



Annual Giving Counting and Classification	
Responsible Official: Vice President for University Advancement	Responsible Office: University Advancement

Policy Purpose

Purpose. This document serves as a resource to consistently classify and count annual gifts as they are received by the University. It applies only to University Advancement.

Policy Statement

Tracking the status/progress of Annual Giving is an important element in ensuring we obtain sufficient philanthropic gifts for the university and develop an adequate base of donors needed for the future. This policy provides guidance and procedures for the consistent categorizing and counting of annual giving donations.

History

Effective Date: 03/01/2016

Revision Date: 04/5/2019

Revision Notes: This revision changes the name of the document to be more apt, revises the format to the new template, and incorporates guidelines for Day of Giving and campaign gifts.

Procedure (s)

1. Classification of Annual Gifts:
 - a. Gifts that cannot be used for current-year funding should not be classified as Annual Gifts.
 - b. Gifts up to \$1,000 that can be used for current-year funding are classified as Annual Gifts.
 - c. Classification of gifts between \$1,000 and \$10,000 that can be used for current-year funding, will be determined during Advancement staff meeting. Discussion should include whether or not the gift can be considered to be “repeatable.” Ultimate decisions to be made by VP for Advancement.
 - d. Gifts of \$10,000 and above that can be used for current-year funding and are not accompanied by a specific Annual Fund response or appeal will automatically be counted as Major Gifts. If gift is accompanied by a specific annual fund appeal, these should be considered during Advancement staff meeting. Decision to be made by VP for Advancement.
 - e. Memorial gifts will not be counted as Annual Gifts.

- f. Gifts of any amount related to trusts, estate planning, etc. will be counted as Planned Gifts
 - g. NOTE: if gifts are matched, the classification of the match portion follows that of the original gift, unless otherwise specified by the matching company.
2. Classification of gifts for Day of Giving (DoG):
 - a. Include gifts and pledges with a Day of Giving Solicitation Code.
 - b. Include anything a giving officer reasonably believes was intended for Day of Giving.
 - c. Include all gifts that come in on the established day(s) of giving.
 - d. Include recurring gifts or payroll deductions initiated as a result of Day of Giving. For the purposes of DoG, consider payroll deduction/recurring as pledges and count one year's worth toward DoG.
 - e. Exclude already-established recurring gifts (credit card, payroll deductions, EFTs, etc.).
 3. Comprehensive Campaign gifts below \$10K. The classification decision still takes place during Advancement staff meeting. While evaluating, be mindful about campaign gifts from people who may not continue that level of giving. Ultimate decisions to be made by the VP for Advancement.

Related Form(s)

N/A

Scope and Applicability

	Governance	
	Academic	
	Students	
	Employment	
	Information Technology	
	Health and Safety	
	Business and Finance	
	Operations and Facilities	
	Communications & Marketing	
X	Advancement	