Cal Poly Straight Pledge Policy *(non-phonathon)*

To enter a pledge on Advance and count in the productivity report, a pledge form is required. One is provided in the UA toolbox on the V: drive and at: [http://www.advancement.calpoly.edu/content/forms/index](http://www.advancement.calpoly.edu/content/forms/index). Colleges and Units can provide their own form or gift agreement if the gift designation and payment schedule are included.

A fundraiser signature is always required, just as with a gift form. For the donor signature:

If the pledge amount is **less than $5K**, the donor signature is suggested, but not required.

If the pledge amount is **less than $25K but greater than or equal to $5K**, either the donor signature is required, or an email from the donor is needed agreeing to the pledge form.

If the pledge amount is **greater than or equal to $25K**, the donor signature is required. Scanned/ emailed agreements are fine.

Send completed form to Advancement Services, University Advancement, 6-1555, giving@calpoly.edu.

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**CSU Pledge Guidelines (non phonathon)**

**Definition**

A pledge is defined as a promise to make a gift or philanthropic grant, the amount of the gift or philanthropic grant to be paid subsequently by the donor, usually in installments.

- **Unconditional Pledges** are legally enforceable and not conditioned on any future event. Only the entity exercising legal control over the assets to be given can make a pledge. Therefore, an individual cannot make a pledge that includes anticipated matching contributions from an employer or other source. Nor can an individual commit funds that may come from a donor-advised fund or community foundation. An enforceable, countable pledge includes only those funds that will be given by the legal entity.

- **Conditional Pledges** are conditioned upon a future event. Examples of conditional pledges are challenge gifts, gifts for capital projects, and pledges that are non-binding on the donor’s estate.

*Reporting Pledges on the California State University Philanthropic Productivity Report*

The following pledge guidelines are provided as minimum standards for reporting pledges on the CSU Productivity Report. Campuses may enhance these standards through written campus policies or procedures. The guidelines below are consistent with the Council for Advancement and Support of Education campaign reporting standards.

- Report pledges at face value.
- Report pledges that were committed during the reporting period (fiscal year).
- Report only pledges with documentation by the funding source or their legal representative. The documentation must be dated within the reporting period. On the rare occasion when special circumstances may warrant making an exception, the advancement officer should write to the individual making an oral pledge to document the commitment, place a copy of the correspondence in the donor’s file, and gain specific written approval from a gift acceptance committee.
- Report conditional pledges that have a reasonable expectation to be received.
- Report only the first five years for pledges with payment schedules exceeding five years. Subsequent five year periods may be reported when the previously reported five year period has been satisfied.
- Pledge payments received in same reporting period that the pledge was committed are reported as a new gift under annual gift receipt totals on the Voluntary Support of Education Survey. *Take care to not to double report as both a gift commitment and a gift receipt.*
- Do not report matching gift claims or expectancies as a gift commitment. The application for a match is not a commitment by the funder and could be declined for a variety of reasons.