA (all types)	
ThM/STM	
DMin	
Other Prof Dr	
PhD/ThD	
Non-Degree	
<b>Total</b>	

Respondent and Comments			
<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>	
<b>Comments:</b>			

Total row is auto calculated. Degree rows shaded in gray indicate categories for which the member school does not have any approved degrees, continue to report in these categories where applicable.

**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. [\[slightly revised instructions\]](#)

**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*). [\[This note was revised to follow new standards\]](#)

Non-Degree Programs refer 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 *Standards of Accreditation*). Canadian schools should include Bachelor of Theology students here; Roman Catholic schools should include pontifical degree programs here. [\[revised note based on new standards\]](#)

# Public Draft of Revised ATS Annual Report Form EF-5 on Enrollment for Offsite and Online

SUMMARY: Form EF-5 is relabeled and revised (still one page). Part A is modestly revised to correspond to new ATS [Policies and Procedures](#) (IV.E.1-3), especially deleting questions about locations that offer less than a fourth of a degree (see NOTE in Part A). Part B is significantly revised to address confusion over questions about online enrollment. Items 1-3 in Part B below use common [IPEDS](#)<sup>A</sup> categories, with the first two categories allowing longitudinal comparisons with previous ARF data. Items 4-5 in Part B below were requested by ATS focus groups. All five items in Part B also include definitions. Previous items about LMS software have been revised and relocated to new Form FF-2 on Technology Expenditures. For this and all ARF modules, instructions are included with the form, rather than in a separate document. **Key changes are highlighted in red font below; [bracketed items in green font]** are explanations only for this public draft and will not appear in the final form.

<sup>A</sup>NOTE: 195 (80%) of 245 ATS schools in US participate in Title IV federal financial aid programs, which requires them to complete IPEDS each year [13 of 35 ATS schools in Canada participate in Title IV but are not required to complete IPEDS].

Annual Report Form EF-5: Enrollment for Offsite and Online <span style="color: green;">[new title]</span>	
Fall data for the current academic year	
<b>Member School:</b>	<b>Survey Year:</b> 2023 - 2024

PART A: OFFSITE ENROLLMENT <span style="color: red;">(Additional locations offering at least one-fourth of a degree)</span>
---

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. 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 in Part A. [new instructions]

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*
<span style="color: green;">[rows may be repeated as needed in online form]</span>			

\*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) <span style="color: green;">[this part is significantly revised to mirror IPEDS]</span>
--

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

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. Check any of the following degrees that you offer <b>completely</b> online?
<input type="checkbox"/> MDiv <input type="checkbox"/> MA <input type="checkbox"/> ThM/STM <input type="checkbox"/> DMin <input type="checkbox"/> Other Prof Dr <input type="checkbox"/> PhD/ThD
5. What percent of your courses this fall CAN be taken <b>completely</b> online? <input type="checkbox"/> 0% <input type="checkbox"/> < 50% <input type="checkbox"/> ≥ 50% <input type="checkbox"/> 100%

**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.

**Only** online (B.1) = students enrolled only in courses offered completely online (students enrolled in "hybrid" courses offered partly online and partly onsite are included below under "partly" online in B.2).

**Partly** online (B.2) = students enrolled in "hybrid" courses (courses offered partly onsite and partly online) OR students enrolled in both onsite and online courses.

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

**Completely online degree** (B.4) is any degree a student CAN complete entirely online, even if some or all of that degree is also offered onsite.

**Courses offered completely online** (B.5) are courses that CAN be completed entirely online (exclude hybrid), even if those same courses are also available to be completed onsite by other students.

Respondent and Comments
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<b>Respondent:</b> [FullName], [Title]	<b>Phone:</b>	<b>Email:</b>	
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<b>Comments:</b>
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## Public Draft of Revised ATS Annual Report Form DF-1 on Development Data

SUMMARY: Form DF-1 has not been revised in more than two decades. Based on input from several dozen ATS senior development officers during Zoom meetings in early fall 2022, numerous revisions are being proposed. Many of the revisions mirror the approach taken by the [Voluntary Support of Education](#) (VSE) survey from CASE, a standard data-collection tool in the development industry and one in which many ATS schools participate. Mirroring the VSE should provide greater consistency and reduce the work needed to complete DF-1 for many schools. For this and all ARF modules, instructions are included with the form, rather than in a separate document. **Key changes are highlighted in red font; [bracketed items in green font]** are explanations only for this public draft and will not appear in the final form.

<b>Annual Report Form DF-1: Development Data</b>	
Most recently completed fiscal year	
<b>Member school:</b>	<b>Survey Year: 2023 - 2024</b>

