

CASE Updates Management and Reporting Standards; Revisions Consistent with NCPG Guidelines for Reporting and Counting Charitable Gift

The Council for Advancement and Support of Education has issued proposed changes to the CASE Management and Reporting Standards. The new CASE recommendations are generally consistent with the NCPG Guidelines for Reporting and Counting Charitable Gifts. "This is a great step forward in the sector's effort to reach agreement on a standard for counting gifts that is straight-forward, transparent, and recognizes the generosity of all donors", said Tanya Howe Johnson, NCPG President and CEO. "I appreciate that the long dialogue between CASE and NCPG is proving an example of cooperation for the good of philanthropy."

The proposed changes were recommended by the Campaign Management Reporting Standards Working Group, composed of CASE members. Among the changes consistent with NCPG's Guidelines include:

- Revocable gifts may be included in campaign totals at face value if they are pledged during the campaign, documented, and as long as they are reported separately from outright gifts and irrevocable deferred gifts.
- Irrevocable deferred gifts may be included in campaign totals at face value, but both face and discounted present values should be reported.

The NCPG Guidelines for Reporting and Counting Charitable Gifts go a few steps further by recommending that campaigns:

- Set separate goals for outright gifts, irrevocable gifts, and revocable gifts.
- Report progress toward each of these goals separately, using face value numbers.

NCPG encourages its members who are also members of CASE to respond to the call for comments on proposed changes to the CASE Management and Reporting Standards. This is an important opportunity to affirm the importance of planned gifts in capital campaigns, and in general fundraising effectiveness.

Russell Howes, vice president for the University of Wisconsin Foundation and chair of NCPG, noted, “with the proposed changes to the Management Reporting Standards, CASE is affirming the importance of a counting procedure that acknowledges the full participation of all donors, and the reality that transformative charitable gifts usually have deferred or revocable components. Revised CASE reporting standards would be a great service to field in making complex gifts more visible and in celebrating their great impact and the great work fundraisers are doing to facilitate these gifts.”