

**SECTION: Institutional Advancement/Capital Campaign**  
**SUBJECT: Parameters on Planned Gifts to a Comprehensive Campaign**

**ISSUED BY:** Office of Institutional Advancement  
**REPLACES:** N/A  
**APPROVED BY:** Office of Institutional Advancement  
**EFFECTIVE DATE:** June 15, 1993

### **Policy**

Only matured planned gifts are applicable to current campaign totals. The only exceptions are as follows:

- 1) Programs that are a part of the master plan of a campaign (i.e. LIFE Endowment program, 1989-95).
- 2) The gift portion of an annuity in which the residual is restricted to a campaign project.
- 3) The accounting for planned gifts in campaigns is generally consistent by CASE / NACUBO Management and Reporting Standards for Educational Fund-Raising Campaigns.

(Note: A matured gift is when the College receives the funds dispersed from a planned gift.)

### **Procedure**