<b>PART I: SUMMARY OF ALL GIFT INCOME (Cash, Securities, Property, Products)</b> [reverse order of parts from current form so that the more general "summary" comes first]								
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 Purposes	\$s from INDIVIDUALS		\$s from ORGANIZATIONS [see Note 1 below]				TOTAL (auto calculated)
		Alums (A)	Friends (B)	Foundations (C)	Corporations (D)	Religious Orgs (E)	Other Orgs (F)	
<b>A. Gifts for Current Operations (Annual Fund Gifts)</b> [see Note 2 below]								
1	Unrestricted							
2	Restricted (e.g., for student scholarships) [collapsed 7 into 1 (see Note 2)]							
<b>3</b>	<b>Total Gifts for Current Operations (auto calculated)</b>							
<b>B. Gifts for Other Purposes (Not Annual Fund Gifts)</b>								
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	Loan Funds							
<b>8</b>	<b>Total Gifts for Other Purposes (auto calculated)</b>							
<b>C. Total Gifts for All Purposes</b> [see Note 3 below]								
<b>9</b>	<b>GRAND TOTAL OF ALL GIFTS (auto calculated, lines 3 + 8)</b>							
10	<b>Do the gifts reported above reflect the member school's engagement in a capital or comprehensive campaign?</b>					Yes or No		
11	<b>Is your development office focused exclusively on the member school or does it serve another entity?</b>					Member school only, or Another entity (e.g., university)		
12	<b>How many FTE development officers are focused on the member school (using the school's own definition of FTE)?</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 <i>who earned a degree</i> from the school). ATS defines "Friends" as any non-alum individuals who give to the member school. [The definition of "Alums" reflects current ARF definition, with input from the ATS focus group who wanted more flexibility in defining the term (hence, "though schools may choose ...").]								

**[NOTES:**

1. The columns (A-F) in Part I correspond mostly to the VSE survey, except "Religious Organizations", which has always been part of form DF-1. The former "Fundraising Consortia" column is deleted because fewer than 1% of member schools used it (see [ADT 5.1](#)). "Friends" replaces "Other Individuals (including parents)," based on focus group input.
2. The first three rows (lines 1-3) in Part I focus on *annual fund gifts*, while the next five rows (lines 4-8) focus on *non-annual fund gifts*. The current form lists 8 restricted areas for Part I.A, but feedback from ATS development officers indicates most of these gifts are unrestricted or, if restricted, the restrictions are mostly "other" (see [ADT 2.5](#)).
3. Part I.C is new (except line 9) and reflects items requested by ATS development officers.]



# Annual Report Form DF-1: Development Data

Most recently completed fiscal year

Member school:

Survey Year: 2023 - 2024

## PART II - DETAILS ABOUT SELECTED GIFTS REPORTED IN PART I

A. Donor Retention, Recapture, and Acquisition (include all donors, not just individuals in II.A) [Part II.A is a new section requested by senior development officers]		#	%	
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 [deleted item on "Number of alums solicited" since often not known (e.g., donor appeals through social media do not target individuals)]			# Alums	
1. Number of alums on record (those for whom the member school has current contact information and may legally contact) [clarified meaning of "alums on record"]				
		# Donors	\$ Amount	
2. Number of alum donors and \$ amount given for <b>all</b> purposes (current operations and capital or endowment purposes)				
3. Number of alum donors and \$ amount given for <b>only</b> current operations [included here, rather than creating separate section as in current form]				
C. Board Giving (Include current, honorary, emeritus board members, as well as members of foundations and advisory boards*)		# Donors	\$ Amount	
1. Number of board donors and \$ amount given for <b>all</b> purposes (current operations and capital or endowment purposes)				
2. Number of board donors and \$ amount given for <b>only</b> 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) [combined faculty and staff previously treated separately; also added parenthetical notes for clarity]		# 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) [NOTE]	# Living Individuals	\$ Amount Given by Living Individuals	# 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 of All Gifts (auto calculated, total of lines 1-5)				

\* Unlike previous versions of this form, member schools related to another entity *should* include giving by advisory board members (see Standard 9.1 of the 2020 ATS Standards of Accreditation).

[NOTE: Part II.E above formerly asked only about gifts of \$5,000 or more but focus groups of development officers requested reports on all gifts broken down by ranges (what VSE calls "gift bands").]

Respondent and Comments				
Respondent:	[FullName], [Title]	Phone:		Email:
Comments:				

# Annual Report Form DF-1: Development Data

Most recently completed fiscal year

Member school:

Survey Year: 2023 - 2024

## INSTRUCTIONS FOR OVERALL FORM [Though these instructions are the longest of any of the Annual Report Forms, development officers felt that this much detail is needed.]

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. [These instructions use "member school," not "institution," to refer to an ATS member school, whether related to another entity or not.] 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.

[Deleted "NOTE" about ATS making individual school data public without school permission since ATS does not do that.]

**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](#). [This NOTE has been updated since the prior NOTE had outdated information.]

### ***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 not 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***

Gifts should be valued by the member school on the date the donor relinquished control of the assets in favor of the school. The amounts reported should be arrived at without regard to the donor's personal estimation of the gift's value, the worth and date of the gift as reported by the donor to the IRS, or the value placed on it by the IRS in reference to the individual's personal income tax liability. In cases where gifts are made in cash, valuation poses no problem. In cases where gifts are made with securities, real and personal property, in trust, through insurance policies, or bearing some real or implied obligation on the part of the school, the following guidelines should

# Annual Report Form DF-1: Development Data

Most recently completed fiscal year

Member school:

Survey Year: 2023 - 2024

be observed:

**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 [This part now appears first since it is more general in nature and since that is the order followed by the VSE.]

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):** See definitions in the note (\*) at end of Part I. [This part greatly reduced since definitions are provided above in the form itself.]

**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.

# Annual Report Form DF-1: Development Data

Most recently completed fiscal year

Member school:

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**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. **[Former column F "Fundraising Consortia" deleted because not in VSE and was rarely used by ATS member schools.]**

## 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) [This part was relabeled based on input from development officers.]

**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. **[based on feedback from development officers]**

### Part I.B Gifts for Other Purposes (Not Annual Fund Gifts) [This part was relabeled based on input from development officers.]

