

Gift Acceptance Policy

The main purpose of a gift acceptance policy is to assist _____ in evaluating potential gifts in order to protect _____ from “problem” gifts (gifts that expose the organization to risk or are inconsistent with our stated mission), and to provide guidance for the acceptance of any gift within the current framework of a non-profit organization.

Acceptance of any contribution, gift or grant is at the discretion of _____.
_____ will not accept any gift unless it can be used or expended consistently with the purpose and mission of _____.

No irrevocable gift, whether outright or life-income in character, will be accepted if under any reasonable set of circumstances the gift would jeopardize the donor’s financial security.

_____ will refrain from providing advice about the tax or other treatment of gifts and will encourage donors to seek guidance from their own professional advisors to assist them in the process of making their.

_____ will accept donations of cash or publicly traded securities. Gifts of in-kind services will be accepted at the discretion of _____.

Certain other gifts, real property, personal property, in-kind gifts, non-liquid securities, and contributions whose sources are not transparent or whose use is restricted in some manner, must be reviewed prior to acceptance due to the special obligations raised or liabilities they may pose for _____.

_____ will provide acknowledgments to donors meeting IRS substantiation requirements for property received by _____ as a gift. However, except for gifts of cash and publicly traded securities, no value shall be ascribed to any receipt or other form of substantiation of a gift received by _____.

_____ will respect the intent of the donor relating to gifts for restricted purposes and those relating to the desire to remain anonymous. With respect to anonymous gifts, _____ will restrict information about the donor to only those staff members with a need to know.

_____ will not compensate, whether through commissions, finders’ fees, or other means, any third party for directing a gift or a donor to _____.