ANNUAL REPORT FORMS

ATS member schools are required to complete the Annual Report Forms. These forms collect various data regarding admissions, completions, enrollment, development, finance, personnel, salary, etc. E-mails are sent in early September announcing the beginning of the collection period, the due date for data submission and the passwords for the current reporting year.

Please Note: Completing these forms each year is a condition of membership—both for Associate members (see ATS Procedures II.C) and for Candidate and Accredited members (see Commission Policies and Procedures II.D and III.D).

Website: To access the Annual Report Forms (ARF) login screen type into a web browser address bar, ARF.ATS.EDU (without “www” or “http://”).

User ID and Passwords: There are three levels of access, General, Personnel and Salary/Submit, each level requires a separate User ID and password set. Each year the passwords are reset, and the General and Personnel passwords are provided to the member school’s Chief Executive Officer or equivalent and the member school’s Academic Vice President/Academic Dean or equivalent. The Salary/Submit passwords are only sent to the member school’s Chief Executive Officer or equivalent.

- **General** access is for multiple users to complete information on forms other than Finance, Personnel, and Salary.
- **Personnel** access is for completion of school personnel information.
- **Salary/Submit** access, accesses all parts of the ARF, and the only code that accesses the Finance and Salary forms as well as the only code that can submit the information to ATS.

*Note: For password purposes, please note the number 1 has a “flag” on the top and the letter l does not. Passwords are case sensitive.*

Above the menu block the member school name, reporting year field and ARF due date information is displayed.

**Reporting Year:** The reporting year field is used to switch between accessing the current and previous data collection period. Current reporting year data can edited until the data is submitted, at which point the data is read only. The previous reporting year data is always read only.

Please note Reporting Year represents the academic year of the ARF processing period. The time period of the data reported will vary for the different forms. Just below the name of the form within the forms and within the instructions is a note indicating the period the data should cover.

**ARF Due Date:** ARF data should be submitted no later than the ARF due date displayed. Email requests for an extension to arf@ats.edu no later than the ARF Due Date. Include the reason for the extension request and a specific proposed submission date. The email subject should read: ARF Extension request for member school name. If an extension is granted the ARF due date will reflect the new due date.

**Menu Block:** The menu block consists of 24 selections read left to right, top to bottom. The first 20 selections access the various Annual Report forms for collecting the annual data. These forms may be completed in any order with the following exceptions.
• Complete the Enrollment by Race and Gender Form before the Enrollment by Age and Gender* and Enrollment by Denomination Forms. *The Enrollment by Age and Gender form is required biennially only and is available every other year in academic years beginning in an odd numbered calendar year.

• Complete the Completions Form before the Completions by Graduation Rate and the Completions by Placement Rate Forms.

• Complete the Finance 1 Form before the Finance 2 Form.

• Complete the Personnel - Full Time Form before the Salary and Ext. and Distance Programs Forms.

Details for the first 20 menu selections can be found by clicking the Instructions button within each form or selecting instructions from the menu block. Links to the instructions are also available on the ATS website at www.ats.edu, Resources, Annual Report Forms. The last four menu selections are explained in detail below.

Print Forms: Forms can be printed individually or as a complete set. To print forms, select “Print Forms” from the form selection menu. A new window will open with a list of the available forms and a link for “All forms in one document” to the right of the forms list. Above the forms list is a check box labeled “Blank Form”. Check or un-check the box for blank or completed forms, and select the individual form to print or for a complete set select “All forms in one document”. Forms may also be accessed from within the individual forms by selecting the “Print” button near the top left of the form screen.

Instructions: Instructions can be viewed and printed individually or as a complete set. To view/print instructions, select “Instructions” from the form selection menu. A new window will open with a list of the available form instructions and a link for “All forms in one document” to the right of the forms list. Select the individual form to view/print or for a complete set select “All forms in one document”. Instructions may also be accessed from within the individual forms by selecting the “Instructions” button near the top right of the form screen.

Form Review: The form review report can be viewed and printed for an individual form by selecting the Form Review button within the form or all the forms in one report by selecting Form Review from the menu block. The report provides a summarized comparison of the current reporting year to the previous reporting year as well as any user comments and validation comments. The differences between the reporting years are shown in number and percentage format. Validation comments are system generated comments to assist reviewing the data for missing information, possible errors and anomalies. There are four types of Validation comments; Informational, Review, Error and Submit Error.

Informational comments provide additional information regarding the relevant data.

Review comments identify unexpected values and large changes in the data compared to the previous reporting year. After review of these items, if no corrections are needed a comment should be provided explaining the reason for the anomaly by clicking the comment button within the relevant form.

Error comments identify items requiring correction or completion. These types of errors will not prevent submission of the ARF, however ATS will contact the respondent(s) for correction(s) and/or additional information.

Submit error comments identify items that must be corrected before submitting the ARF.

Submit Data: The submit data screen displays a list of errors with the submit errors in red at the top of the list. Resolve the submit errors and as many of the other errors as possible. The respondent field is for identifying the person submitting the ARF. If the respondent is not listed, click the link to add a new respondent. After the errors are resolved and the respondent is selected click the Submit Now button to submit the ARF. A window will display confirmation ATS received the data. ATS will review the data and contact the respondent(s) if additional information is required.
**Annual Report Forms Application Notes**

**Form Headers:** Each form includes a header of information and navigation buttons.

- The left shaded area of the header includes the name of the form and a note indicating the period for which the data represents.
- The right shaded area includes the name of the member institution for which the data represents, the ARF reporting year field and a button to access the form review report.
  - The Reporting Year field functions the same as the Reporting Year field displayed above the menu block and described above.
  - The Form Review button functions similar to the Form Review selection in the menu block with the exception of only displaying the data for the active form.

Below the shaded areas of the header are the following navigation buttons.

- **Print and Blank Form:** The Print button and the Blank Form check box work together if Blank Form is checked the Print button will display a printable version of the active form with no data. If Blank Form is not checked the Print button will display a printable version of the active form including the data entered in the form.
- **Comments:** The Comments button accesses the comments field. Comments can be left for each form to further explain the data entered. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
- **Close:** The Close button saves the information entered and returns to the menu block screen. Some of the forms have fields that are validated upon saving. If validation fails a list of errors is displayed below the form header. Some forms will allow saving the data with errors by clicking the Close Now button which will appear below the validation error list if the option to save with errors is available. If the option is not available all errors must be resolved to close the form with the data saved. If the errors cannot be resolved at the time of attempting to close, use the Cancel button to exit the form, no data will be saved.

  **The Close Now button does not mean the errors do not need to be resolved. The button is provided as a convenience to prevent the need to re-enter large amounts of data if the errors cannot be corrected immediately. If the errors are not corrected before submission ATS will contact the respondent for the corrected information in order to complete the ARF process.**

- **Page/Record Navigation buttons:** Forms with multiple pages/records have buttons to navigate the screens. A button with two arrow heads pointed left navigates to the first screen, pointed right navigates to the last screen. A button with one arrow head pointed to the left navigates to the previous screen, pointed right navigates to the next screen. A drop down menu between the arrow heads navigates to the screens directly by selecting the screen name from the list. The Personnel-Full Time, Salary and Respondents forms display one screen per record identified by a person’s name.
- **Instructions:** The Instructions button accesses the instructions document for the active form.
- **Cancel:** The Cancel button exits the form without saving changes.

**Gray shaded fields:** For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.
**Blue shaded fields:** The blue shaded fields represent fields for which data entry is not allowed. These fields, such as Total fields are calculated or contain amounts that are brought forward from another part of the form—the type in these fields is navy blue.

**Totals:** Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

**Decimals:** Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

**Browser Compatibility:** Throughout the ARF program, there is formatting used to identify fields or draw attention to notes. Microsoft Internet Explorer versions 8 and 9 may not display some or all of the formatting as intended. In order to view the webpage as intended the Compatibility View setting may need to be turned on or off.

If Internet Explorer recognizes a webpage that isn’t compatible, the Compatibility View button will be displayed on the Address bar (figure 1a). To turn Compatibility View on, click the Compatibility View button to make the icon change from an outline 🔎 to a solid color 📊. Compatibility View can also be turned on and off by clicking “Compatibility View” on the tools menu. (figure 1b).
Print/Save a report, form or instructions to a “PDF” file: Due to a change in the Windows operating environment, some users are unable to send a copy of the reports and/or forms to a local printer by clicking on the Printer icon. An alternate way to print reports/forms is to save the report/form to a “PDF” file.

- Select the Print button to open the printable version of the report/form.
  - If the printable version of the report/form does not appear:
    - Confirm the browser’s pop-up blocker is turned off or set to allow pop-ups from the ATS Annual Report Forms website.
    - Confirm the Microsoft Active X control RSClientPrint add-on is enabled.
- Click the “Export” icon near the top of the window, and choose the “PDF” file option. (see figure 2a for Firefox and figure 2b for MS Internet Explorer)
- Select Open when prompted*
  *If using Mozilla Firefox the prompt will look similar to figure 3a, if using Microsoft Internet Explorer the prompt may appear at the bottom of the window and look similar to figure 3b.
- A new window will open a version of the report which can be saved or printed as usual.

Figure 2a (Mozilla Firefox)

Figure 2b (Microsoft Internet Explorer)

Figure 3a (Mozilla Firefox)

Figure 3b (Microsoft Internet Explorer)
INSTRUCTIONS
For each group of degree programs enter the appropriate number of Applicants, Acceptances and Enrollees.

Number of Applicants: For each group of degree programs enter 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.

Number of Acceptances: For each group of degree programs enter the number of students who formally submitted complete applications and were formally accepted for the fall.

Number of Enrollees: For each group of degree programs enter the number of students who were formally accepted and actually enrolled in the fall for the following degree programs.

DEGREE PROGRAM

Basic Programs Oriented Toward Ministerial Leadership
MDiv Master of Divinity
MRE Master of Religious Education
MCE Master of Christian Education
MA in RelEd Master of Arts in Religious Education
MA in CE Master of Arts in Christian Education
MCM Master of Church Music
MSM Master of Sacred Music
MA in ___ (Spec.) Professional Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
MPS Master of Pastoral Studies
MAPS Master of Arts in Pastoral Studies

Basic Programs Oriented Toward General Theological Studies
MA Master of Arts
MAR Master of Arts (Religion)
MTS Master of Theological Studies
MARS Master of Arts (Religious Studies)
MATS Master of Arts (Theological Studies)

Advanced Programs Oriented Toward Ministerial Leadership
DMin Doctor of Ministry
DMiss Doctor of Missiology
DEdMin Doctor of Educational Ministry
EdD Doctor of Education
DMA Doctor of Musical Arts
DCM Doctor of Church Music
Doctor in ___ (Special) Doctor of specialized ministry

Advanced Programs Oriented Toward Research and Teaching
ThM Master of Theology
MTh Master of Theology
STM Master of Sacred Theology
ThD Doctor of Theology
PhD Doctor of Philosophy

Degree Program Notes:
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

Canadian schools—Students in the Bachelor of Theology degree should be entered under Certificate and Diploma programs because it is an undergraduate degree. Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.


**ARF PROGRAM NOTES**

**Gray shaded fields:** For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

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**Totals:** Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

**Decimals:** Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

**Comments:** A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
INSTRUCTIONS

Complete the Graduation Rates by Degree Programs form only for those degree programs your school offers. Leave blank any programs that you do not offer or are too new to have graduates. The formulae used below are meant to keep this form as simple as feasible, using as a basis 200% (double) the degree duration requirements listed in the standards. While some agencies use 150% to calculate graduation rates, the 200% timeframe allows for the high number of part-time students in ATS member schools and helps address schools with four-year MDiv programs. [NOTE: Do not include in your entering count students who do not intend to graduate (i.e., count only degree-seeking students). Also, if a student begins in one program but transfers to and graduates from another, please count that student as starting in the program from which he/she graduated.]