**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 8).

**Loan Funds (line 7):** Gifts restricted by donors to be available for loans to students, faculty, and staff.

### Part I.C Total Gifts for All Purposes

**Line 9 (Grand Total of All Gifts):** This field is automatically calculated by adding the totals from line 3 in Part I.A and line 8 in Part I.B.

**Line 10 (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 11 (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 12 (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 [This part now appears at the end of this form, per the order followed in the VSE.]

### A. Donor Retention, Recapture, and Acquisition [This section was added by request of development officers since these 3 data points provide significant benchmarks for development.]

- 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

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Most recently completed fiscal year

Member school:

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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). [This definition reflects the current ARF, along with input from the ATS focus groups who desire more flexibility in defining the term. Deleted here is the former item on "Number of alums solicited" since many ATS development officers indicated that it is very difficult to track that number in an era when many donor appeals are no longer "direct mail," e.g., broad appeals through social media platforms.]

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. [Similar to VSE definition]
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). [Per the note (\*) at the end of Part II, unlike previous versions of this ATS form, this revised version asks schools to include giving by advisory board members, since nearly half of all ATS member schools are related to another entity and have some form of an advisory board, though that board may have various names (see 2020 ATS Standards of Accreditation, Standard 9.1). This revision was requested by numerous ATS member schools.]

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. [Combined faculty and staff into one line item, based on development officers' input.]
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) [This section all new, based on input from development officers.]

**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.

## Public Draft of Revised ATS Annual Report Form FF-1 on Financial Data

SUMMARY: Form FF-1 has been revised in these ways: (1) replaced “larger university” or “complex” with “another entity,” (2) relabeled Section 1.U to Section 1.B and shortened it, (3) moved Section 3 on “IT” to Form FF-2 (which has been significantly revised), and (4) inserted item #4 from FF-2 (on tuition revenue/scholarships) to new Section 3 with new items about student debt. **Key changes are highlighted in red font below;** [bracketed items in green font] are explanations only for this public draft and will not appear in the final form. For this and all ARF modules, instructions are included with the form, rather than in a separate document.

<b>Annual Report Form FF-1: Financial Data</b>	
Most recently completed fiscal year	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

Please select the choice that best represents the member school: <input type="checkbox"/> Stand-alone <input type="checkbox"/> Related to another entity (e.g., university)		
Section 1.A - Statement of Financial Position for <b>Stand-alone School</b> (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	Deferred charges, prepaid expenditures and inventories	\$
7	Notes receivable, net of allowance	\$
8	Property, plant and equipment, net	\$
9	Investments held for long-term purposes	\$
<b>10</b>	<b>Total Assets</b> (auto calculated from lines 1-9; must be the same as line 24 below)	<b>\$</b>
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 obligation	\$
17	Grants refundable	\$
18	Long-term debt	\$
19	Liabilities other than those listed above (e.g., defined benefit plans)	\$
<b>20</b>	<b>Total Liabilities</b> (auto calculated from lines 11-19)	<b>\$</b>
Line	Net Assets:	
21	Without donor restrictions	\$
22	With donor restrictions – by time and purpose	\$
23	With donor restrictions – in perpetuity	\$
<b>24</b>	<b>Total Net Assets</b> (auto calculated from lines 21-23; must be same as Section 2, Part C, line 4, column D)	<b>\$</b>
<b>25</b>	<b>Total Liabilities and Net Assets</b> (auto calculated by adding lines 20 and 24; must be same as line 10 above)	<b>\$</b>

Section 1.B - Statement of Financial Position for Member School Related to Another Entity (e.g., part of a university)	
[This section is completely revised and much shorter, based on input from member schools]	
Line	If the member school is related financially to another entity (e.g., part of a university), please respond to the following questions.
1	<p>Which one of the following best describes the expectations the other entity has for the member school in terms of annual operating results?</p> <p><input type="checkbox"/> A. End each fiscal year with any surplus (revenues in excess of expenses)</p> <p><input type="checkbox"/> B. End each fiscal year with a surplus sufficient to cover all or a portion of shared expenses from the other entity</p> <p><input type="checkbox"/> C. End each fiscal year with a balanced budget, but no surplus is expected</p> <p><input type="checkbox"/> D. There are no financial expectations for the member school from the other entity</p>
2	<p>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?      Yes / No</p> <p>A. If yes, what is the dollar amount of the fee?      \$</p> <p>B. If yes, how is the annual fee determined?    <input type="checkbox"/> fixed dollar amount    <input type="checkbox"/> percentage of revenues    <input type="checkbox"/> percentage of expenses</p>
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):      \$

# Annual Report Form FF-1: Financial Data

Most recently completed fiscal year

Member School:

Survey Year: 2023 - 2024

## Section 2 - Statement of Activities (All Member Schools)

### 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)	\$	\$	\$	\$

### 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)	\$			\$

### PART C – NET ASSETS

Line	Net Assets	A. Without Donor Restrictions	B. With Donor Restrictions (Time/Purpose)	C. With Donor Restrictions (In Perpetuity)	D. Total (auto calculated)
1	Change in net assets (auto calculated, see instructions)	\$	\$	\$	\$
2	Net assets, beginning of year (see instructions)	\$	\$	\$	\$
3	Other changes to net assets (see instructions)	\$	\$	\$	\$
4	Net assets, end of year (auto calculated, see instructions)	\$	\$	\$	\$

## Section 3 – Other Financial Data [greatly revised section; see Summary at start of this form]

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?		Yes / No		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)	\$	\$	\$	\$	\$ [NEW]	\$
4	Scholarship Expenses (Total = Total of Section 2, Part B, line 10)	\$	\$	\$	\$	\$ [NEW]	\$

\* Masters = any master's degree [MDiv, MA (prof), MA (acad), MA (both), ThM]; see Standard 4 in 2020 *Standards of Accreditation*. 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 *Standards of Accreditation*). 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. [Non-Degree column added to respond to the growing number of these programs among ATS schools.]

