Policies Outline
Start Planned Giving Right
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Gift Acceptance Policy

A gift acceptance policy should contain many of the following elements:

• Purpose Statement
• Cash
• Pledges
• Publicly Traded Securities
• Closely Held Securities (Gift Review Committee should come into play with these gifts)
• Real Estate (Gift Review Committee should come into play with these gifts)
• Life Insurance
• Tangible Personal Property
• Planned Gifts
  o List the planned gifts accepted by your organization
• Endowed Funds
  o Minimum levels for select endowed funds
  o Methods to establish an endowment
    • Outright gift
    • Planned gift
• Other Naming Opportunities

Investment Policy

An investment policy could cover the following:

• Purpose Statement
• Endowment Management
  o Earnings
  o Distribution of earnings
  o Realized and unrealized gains
  o Spending and expense
• Investment Strategies
  o Equities
  o Fixed-income investments
  o Cash and cash equivalents
  o Other investments
  o Portfolio and total return
  o Risk tolerance
  o Diversification
  o Standards of performance
• Donor Relations
  o Working with professional advisors
  o Disclosing management fees and expenses
  o Meeting donor's expectations and not-for-profit mission