DEGREE PROGRAM

**Basic Programs Oriented Toward Ministerial Leadership**

**Standard A**
- MDiv Master of Divinity

**Standard B**
- MA in CH Master of Arts in Christian Education
- MAPS Master of Arts in Pastoral Studies
- MA in RelEd Master of Arts in Religious Education
- MA in ___ (Spec.) Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
- MCE Master of Christian Education
- MPS Master of Pastoral Studies
- MRE Master of Religious Education

**Standard C**
- MCM Master of Church Music
- MSM Master of Sacred Music

**Basic Programs Oriented Toward General Theological Studies**

**Standard D**
- MA Master of Arts
- MAR Master of Arts (Religion)
- MTS Master of Theological Studies
- MARS Master of Arts (Religious Studies)
- MATS Master of Arts (Theological Studies)

**Advanced Programs Oriented Toward Ministerial Leadership**

**Standard E**
- DMin Doctor of Ministry

**Standard F**
- EdD Doctor of Education

**Standard G**
- DEdMin Doctor of Educational Ministry
- DMiss Doctor of Missiology
- Doctor in ___ (Special) Doctor of specialized ministry

**Standard H**
- DCM Doctor of Church Music
- DMA Doctor of Musical Arts

**Advanced Programs Oriented Toward Research and Teaching**

**Standard I**
- STM Master of Sacred Theology
- ThM/MTh Master of Theology

**Standard J**
- PhD Doctor of Philosophy
- ThD Doctor of Theology

**Degree Program Notes**

For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

**Canadian schools**—Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.
ARF PROGRAM NOTES

Gray shaded fields: For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

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Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
The Number of Completions by Race and Gender form is designed to work with the Time to Completions by Gender form. The Number of Completions by Race and Gender form must be completed first.

INSTRUCTIONS
For each group of degree programs enter the Head Count of students that have completed the degree program in the previous academic year for each racial/ethnic category and gender available.

HEAD COUNT
Formal summer school enrollees who completed their degree requirements at the end of the summer should be counted as completions on the Number of Completions by Race and Gender form.

Do not include individual students in more than one count. Students should be counted in only one program, preferably in the longer duration or higher academic degree program. Thus, a PhD candidate who may receive a master’s degree after two years should normally be listed only as an enrollee under PhD.

RACE/ETHNIC CATEGORIES
Visa or Nonresident Alien: A person who is not a citizen or national of the United States or Canada and who is in the country on a temporary basis and does not have the right to remain indefinitely.
Black Non-Hispanic: A person having origins in any of the black racial groups of Africa.
American Indian, Alaskan Native, or Inuit: A person having origins in any of the original peoples of North America and maintaining cultural identification through tribal affiliation or community recognition.
Asian or Pacific Islander: A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.
Hispanic: A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.
White Non-Hispanic: A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

Note: Schools that do not collect information on the race and/or ethnicity of its students must enter the appropriate figures for race/ethnicity as “Not Available”.

DEGREE PROGRAM
Basic Programs Oriented Toward Ministerial Leadership
MDiv Master of Divinity
MRE Master of Religious Education
MCE Master of Christian Education
MA in RelEd Master of Arts in Religious Education
MA in CE Master of Arts in Christian Education
MCM Master of Church Music
MSM Master of Sacred Music
MA in ____ (Spec.) Professional Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
MPS Master of Pastoral Studies
MAPS Master of Arts in Pastoral Studies

Basic Programs Oriented Toward General Theological Studies
MA Master of Arts
MAR Master of Arts (Religion)
MTS Master of Theological Studies

MARS Master of Arts (Religious Studies)
MATS Master of Arts (Theological Studies)
Advanced Programs Oriented Toward Ministerial Leadership
DMin Doctor of Ministry
DMiss Doctor of Missiology
DEdMin Doctor of Educational Ministry
EdD Doctor of Education
DMA Doctor of Musical Arts
DCM Doctor of Church Music
Doctor in ____ (Special) Doctor of specialized ministry

Advanced Programs Oriented Toward Research and Teaching
ThM Master of Theology
MTh Master of Theology
STM Master of Sacred Theology
ThD Doctor of Theology
PhD Doctor of Philosophy
Degree Program Notes:
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

Canadian schools—Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.

ARF PROGRAM NOTES

Gray shaded fields: For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

Blue shaded fields: The blue shaded fields represent fields for which data entry is not allowed. These fields, such as Total fields are calculated or contain amounts that are brought forward from another part of the form—the type in these fields is navy blue.

Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
The Placement Rates by Gender form was developed to gain a more comprehensive picture of the state of theological education and the placement of graduates from Commission related institutions. For several years the Commission’s accreditation standards have expected accredited school to collect and publish information related to the placement of graduates.

INSTRUCTIONS
The Placement Rates by Gender form is designed to work with the prior year’s Number of Completions by Race and Gender form. Using the data reported on the prior year’s Number of Completions by Race and Gender, data is to be entered into the Placement Rates by Gender form to account for all of the prior year’s graduates. The subtotals reported on the Placement Rates by Gender form are to match the subtotals from the prior year’s Number of Completions by Race and Gender form.

HEAD COUNT
Report whole numbers.

Do not include individual students in more than one count. Report only the most current status of the graduate.

The data being reported on the Placement Rates by Gender form reflects the placement of graduates 12-18 months following their graduation. [18 months as some schools award degrees at the end of both semesters.]

CATEGORIES

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 within 12-18 months of 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 actually placed.

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. Institutions should not use this category to justify not tracking their graduates’ placements, since doing so is required. However, institutions may use this category when, despite their best efforts, some graduates’ placement status remains unknown.
DEGREE PROGRAM

Basic Programs Oriented Toward Ministerial Leadership
MDiv Master of Divinity
MRE Master of Religious Education
MCE Master of Christian Education
MA in RelEd Master of Arts in Religious Education
MA in CE Master of Arts in Christian Education
MCM Master of Church Music
MSM Master of Sacred Music
MA in ___ (Spec.) Professional Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
MPS Master of Pastoral Studies
MAPS Master of Arts in Pastoral Studies

Basic Programs Oriented Toward General Theological Studies
MA Master of Arts
MAR Master of Arts (Religion)
MTS Master of Theological Studies
MARS Master of Arts (Religious Studies)
MATS Master of Arts (Theological Studies)

Advanced Programs Oriented Toward Ministerial Leadership
DMin Doctor of Ministry
DMiss Doctor of Missiology
DEdMin Doctor of Educational Ministry
EdD Doctor of Education
DMA Doctor of Musical Arts
DCM Doctor of Church Music
Doctor in ___ (Special) Doctor of specialized ministry

Advanced Programs Oriented Toward Research and Teaching
ThM Master of Theology
MTh Master of Theology
STM Master of Sacred Theology
ThD Doctor of Theology
PhD Doctor of Philosophy

Degree Program Notes:
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

Canadian schools—Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.

ARF PROGRAM NOTES

Gray shaded fields: For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

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Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
The Time to Completions by Gender form is designed to work with the Number of Completions by Race and Gender form. **The Number of Completions by Race and Gender form must be completed first.** The subtotals from the Time to Completions by Gender form must match the subtotals from the Number of Completions by Race and Gender form.

**INSTRUCTIONS**
For each group of degree programs enter the Head Count of students that have completed the degree program in the previous academic year for each graduation rate available per gender.

**GRADUATION RATE**
The duration of time it takes a student to complete their degree program.

If a student begins in one master’s degree program and graduates from another master’s degree program, then use the start date of the initial degree program for purposes of determining the years to completion for the graduate.

**HEAD COUNT**
Formal summer school enrollees who completed their degree requirements at the end of the summer should be counted as completions on the Number of Completions by Race and Gender form.

**Do not include individual students in more than one count.** Students should be counted in only one program, preferably in the longer duration or higher academic degree program. Thus, a PhD candidate who may receive a master’s degree after two years should normally be listed only as an enrollee under PhD.

**DEGREE PROGRAM**

**Basic Programs Oriented Toward Ministerial Leadership**
- MDiv Master of Divinity
- MRE Master of Religious Education
- MCE Master of Christian Education
- MA in ReEdMaster of Arts in Religious Education
- MA in CE Master of Arts in Christian Education
- MCM Master of Church Music
- MSM Master of Sacred Music
- MA in ____ (Spec.) Professional Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
- MPS Master of Pastoral Studies
- MAPS Master of Arts in Pastoral Studies

**Basic Programs Oriented Toward General Theological Studies**
- MA Master of Arts
- MAR Master of Arts (Religion)
- MTS Master of Theological Studies

**Advanced Programs Oriented Toward Ministerial Leadership**
- DMin Doctor of Ministry
- DMiss Doctor of Missiology
- DEdMin Doctor of Educational Ministry
- EdD Doctor of Education
- DMA Doctor of Musical Arts
- DCM Doctor of Church Music
- Doctor in ____ (Special) Doctor of specialized ministry

**Advanced Programs Oriented Toward Research and Teaching**
- ThM Master of Theology
- MTh Master of Theology
- STM Master of Sacred Theology
- ThD Doctor of Theology
- PhD Doctor of Philosophy

**Degree Program Notes:**
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.
Canadian schools—Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.

ARF PROGRAM NOTES

Gray shaded fields: For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

Blue shaded fields: The blue shaded fields represent fields for which data entry is not allowed. These fields, such as Total fields are calculated or contain amounts that are brought forward from another part of the form—the type in these fields is navy blue.

Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
INSTRUCTIONS

Data for the previous fiscal year (or in some cases, the calendar year) are to be reported only for the ATS member school. The ATS member school may be part of an institutional complex, and some figures may be maintained for only the total institution as opposed to the individual ATS member school. In this instance, a formal designation should be agreed upon for the assignment of funds. We recommend that the institution develop a ratio of the budget of the theological school to the entire budget of the total institution.

Round all figures to the nearest dollar. Do not report cents. Blank will be the equivalent of “NA” (Not Available) where the information is not available. Zero (0) will be the equivalent of not applicable or no support was received. Verify column and row totals.

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

Note: On the recommendation of development officers and with the approval of the ATS Board of Directors, ATS may make development data public with individual school identity. The objective of this procedure is to enable schools to better utilize and benefit from all development data. In the event a school does not wish to participate in this development data service, please attach a statement to this effect to the completed form.

Include as voluntary support (all gift and grant income):
- Gifts and grants to the institution, both restricted and unrestricted for current operations and for 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 institution;
- 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 institution (because they are counted when RECEIVED by the affiliated foundation or organization, not when they are passed to the institution itself)
- Nongift revenue earned by the fundraising function (e.g., from advertisements in alumni magazines or event programs, sales of alumni 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 an institution’s gifts. Grant income from private, nongovernment sources should be included in an institution’s gift totals. **Contract revenue should not be included.** Both private grants and contracts may be awarded on the basis of an unsolicited proposal. Both may be based on line-item budgets submitted to the awarding agency and may involve the institution 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 basis of the intention of the awarding agency and the legal obligation incurred by an institution in accepting the award.

For purposes of this survey, 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 institution and the awarding agency and is enforceable by law. Whereas an institution 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 institution on the date the donor relinquished control of the assets in favor of the institution. 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 institution, the following guidelines should be observed:

- **Securities**: Institutions should report gifts of securities at market value on the date the donor relinquished control of the assets in favor of the institution. Neither losses nor gains realized by the institution’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 institution with some expertise—such as a librarian or professor of art—and that informal valuation may be used for institutional 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 in order to meet a payout obligation, the gift’s net realizable value (i.e., the remainder interest, as calculated by the institution 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 or not 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 an institution’s gift totals.

Trust Administered by Others: The value of the assets of gifts in trust that the institution or the donor has chosen to have administered by others (not the institution itself) should be included in the institution’s gift totals in the year given—provided the institution has an irrevocable right to all or a predetermined portion of the income or remainder interest.

Caveat: When an institution 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.

Note: We recognize that this treatment is at variance with generally accepted accounting principles for colleges and universities that provide for the omission of the assets of trusts administered by others from the institution’s records.

Insurance: An institution must be named both beneficiary and irrevocable owner of an insurance policy before a policy can be recorded as a gift. Institutions 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 institution should include the entire amount of the premium payments in its gift totals. If the institution 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 institution and the insurance company’s settlement at the death of the donor should NOT be reported as a gift. However, when an institution 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.

LINE BY LINE INSTRUCTIONS

PART I—SELECTED DETAILS ABOUT GIFTS REPORTED IN PART II

A. Alumni Giving for All Purposes
   Alumni are defined as former students—full- or part-time—who have earned some credit toward one of the ATS approved degrees offered by the reporting institution. Include the count of Alumni who make one or more gifts to current operations and/or capital purposes grouped as defined below.

