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. LIFEndowment 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