

Temple Shir Tikvah
Review and Approval of Proposed Directed Gifts
(November 14, 2005)

Overview

Before accepting a directed gift, either solicited or unsolicited, the temple has an interest in determining whether the gift will be consistent with the religious, aesthetic, and other philosophies or expectations of the temple community and whether the gift will carry burdensome financial or other commitments by the temple. The following procedure will allow the temple to work with donors so that directed gifts are both appropriate for the temple and consistent with the donor's intentions. A "directed gift" is one that involves either money that carries restrictions imposed by the donor or tangible goods and services of any kind.

Approval required for every directed gift

No directed gift will be accepted by the temple until affected committees have determined that the gift is consistent with the interests of the temple. The decisions of the committees will be subject to review by the Board of Trustees.

All proposals to be routed through the temple administrator

Every proposal for a directed gift, whether initiated by a donor or by the temple, must be routed through the temple administrator for distribution to all affected committees. The administrator will also contact the temple liaison for directed gifts. The liaison and the affected committees will maintain a simple written record of the nature and progress of each proposed directed gift. The liaison will monitor the committees to assure prompt review and decisions, and will report the decisions promptly to the Board of Trustees for review. The liaison's record will include the identity of the donor, the date when the gift was first proposed, a moderately detailed description of the amount and nature of the gift and its financial and other impacts on the temple, the identity of the liaison and the committees to whom the proposal was referred, and the comments and decisions of the affected committees.

Temple liaison for each proposal

For each proposed directed gift, the administrator will promptly notify the temple's liaison, someone appointed by the Board of Trustees. The liaison will contact the donor, explain the temple's process for considering the gift, gather information from the donor, facilitate discussions between the temple and the donor, express the temple's gratitude, communicate the decision of the temple, and keep the donor comfortable with the process. The liaison, however, will not have authority to decide whether to accept the gift. Affected committees may also meet with the donor from time to time and may work with the donor to develop cost estimates and alternative proposals.

Decisions on directed gifts

In considering a proposed directed gift, each of the affected committees will be free to consult with the donor, other committees, or individuals within or outside the temple community. Approval by the Design Committee will be required for every directed gift that will have any aesthetic impact on the temple building, fixtures, or furnishings, decorations, supplies, publications, printed material, signs, plaques, logos, images, designs, typography, or the like. The Finance Committee must approve any directed gift that will carry a substantial [define] impact on the temple's finances. When a directed gift may present a conflict with the religious philosophy or ritual of the temple, the gift must be approved by the Ritual Committee. The School Committee must approve any directed gift that will cause a significant change in the philosophy or educational approach of the religious school. Other committees may be asked by the administrator to review and approve directed gifts. The Board of Trustees may engage other committees as appropriate.

Review by the Board of Trustees

A directed gift that has been approved by the affected committees will be presented to the Board of Trustees by providing them a copy of the written record of the proposed gift. The board may approve, take no action (in which case the gift will be considered approved), request more study, or reject the proposal with reasons.

Confidentiality of proposed directed gifts

The administrator, the liaison, the affected committees, and the Board of Trustees will conduct their review and make their decisions with due regard to the interests of the donor in keeping the proposed donation confidential.

Wish lists

The administrator will maintain, post, and publicize lists of tangible items and services that are of interest to the temple for prospective directed gifts. Suggestions for items to include on the list can be provided by any committee or individual, but no item will be included on the list without a review and approval in advance by the affected committees.