1. Alumni of record: those living alumni carried in an institution’s files and for whom there are believed to be current addresses.

2. Alumni solicited: the number of the alumni of record who receive at least one solicitation during the course of the reporting year.

3. Alumni donors: the number of alumni who made one or more gifts during the year in question.
B. Alumni Giving for Current Operations Only
   Use same definitions as directly above, but apply only to those alumni who make one or more gifts to current operations.

C. Giving of $5,000 or More from Individuals
   How many living individuals gave a total of $5,000 or more in one or more gifts, regardless of any restrictions during the year? Count the number of such donors, not the number of their separate gifts. Do the same for bequests.

D. Direct Giving from Governing Board Members (Trustees)
   Members of the governing board (current, honorary or emeritus, not advisory board, both for the institution itself and for a foundation, if there is one) contributing gifts for either current operations or capital purposes (lines a and b). 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 gifts that the board member may have "caused" to be given by a corporation or foundation over which he or she exerts influence. Report the percentage of governing board members contributing (line d).

E. Further Detail Regarding Alumni Giving
   Report the total amount given by alumni for current operation (Part II, line 11, column A) and capital purposes (Part II, line 16, column A). The total of the amounts reported should equal Part II, line 17, column A. Report also the total number gifts made by alumni within each category.

F. Faculty and Staff Giving for All Purposes
   Report the total number of gifts made by faculty and staff and the total amount received for both current operations and capital purposes. This amount should be included in the total reported (Part II, line 17, column A or B). Report the percentage of faculty and staff contributing.

PART II—SUMMARY OF ALL GIFT INCOME

All (100%) of your income should be reported somewhere in Part II. The instructions below provide detailed definitions for the row and column categories used in Part II—Summary of All Gift Income.

Definitions of Sources

Sources of gifts are defined as those individuals or organizations, by type, that transmit the gift or grant to the institution 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 institution or from one organization to another organization to the institution—the last of the entities through which it passes before being received by the institution 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 the purpose of 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.
**Alumni/ae (column A)**
Former students—full- or part-time—who have earned some credit toward one of the ATS approved degrees offered by the reporting institution.

Examples: For the purpose of this report, an individual who completed only one semester or, indeed, only one degree-credit course with passing grades may be included in the alumni category. An individual who matriculated but did not complete the semester or who enrolled in a special course that did not carry degree credit, offered, for example, through the institution’s extension division, should not be included in the alumni category.

**Other Individuals (include parents) (column B)**
All persons who are not classifiable as alumni or by the above definition.

**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 and the Empire State Foundation, for example, are not private tax-exempt entities.

**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.

_Caveats:_ 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 (published by the Foundation Center, 888 Seventh Avenue, New York, NY 10019), which cites the principal donor of each foundation's assets.

**Religious Org. (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.

**Fundraising Consortia (column F)**
Entities that have been formed by a group of cooperating institutions or organizations for the purpose of facilitating their fundraising activities. The United Negro College Fund and the Virginia Council of Independent Colleges are examples of entities to be considered fundraising consortia rather than governmental agencies.
**Other Org. (column G)**
All organizations not defined above as foundations, corporations and businesses, religious organizations, or fundraising consortia other than governmental agencies. Examples include fraternal organizations. Alumni association gifts should be counted as coming from alumni.

**Associations**
Seminary or divinity school-affiliated foundations and associations (as well as alumni association chapters) that have been organized solely for the support of the institution with which they are affiliated should be considered a part of the institution itself. As an example, a gift made by an alumna to a chapter of her school’s alumnae organization should be recorded as a gift from alumni rather than other organizations.

**Definitions of Purposes**
With one exception, you report a gift’s purpose as it was specified by the donor. In other words, how your institution 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 14) because, by their nature, this is how they effectively must be treated by the institution given the form in which they were provided by the donor.

**A. Gifts for Current Operations (cash, securities, property, products)**

1. **Unrestricted**: Gifts, in any form, including bequests, given by donors without any restriction, regardless of any subsequent designation by the institution for current operations, to function as endowment, or to construct facilities. In cases where the donor expresses a preference but leaves usage decision to the institution, 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.

2. **Academic Divisions**: Gifts for current operations that have been restricted by the donor for a particular academic division or department of the institution but upon which no further restriction has been placed.

   **Caveat**: Gifts for faculty and department staff salaries should be reported under faculty and staff compensation.

3. **Faculty & Staff**: Gifts for current operations that have been restricted by the donor for faculty and staff salaries and employment benefits. Include gifts in support of sabbatical and other professional leaves for persons in the current employment of the institution. Gifts made to support lecture series and consultants should be reported under Other Restricted (line 9).

   **Caveat**: As an accounting convenience, funds made available for salaries as part of a larger grant for support of a research project may be credited under the research category.

4. **Research**: Gifts for current operations that are restricted by the donor to scientific, technical, theological, and humanistic investigation. This category includes private grants for individual and/or project research as well as those for institutes and research centers. It does not include government grants of any type, which should not be reported anywhere in this survey.

   **Caveat**: Funds received under contractual arrangements should not be reported as gift revenue. See “Nongovernment Grants and Contracts” above.
5. **Public Services**: Gifts for current operations that are restricted by the donor to support of activities established primarily to provide noninstructional services beneficial to individuals and groups external to the institution. These activities include community service programs (excluding instructional activities for credit) and cooperative extension services.

6. **Library**: Gifts for current operations restricted by the donor to the acquisition, restoration, and preservation of books, periodicals, manuscripts, maps, audiovisual equipment, and other materials and activities appropriate to a library.

   **Caveat**: Gifts for staff salaries and operation and maintenance of the library should be reported under faculty and staff compensation, and operation and maintenance of physical plant.

7. **Oper. & Maint. Plant**: Gifts credited to this category should include those for current operations restricted by the donor to support the ongoing operation of the physical plant, including its buildings and grounds, other facilities, and equipment. Any gifts of $10,000 or less for repairs to existing buildings or for new construction may be credited in this category (see line 12 Property, Buildings, and Equipment).

8. **Student Fin. Aid**: Gifts for current operations that have been restricted by the donor for financial aid to students, whether full- or part-time. For the purpose of this report, such aid includes both need-based and merit scholarships, graduate fellowships, student awards and prizes, and gifts made in support of student work-study arrangements.

   **Caveat**: Funds channeled through the institution for support of students specified by name by the individuals or organizations providing the funds should not be reported as gift income anywhere in the report.

9. **Other Restricted**: All gifts restricted by the donor for current operations that cannot be classified as to purpose in one or another of the above restricted categories (lines 2 through 8). To be included in this category are all gifts to auxiliary enterprises and independent operations.

10. **Total Restricted (lines 2–9)**: The total amount of gifts for current operations on which the donor placed a restriction as to how those funds could be expended for current operations should calculate automatically.

11. **Total for Current Oper. (lines 1 + 10)**: The total amount of gifts for current operations both unrestricted and restricted should calculate automatically. Lines 1 + 10 should equal line 11.

**B. Gifts for Capital Purposes**

12. **Property, Buildings, and Equipment**: Gifts of both real and personal property for the use of the institution, as well as gifts made for the purpose of purchasing buildings, other facilities, and land for use of the institution; constructing or providing major renovations of building and other facilities; 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.

13. **Endow. & Sim. Funds: Unrestricted Income**: Gifts restricted by donors for endowment but not bearing any restriction from the donor as to the use of the income the endowment produces.
14. **Endow. & Sim. Funds: Restricted Income**: Those gifts added to the endowment funds of the institution 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 or not the remainder interest has been restricted for endowment. 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.

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 under Endowment and Similar Funds—Restricted Income; the second under Property, Buildings, and Equipment.

15. **Loan Funds**: Gifts restricted by donors to be available for loans to students, faculty, and staff.

**BEFORE RETURNING THE FORM**

Please make sure that you have:

- rounded all figures to the nearest dollar. **Do not report cents.**
- verified that your total figures in Part II agree across and down.
- included corporate foundation gifts, corporate matching gift dollars, and corporate product and property gifts in column D, Corporations.
- entered bequests only under individuals (columns A and B). Bequests given by donors without any restriction, regardless of any subsequent designation by the institution, should be reported on line 1 of the summary table as unrestricted gifts for current operations.
- retained a copy for your own records.

**Voluntary Support of Education (VSE) Survey conducted by the Council for Aid to Education (CAE)**

If you wish to complete the full Voluntary Support of Education (VSE) Survey conducted by the Council for Aid to Education (CAE) and be listed in the VSE Report, you need to fill out the VSE Survey. CAE mailed survey materials to theological schools in early September. You may also complete the VSE Survey over the Web at www.cae.org. When you are asked for the INITIAL PASSWORD, use zyzxa. Please contact Tanisha at CAE (212-661-5800, Ext. 200 or tanisha@cae.org) if you need VSE Survey materials.
ARF PROGRAM NOTES

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Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
The Enrollment Summary of Students by Age and Gender (Age and Gender) form is required biennially only. The form is available every other year in academic years beginning in an odd numbered calendar year.

The Age and Gender form is designed to work with the Enrollment Summary of Students by Race and Gender (Race and Gender) form. The Race and Gender form must be completed first. The Head Count subtotals on the Age and Gender form must match the Head Count subtotals from the Race and Gender form.

INSTRUCTIONS
For each group of degree programs enter the Head Count of enrolled students for each age group and gender available. The students included on the Age and Gender form are the same students included on the Race and Gender form grouped by age rather than race/ethnicity category.

HEAD COUNT
Include only those students who are formally moving toward completion of a degree, diploma, or certificate. Do not include audit students.

Formal summer school enrollees who complete their degree requirements at the end of the summer should not be counted in the fall enrollment but should be counted as completions on the ATS Completions form.

Do not include individual students in more than one count. Students should be counted in only one program, preferably in the longer duration or higher academic degree program. Thus, a PhD candidate who may receive a master’s degree after two years should normally be listed only as an enrollee under PhD.

Schools that are members of a cluster should not list those students enrolled in graduate or professional programs of the cluster if the cluster itself is a member of ATS and reports the enrollment. Use the criterion of primary registration to determine this. In case of doubt, the school and the cluster should agree to which school will report the figure.

DEGREE PROGRAM

<table>
<thead>
<tr>
<th>Basic Programs Oriented Toward Ministerial Leadership</th>
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</thead>
<tbody>
<tr>
<td>MDiv Master of Divinity</td>
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<tr>
<td>MRE Master of Religious Education</td>
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<tr>
<td>MCE Master of Christian Education</td>
</tr>
<tr>
<td>MA in RelEd Master of Arts in Religious Education</td>
</tr>
<tr>
<td>MA in CE Master of Arts in Christian Education</td>
</tr>
<tr>
<td>MCM Master of Church Music</td>
</tr>
<tr>
<td>MSM Master of Sacred Music</td>
</tr>
<tr>
<td>MA in ___ (Spec.) Master’s of specialized ministry</td>
</tr>
<tr>
<td>MPS Master of Pastoral Studies</td>
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<tr>
<td>MAPS Master of Arts in Pastoral Studies</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Basic Programs Oriented Toward General Theological Studies</th>
</tr>
</thead>
<tbody>
<tr>
<td>MA Master of Arts</td>
</tr>
<tr>
<td>MAR Master of Arts (Religion)</td>
</tr>
<tr>
<td>MTS Master of Theological Studies</td>
</tr>
<tr>
<td>MARS Master of Arts (Religious Studies)</td>
</tr>
<tr>
<td>MATS Master of Arts (Theological Studies)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Advanced Programs Oriented Toward Ministerial Leadership</th>
</tr>
</thead>
<tbody>
<tr>
<td>DMin Doctor of Ministry</td>
</tr>
<tr>
<td>DMiss Doctor of Missiology</td>
</tr>
<tr>
<td>DEdMin Doctor of Educational Ministry</td>
</tr>
<tr>
<td>EdD Doctor of Education</td>
</tr>
<tr>
<td>DMA Doctor of Musical Arts</td>
</tr>
<tr>
<td>DCM Doctor of Church Music</td>
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<tr>
<td>Doctor in ___ (Special) Doctor of specialized ministry</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Advanced Programs Oriented Toward Research and Teaching</th>
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</thead>
<tbody>
<tr>
<td>ThM Master of Theology</td>
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<tr>
<td>MTh Master of Theology</td>
</tr>
<tr>
<td>STM Master of Sacred Theology</td>
</tr>
<tr>
<td>ThD Doctor of Theology</td>
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<tr>
<td>PhD Doctor of Philosophy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Certificate &amp; Diploma Programs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Programs involving a prescribed curriculum of courses taken over time under faculty supervision. Normally, the curriculum comprises of courses offered for credit in the school’s degree programs. Students enrolled for continuing education or other short-term educational enrichment programs should not be counted in the enrollment for certificate or diploma programs.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Special/unclassified</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students participating in regular classes for credit but not enrolled in a regular degree program. Include here students who have been conditionally accepted. Do not include here those students enrolled in special noncredit programs of lay education, special courses for spouses, or those regarded as auditors.</td>
</tr>
</tbody>
</table>
Degree Program Notes:
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

Canadian schools—Students in the Bachelor of Theology degree should be entered under Certificate and Diploma programs because it is an undergraduate degree. Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.