# Annual Report Form FF-1: Financial Data

Most recently completed fiscal year

Member School:

Survey Year: 2023 - 2024

Line	Federal Student Loans (only for member schools that participate in Title IV U.S. federal financial aid programs) [lines 5-7 are revised and relocated from ATS Annual Report form IC-1, lines 8-10 are new items]	
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.	Yes / No
6	Is the <i>ATS Commission on Accrediting</i> your "primary/gatekeeper" agency for Title IV funds?	Yes / No
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?	Yes / No
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:	[FullName], [Title]	Phone:		Email:	
Comments:					

**Instructions for All Sections:** [revised to reflect new/changed items above] 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.

## Instructions for Sections 1.A and 1.B

Section 1.A is to be completed by the member schools that are **NOT** related financially to another entity (called here *stand-alone* schools). Section 1.B is to be completed by schools that **ARE** related financially 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. [abbreviated former instructions]

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

See above 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. [former line 2 was blank so deleted it and renumbered the following lines]

**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.



# Annual Report Form FF-1: Financial Data

Most recently completed fiscal year

**Member School:**

**Survey Year: 2023 - 2024**

**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:** Report the sum of lines 1 through 11 inclusive. [former line 12 was blank so deleted it and renumbered this line as new line 12]

## Instructions for Section 2, Part B: Expenditures and Losses

**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). [Form LF-1 has been revised]

**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 calculates this figure.

## Instructions for Section 2, Part C: Change in Net Assets

**Line 1. Change in net assets:** Enter here the difference between total revenues, gains and other support, and total expenses and losses. The changes 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

# Annual Report Form FF-1: Financial Data

Most recently completed fiscal year

Member School:

Survey Year: 2023 - 2024

"Net assets, end of year". *Note: Line 2 here is not applicable to member schools related to another entity (e.g., part of a university).*

**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 attach an explanation.

**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.**  
*Note: Line 4 is not applicable to member schools related to another entity (e.g., part of a university).*

## Instructions for Section 3: Other Financial Data [greatly reduced and revised section]

**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. **[Note: These two lines were formerly part of Annual Report Form FF-2, item #4.]**

**[Lines 5-7 (added in Fall 2023) are revised from items that were formerly part of Form IC-1, Part B. The revisions are designed to help schools more easily supply the Title IV information.]**

**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 lines (added in fall 2023) respond to member schools' concerns about student debt, at least in terms of federal financial loans (the most common type of financial aid available to member schools).]** These questions apply only to schools that participate in Title IV Federal Financial Aid programs operated by the U.S. Department of Education. **[all new based on ATS member school input]**

## Public Draft of Revised ATS Annual Report Form FF-2 on Financial Data for Technology Expenditures

SUMMARY: Form FF-2 has been significantly revised by focusing on IT expenditures, a growing area among ATS schools. Those expenditures were previously addressed in Section 3 of FF-1, with that form now incorporating several components of the former FF-2 (e.g., data on tuition revenue and scholarships) and other components deleted due to lack of use (e.g., composition of restricted assets). The revisions below reflect significant input from focus groups of IT professionals at ATS schools that met via Zoom in in Spring and Fall 2022. **Key changes are highlighted in red font below**; [bracketed items in green font] are explanations only for this public draft and will not appear in the final form. For this and all ARF modules, instructions are included with the form, rather than in a separate document.

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

Most recently completed fiscal year **(for member school only)** [nearly all the items below are new]

<b>Member School:</b>	<b>Survey Year:</b> 2023 - 2024
-----------------------	---------------------------------

1. Please select the choice that best represents the member school: [ ] Stand-alone [ ] Related to another entity (e.g., university) [Questions in #1 recognize that <i>related schools' IT expenditures are frequently handled differently than freestanding schools'.</i> ]			
a. If related to another entity, does the member school rely on that entity for IT services?			Yes / No
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			Yes / No
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			Yes / No
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? [helps in "normalizing" IT costs]			Yes / No
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): [Questions in #5 provide more detail than previous questions in FF-1, Section 3.]			
Technology Category (if one system covers multiple categories, split if can)	Amount spent for Software/Licensing** [^]	Cloud-based?	Name of Product (see examples below) [fill-in-blank fields]
(a) Cyber security*	\$	Yes / No	
(b) Student Information System (SIS)	\$	Yes / No	If specific SIS, list here (e.g., Populi, Jenzabar)
(C) Learning Management System (LMS)	\$	Yes / No	If specific LMS, list here (e.g., Canvas, Moodle)
(d) Videoconferencing System	\$	Yes / No	If specific one(s), list here (e.g., Zoom, Teams)
(e) Financial/Accounting System	\$	Yes / No	If specific one(s), list here (e.g., Oracle)
(f) Student Financial Aid System	\$	Yes / No	If specific one(s), list here (e.g., Banner)
(g) Development/Fundraising System	\$	Yes / No	If specific one(s), list here (e.g., Blackbaud)
(h) Library	\$	Yes / No	If specific one(s), list here (e.g., OCLC, EBSCO)
(i) Other category not listed above (if any)	\$	Yes / No	List here what other category:
* Cyber security 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).			
[^ The IT focus groups discussed whether to ask for \$ amounts or % spent but felt that \$ amounts were easier to calculate, since any % spent would have to be based on \$ amounts spent. Questions about hardware were originally included here but have been moved to item 6 below because hardware costs are not typically confined to a particular technology category.]			
6. Amount spent on IT hardware last fiscal year (estimate, if exact amount not known): [Separated from #5 because hardware used for many categories.]			\$
7. Do you have cyber insurance? [This question reflects a growing concern for many ATS schools.]			Yes / No
a. If yes, what level of insurance? (Select from: ≤\$1 million, ≤\$5 million, ≤ \$10 million, > \$10 million)			
b. If yes, what amount did your school spend for the last contract year?			\$
8. How many of your technology staff are considered full-time? (using school's own definition of full-time)			
9. How many of your technology staff are considered part-time? (number of staff working at least 10 hours per week on average)			
10. What is your 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

