

2019 NACUBO-TIAA Study of Endowments

Frequently Asked Questions

Getting Started

How do I contact the survey help desk?

The help desk is available to assist you with all technical and content-related questions. Please email NTSE@nacubo.org. You will receive a response within one business day. Alternatively, you may also call the help desk at (844) 233-5750. We recommend sending inquiries by email in order to allow us to send you detailed instructions or clarification, if needed.

What are the deadlines for this year's survey?

The 2019 NACUBO-TIAA Study of Endowments (NTSE) will release select findings in advance of the full report; please see the Voluntary Early Release Performance Results section for more information.

September 3, 2019	Survey opens
October 11, 2019	Deadline for the voluntary early release performance results section
October 18, 2019	Early release performance results data shared with participating institutions
November 15, 2019	Deadline for full survey submissions

How can I guarantee I will receive my institution-specific link?

On September 3, 2019, you will receive an email with a survey link specific to your institution. If you do not receive your institution-specific link by September 15, please contact the survey help desk at NTSE@nacubo.org.

I received my link, but it should have been sent to someone else at my institution. What should I do?

If another colleague is the more appropriate respondent, please email NTSE@nacubo.org with the individual's name, email address, and title. We will resend your institution's link to the right person.

2019 NACUBO-TIAA Study of Endowments

Frequently Asked Questions

Completing the Survey

Can I review the survey before I start my submission?

Yes, we recommend reviewing the survey prior to starting your submission using the survey worksheet to gather the necessary data. The worksheet is available at the bottom of each page of the survey. All survey data must be entered online. Once you reach the end of the survey, you can review and download a PDF of your answers before submitting.

How long is the survey?

The NTSE contains nine sections of varying length. It is similar to previous years' surveys. We recommend using the survey worksheet prior to starting the survey.

Can I forward my institution-specific link to a colleague who is helping me complete the survey?

You can forward the link to any of your colleagues for help when completing your submission. However, there can be only one email address affiliated with each institution-specific link to avoid duplicate entries from the same institution. Additionally, to ensure information is captured correctly, only one person should be making updates to the survey at a time. We recommend using the survey worksheet prior to starting the survey.

Can I leave the online survey and return to finalize my submission?

Yes. You can leave the survey after entering data by closing out the screen. If you need to close the survey and return to it later, please access the survey on the same computer and in the same web browser. To ensure information is captured, please advance to the next page, regardless of whether you've completed all questions on that page. When you return, all previously-entered data will be saved.

Can I go back to change or review data I have already entered?

As long as you have not submitted your final survey, you can go back to review your entries by using the back arrow button at the bottom of each page of the survey.

Why am I getting a validation error?

Validation errors occur if:

1. You fail to answer a required question;
2. Your answers fail to total correctly; or
3. You enter any symbols (% or \$) in your entry. For example, 10.5% must be entered as 10.5.

If you are unable to proceed with the survey after addressing these three issues, please email NTSE@nacubo.org.

2019 NACUBO-TIAA Study of Endowments

Frequently Asked Questions

I'm not sure what certain terms in the survey mean. What should I do?

Please refer to the glossary for definitions of terms used in the NTSE, located at the bottom of each page in the online survey. If it is still unclear, please email NTSE@nacubo.org.

What if I want to provide more information about my answer, but there isn't space?

We have included an optional comments box at the end of each of the sections.

Are all fields required?

While you can advance through the survey without answering all questions, we ask that you make every effort to complete all relevant questions. Once you reach the end of the survey, you can review and download a PDF of your answers before submitting. You will be prompted to answer any questions that are required in order to move to the next page.

How can I get a copy of my final submission once I click the submit button?

Once you reach the end of the survey, you can review and download a PDF of your answers. In the event you need to have your survey reopened to correct an error, you may request a PDF version of your amended response by emailing NTSE@nacubo.org.

Voluntary Early Release Performance Results

What is the voluntary early release performance results option?

We introduced a new, optional section in last year's survey. You can elect to submit your total endowment value as well as your 1-, 3-, 5-, and 10-year returns and share this information with other participating institutions. Note that this data *will be preliminary* and subject to change if institutions submit changes to their returns or endowment market values throughout the survey period.

What information will be shared?

If you elect to participate, your institution's name; total endowment value; and 1-, 3-, 5-, and 10-year returns will be shared in un-aggregated table form.

When is the information due?

To be an eligible participant in the early release, you must submit your answers to these specific questions **by October 11, 2019**. You do not need to complete the rest of the survey by October 11.

Who will receive this information?

The information gathered in the voluntary early release performance results section will only be shared with the institutions that elect to participate. It will not be distributed to the media, nor is it permitted to be forwarded for use beyond your institution.

2019 NACUBO-TIAA Study of Endowments

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Is the Early Release information “final?”

No. While we ask that you make every effort to enter the information accurately, unlike the final study data, we will not have the ability to verify and validate results.

Can I elect to submit only the voluntary early release performance results?

No. Completion of the voluntary early release performance results section is an optional component of the NTSE. While it is intended to provide you with early additional value, it is not a supplement for the full survey and does not constitute participation.

What if I have more questions?

Please email us at NTSE@nacubo.org.

General

Will my institution’s data be shared?

With the exception of institutions that elect to participate in the voluntary early release performance results, only endowment market value, FTE students, and one-year change in endowment market value will be published on the [NACUBO website](#). All other institutionally-specific information is confidential and will only be reported in aggregate in the 2019 NTSE final report.

When will the Study be published? Who from my institution will receive a copy of the full report?

Upon publication in February 2020, a copy of the full report will be sent to the person who originally received the survey email. The final report will also be made available to all staff at participating institutions via the [NACUBO website](#). If you would like a separate email sent to another member of your organization, please email NTSE@nacubo.org.

Custom Reports

I used to have the ability to request custom benchmarking reports from the previous sponsor. Is that option still available to me?

Yes. The [TIAA Endowment & Philanthropic Services](#) team will be pleased to prepare and deliver a more customized benchmark report, drawing on specific peer groups (e.g., athletic conference, geographic region, endowment size) and/or research topics (e.g., responsible investing, spending policy) that matter most to your institution.

How do I request a custom report for my institution?

Please email us at NTSE@nacubo.org.

When will custom reports be delivered?

We will begin delivering custom reports once the 2019 NTSE Study is published in February 2020. We will make every effort to accommodate any internal deadlines you may have.