Roman Catholic schools granting Pontifical degrees (STL or STD) not in conjunction with ATS degrees should enter students under Special/Unclassified.

Interns—Students enrolled in intern-year programs, when the internship is under the supervision of the theological school and integral to the completion of the degree program, should be reported under the degree program in which they are enrolled.

GLOSSARY

Credit: Recognition of attendance and/or performance in an instructional activity (course or program) that can be applied by a recipient toward requirements for a degree, diploma, certificate, or other formal award at a given institution.

Noncredit Program: A program or activity having no credit applicable toward a degree, diploma, certificate, or other formal award.

Primary Registration: The primary registration of a student is determined by the institution in which the student is registered in a degree program, not the institution in which the student is currently taking courses.

ARF PROGRAM NOTES

Gray shaded fields: For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

Blue shaded fields: The blue shaded fields represent fields for which data entry is not allowed. These fields, such as Total fields are calculated or contain amounts that are brought forward from another part of the form—the type in these fields is navy blue.

Totals: Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
The Enrollment Summary of Students by Denomination (Denomination) form is designed to work with the Enrollment Summary of Students by Race and Gender (Race and Gender) form. The Race and Gender form must be completed first. The totals from the Denomination form (line 1100) must equal the Totals from the Race and Gender form as shown in the final row of the Denomination form.

**FORM INSTRUCTIONS**

For each group of degree programs enter the Head Count of enrolled students for each denominational affiliation available. The students included on the Denomination form are the same students included on the Race and Gender form grouped by denomination rather than race/ethnicity category.

**HEAD COUNT**

Include only those students who are formally moving toward completion of a degree, diploma, or certificate. Do not include audit students.

Formal summer school enrollees who complete their degree requirements at the end of the summer should not be counted in the fall enrollment but should be counted as completions on the ATS Completions form.

Do not include individual students in more than one count. Students should be counted in only one program, preferably in the longer duration or higher academic degree program. Thus, a PhD candidate who may receive a master’s degree after two years should normally be listed only as an enrollee under PhD.

Schools that are members of a cluster should not list those students enrolled in graduate or professional programs of the cluster if the cluster itself is a member of ATS and reports the enrollment. Use the criterion of primary registration to determine this. In case of doubt, the school and the cluster should agree to which school will report the figure.

**DENOMINATIONAL AFFILIATION**

When a denominational family is given, no entry should be made on the family heading line. Entries should be made for specific denominations that follow the family heading. If you do not know the denominational affiliation of a student or the denominational affiliation is not listed, report the student in the count for “Unknown/Other.”

**DEGREE PROGRAM GROUP**

**MDiv**: For each applicable denomination enter the Head Count for students enrolled in the MDiv program. These students are the same students reported on the Race and Gender form (page 1) under the MDiv Program.

**NonMDiv**: For each applicable denomination enter the total Head Count for students enrolled in these Basic Programs Oriented Toward Ministerial Leadership: MRE/MCE/MA in RelEd/MA in CE, MCM/MSM, MA in ______ (Special), and MPS/MAPS. These students are the same students reported on the Race and Gender form (page 1) under the same programs.

**All Other Students**: For each applicable denomination enter the total Head Count for students enrolled in Basic Programs Oriented Toward General Theological Studies, Advanced Programs Oriented Toward Ministerial Leadership, Advanced Programs Primarily Oriented Toward Theological Research and Teaching, Certificate and Diploma Programs, and Special/Unclassified Students. These students are the same students reported on the Race and Gender form (pages 2 and 3) under the same programs.
DEGREE PROGRAM

**Basic Programs Oriented Toward Ministerial Leadership**
- MDiv: Master of Divinity
- MRE: Master of Religious Education
- MCE: Master of Christian Education
- MA in RelEd: Master of Arts in Religious Education
- MA in CE: Master of Arts in Christian Education
- MCM: Master of Church Music
- MSM: Master of Sacred Music
- MA in ___ (Spec.): Professional Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
- MPS: Master of Pastoral Studies
- MAPS: Master of Arts in Pastoral Studies

**Advanced Programs Oriented Toward Ministerial Leadership**
- DMin: Doctor of Ministry
- DMiss: Doctor of Missiology
- DEdMin: Doctor of Educational Ministry
- DMA: Doctor of Musical Arts
- DCM: Doctor of Church Music
- Doctor in ___ (Special): Doctor of specialized ministry

**Advanced Programs Oriented Toward Research and Teaching**
- ThM: Master of Theology
- MTh: Master of Theology
- STM: Master of Sacred Theology
- ThD: Doctor of Theology
- PhD: Doctor of Philosophy

**Certificate & Diploma Programs**
Programs involving a prescribed curriculum of courses taken over time under faculty supervision. Normally, the curriculum comprises of courses offered for credit in the school’s degree programs. Students enrolled for continuing education or other short-term educational enrichment programs should not be counted in the enrollment for certificate or diploma programs.

**Special/unclassified**
Students participating in regular classes for credit but not enrolled in a regular degree program. Include here students who have been conditionally accepted. Do not include here those students enrolled in special noncredit programs of lay education, special courses for spouses, or those regarded as auditors.

**Degree Program Notes:**
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

Canadian schools—Students in the Bachelor of Theology degree should be entered under Certificate and Diploma programs because it is an undergraduate degree. Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.

Roman Catholic schools granting Pontifical degrees (STL or STD) not in conjunction with ATS degrees should enter students under Special/Unclassified.

Interns—Students enrolled in intern-year programs, when the internship is under the supervision of the theological school and integral to the completion of the degree program, should be reported under the degree program in which they are enrolled.

**GLOSSARY**

**Credit:** Recognition of attendance and/or performance in an instructional activity (course or program) that can be applied by a recipient toward requirements for a degree, diploma, certificate, or other formal award at a given institution.

**Credit Course:** A course that, if successfully completed, can be applied toward the number of courses required for achieving a degree, diploma, certificate, or other formal award.

**Degree Seeking Students:** Students enrolled in courses for credit who are recognized by the institution as seeking a degree or formal award.

**Full-Time Equivalent (FTE):** The Head Count enrollment is for both full-time and part-time students. The FTE is a computed figure based on average workload to determine how many of the students would equal one or more full-time students enrolled in courses as of the fall “snap shot” reported in the Annual Report Forms.
**Full-Time Student:** A student taking the average academic load required to graduate in the normal time for which the degree has been approved.

**Noncredit Program:** A program or activity having no credit applicable toward a degree, diploma, certificate, or other formal award.

**Primary Registration:** The primary registration of a student is determined by the institution in which the student is registered in a degree program, not the institution in which the student is currently taking courses.

**ARF PROGRAM NOTES**

**Gray shaded fields:** For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

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**Decimals:** Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

**Comments:** A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
The enrollment Summary of Students by Race and Gender form is designed to work with the Enrollment Summary of Students by Denomination and the Enrollment Summary of Students by Age and Gender forms. The Enrollment Summary of Students by Race and Gender form must be completed first.

INSTRUCTIONS
For each group of degree programs enter the Head Count of enrolled students for each racial/ethnic category and gender available. In the bottom row, enter the Full-Time Equivalent data for each degree program group.

HEAD COUNT
Include only those students who are formally moving toward completion of a degree, diploma, or certificate. Do not include audit students.

Formal summer school enrollees who complete their degree requirements at the end of the summer should not be counted in the fall enrollment but should be counted as completions on the ATS Completions form.

Do not include individual students in more than one count. Students should be counted in only one program, preferably in the longer duration or higher academic degree program. Thus, a PhD candidate who may receive a master’s degree after two years should normally be listed only as an enrollee under PhD.

Schools that are members of a cluster should not list those students enrolled in graduate or professional programs of the cluster if the cluster itself is a member of ATS and reports the enrollment. Use the criterion of primary registration to determine this. In case of doubt, the school and the cluster should agree to which school will report the figure.

CREDIT HOURS
Calculate using semester credit hours; if using quarter hours, multiply by 0.67. [NOTE: If using any other system (e.g. units), convert to semester credit hours using reasonable method.]

FULL-TIME EQUIVALENT (FTE) DATA
Enter the FTE data for each applicable degree program where head count data is entered. FTE cannot exceed the headcount for any degree category and should be calculated as follows:

Masters Programs, Certificates and Diploma Programs, and Special/ Unclassified
For each master’s level program group, certificate and diploma programs and special/unclassified, FTE is computed using the academic load, and the total number of credit hours in which students are enrolled in a given semester for each degree program.

First, calculate academic load by dividing the total number of credits required for the degree by the number of semesters or quarters prescribed by the ATS Bulletin, Part 1, for degree duration or as described in the school’s catalog.

For example, if an MDiv degree requires 90 semester hours, and the school typically considers the degree to be a three-year degree, the load would be 15 hours per semester.

Then, divide the total of credit hours for which students have enrolled in a given semester for the degree program by the academic load for the same period of time.

For example, if all MDiv students are enrolled for a total of 600 hours for the semester, and the academic load is 15 hours per semester, the FTE would equal 40.
**Doctoral Programs**
ATS will calculate FTE data for all doctoral level programs as one Head Count equals one FTE, except in the case of the DMin degree, which will be calculated as three Head Count equal one FTE.

**RACE/ETHNIC CATEGORIES**
**Visa or Nonresident Alien:** A person who is not a citizen or national of the United States or Canada and who is in the country on a temporary basis and does not have the right to remain indefinitely.

**Black Non-Hispanic:** A person having origins in any of the black racial groups of Africa.

**American Indian, Alaskan Native, or Inuit:** A person having origins in any of the original peoples of North America and maintaining cultural identification through tribal affiliation or community recognition.

**Asian or Pacific Islander:** A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.

**Hispanic:** A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

**White Non-Hispanic:** A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

**Note:** Schools that do not collect information on the race and/or ethnicity of its students must enter the appropriate figures for race/ethnicity as “Not Available”.

**DEGREE PROGRAM**

**Basic Programs Oriented Toward Ministerial Leadership**
- MDiv Master of Divinity
- MRE Master of Religious Education
- MCE Master of Christian Education
- MA in RelEd Master of Arts in Religious Education
- MA in CE Master of Arts in Christian Education
- MCM Master of Church Music
- MSM Master of Sacred Music
- MA in ___ (Spec.) Professional Master’s programs for the specialization as defined (i.e., Master of Arts in Counseling)
- MPS Master of Pastoral Studies
- MAPS Master of Arts in Pastoral Studies

**Basic Programs Oriented Toward General Theological Studies**
- MA Master of Arts
- MAR Master of Arts (Religion)
- MTS Master of Theological Studies
- MARS Master of Arts (Religious Studies)
- MATS Master of Arts (Theological Studies)

**Advanced Programs Oriented Toward Ministerial Leadership**
- DMin Doctor of Ministry
- DMiss Doctor of Missiology
- DEdMin Doctor of Educational Ministry
- EdD Doctor of Education

**DMA Doctor of Musical Arts**
**DCM Doctor of Church Music**
**Doctor in ___ (Special) Doctor of specialized ministry**

**Advanced Programs Oriented Toward Research and Teaching**
- ThM Master of Theology
- MTh Master of Theology
- STM Master of Sacred Theology
- ThD Doctor of Theology
- PhD Doctor of Philosophy

**Certificate & Diploma Programs**
Programs involving a prescribed curriculum of courses taken over time under faculty supervision. Normally, the curriculum comprises of courses offered for credit in the school’s degree programs. Students enrolled for continuing education or other short-term educational enrichment programs should not be counted in the enrollment for certificate or diploma programs.