<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>		<b>Email:</b>	
<b>Comments:</b>					

**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.

## Public Draft of Revised ATS Annual Report Form IC-1 on Institutional Characteristics

SUMMARY: Form IC-1 has been significantly revised in these ways: (1) Part A reflects new categories of race used throughout the revised ARF; (2) Part B on Accreditation and Part D on Catalog and Statement of Educational Effectiveness URLs have been combined and reduced to one question. Items previously collected in Part B on Title IV status were revised and relocated to form FF-1 Finance Data, section on Federal Student Loans; and (3) Part C on Student Charges deletes “In-Country/Out-of-Country” distinctions and adds credit hour charges, based on member input. **Key changes are highlighted in red font below; [bracketed items in green font]** are explanations only for this public draft and will not appear in the final form. For this and all ARF modules, instructions are included with the form, rather than in a separate document.

Annual Report Form IC-1: Institutional Characteristics	
Fall data for the current academic year <b>(for member school only)</b>	
<b>Member School:</b>	<b>Survey Year:</b> 2023 - 2024

### PART A – DENOMINATION AND RACE

1. Has the member school changed the denominations(s) to which it is formally related?	Yes / No
If yes, list the denomination(s) below; if more than one, indicate <b>one</b> as primary, if four or more, indicate Inter/Multidenominational as primary. (See <i>denomination list at the end of this form</i> )	
2. Has the primary race of the member school’s student body changed since last year?	Yes / No
If yes, what is the primary race/ethnicity of enrolled students: <input type="checkbox"/> Black, African American, African Canadian <input type="checkbox"/> Native North American, First Nation, Indigenous <input type="checkbox"/> Asian-descent or Pacific Islander <input type="checkbox"/> Hispanic, Latino(a), Latin@ <input type="checkbox"/> White, Caucasian <input type="checkbox"/> Multiracial <input type="checkbox"/> Not Available	
3. Are most of your students international?	Yes / No

### PART B – ACCREDITATION INFORMATION [relocated items on Title IV status to form FF-1 Financial data section on Federal Student Loans]

1. List here the URL for the member school’s Statement of Educational Effectiveness (see Standard 2.8 of the 2020 <i>Standards of Accreditation</i> ):
--

### 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)	Annual Tuition Charged (C)	Annual Fees Charged (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.

### Respondent and Comments

<b>Respondent:</b> [FullName], [Title]	<b>Phone:</b>	<b>Email:</b>
<b>Comments:</b>		

### NOTES: [these additions and revisions reflect membership input]

- (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. [new item]
- (B) **Tuition per Credit Hour** = Dollar amount of tuition charged per semester credit. If the member school uses the quarter hour system, divide 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). [new item]
- (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).

**DENOMINATION LISTING**  
(for Item #1 in Part A of IC-1)

[like EF-3, the lengthy list below is shortened by deleting those rarely used (highlighted here)]

**Adventist Bodies**

Advent Christian Church  
Seventh-day Adventist

**Anglican**

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

**Associated Gospel Churches of Canada**

**Baptist**

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

**Brethren**

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

**Buddhist**

**Catholic**

Byzantine Catholic  
Catholic, Other  
Roman Catholic

**Christian and Missionary Alliance**  
**Church of God (Anderson, Indiana)**  
**Church of the Nazarene**

**Churches of Christ-Christian Churches**

Christian Churches and Churches of Christ  
Churches of Christ  
Churches of Christ-Christian Churches, Other  
Christian Church (Disciples of Christ)

**Churches of God, General Conference**

**Evangelical Church in Canada**  
**Evangelical Congregational Church**  
**Evangelical Covenant Church**  
**Evangelical Formosan Church**  
**Evangelical Free Church of America**  
**Evangelical Free Church of Canada**  
**Inter/Multidenominational**  
**Jewish**  
**Korean Evangelical Holiness Church**

**Lutheran**

Evangelical Lutheran Church in America  
Evangelical Lutheran Church in Canada  
Lutheran Church-Canada  
Lutheran Church-Missouri Synod  
Lutheran, Other  
Wisconsin Evangelical Lutheran Synod

**Mennonite**

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

**Methodist**

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

**Missionary Church in Canada**

**Moravian Church in North America**

**Muslim**

**National Association of Congregational Christian Churches**  
**Nondenominational**

**Orthodox**

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

**Pentecostal**

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

**Presbyterian**

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

**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  
**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**

**Not Available**

# Public Draft of Revised ATS Annual Report Form LF-1 on Library

SUMMARY: Form LF-1 has not been revised in nearly two decades. This revision reflects significant input from [Atla](#) and more than a score of ATS librarians who participated in several ATS focus groups in 2022. One key aspect of this revision is to reduce the workload for member schools by paralleling data requested in the [IPEDS](#)<sup>^</sup> library survey. For this and all ARF modules, instructions are included with the form, rather than in a separate document. In several places, links to the IPEDS library survey instructions are included to provide more details. **Key changes are highlighted in red font; [bracketed items in green font]** are explanations only for this public draft and will not appear in the final form.

