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Communications Materials and Policy Checklist

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Priority campaign materials

1. Comprehensive case statement with talking points
2. Proposal templates for foundation grants and corporate giving programs
3. Fundraising brochure and remittance envelope with giving & recognition levels
4. Website with donation information if support systems are available

Fundraising Policies

We recommend taking an inventory of current policies and prioritizing ones needed as part of the Campaign Plan. Consultants can provide models and orientation towards use, however human resources and legal advisors should review prior to adoption.

Fund Development Policies may include:

Authority for Fund Development (who can raise funds, how, what channels?)

Management of Fund Raising Activity

Public Solicitation procedures

Gift Acceptance policies

Gift Processing procedures

Gift Acknowledgement procedures

Honors and Recognition policy

Corporate Contributions policy (including types of corporations not allowed to contribute)

Other Financial Policies may include:

Budget Policies (some groups for example have a zero based budget policy, or a no-deficit policy)

Contract and Grants Administration

Accounting policies and procedures including legal responsibilities for reporting

Planned Giving program policies

Investment and Endowment policy