



Chartwell Gift Acceptance Policy Overview

Chartwell School solicits and accepts gifts that are consistent with its mission. Donations will generally be accepted from individuals, partnerships, corporations, foundations, government agencies, or other entities, without limitations. In the course of its regular fundraising activities, Chartwell School will accept donations of money, real property, personal property, stock, and in-kind services. Certain types of gifts must be reviewed prior to acceptance from the Head of School and Board of Trustees due to the special liabilities they may pose for Chartwell School. Examples of gifts which will be subject to review include gifts of real property, gifts of personal property, and gifts of securities.

Whereas Chartwell School actively solicits gifts and grants to further the mission of Chartwell, and there is the potential for certain gifts that may fall outside the guidelines, the organization has adopted the following Gift Acceptance Policy and general guidelines:

- Values—whether the acceptance of the gift compromises any of the core values of Chartwell School
- Compatibility—whether there is compatibility between the intent of the donor and the Chartwell's use of the gift
- Public Relations—whether the acceptance of the gift damages the reputation of Chartwell
- Primary Benefit—whether the primary benefit is to Chartwell versus the donor
- Consistency—whether the acceptance of the gift is consistent with prior practice
- Form of Gift—whether the gift offered is in a form that Chartwell can use without incurring substantial expense or difficulty
- Valuation—whether the school and donor agree upon the value of the gift
- Effect on Future Giving—whether the gift will encourage or discourage future gifts

All decisions to solicit and/or accept potentially controversial gifts outside of the guidelines will be reviewed, and the decision will be made by the Executive Committee of the Board Trustees in consultation with the Head of School and Advancement Director. The primary consideration will be the impact of the gift on the organization.

Please reach out to Elena Mueller, director of advancement, at emueller@chartwell.org or 831.394.3468 with any questions. Thank you.