**Special/unclassified**
Students participating in regular classes for credit but not enrolled in a regular degree program. Include here students who have been conditionally accepted. Do not include here those students enrolled in special noncredit programs of lay education, special courses for spouses, or those regarded as auditors.

**Degree Program Notes:**
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.

**Canadian schools**—Students in the Bachelor of Theology degree should be entered under Certificate and Diploma programs because it is an undergraduate degree. Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.
Roman Catholic schools granting Pontifical degrees (STL or STD) not in conjunction with ATS degrees should enter students under Special/Unclassified.

Interns—Students enrolled in intern-year programs, when the internship is under the supervision of the theological school and integral to the completion of the degree program, should be reported under the degree program in which they are enrolled.

GLOSSARY

Credit: Recognition of attendance and/or performance in an instructional activity (course or program) that can be applied by a recipient toward requirements for a degree, diploma, certificate, or other formal award at a given institution.

Full-Time Equivalent (FTE): The Head Count enrollment is for both full-time and part-time students. The FTE is a computed figure based on average workload to determine how many of the students would equal one or more full-time students enrolled in courses as of the fall “snap shot” reported in the Annual Report Forms.

Noncredit Program: A program or activity having no credit applicable toward a degree, diploma, certificate, or other formal award.

Primary Registration: The primary registration of a student is determined by the institution in which the student is registered in a degree program, not the institution in which the student is currently taking courses.

ARF PROGRAM NOTES

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Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
INSTRUCTIONS
This form collects figures for unduplicated enrollment by degree family. Enter figures for the academic year just completed.

HEAD COUNT
Include only those students who are formally moving toward completion of a degree, diploma, or certificate. Do not include audit students.

Do not include individual students in more than one count. Students should be counted in only one program, preferably in the longer duration or higher academic degree program. Thus, a PhD candidate who may receive a master’s degree after two years should normally be listed only as an enrollee under PhD.

Schools that are members of a cluster should not list those students enrolled in graduate or professional programs of the cluster if the cluster itself is a member of ATS and reports the enrollment. Use the criterion of primary registration to determine this. In case of doubt, the school and the cluster should agree to which school will report the figure.

DEGREE PROGRAM

Basic Programs Oriented Toward Ministerial Leadership
MDiv Master of Divinity
MRE Master of Religious Education
MCE Master of Christian Education
MA in RelEd Master of Arts in Religious Education
MA in CE Master of Arts in Christian Education
MCM Master of Church Music
MSM Master of Sacred Music
MA in ___ (Spec.) Professional Master’s programs for the specialization as defined (i.e, Master of Arts in Counseling)
MPS Master of Pastoral Studies
MAPS Master of Arts in Pastoral Studies

Basic Programs Oriented Toward General Theological Studies
MA Master of Arts
MAR Master of Arts (Religion)
MTS Master of Theological Studies
MARS Master of Arts (Religious Studies)
MAT Master of Arts (Theological Studies)

Advanced Programs Oriented Toward Ministerial Leadership
DMin Doctor of Ministry
DMiss Doctor of Missiology
DEdMin Doctor of Educational Ministry
EdD Doctor of Education
DMA Doctor of Musical Arts
DCM Doctor of Church Music
Doctor in ___ (Special) Doctor of specialized ministry

Advanced Programs Oriented Toward Research and Teaching
ThM Master of Theology
MTh Master of Theology
STM Master of Sacred Theology
ThD Doctor of Theology
PhD Doctor of Philosophy

Certificate & Diploma Programs
Programs involving a prescribed curriculum of courses taken over time under faculty supervision. Normally, the curriculum comprises of courses offered for credit in the school’s degree programs. Students enrolled for continuing education or other short-term educational enrichment programs should not be counted in the enrollment for certificate or diploma programs.

Special/unclassified
Students participating in regular classes for credit but not enrolled in a regular degree program. Include here students who have been conditionally accepted. Do not include here those students enrolled in special noncredit programs of lay education, special courses for spouses, or those regarded as auditors.

Degree Program Notes:
For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. These gray fields represent degree program areas that are not applicable to your institution. The program will automatically skip over these fields during data entry. Because there are always exceptions, data entry is possible within these fields, however an explanation is required. Enter the explanation in the comments field.
Canadian schools—Students in the Bachelor of Theology degree should be entered under Certificate and Diploma programs because it is an undergraduate degree. Schools offering the BRE for which a completed bachelor’s degree is normally required should report figures under MRE/MCE/MA in RelEd.

Roman Catholic schools granting Pontifical degrees (STL or STD) not in conjunction with ATS degrees should enter students under Special/Unclassified.

Interns—Students enrolled in intern-year programs, when the internship is under the supervision of the theological school and integral to the completion of the degree program, should be reported under the degree program in which they are enrolled.

GLOSSARY

Credit: Recognition of attendance and/or performance in an instructional activity (course or program) that can be applied by a recipient toward requirements for a degree, diploma, certificate, or other formal award at a given institution.

Noncredit Program: A program or activity having no credit applicable toward a degree, diploma, certificate, or other formal award.

Primary Registration: The primary registration of a student is determined by the institution in which the student is registered in a degree program, not the institution in which the student is currently taking courses.

ARF PROGRAM NOTES

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Decimals: Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

Comments: A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
INSTRUCTIONS

IT IS IMPORTANT TO NOTE THAT ALL EXTENSION SITES WHERE HALF OR MORE OF THE CREDITS REQUIRED FOR A DEGREE--AS WELL AS ALL DISTANCE EDUCATION SITES--MUST BE REVIEWED AND ACCREDITED INDIVIDUALLY BY THE BOARD OF COMMISSIONERS OF THE COMMISSION ON ACCREDITING. MERELY LISTING THE SITE IN THE ANNUAL REPORT FORM IS NOT SUFFICIENT FOR ACCREDITATION.

Part A – Extension Education Enrollment
Indicate (Yes or No) if any courses are offered at any physical location other than the main campus.
- If No, please skip to Part B – Distance Education Enrollment, If Yes, please continue with Part A.

Indicate (Yes or No) if any of the courses are offered for credit less than once a year.
If No, skip to the “all other off-campus, for credit courses” section.
If Yes, continue by providing the following information
- How many of those courses are scheduled for the Fall?
- How many different students are enrolled in those Fall courses?
  Do not include individual students in more than one count. Students should be counted in only one program.
- How many different sites offer these “occasional” courses for credit?
  These kinds of “occasional” courses were formally called Type 1

List the “occasional” courses’ site locations (if applicable):
- Enter a unique Site Name or Identifier.
- Enter the City and State/Province of the physical location

For all other off-campus, for-credit courses, list the site locations and provide the requested information for each location.
- Enter a unique Site Name or Identifier.
- Enter the City and State/Province of the physical location
- Enter the number of students the fall.
- Indicate the highest portion of any degree students can complete at the listed site.

* Under the "# of Students This Fall" column, do not count any student more than once. So the same student enrolled in two extension courses would count only once. The number of students entered above should also be included in earlier forms that ask for fall enrollment figures, since those earlier forms should include ALL your fall students, including extension students. The only caveat is that a student taking classes at an extension site and through distance education should be counted on each of these two forms, but should only be counted once in the earlier forms, not twice, since those earlier forms reflect total unduplicated headcount. If an extension site enrollment period is not completed when you submit this form, estimate as best you can how many students will enroll this fall.

** Under the "Highest Portion of Any Degree..." column, please mark only one percentage based on the highest portion of any degree that can be completed at that site. For example, if a site offers three degrees, but only one can be completed totally at that site, you would still mark "100%" and only "100%." These categories were formerly called Type 2, Type 4, and Type 5, respectively.
Part B – Distance Education Enrollment

Indicate (Yes or No) if any courses are offered as distance education courses (e.g. online or interactive video)? If no, please skip the rest of this form. If yes, please continue.

Indicate (Yes or No) if your school has approval for comprehensive distance education (i.e. offering at least six different courses over any period of time via distance education)?
   If you do not know, check the ATS website for your school.
   If no, indicate how many different courses (not different sections) of courses for credit are offered through distance education (total number, not just those offered this fall)?
   **If more than five, you must petition for comprehensive distance education approval.**

NOTE: Count hybrid courses only if at least half the instruction is through distance education.

For six or more courses offered through distance education, please complete the following.
- Provide the name, title, and email address of the person responsible for your distance education.
- What is the primary delivery system for distance education (e.g. online via Moodle, interactive video)?
- How many distance education courses are scheduled for this fall?
- How many different students are enrolled in those courses for credit this fall?
  [Do not count students more than once and count only those taking courses for credit]

The number of students entered above should also be included in earlier forms that ask for fall enrollment figures, since those earlier forms should include ALL your fall students, including distance education students. The only caveat is that a student taking classes at an extension site and through distance education should be counted on each of those two forms, but should only be counted once in the earlier forms, not twice, since those earlier forms reflect TOTAL unduplicated headcount. If the enrollment period for one or more distance education courses is not completed when you submit this form, give your best estimate as to how many distance education students will be enrolled this fall.

**ARF PROGRAM NOTES**

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**Decimals:** Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

**Comments:** A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
INSTRUCTIONS
Data are to be reported only for the member theological school in a manner that fully reflects the complete operation of the institution. If the school will not have audited figures in time for submission of this form by the deadline, it may use unaudited data. You no longer need to submit an audit with the ARF, although the Commission might elect to request a copy at a later date. The instructions provide guidelines to use when figures need to be estimated or prorated.

As approved at the June 1998 Biennial Meeting, dues are assessed on the basis of total expenditures, less scholarship and fellowship expenses, as reported by member schools in the prior year. Total expenditures are defined as the amount reported on line 12 of Form 2, Part B of the ATS Finance Annual Report Form. Scholarship and fellowship expense is the amount reported on line 10 of Form 2, Part B of the ATS Finance Annual Report Form. Because the form itself requests information about expenditures from the previous fiscal year, current dues are calculated on the basis of expenditures two years prior (i.e., 2010-11 dues are calculated on expenditures made during the 2008-09 academic year and were reported on the fall 2009 Annual Report Forms).

The Finance forms have been revised to comply with U.S. Financial Accounting Standards Board (FASB) Statements Nos. 116 and 117. For applying the requirements of FASB 116 and 117, the following definitions should be used in completing the form:

- **Temporarily restricted**: Assets that have a donor-imposed restriction that permits the recipient organization to use or expend the donated assets as specified and that is satisfied either by passage of time or by actions of the organization. Canadian schools should report all restricted activities in this column.

- **Permanently restricted**: Assets that have a donor-imposed restriction that stipulates resources be maintained permanently but permits the organization to use or expend part or all of the income derived from the donated assets (permanent endowment funds). No amounts should be reported in this column by Canadian schools.

- **Unrestricted**: 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.

For entities that have not yet complied with the standards and for Canadian schools, adjustments should be made to conform with the Finance forms as noted in the instructions. Explanations should be attached to note differences.

All data should be reported in whole dollars only; omit cents. For any item on the report where exact data do not exist, please give estimates. Items are cited by column and line numbers.

**Note**: ATS may make financial data public with individual school identity. The objective is to enable schools to utilize and benefit from all financial data. If a school does not wish to have its financial data made public, a statement to this effect should be attached to the completed form or returned data.
BEFORE RETURNING THIS FORM, please check the following:

FORM 1: Statement of Financial Position (Independent Schools)
- Line 10 (Total Assets) MUST equal line 24 (Total Liabilities and Net Assets).
- Line 23 (Total Net Assets) MUST equal line 16, column D (Net Assets, End of Year, Total Column) of Form 2: Statement of Activities (All Schools), Part B: Expenditure and Losses.

FORM 2: Statement of Activities (All Schools), Part A: Revenues, Gains and Other Support
- Line 13 (Net Assets Released from Restrictions) Columns A, B, and C MUST equal zero.

