

## Bates College Reunion Counting

### What Counts as a Reunion Gift?

Any gift to *any* designation counts toward the overall Reunion class gift and participation percentage. During Reunion weekend we'll report out two totals: (1) The Bates Fund total and (2) Overall Reunion Gift.

#### 1. Bates Fund

- The Bates Fund is the college's annual fund for current-use gifts. It supports the fundamental aspects of the Bates education. It is one subset of the overall Reunion class gift.
- The Gift Committee will focus on a Bates Fund goal (similar to the class agent fundraising efforts in non-Reunion years).
- We no longer differentiate between Bates Fund participation and overall participation. Every gift counts towards the class participation.
- The following designations fall under the Bates Fund:
  - Academic Excellence
  - Annual Library Purchases
  - The Arts
  - Friends of Bates Athletics (general athletics fund or a specific team)
  - Scholarships/Financial Aid
  - Residential Life

#### 2. Overall Reunion Gift

- The overall Reunion class gift includes any gift to any designation made in the current fiscal year AND forward-looking multi-year pledges.
- In addition to Bates Fund gifts, the overall total includes gifts to:
  - Current capital projects, restricted uses, or endowed funds
  - Planned gifts
  - Face value of all assets used to establish (or make additions to):
    - Charitable Gift Annuities
    - Charitable Trusts (internally and externally managed)
    - Pooled Income and Pooled Growth Funds

### What Assets May be Used?

- Cash or credit card gifts
- Appreciated securities
- IRA distributions
- Life insurance
- Real estate, partial or future interests in real estate
- Tangible personal property
- Closely held stock or business interests