<sup>^</sup>NOTE: 195 (80%) of 245 ATS schools in US participate in Title IV federal financial aid programs, which requires them to complete IPEDS each year [13 of 35 ATS schools in Canada participate in Title IV but are not required to complete IPEDS].

<b>Annual Report Form LF-1: Library Information</b>	
Most recently completed fiscal year <span style="color: green;">[same period as IPEDS, though IPEDS doesn't require reporting until spring]</span>	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

## PART A – LIBRARY STRUCTURE

1. Library structure: [these categories have been revised for greater clarity based on library focus group input]

[ ] 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

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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):

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

## PART B – LIBRARY COLLECTIONS, USAGE, SERVICES (for clarification of any of these categories; see [IPEDS](#))

**1. Library Collections** (as of end of recently complete fiscal year) [same data asked by IPEDS]

Category	# Physical Items*	# Digital/Electronic Items*	Total # Items (auto calculated)
Books			
Databases+			
Media (AV, microforms, etc.)			
Serials/Periodicals			
Institutional Repositories <sup>^</sup>			
<b>Total (auto calculated)</b>			

\* Per [IPEDS instructions](#), list number of *cataloged titles* in each category.  
+ Count each database individually, even if access to several databases is gained through same vendor interface.  
<sup>^</sup> Include here any form of repository (e.g., archives), as well as any special collections, whether circulating or not.

Portion of library e-collection total above "shared" with other libraries: [ ] 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) [same data asked by IPEDS]

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

\* Per [IPEDS instructions](#), 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) [similar to current ATS form]

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: [revision of current question]

[ ] Information technology [ ] Repository/archives

[ ] Writing/research center [ ] Bookstore

[ ] Evaluation/assessment [ ] Other (describe here):

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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 [same period as IPEDS, though IPEDS doesn't require reporting until spring]

**Member School:**

**Survey Year:** 2023 - 2024

## PART C – LIBRARY STAFFING AND EXPENSES [for clarification of any of these categories; see IPEDS]

### 1. Library Staffing (report number of FTEs, using the member school's definition of full-time) [same items as IPEDS]

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 [same data asked by IPEDS]

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 [same data asked by IPEDS]

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 [same data asked by IPEDS]

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 [similar to data asked on current ATS form]

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

<b>Respondent:</b> [FullName], [Title]	<b>Phone:</b>	<b>Email:</b>
<b>Comments:</b>		

## Public Draft of Revised ATS Annual Report Form PF-1 on Personnel - Full-Time: Faculty and Select Administrators

SUMMARY: Form PF-1 is revised in multiple ways. **Key changes are highlighted in red font below**; [bracketed items in green font] are explanations only for this public draft and will not appear in the final form. For this and all ARF modules, instructions are included with the form, rather than in a separate document.

Annual Report Form PF-1: Personnel – Full-Time: Faculty and Select Administrators						
Fall data for the current academic year (for member school only)						
<b>Member School:</b>				<b>Survey Year: 2023 - 2024</b>		
<p>The online and filled versions of this form are 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.</p> <p>Review each person's details for accuracy and delete any personnel that do not meet the form criteria.</p>						
<b>Personnel Record</b>						
Last Name:		First Name:		MI:		
1. Is this person a full-time employee? If no, delete this person from the form. This form is intended for full-time employees only.				Yes / No		
a. if full-time, does this person have faculty status?				Yes / No		
b. if full-time, does this person have one or more of the tracked administrative roles (see list in NOTE 6)				Yes / No		
If 1a. and 1b. are BOTH no, delete this person from the form. This form is limited to faculty and select administrators.						
"Full-time" status is defined by the member school in keeping with its own policies and with any applicable state, provincial, or federal regulations.						
Delete this person from the form?				Yes / No		
If yes, which option best fits the reason for deleting this person from this form?						
[ ] a. Deceased						
[ ] b. Retired						
[ ] c. No longer at the member school						
[ ] d. At the member school, does not meet the form criteria						
[ ] e. Duplication or mistake						
2. Is this person new to the member school this year?				Yes / No		
3. Does the member school share this person with another entity*?				Yes / No		
*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 and are considered full-time by either entity.						
<b>Contact Information</b>						
4. Form of Address		5. Email		6a. Phone	6b. Ext	6c. Check if phone number is NOT North American.
[drop-down list]						[ ]
<b>Demographic Information</b> Please supply as much demographic information as is known for each person (if not known, leave blank or choose Not Available) [relabelled former "Personal Attributes" and reformatted]						
7. Gender <sup>1</sup>	8. Race <sup>1</sup>		9. Denomination <sup>2</sup>	10. Year of Birth	11. Ordained?	12. Has MDiv or Equiv.?
[drop-down list]	[drop-down list]		[drop-down list]		[drop-down list]	[drop-down list]
<b>Highest Degree earned</b>						
13a. Degree level <sup>3</sup>		13b. Area of study <sup>4</sup>		13c. Year degree earned	13d. School where degree earned <sup>5</sup>	
[drop-down list]		[drop-down list]			[drop-down list]	
<b>Position Information</b> [this section is significantly reworded and reformatted]						
13. If this person has one or more of the administrative responsibilities <sup>6</sup> listed, choose all that apply, indicating which is primary (see list at end of this form): [drop-down list]						
14. If this person has administrative responsibilities, list here that title:						
15. If this person has teaching responsibilities, list here that title:						
16. If this person has faculty status, what is their faculty rank?		[ ] Professor [ ] Associate Professor [ ] Assistant Professor [ ] Instructor [ ] Lecturer [ ] Not Ranked [ ] School does not have faculty rankings [ ] Not Applicable (i.e., does not have faculty status)				
17. If this person has faculty status, what is their tenure status?		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)				
18. What percent of this person's time is typically spent teaching?				[ ] 0% [ ] 1-24% [ ] 25%-49% [ ] 50%-74% [ ] 75%-99% [ ] 100%		
19. What is(are) this person's teaching field(s)? [Click "None" if not teaching]				[drop-down list]		
<b>Comments:</b>						
<b>Respondent Contact Information</b>						
<b>Respondent:</b>	[FullName], [Title]			<b>Phone:</b>		<b>Email:</b>