FORM 2: Statement of Activities (All Schools), Part B: Expenditure and Losses
- Line 13 (Change in Net Assets) is calculated by subtracting FORM 2B, Line 12 (Total expenditures and losses) from Line 14 (Total Revenues, gains and other support) of FORM 2: Statement of Activities (All Schools), Part A: Revenues, Gains, and Other Support.
- Line 14 (Net Assets, Beginning of Year) should equal the previous year's FORM 2: Statement of Activities (All Schools), Part B: Expenditure and Losses line 16 (Net Assets, End of Year).
- Line 16, column D (Net Assets, End of Year, Total Column) MUST equal Line 23 (Total net assets) of FORM 1: Statement of Financial Position (Independent Schools).

FORM 1: STATEMENT OF FINANCIAL POSITION

NOTE: There are two versions of FORM 1, Page 1. Use the version of Form 1 that best suits your institution, and ignore the alternate Form 1.

Form 1: Statement of Financial Position (Independent Schools). This form should be completed by all schools that are not integrally related to larger institutions. Complete all applicable areas for your school. The information provided should be focused on the organization as a whole rather than particular funds.

Form 1.U: Statement of Financial Position (Theological Schools Integrally Related to Larger Institutions). This form should be used when Form 1 is not applicable. The questions in Parts A and B should be completed, and the balances for the requested items should be completed as they relate to the theological school only.

Categorization of assets and liabilities should follow audited financial disclosure, with special attention given to the following:

Line 4 Contributions receivable: Amounts due to the school for voluntary nonreciprocal transfers of cash or other assets. Only legally enforceable promises are recorded as receivable. Intentions should not be recorded.

Lines 5 and 9 Investments: Investments should be recorded in accordance with the provisions of FASB No. 124.

Line 10 Total Assets: Form 1: Statement of Financial Position (Independent Schools) Lines 10 and 24 MUST be equal.

Line 13 Deferred revenue: Care should be exercised when completing this information. Due to revenue recognition changes related to FASB No. 116, most amounts previously reported as deferred revenue will now be temporarily restricted net assets. Grant revenues are recognized when the promise is received, and amounts should be released from restriction when the expenditure for the grant purpose is incurred.

Line 23 Total Net Assets: MUST equal Form 2: Statement of Activities (All Schools), Part B: Expenditures and Losses, line 16, column D.

FORM 2: STATEMENT OF ACTIVITIES (ALL SCHOOLS)

PART A: REVENUES, GAINS, AND OTHER SUPPORT

See above for the definitions of temporarily restricted (column B), permanently restricted (column C) and unrestricted (column A). Column D, Total will total the unrestricted, temporarily restricted, and permanently restricted 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 Form 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 11.)

Line 2. This line is reserved for future use. No amounts should be reported.

Line 3. Government grants, contracts, and appropriations: Include all amounts received by the institution through acts of a legislative body plus grants and contracts received from governmental agencies that are for specific research projects, training programs, and similar activities for which amounts are received or expenditures are reimbursable under the terms of a government grant or contract.

Line 4. 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 unrestricted revenues in column (A), revenues with temporary restrictions in column (B), and revenues with permanent restrictions in column (C). The entire contribution should be recognized as revenue when received regardless of when funds were expended.

Line 5. 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 6. Value of contributed services: Report the estimated dollar amount of contributed services on line 6. These services follow NACUBO 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 institution that are related to the contributing personnel and have no counterpart in a lay employee relationship.

Contributed services also should be recognized according to FASB No. 116 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 craftspersons. The value of contributed service will also need to be reported as an expenditure under the appropriate function in Part B of Form 2, Unrestricted Expenditures.
Line 7. Investment income: Report the unrestricted income of permanently restricted funds that have no restrictions as to how the income should be spent as unrestricted investment income. Report the temporarily restricted income of permanently restricted funds that have donor imposed restrictions as temporarily restricted investment income. Do not include capital gains or losses.

Line 8. Net realized gains on long-term investments: Include only realized gains as appropriate.

Line 9. Net unrealized appreciation (depreciation): Report the unrealized appreciation (depreciation) of investments, unrestricted, temporarily restricted, or permanently restricted, according to governmental law and donor-imposed restrictions.

Line 10. Other sources: Include all revenues not reported elsewhere. Attach explanation of detail if more than 10 percent of total revenues, gains, and other support. 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 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 11. 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 book stores.

Line 12. This line is reserved for future use. No amounts should be reported.

Line 13. 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 temporarily or permanently restricted net assets and an increase in unrestricted net assets. The net of this transfer should always equal zero.

Line 14. Total revenues, gains, and other support: Report the sum of lines 1 through 13 inclusive.

FORM 2: STATEMENT OF ACTIVITIES (ALL SCHOOLS)

PART B: EXPENDITURES AND LOSSES/CHANGE IN NET ASSETS

Unrestricted Expenditures and Losses: The costs incurred for goods and services used in the conduct of the institution’s operations. They include all expenditures of the organization including plant and expenditures made to satisfy donor-imposed restrictions.

Note: All expenditures should be recorded in the unrestricted column. No expenditures should be shown in the temporarily or permanently restricted columns. Any satisfaction of restrictions is recorded as a transfer to the unrestricted column on line 13. The total unrestricted expenditures from column (A) should automatically transfer to column D.

Line 1. Instruction: This line contains only the audit category of instruction and should include expenditures of the college, schools, departments, and other instructional divisions of the institution and expenditures 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 institution or separately budgeted by an organizational unit within the institution. Do not report nonresearch 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 institution. Exclude instructional activities, such as noncredit instructional offerings, which should be included in line 1. In line 3 include 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 in support of instruction would be categorized 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 ATS member institution’s main library, branches, faculty and departmental libraries. See the instructions for Form 2, Part A, line 6, Value of Contributed Services. The total library expenditures should match the total expenditures reported on the ATS Library form.

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 institution, 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 the remissions that are granted because of faculty or staff status; charge these to staff benefits. Do not report College Work-Study Program expenses here; report these expenses where the student served (e.g., dining hall, line 13; faculty support, 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 book stores.
**Line 12. Total expenditures and losses:** The program automatically calculates this figure.

**Line 13. 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.

Line 13 is calculated by subtracting Form 2B, line 12 (Total Expenditures and Losses) from Line 14 (Total Revenues, Gains and Other Support) of Form 2A: Statement of Activities (All Schools), (Revenues, Gains, and Other Support).

**Line 14. Net assets, beginning of year:** Enter the balance for each asset classification at the beginning of the fiscal year. Line 14 should equal the previous reporting year’s Form 2, Part B, Line 16D.

**Note:** Line 14 is not applicable to theological schools integrally related to larger institutions.

**Line 15. 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 16. Net assets, end of year:** The program automatically totals lines 13–15. These amounts should agree with Form 1, lines 20 to 23.

**Note:** Line 16 is not applicable to theological schools integrally related to larger institutions.

**Line 17.** Deferred maintenance cost is the cost associated with performing the needed repairs and capital renewal projects to keep existing facilities safe and functional. ATS is requesting schools to estimate the current cost of performing deferred maintenance. Many 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 part of colleges or universities should report the estimated deferred maintenance cost of buildings designated for use by the theological school.

**FORM 3: IT**

**General Infrastructure** is defined as all IT-related costs that are not specifically related to providing instruction in the classroom. Assume these are IT costs associated with running your organization, such as finance, development, student services, and administration.

**General Instruction** is defined as the costs associated with instruction at the institution and would include educational software/hardware and IT personnel support for faculty, library, and other instructional services.

**Online and distance education** are IT costs associated with education provided electronically to students who are not present in person at the main campus or extension sites.

**Instructions:**

1. **Hardware/Software Costs:** Identify how hardware, software, and licensing are obtained. If provided by a larger entity (university, diocese), provide actual or estimated expenditures for each area. If leased hardware and software, provide an estimate of the amount that is for hardware and amount that is for software.
2. **IT Staffing Costs:** Identify the total cost of IT personnel by category of how the IT personnel are obtained (either seminary personnel, consultant services, or provided by a larger entity). If provided by a larger entity, provide actual or estimated expenditures. Expenditures for personnel should be for **total compensation** (salary + benefits as defined in the Salary form).

3. **IT Costs by Category:** Identify the total IT costs by IT category. If costs are not specifically tracked by these broad categories, provide amounts in the broad categories based upon estimated proportions.

**ARF PROGRAM NOTES**

**Gray shaded fields:** For accredited institutions; the Admissions, Completions, and Enrollment forms may have gray fields. The gray fields represent degree program areas that are not applicable to the member school and the program will skip over these fields during data entry. As there are always exceptions, data entry is possible within these fields; however, an explanation should be entered in the comments field of the relevant form. Some forms require explanations and the form cannot be saved without entering comments.

**Blue shaded fields:** The blue shaded fields represent fields for which data entry is not allowed. These fields, such as Total fields are calculated or contain amounts that are brought forward from another part of the form—the type in these fields is navy blue.

**Totals:** Column and row totals are generated automatically during data input—the type in these fields is navy blue. Some forms require certain totals to match other forms’ totals or totals on other pages. There is a small tolerance for differences in the totals to account for differences in rounding.

**Decimals:** Most fields on ATS forms require whole numbers. If decimals are entered in these fields, the program will round to the nearest whole number.

**Comments:** A comments field is included on each of the Annual Report Forms. The field is accessed by clicking the Comments button located in the upper left corner between the Print and Close buttons. Some forms will require explanations be entered in the comments in order to continue. The text color on the comments button changes to red when comments are entered.
INSTRUCTIONS
This form displays the information ATS currently possesses on full-time faculty and selected administrators at the accredited institution. The ATS Personnel Form contains only current information. It will reflect a record for each person listed on last year’s ATS Personnel form and any changes received by ATS throughout the past year.

It is important that ATS have information about the individual who has primary responsibility for executive matters (CEEXEC) and the person who has primary responsibility for academic matters (ACDVP) at the accredited institution or department. While they can be the same person, there should be no more than one person designated for each of these two positions.

Please note that, as is the case for the Salary form, it is not necessary to include all staff members. Faculty should be limited to those teaching at least half time (with an exception for those on a paid sabbatical) and administrators should be limited to senior positions. A full list of those positions is included below.

Make sure that all information is complete and accurate for all personnel listed, including percent of teaching time. Make any deletions and/or changes to the personnel information on the screen.

Full-Time Faculty: Any individual working full time for an institution, who has faculty status, and who devotes greater than or equal to 50 percent of his or her time to teaching and or research will be counted by ATS as a full-time faculty member. Include faculty on sabbatical leave and persons who are on leave but remain on the payroll.

Selected Administrators: Enter only personnel for the administrative positions that ATS is currently tracking. Do not report information for any other administrative positions. See the Administrative Codes listed below:

CEEXEC Chief Executive Officer
ACDVP Academic VP/Academic Dean
ADSOF Admissions Officer
ALMOF Alumni Officer
ASSESS Director of Assessment
CEDOF Director of Continuing Education
DEAN Academic Dean—Other
DEVOF Chief Development Officer
DEVPS Development Professional Staff
DirHouse Director of Housing/Student Life
DGRDS Director of Graduate Studies
DMIND Director of Doctor of Ministry
DSTUD Dean of Students
EXCVP Executive Vice President
EXTOF Director of Extension/Distance Ed
FEDOF Director of Field Education
FINAID Financial Aid Officer
FINOF Chief Financial Officer
FORMD Director of Formulation
HDLIB Head Librarian – Admin./Faculty
LIBPS Librarian Professional Staff
PlaceOff Director of Career/Placement Services
RECOF Recruitment Officer
REGOF Registrar
STSOF Director of Student Services
SYSOF Information Systems Manager
VPADM Vice President for Administration

These titles are functional and do not necessarily relate to the person’s title. For example, the Chief Executive Officer may be a President, Dean, or Rector. But if his or her function is the overall administrative functioning of the accredited entity, whether it be a department within a university or a separate institution, he or she should be designated as the CEXEC.
INSTRUCTIONS FOR SPECIFIC FIELDS

Name: Enter the first name, middle initial, and last name of the full-time administrator or full-time faculty member. An individual should be reported only once.

Administrative Title: Enter the correct title for the position of the person being reported. Use only administrative titles in this field even if the person has faculty status.

Faculty Title: Enter the correct title for the position of the person being reported. Use only faculty titles in this field even if the person has administrative responsibilities as well.

