



Checklist of Development Department Policies & Procedures

Following is a list of Policies and Procedures you should have in place to ensure successful implementation of Development and Fundraising Strategies:

Development Department Policies

- Gift Solicitation & Acceptance** which includes the following policies:
 - Accepting gifts of:
 - Restricted gifts
 - Securities
 - Personal Property
 - Intellectual Property
 - Planned Gifts
 - Donor Privacy
 - Permission for e-mail communication to donors and supporters
- Board Manual** containing:
 - Duties and Responsibilities
 - Fundraising Expectations and Commitments
 - Meeting attendance policy
 - Conflict of Interest Policy
 - Fiduciary Responsibilities
 - Committee Descriptions
 - Conflict of Interest Receipt

Development Department Procedures

- Donation Acceptance Procedures** including
 - Gift recording
- Donation Acknowledgment** including:
 - IRS receipts and thank yous
 - Donor Recognition and Stewardship
- Data Management** including
 - Database procedures and instructions
 - Confidentiality related to donor records and information