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

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

Member School:

Survey Year: 2023 - 2024

INSTRUCTIONAL NOTES: [These instructions are significantly revised from the current form. References to “drop-down list” refer to the online version of this printed form.]

- 1 The “Gender” and “Race” drop-down lists include the same categories used for ATS Annual Report Forms; AF-1a, AF-1b, AF-1c, EF-1, and CF-1.
- 2 The “Denomination” drop-down list is the same list used for ATS Annual Report Form EF-3 and IC-1, including “N/A.”
- 3 The “Degree level” drop-down list includes the degree levels of Associate’s, Bachelor’s, Master’s, Professional Doctorate (e.g., DMin), and Research Doctorate (e.g., PhD).
- 4 The “Area of study” refers to high-level disciplinary areas, rather than specific subjects, e.g., arts, business, communication, education, science and engineering, social science, theology
- 5 The “School where degree earned” drop-down list 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).
- 6 The “administrative responsibilities” (listed below) 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 chief executive officers, chief academic officers, and accreditation liaison officers, 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.

Select Administrative Responsibilities: [this is the “drop-down list” in the online version of this form]

**Member school primary contacts** (assign these roles to only one person each)

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

**Academic Affairs**

Academic Dean - Other  
Chief Diversity Officer  
Director of Assessment  
Director of Continuing Education/Lifelong Learning  
Director of Doctor of Ministry  
Director of Field Education  
Director of Formation  
Director of Graduate Studies  
Director of Institutional Effectiveness  
Director of Institutional Research  
Director of Library  
Director of Online Education/Distance Learning/Digital Learning  
Director/Chair of Academic Degree Program  
Data Specialist  
Educational Technology Staff  
Library Staff

**Development/Marketing/Communications**

Alum Officer  
Chief Development Officer  
Director of Advancement  
Director of Communications  
Director of Marketing  
Director of Relations (Alum, External, Church)  
Communications Staff  
Development Professional Staff

**Executive Office**

Executive Vice President

**Finance**

VP-Finance (CFO)  
Business Office Manager  
Accounting Staff  
Business Office Staff

**Information Technology**

Chief Information Officer (CIO)  
Director of IT  
Developer  
IT Help Desk Support  
Network Administrator  
PC Technician

**Operations**

Facilities Director  
VP/Director-HR  
VP-Administration  
VP-Operations/Facilities (COO)  
HR Staff

**Student Affairs**

Admissions Officer  
Dean of Chapel/Chaplain  
Dean of International Student Services  
Dean of Students  
Director of Admissions  
Director of Career/Placement Services  
Director of Enrollment Management  
Director of Financial Aid  
Director of Housing/Student Life  
Director of Recruitment/Retention  
Director of Student Services/Affairs  
Financial Aid Officer  
Recruitment Staff  
Registrar  
Title IX Coordinator

## Public Draft of Revised ATS Annual Report Form PF-2 on Personnel - Part-Time: Faculty

SUMMARY: Form PF-2 is revised in several ways. **Key changes are highlighted in red font below**; **[bracketed items in green font]** are explanations only for this public draft and will not appear in the final form. For this and all ARF modules, instructions are included with the form, rather than in a separate document

<b>Annual Report Form PF-2: Personnel – Part-Time: Faculty</b>			
Estimate for full academic year (for member school, current year: fall and spring)			
<b>Member School:</b>	<b>Survey Year:</b> 2023 - 2024		
1 Does the member school employ part-time faculty? [If "No," please skip the rest of this form.]			
<small>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. <b>[These instructions are significantly revised and expanded to provide more clarity.]</b></small>			
2 Total Number of Part-Time Faculty (all part-time, plus any who teach full-time but only for part of the year)			
<small>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). <b>[Additional instructions provided for greater clarity.]</b></small>			
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)			
<small>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 the 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). <b>[Examples intended to provide greater clarity.]</b></small>			
Respondent and Comments			
<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>	<b>Email:</b>
<b>Comments:</b>			

# Public Draft of Revised ATS Annual Report Form SF-1 on Salary Data for Full-Time Faculty and Select Administrators

SUMMARY: Form SF-1 has been minimally revised (see **changes in red font** below). For this and all ARF modules, instructions are included with the form, rather than in a separate document.

