

# Five significant changes to expect for revised Annual Report Form

BY DEBORAH H. C. GIN

With fall 2022 marking the start of the implementation phase of the Comprehensive Revision of the Association's Annual Report Form (ARF), a new series of focus groups recently met to review the first set of revised forms. The revisions reflect the large quantity of input received during last year's information-gathering phase, including the following five most significant changes.



## 1 Library

The *Library* form will undergo the largest reduction, from 100-plus items on four pages to 30 items on two pages. Following the principle of streamlining the reporting that schools do to various organizations, the revised form will parallel the Integrated Postsecondary Education Data System (IPEDS) library survey as much as possible. While not all ATS schools report to IPEDS, 195 (80%) of 245 schools in the 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 they are not required to complete IPEDS). The revision made possible the retention of key data items while removing questions that were interesting but not essential for annual collection.

"I know our members will appreciate the efforts to leverage data they're already collecting for other purposes," said Gillian Harrison Cain, director of member programs at Atla (American Theological Library Association), who

has been involved in the entire revision process. "We look forward to collaborating closely to analyze and report on trends."

## 2 Finance

The most significant revision to the *Finance* forms is the separation of financial data for technology expenditures into its own form. This reflects the increased reliance on technology among theological schools during the last decade, but especially since the onset of COVID-19. Information related to various technology systems, the number of technology staff, and the percentage of total expenditures spent on IT are among the questions asked on this new form.

An additional revision is a set of updated items for related/embedded schools, based on a brief survey sent to CFOs at related schools. These items will help ATS better understand any financial expectations the related entity has of the ATS school and how any fees paid to the related entity are determined.

### 3 **Development**

The *Development* form is the one that needed the most updating, as several items had not been revised in more than two decades. Gift size ranges have been updated to reflect current patterns, as have certain categories of information (e.g., removal of number of alums solicited, given donor appeals that occur through social media, making it impossible to know the number). Like the *Library* form, the *Development* form largely parallels the Voluntary Support of Education (CASE VSE) survey that is well known in the world of development in education. Based on focus group input from senior development officers, questions related to donor retention, recapture, and acquisition have also been added so that peer comparisons can be made.

### 4 **Personnel**

Focus groups of CEOs, CAOs, and CFOs expressed difficulty in reporting roles of school employees, requesting more categories and subdivisions, as well as a way to indicate when the school carries only part of an individual's contract. The revision of the *Personnel* forms expands the possible roles from 29 to more than 50, based on a recent survey on personnel structures that went to CEOs of every school, and an item to indicate whether the employee is shared between entities. In addition, the form now includes an item to indicate if someone has "faculty status" to account for administrators who are faculty but do not teach full-time, and a mechanism to indicate which of several administrator roles is primary. A significant anticipated impact of this fine-tuning is better salary data, with individuals more accurately reported in administrator categories.

### 5 **Admissions/Enrollment/Completions (ACE)**

Several important updates have been proposed to this suite of ACE forms. Perhaps most significant is a standardized full-time equivalent student (FTE). Challenges around computing FTE surfaced among most focus groups in the spring. ATS staff and focus groups in the fall went back and forth, weighing potential decisions. Ultimately, the main issue centered on lack of clarity

without a standard definition of "full load." Without this standard, school-to-school comparisons would be akin to comparing apples to oranges. School charisms and target audiences are certainly different, as are expectations of time to finish degree programs. National definitions of "full load" also range broadly (cf., IPEDS vs. USDE's Title IV, graduate vs. undergraduate, US vs. Canada), and the newly redeveloped *Standards of Accreditation* no longer focus on length of a degree. What we heard from focus groups is that if ATS provides a starting point for "full load," then a standard measure could be computed from total credit hours, and interpretations could be nuanced from there. At the same time, definitions would be clear, and the important longitudinal school-to-school comparison could be made. The public draft of the revision will include the final definition of "full load" (see below about public draft).

Other important changes to the ACE forms include:

- **Admissions**—expanded the form to include race and gender information on the application-to-matriculation process (which are already collected by admissions offices) to keep track of emerging new audiences and potential pathways to theological education.
- **Enrollments**—pulled "Visa" from the race category and created a separate "International Status" item; also significantly revised items related to online enrollment.
- **Completions**—added "Persistence Rate" to "Graduation Rate" to account for those still enrolled; also replaced gender with race on the Completions by Time and Degree form (keeping the Placements by Gender and Degree form).

The *Institutional Characteristics* form was made far simpler. Tuition per credit hour was also added for MA degrees, per request from CEOs and CAOs.

Now in its third year, the ARF Comprehensive Revision project has had the important aims of making the ARF more relevant for schools and the industry of theological

education and bolstering the data-informed decision-making capacity of schools. To that end, the project has involved representatives from two-thirds (more than 185) of the 280 schools in the membership. This involvement has been substantive, including hour-length interviews and numerous focus groups. It has truly been a collaborative endeavor!

Adjustments to the revised forms are underway and internal cohesion and consistency are being scrutinized. A public draft of the full set of forms will be made available in January 2023. Please look for announcements.



---

*Deborah H. C. Gin is Director of Research and Faculty Development at The Association of Theological Schools in Pittsburgh, Pennsylvania.*