



*This document includes actual Management Projects accepted by the CFRE International Board of Directors for points on the CFRE application. They are intended to inform candidates of the type of submission the Board expects and to aid candidates in the development of their own submissions. Questions about Communications and Management Projects should be directed to the CFRE International staff.*

## **MANAGEMENT**

**Description of Activity:** \*\*\*\*\* College did not have written gift acceptance policy which was creating confusion and conflicting “official” statements. The goal of this project was to provide the college, primarily the Development and Finance offices, with guidance on gifts.

**Materials/Strategy Used:** I requested gift acceptance policies from several other institutions. I also contacted CASE and AFP for information on gift policies. After analyzing these examples, I drafted a gift acceptance policy that followed legal and ethical guidelines and was appropriate for \*\*\*\*\* College. The draft was presented to Vice President of the College and the planned giving officer; the final draft was approved by the Board of Trustees in June 2002.

The policy was reproduced for every staff member in every office that worked with donors or potential donors. A detailed table of contents covered: coordination of appeals for funds; processing and acknowledging gifts and pledges; types of gifts to be marketed and accepted; use of gifts; donor recognition; and other general policies.

Having a written gift policy has expedited the processing of gifts because many questions are answered in the policy and most processing has become routine. For more complicated gift acceptance issues as described in the policy, the Gift Acceptance Committee, established by the policy, is convened.

**Outcome/Results Achieved:** The primary purpose of the written policy on gift solicitation and acceptance is to ensure that \*\*\*\*\* College can respond quickly and appropriately to all gift offers. A secondary goal is to maintain in one location, master copies of disclosure statements and other important documents that may be required by state and federal regulatory authorities.

The written policy ensured that the College was meeting its obligations to its donors, the public and the law through systemized documentation. Before the written policy was implemented, the information was maintained in a haphazard manner. The systems of the new written policy will enable statistical analyses to be conducted to support more sophisticated solicitations to individual donors , corporations and granting agencies.



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**Description of Activity:** Consolidation of \*\*\*\*\* University Funding Requirements

**Stated Purpose/Goal:** To simplify the identification of funding requirements from university program managers in such a way that we could facilitate decisions on determining spending rates and also reduce the frequency of withdraws from invested funds.

**Materials/Strategy Used:** Prepared a consolidated spreadsheet of requests from the previous year and, with the Board’s endorsement, requested that the university president poll university program managers in the spring of each year. A comprehensive report of anticipated funding requests that would require that we withdraw funds from the investment pool would be developed.

**Outcome/Results Achieved:** Instead of piece-meal submission of requests during the year, the Board is now able to act on the basis of one report each spring to approve a spending rate and amounts for each endowment. This is done in sufficient time for us to then prepare a schedule of distributions that spaces withdrawals across the school year thereby permitted minimal incursions into the investment pool and providing the financial consultant a timeline for those distributions.



**Description of Activity:** I implemented a program which integrated management of all capital campaign solicitation activity for a medium sized church.

**Stated Purpose/ Goal:** To correlate the capital campaign solicitation materials and tracking system so as to meet the different needs for multiple donor solicitation techniques and giving mechanisms among this economically, racially, and politically diverse congregation.

**Materials/Strategy Used:** Specialized training for solicitation volunteers enabled to utilize a uniform donor pledge card for a variety of types of contributors while the pledge card with information with ancillary materials as needed.

**Outcomes/Results Achieved:** The campaign exceeded its goal for many positive reasons but, among them was the utilization of the training and materials which facilitated over 30 gifts of appreciated stock! The key administrative secretary was able to track all types of gifts and give the campaign leadership clear reports on campaign activity in all campaign divisions.