<b>Annual Report Form SF-1: Salary Data for Full-Time Faculty and Select Administrators</b>	
Fall data for the current academic year (include only those personnel on the completed form PF-1, Personnel Data for Full-Time Faculty and Selected Administrators)	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

The online and filled versions of this form are auto-populated with Name, Admin Code(s), Faculty Rank and Percent of Teaching Time for each person on the form *Personnel Data for Full-Time Faculty and Select Administrators* (PF-1). Adjustments to the auto-populated data or personnel listed must be performed on form PF-1, which should be completed prior to completing this form.

Name	Admin Code	Faculty Rank	% of Teaching Time	SO*	Contract Salary	Contributed Services	Housing Value	Added Benefits	Pension Payments	TOTAL (auto calculated)	Comments

Respondent Contact Information			
<b>Respondent:</b>	[FullName], [Title]	<b>Phone:</b>	
		<b>Email:</b>	

As in the past, ATS will continue to maintain the confidentiality of individual salary data and only aggregate sets that contain **two** or more data elements will be released.

**\*Salary Override:** Check this box if the individual's salary is paid by another entity (for example, the member school is part of another entity, and the other entity pays that person's salary).

**Contract Salary:** Enter the dollar amount of the current contract salary as of the fall reporting date. Separate thousands with a comma or space. 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 in field (I). 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:** Auto calculates the total compensation as the sum of Contract Salary, Contributed Services, Housing Value, Added Benefits, and Pension Payments.

## Public Draft of Revised ATS Annual Report Form IPPR on Request for Institutional Peer Profile Report

SUMMARY: Form IPPR has been revised only minimally, mainly in the instructions (see **changes in red font** below). More detailed instructions are provided in the online version of this form.

<b>Annual Report Form IPPR: Request for Institutional Peer Profile Report</b>	
Current Annual Report Forms survey year	
<b>Member School:</b>	<b>Survey Year:</b> 2023 - 2024

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 <i>minimum of five to a maximum of fifteen member schools</i> for your peer profile. A list of member schools can be found on the <a href="#">ATS website.</a> )
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	

<b>Respondent and Comments</b>			
<b>Respondent:</b>	[Full Name], [Title]	<b>Phone:</b>	[Phone Number]
		<b>Email:</b>	[Email Address]
<b>Comments:</b>			

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.

## Public Draft of Revised ATS Annual Report Form RF-1 on Respondents

SUMMARY: Form RF-1 has been revised only minimally, mainly in adding new or revised labels to the list of forms. **Key changes are highlighted in red font below**; [bracketed items in green font] are explanations only for this public draft and will not appear in the final form. For this and all ARF modules, instructions are included with the form, rather than in a separate document.

Annual Report Form RF-1: Respondent Form	
Current Annual Report Forms survey year	
<b>Member School:</b>	<b>Survey Year: 2023 - 2024</b>

Form	Form Title	Name and Title for Administrator Responsible	Administrator's Phone* and Email
AF-1a	Admissions – <b>Applicants by Race and Gender</b>	[Full Name], [Title]	[phone] [email]
AF-1b	Admissions – <b>Acceptances by Race and Gender</b>	[Full Name], [Title]	[phone] [email]
AF-1c	Admissions – <b>New Enrollments by Race and Gender</b>	[Full Name], [Title]	[phone] [email]
CF-1	Completions by Race and Gender	[Full Name], [Title]	[phone] [email]
CF-2	Completions by Time <b>and Race</b>	[Full Name], [Title]	[phone] [email]
CF-3	Completions by Placement and Gender	[Full Name], [Title]	[phone] [email]
CF-4	Completions, Graduation Rate, <b>and Persistence Rate</b>	[Full Name], [Title]	[phone] [email]
DF-1	Development Data	[Full Name], [Title]	[phone] [email]
EF-1	Enrollment by Race and Gender	[Full Name], [Title]	[phone] [email]
EF-2	Enrollment by Age and Gender [every odd year]	[Full Name], [Title]	[phone] [email]
EF-3	Enrollment By Denomination	[Full Name], [Title]	[phone] [email]
EF-4	Enrollment for Previous Year	[Full Name], [Title]	[phone] [email]
EF-5	Enrollment <b>for Offsite and Online</b>	[Full Name], [Title]	[phone] [email]
FF-1	Financial Data	[Full Name], [Title]	[phone] [email]
FF-2	Financial Data <b>for Technology Expenditures</b>	[Full Name], [Title]	[phone] [email]
IC-1	Institutional Characteristics	[Full Name], [Title]	[phone] [email]
LF-1	Library Information	[Full Name], [Title]	[phone] [email]
PF-1	Personnel - Full-Time Faculty and Select Administrators	[Full Name], [Title]	[phone] [email]
PF-2	Personnel - Part-Time Faculty	[Full Name], [Title]	[phone] [email]
SF-1	Salary Data for Full-Time Faculty and Select Administrators	[Full Name], [Title]	[phone] [email]
IPPR	<b>Request for</b> Institutional Peer Profile Report	[Full Name], [Title]	[phone] [email]
	Submit ARF Data	[Full Name], [Title]	[phone] [email]

Respondent and Comments			
<b>Respondent:</b>	[Full Name], [Title]	<b>Phone:</b>	
<b>Comments:</b>			

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.