Ecclesiastical/Academic Form of Address: This field is used to generate a salutation for office correspondence and should indicate the individual’s preferred form of address. For example, “Dr.”, “Rev.”, or “Msgr.” are correct entries for this field as opposed to “Dr. Smith”, “Rev. Jones”, or “Msgr. Brown”.

Denomination: This pull-down menu lists all denominations in the system. Please choose the correct denomination for this person.

Race/Ethnicity: Use this pull-down menu to designate the person’s race. Identify an individual according to the racial/ethnic category in which he or she appears to belong, identifies with, or is regarded in the community as belonging. No person should be in more than one group. In addition, those who have not been admitted to Canada or the United States for permanent residence should be identified as VISAN or nonresident aliens.

BLACK Black, not of Hispanic Origin: A person having origins in any of the black racial groups of Africa.

HISPN Hispanic: A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.

ASIAN Asian or Pacific Islander: A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.

INDIAN American Indian, Alaskan Native: A person having origins in any of the original peoples of North America and maintaining cultural identification through tribal affiliation or community recognition.

WHITE White, not of Hispanic Origin: A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.

VISAN Nonresident Alien: A person who is not a citizen or national of the United States or Canada and who is in the country on a temporary basis and does not have the right to remain indefinitely.

Gender: Choose male or female to indicate the gender of the administrator or faculty member.

Year of Birth: Enter the year of birth, in four digits, of the individual.

Faculty Rank: The institutionally designated grade of a person holding faculty status. If applicable, choose the appropriate rank from this drop-down menu.

PROF Professor
ASCP Associate Professor
ASTP Assistant Professor
INST Instructor
LECT Lecturer
NONRNK Nonranked

Percent of Time Teaching: Please indicate an approximate percentage of the time that the individual spends in teaching and teaching related activities, including academic research. Any individual working full-time for an institution, who has faculty status, and who devotes greater than or equal to 50 percent of his or her time to teaching and or research will be counted by ATS as a full-time faculty member.
Tenure Status: Serves to identify the status of employees with respect to permanence of appointed position. If applicable, choose the appropriate Status from this drop-down menu.

- **Tenured:** Individuals who have been granted tenure in that they have a permanent standing with the institution.
- **Not Tenured:** Individuals who may be eligible for tenure in that they are in a tenure-track position that has a potentially permanent standing with the institution.
- **Contractual:** Individuals who are hired for a specified period of time such as one term or one academic year and are not considered to hold a tenure-track position. These are usually temporary appointments of limited duration.
- **Permanent:** Permanent faculty at an institution that does not grant tenure. Schools with no provision for tenure should list all faculty under permanent. (This mostly applies to Roman Catholic institutions.)

Teaching Field: This section lists the area(s) in which the administrator/faculty teaches or is qualified to teach. To add a discipline, click on the “add” button beside “teaching,” and then use the drop-down menu to choose the correct field. Click on the “save” link to add the field to the person’s list of teaching fields. At any time, clicking the “X” beside a field will remove that discipline from the person’s list of teaching fields.

Administrative: A title identifying professional staff positions in school administration. Administrative titles should be designated in terms of the ATS member institution. For example, an individual may be a dean at a university-related school but would be considered the chief administrative officer of the ATS School. The persons reported for Chief Administrative Officer and Academic VP/Academic Dean will correspond to those reported for the first and second positions in the ATS Membership List. If a person’s area of responsibility includes more than one title, multiple codes may be entered. For example, the same person may function as both admissions officer and recruitment officer.

**Note:** Enter only personnel for the administrative positions that ATS is currently tracking. Do not enter information on any other administrative positions.

To attach an administrative title, click the “add” link beside “Administration.” Then, use the drop-down menu to choose the person’s title. Finally, click “save” to add the title to the person’s list of administrative titles. At any time, clicking the “X” beside a title will remove that title from a person’s list.

Doctorate: To add a doctorate degree for a person, first click the “add” link beside “Doctorate.” Then, choose the correct degree from the drop-down list. After this, enter the full name of the educational institution that awarded the doctoral degree in the “Source” field. Then, enter the year the degree was completed in four digits (YYYY) in the “Year” field. Lastly, click “save” to add this degree to the person’s list of doctoral degrees. At any time, clicking the “X” beside a doctoral degree will remove it from a person’s list.

**ADDING/DELETING A RECORD**

Click the Add button that is along the top of the form to add a new person.

1. In the new window, type in the first name, middle initial, and last name of the individual to add.
2. Enter the appropriate data in each field, especially a business phone number and valid email address for the new person.
3. Click on the Save New Person button.

Click the Cancel button to return to the ATS Personnel form without adding a new record.

Click the Delete button to delete the active record.
**ARF PROGRAM NOTES**

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INSTITUTIONAL CHARACTERISTICS

INSTRUCTIONS
Answer the questions as indicated on the form. Use the following definitions to complete the form.

Academic Year: The period of time generally extending from September to June; usually equal to two semesters or three trimesters, three quarters, or the period covered by 4-1-4 plan.

Accrediting Agency: Agencies that establish operating standards for educational or professional instruction and programs, determine the extent to which the standards are met, and make public their findings.

Degree: An award conferred by a college, university, or other postsecondary educational institution as official recognition of the successful completion of a program of studies.

Denomination Code: A code used to identify the formal denominational affiliation(s) of the institution as related to governance, financial support, or other formal relationship. Yearbook of American & Canadian Churches has been used as a resource for denominational families. Note that there are no codes and, therefore, no data entries for family headings.

Adventist Bodies
ADCHCH Advent Christian Church
SDADV Seventh-day Adventist

Anglican
ANGL Anglican Church of Canada
EPISC Episcopal Church
REEPISC Reformed Episcopal Church
ANGOTH Anglican Other

ASGSPC Associated Gospel Churches of Canada

Baptist
ABCU USA American Baptist Churches in the USA
BAPT Baptist
BAPTOQ Baptist Convention of Ontario and Quebec
BGAV Baptist General Association of Virginia
BAPTCG Baptist General Conference
BAPBGCT Baptist General Convention of Texas
BAPTMA Baptist Missionary Association of America
BAPTNC Baptist State Convention of North Carolina
BAPTWC Baptist Union of Western Canada
CCSBAPT Canadian Convention of Southern Baptists
CBAPTAAC Conservative Baptist Association of America
ATLBAPT Convention of Atlantic Baptist Churches
CBF Cooperative Baptist Fellowship
FEVBAPT Fellowship of Evangelical Baptist Churches in Canada
GENBAPT General Association of General Baptists
BAPTREG General Association of Regular Baptist Churches
GBAPTNC General Baptist State Convention, N.C.
INDBAP Independent Baptist
NLTBCV National Baptist Convention
NABAPC North American Baptist Conference
PNTLBCV Progressive National Baptist Convention
SDBGCF Seventh Day Baptist General Conference
SBC Southern Baptist Convention
UNEBFC Union d’Eglises Baptistes Francaises au Canada

Brethren
BRCHAO Brethren Church (Ashland, Ohio)
BRCHCH Brethren in Christ Church
CHBPBR Christian Brethren (Plymouth Brethren)
CHBRETH Church of the Brethren
FEGRACE Fellowship of Grace Brethren Churches
BUDDHIST Buddhist

Catholic
BYZANTR Byzantine Catholic Archeparchy of Pittsburgh
RC Roman Catholic

CMA Christian and Missionary Alliance

COGAND Church of God (Anderson, Indiana)
CHNAZ Church of the Nazarene

Churches of Christ-Christian Churches
DISCPL Christian Church (Disciples of Christ)
CCHCHC Christian Churches and Churches of Christ
CHUCHR Churches of Christ

COGGC Churches of God, General Conference
EVCHCA Evangelical Church in Canada
EVCHCNG Evangelical Congregational Church
EVCOV Evangelical Covenant Church
EVFORM Evangelical Formosan Church
EFCA Evangelical Free Church of America
EFVRCF Evangelical Free Church of Canada

INTER Inter/Multidenominational

JEISH Jewish
Lutheran
ELCA Evangelical Lutheran Church in America
ELCC Evangelical Lutheran Church in Canada
LUTHCA Lutheran Church-Canada
LUTHMS Lutheran Church-Missouri Synod
WIEVLS Wisconsin Evangelical Lutheran Synod
LUTHOTH Lutheran – Other

Mennonite
CFMENI Conference of Mennonites
MBNA Mennonite Brethren Church in N.A.
MNCHCA Mennonite Church Canada
MBUS Mennonite Church USA
MENOTH Mennonite, Other

Methodist
AME African Methodist Episcopal
AME2 African Methodist Episcopal Zion
CHMEEP Christian Methodist Episcopal
FRMECH Free Methodist Church
INMECH Independent Methodist
UMC United Methodist Church

Presbyterian
ARP Associate Reformed Presbyterian Church
PCCUM Cumberland Presbyterian Church
EVPRCH Evangelical Presbyterian Church
KAPC Korean American Presbyterian Church
OXPRES Orthodox Presbyterian
PCUSA Presbyterian Church (U.S.A.)
PCA Presbyterian Church in America
PCPC Presbyterian Church in Canada
PCINT Presbyterian Church International

Reformed
CANREF Canadian Reformed Churches
CRC Christian Reformed Church
HERREF Heritage Reformed Congregations (USA and Canada)
RFCHAM Reformed Church in America
RFCHCA Reformed Church in Canada

Religious Society of Friends
FRNDQKR Friends, Quaker
FRNDS Religious Society of Friends

Swedishborean Church
GCNJER General Church of New Jerusalem
GCSWED Swedishborean Church, General Convention
UUA Unitarian Universalist

Other
UCCAN United Church of Canada
UCC United Church of Christ
OTHER Other

Full-Time Student: A student taking the average academic load that must be taken to graduate in the normal time for which the degree has been approved.

In-Country Student: A student who is a legal resident of the country in which he/she attends school.

Out-Of-Country Student: A student who is not a legal resident of the country in which he/she attends school.

Race/Ethnicity Code: Identify the primary racial/ethnic composition of the institution’s student body according to the following racial/ethnic categories.

Note: Students who have not been admitted to Canada or the United States for permanent residence would be identified as visa students or nonresident aliens.

BLACK Black, not of Hispanic Origin: A person having origins in any of the black racial groups of Africa.
HISPAN Hispanic: A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.
ASIAN Asian or Pacific Islander: A person having origins in any of the original peoples of the Far East, Southeast Asia, the Indian Subcontinent, or the Pacific Islands. This area includes, for example, China, Japan, Korea, the Philippine Islands, and Samoa.
INDIAN American Indian, Alaskan Native: A person having origins in any of the original peoples of North America and maintaining cultural identification through tribal affiliation or community recognition.
WHITE White, not of Hispanic Origin: A person having origins in any of the original peoples of Europe, North Africa, or the Middle East.
VISAN Nonresident Alien: A person who is not a citizen or national of the United States or Canada and who is in the country on a temporary basis and does not have the right to remain indefinitely.
Tuition and Required Fees:

**Tuition**: Amount of money charged to students for instructional services. Tuition may be charged per term, per course, or per credit.

**Required Fees**: Charges assessed to students for items not covered by tuition and required of such a large proportion of all students that the student who does not pay is an exception. May include such charges as student center and/or health service fees but should not include first-time admissions or application charges. May also include charges specific to a program such as a materials charge.

**WORKSHEET FOR ACADEMIC-YEAR TUITION CHARGES: MDiv**

<table>
<thead>
<tr>
<th>Per Credit-Hour Charge</th>
<th>Total Credit Hours to complete degree</th>
<th>Divide by # of years to complete program</th>
<th>Total tuition for the academic year</th>
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**WORKSHEET FOR ACADEMIC-YEAR TUITION CHARGES: PhD or ThD**

<table>
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<tr>
<th>Per Credit-Hour Charge</th>
<th>Total Credit Hours to complete degree</th>
<th>Divide by # of years to complete program</th>
<th>Total tuition for the academic year</th>
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</tbody>
</table>

**Statement of educational effectiveness**: List the web address for your public statement of educational effectiveness, as required by the ATS Commission’s Educational Standard (section ES.6.4.4)

**ARF PROGRAM NOTES**

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INSTRUCTIONS
ATS offers the Institutional Peer Profile Report (IPPR) to its member schools as a statistical resource. Schools may identify no fewer than five and no more than 15 ATS member institutions that they consider to be “peers” on the basis of any of a number of institutional characteristics (i.e., size of enrollment, annual operating budget, denominational affiliation, etc.) and compare their school’s statistics with those of their “peers.”

