



JCamp 180 Endowment Accelerator Policy Evaluation Criteria

Investment Policy	1a	A target allocation policy for equity and fixed income classes
	1b	Which committee is responsible for management of the fund, how the committee is appointed, and who the committee reports to
	1c <i>*recommended, not required</i>	How often the fund is rebalanced and how often the oversight committee reviews performance
	1d	Who approves the investment policy
Gift Acceptance Policy	2a <i>*recommended, not required</i>	A gift acceptance committee that reviews non-cash-equivalent gifts
	2b	What types of gifts the organization accepts and does not accept
	2c	What types of gifts require a committee review
	2d <i>*recommended, not required</i>	How and when non-cash-equivalent gifts are converted to cash
Spending Policy	3a	The organization is the beneficiary of the endowment
	3b	How the annual distributions will be calculated
	3c	Allowed usages of the annual distributions
	3d	A statement protecting the fund corpus (principal) from use other than in extraordinary circumstances which must be clearly defined and how this would be approved (by which governing body)
	3e	A successor plan detailing what happens to the fund if the camp ceases to exist
	3f	Who approves the spending policy