Gift Type Definitions

Cash		Include for Fundraising Total	Include for Cash-in-Door Total
Cash	Outright gift. Not a payment against a recorded Pledge or Recurring Gift.	X	X
Pay-Cash	Pledge payment of "Cash".		X
MG Pay-Cash	Matching Gift payment of "Cash".		X
Recurring Gift Pay-Cash	The payment of the "Recurring Gift".	X *	X
Stock			
Stock/Property	Gift of Stock/Property.	X	X
Pay-Stock/Property	Pledge payment of "Stock/Property".		X
MG Pay-Stock/Property	Matching Gift payment of "Stock/Property".		X
Stock/Property (Sold)	Gift of Stock/Property that is marked as sold. *As of FY12, SU did not use this gift type.*	X	X
Pay-Stock/Property (Sold)	Pledge payment of Stock/Property that is marked as sold. *As of FY12, SU did not use this gift type.*		X
MG Pay-Stock/Property (Sold)	Matching Gift payment of Stock/Property that is marked as sold. *As of FY12, SU did not use this gift type.*		X
Gift-in-Kind			
Gift-in-Kind	Non-cash donations such as equipment, software, print materials, food, etc.	X	
Pay-Gift-in-Kind	Pledge payment of "Gift-in-Kind".		
MG Pay-Gift-in-Kind	Matching Gift payment of "Gift-in-Kind".		
Pledge			
Pledge	Commitment to make at gift at a future date.	X	
MG Pledge	Projected company match of donor gift (booked only when match request documentation is received)	X	
Recurring Gift			
Recurring Gift	Similar to Pledge - paid in installments and can have an end date or no stated end date.		
Planned Gift			
Planned Gift	Future gift expectancies. Includes bequests, gift annuities, life insurance, etc.	X	
Other			
Other	Gift not categorized by the above categories. *As of FY12, SU used this gift type to record internal gift transfers (eg. SU Gala)*	X	X
Pay-Other	Pledge payment of "Other". *As of FY12, SU used this gift type to record internal gift transfers (eg. SU Gala)*		X
MG Pay-Other	Matching Gift payment of "Other". *As of FY12, SU did not use this gift type.*		X

*"Recurring Gift Pay-Cash" is technically a payment on the gift type "Recurring Gift" and should not be included in Fundraising Total. However, current UA business rules do not factor in anticipated cash flows from recurring gifts in fundraising performance. Only when a payment is received and processed is it counted in the totals. In this way, it is appropriate to count "Recurring Gift Pay-Cash" toward Fundraising Performance, even if the recurring gift was recorded in a prior fiscal year.

Gift Types: Fundraising Performance vs. Cash-in-Door

There are two primary methods for reporting fundraising totals: Fundraising Performance and Cash-in-Door. Each method serves a purpose within an Advancement office. It is good practice to obtain clarification as to which reporting method is desired.

Fundraising Performance

Fundraising Performance is the total of all cash, pledges, gifts-in-kind and planned gifts recorded during the fiscal year. An important distinction between the two methods is that **Fundraising Performance does not include pledge payments**. The full amount of the pledge is counted in the fiscal year the pledge was recorded (as determined by the Gift Date). This is the case even if the pledge payment schedule is over many fiscal years, or if the pledge is subsequently written-off. Generally, Advancement staff will be referring to this reporting method when requesting "the totals".

The specific Gift Types for reporting on Fundraising Performance include:

- Cash
- Recurring Gift Pay-Cash(*)
- Pledge
- MG Pledge
- Stock/Property
- Stock/Property (Sold)
- Gift-in-Kind
- Planned Gift
- Other

Notes:

- "Pledge" and "MG Pledge" are counted at gift amount, not gift balance (ie. the option "Use pledge balance instead of gift amount" should toggled OFF)
- (*) "Recurring Gift Pay-Cash" is technically a payment on the gift type "Recurring Gift". However, current UA business rules do not factor in anticipated cash flows from recurring gifts in fundraising performance. Only when a payment is received and processed is it counted in the totals. In this way, it is appropriate to count "Recurring Gift Pay-Cash" toward Fundraising Performance, even if the recurring gift was recorded in a prior fiscal year.

Cash-in-Door

Cash-in-Door is the total amount of money actually received during the fiscal year. It is best to think of this method as including any gift transaction recorded during a given fiscal year where money would be deposited into a bank account. It does not matter if a donor is making a $1,000 payment on a pledge that was initially made 3 fiscal years ago, or if a donor is making a spontaneous $1,000 outright gift. The end result is the same for Cash-in-Door: $1,000 has been received and currently resides in the university's bank account. This reporting method is most useful for Finance staff and those interested in monitoring cash flows into specific funds (eg. an endowed scholarship as it approaches the payout threshold).

The specific Gift Types for reporting on Fundraising Performance include:

- Cash
- Pay-Cash

- MG Pay-Cash
- Recurring Gift Pay-Cash
- Stock/Property
- Stock/Property (Sold)
- Pay-Stock/Property
- Pay-Stock/Property (Sold)
- MG Pay-Stock/Property
- MG Pay-Stock/Property (Sold)
- Other
- Pay-Other
- MG Pay-Other