The data are presented in a format that maintains the confidentiality of the peer institutions’ information by providing the peer group figures as a total average or median.

This form is used to generate a new IPPR Request. ATS will provide member schools with one IPPR, per year, free of charge. There is a $100.00 fee for each additional IPPR.

NOTE: A valid IPPR must contain between 5 and 15 schools.

Previously selected IPPR requests will be displayed upon entering the IPPR Request form.
- If you do not wish to receive an IPPR at this time, check the box “No IPPR is requested”
- To reuse previously selected IPPR requests select Yes in the “Use Peer Set” column.
- To add a new IPPR request click the “Add New IPPR Request” button
  o Enter a distinct and descriptive name in the profile name field.
  o Click “Save Request” to save the profile name and activate the “Add Schools” section of the form.

For example, a profile based on other schools in the immediate area could be named Geographical; a profile of schools that have the same denominational affiliation could be called Denominational or could bear the denomination name; a list of schools that are emulated could be called Aspirational. Whatever the name, it should identify the common thread that links the schools selected for that profile.
  o Click “Save Request” to save the profile name and activate the “Add Schools” section of the form.

A message will appear indicating A VALID IPPR REQUEST MUST CONTAIN NO LESS THAN 5 SCHOOLS AND MUST CONTAIN NO MORE THAN 15 SCHOOLS. The message will remain as long as the selection of schools does not meet the stated criteria.
  o Click “Add New School”
    o Select a school from the drop down list. The list can be narrowed by selecting the first letter of the schools name from the list of letters available above the drop down list.
    o Select “Save New School to add the selected school to the Peer Set.
  o Repeat Adding Schools until a min of 5 and a max of 15 schools are selected.

Selected schools can be activated and deactivated by toggling the button in the Active column. A green dot with a check mark indicates an active selection and a red X indicates an inactive selection.
  o Click Close Request to save the selections and return to the previous screen.
  o Repeat adding requests as desired.

One request per reporting year is provided free of charge, each additional request is $100 and will be invoiced to the member school upon delivery of the IPPR.
INSTRUCTIONS
The ATS Library Form has been designed to gather data regarding library holdings and administration. Please refer to the current edition of the Anglo-American Cataloging Rules if there are questions regarding terminology.

The term library used throughout these instructions refers to collections of the ATS member institution. Report only activity and/or collections for which the ATS member institution library has administrative and budgetary responsibility. If the library is part of a larger library, figures may need to be estimated or prorated.

Please respond to each item on this report in the space provided. If an exact figure is not available for a particular item but the amount is known to be greater than zero, enter an estimate of the amount. Items that are left blank will be interpreted as zero or not relevant to your library. If necessary, request help from your business office in providing expenditures and personnel salary data.

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

Part A: LIBRARY CHARACTERISTICS

Question 1: Please mark only one description of your institution's library. Normally a departmental or branch library maintains its own separate collection and provides discrete services for the theological school. An integrated library collection is intershelved with the university or college collection. A shared library facility houses an organized collection of materials that is jointly administered by more than one educational institution or received funds or operating expenditures from more than one educational institution.

Question 2: In the organizational structure of the institution, is the responsibility for these services within the library or another department? Responsibility involves financial and staff support for these services. For example, are you responsible for managing the campus network? Do you run courseware or are you responsible for scanning?

Question 4: Refer to ATS Standard 10 for definitions of these programs and ATS recommendations for library services.

Part B. THE LIBRARY AS PLACE

Question 1: If your institution has multiple library locations, choose and list the information for up to three primary sites. Renovation includes substantial expansion, alteration or upgrading to some component of the physical facility. Do not include cosmetic changes, such as painting, collection shifting, carpeting, etc. Indicate cost if the renovation was within the last five fiscal years. If part of a larger campus renovation, estimate library expense based on percentage of square footage of the project.

Question 2: Offsite storage and/or shelving might be used for archival resource, microforms and/or other non-book physical objects. Describe in Line c.
Part C. LIBRARY USE DATA

Line 1: report the circulation transactions including: check-outs, renewals, reserves. Include circulation services provided to distance education programs and extension sites. Exclude check-ins, e-books and in-house use except reserves.

Lines 2 and 3: Enter interlibrary lending and borrowing. Report the number of requests for material (both returnables and non-returnables) provided to other libraries. Include originals, photocopies, and materials sent by fax or other forms of electronic transmission. Include patron-initiated transactions. Exclude requests for materials locally owned and available on the shelves and electronically. Exclude circulation services provided to distance education programs and extension sites.

Line 4: Report the total number of sessions during the year of presentations made as part of formal library instruction programs and through other planned class presentations, orientation sessions and tours. Do not include meetings sponsored by other groups using library meeting rooms or training for library staff. The purpose of this question is to capture information about the service the library provides to its patrons.

Line 5: Report the total number of participants in the presentations reported on line 4. For multi-session classes with constant enrollment, count each person only once.

Line 6: Report personal, one-to-one instruction in the use of sources in-person, by telephone or electronic communication. Include referrals. Exclude directional questions. Please indicate if the figure is based on sampling or if other special situations exist.

Part D: COLLECTION GROWTH AND HOLDINGS

Column (A). Prior Year Net Holdings: Enter the total number of items in each category at the close of the previous report period.

Column (B). Purchased Items Added: Report the number of volumes/units purchased during the fiscal year being reported.

Column (C). Gifts Added: Report the number of volumes/units added in each category for the fiscal year being reported. Count exchange volumes received as gifts unless the library materials budget carries the expense of providing the items offered in exchange.

Column (D). Items Deleted: Report the number of volumes/units removed during the fiscal year.

Column (E). Adjustments: Indicate positive or negative adjustments needed for instances such as: inventory corrections, bar-coding projects, corrections to previous years’ reporting.

Column (F). Current Year Net Holdings: Compute this figure by adding the amount in columns (A), (B), and (C) and subtracting (D) volumes/units withdrawn during the fiscal year reported. If applicable, add or subtract the adjustment shown in Column (E).

Line 1. Printed Books (Volumes): Report on this line physical volumes of printed books. Include as well serial volumes that are not received on subscription or standing order.

Line 2. Printed (Bound) Periodical Volumes: Report retrospective purchases and newly bound serials under column (B).

Line 3. Current Print Periodicals Received: Report the number of titles of print periodicals received on subscription or by gift.
Line 4. Microforms: Report the number of physical reels of microfilm and sheets of fiche.

Line 5. Music Scores: Report the number of physical units of these items.

Line 6. Manuscripts and Archives: These can be reported as either Number of Items or it can be a measurement of Linear Feet. Please be sure to indicate either (I) for Items or (L) for Linear Feet. A linear foot is roughly calculated as a cubic foot or 12x12x12 inches. For a more precise definition and calculation, refer to the Society of American Archivists Glossary available at www.archivists.org.

Line 7. Other Non-book Physical items: Include all audio and/or visual materials in all physical formats, and all other physical materials not included in the categories above. Exclude electronic databases, e-journals, e-books, etc.

PART E. PERSONNEL AND SALARY DATA:

The personnel and salary data section is for the previous fiscal year in order to maintain consistent timing with the other expenditure data on the library form. Only total compensation by categories of personnel is to be reported. (The current individual salary and benefits of professional library staff are reported elsewhere in the institutional report.)

Column (A). Staff FTE: Compute the full-time equivalent for each individual in the category by relating the individual’s regular number of hours of work to those worked by someone who is considered full-time. Include staff in religious orders, volunteers and friends of the library groups in Line 4. Maintain decimals and compute a total for the category. Then round the total to two decimal places and enter this number on the form.

Column (B). Total Compensation: Enter the total compensation for each category of individuals, including salaries, wages, and fringe benefits, such as medical insurance and pension payments.

Lines 1 and 2: Record exempt (salaried) and non-exempt (hourly) employees as defined by the US Department of Labor. Include all staff whose salaries are paid from the library budget rather than other departmental budgets.

Line 3. Students: Employees who are also students of the responding institution and whose full wages are carried in the library budget. Persons who are on salary and who also happen to be taking courses should be counted as staff and not as students.

Line 4: Contributed Services: Include staff in religious orders, volunteers and friends of the library groups, etc.

Line 5. Total Library Staff FTE: The program calculates a total for column (A).

Line 6. Total Library Staff Compensation: The program calculates a total for column (B). This total will also be posted to Part F, Financial Summary, Line 10.

PART F. FINANCIAL SUMMARY

Report the expenditures for each category for the most recently completed fiscal year.

Line 1 - 6: refer to definitions in Part D

Line 7: Total for Electronic Resources for Collections: Include expenditures for electronic resources for collections both leased and owned. Include e-journals, e-books, databases, platform access fees, etc. Exclude ILS and other software maintenance fees.
Line 8. **Total for Collection Expenditures**: Report the expenditures for total library materials that were computed from lines 1 - 7.

Line 9. **Total for Binding and Preservation**: The total for binding should include costs of both in-house and commercial binding.

Line 10. **Total Library Staff Compensation**: Report the total for library staff compensation that was computed in Part E, line 6, column (B).

Line 11: **Total for Library Staff Development**: Cost for continuing education courses, conferences and associated travel if paid from library budget.

Line 12. **Total for Computer Services**: The total for computer services should include the costs of bibliographic utilities, ILS and software maintenance, hardware costs, data-networking costs, and in-house computer services if paid from in library budget.

Line 13. **Total Other Expenses**: Include here any other library expenses not reported in lines 1 through 12 above. These would include non-computer equipment and furnishings, consultants, telephone, insurance, postage, supplies, etc.

Line 14. **Total Library Expenditures**: The program calculates library expenditures reported in lines 3 through 13.

**ARF PROGRAM NOTES**

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PART-TIME FACULTY
Current Academic Year

INSTRUCTIONS
If the accredited institution uses part-time faculty, choose the “yes” option. Otherwise, choose “no.” A message will warn that any data already entered on this form will be lost.

Count faculty for the full academic year as anticipated at the time of completing the ARF forms.

NUMBER OF PART-TIME FACULTY:

Enter the combined total of:
(a) those who teach on a part-time basis during the year,
(b) those teaching full-time for only part of the year.

Do not count full-time faculty on sabbatical leave who may teach part of the year. Do not include on-site field supervisors.

FULL-TIME EQUIVALENT (FTE) OF PART-TIME FACULTY:

Divide the total number of courses taught by all part-time faculty by the average teaching load of a full-time faculty member.

In most cases, all individuals reported on this form should NOT have a corresponding entry reported on the ATS Salary form.

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INSTRUCTIONS
This form is intended to record which ATS documents personnel associated with an ATS school have responded to, as well as pertinent information of such persons. Any person that completes any of the ARF documents should be listed on this form. This information will be populated to the printed version of the individual forms.

Adding a New Respondent
To add a new respondent, first click on the “New Person” button.

The following fields are required: Last Name, First Name, Phone Number, and Email.

Any number of documents can be chosen by placing a checkmark next to them. Additionally, if the person returned a catalog or returned audited financials, that can be indicated as well.

Deleting a Respondent
A person, as well as the listing of the documents to which they responded, can be deleted simply by clicking on the “Delete” button.

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INSTRUCTIONS
The ATS Salary form surveys the contract salary and benefits for certain administrative and all full-time faculty positions. The form Personnel Data for Full-Time Faculty and Selected Administrators must be completed prior to completing the Salary data; Salary records are created based on the Personnel Data form.

Please note that, as is the case for the Personnel form, it is not necessary to include all staff members. Faculty should be limited to those teaching at least half time (with an exception for those on a paid sabbatical) and administrators should be limited to senior positions. A full list of those positions is included with the instructions for the Personnel Data for Full-Time Faculty and Selected Administrators form.

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

Report only whole numbers. Round all figures to the nearest dollar.

Salary Override: Check this box if the individual's salary is paid by another entity (for example, the university proper as opposed to the theological school).

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. ATS is surveying base salaries plus fringe benefits. Compensation for additional responsibilities is to be excluded.

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 institution for personal use of the administrator, health and life insurance programs, and all other benefits that are paid by the institution. 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 institution’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 I–M: The total compensation automatically computes fields I through M.

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