

Advancement | UCF Foundation, Inc.

Donor Relations and Stewardship Policy

Policy# 9.05

Effective Date: April 1, 2021

Responsible Department: Donor Relations and Stewardship

1. PURPOSE

This policy relates to the administration of donor relations activities and actions concerning gifts to the UCF Foundation, Inc. (“Foundation”). The purpose of donor relations and stewardship is to preserve, nurture and enhance donors’ philanthropic relationships with the Foundation and University of Central Florida (“University”) and to demonstrate responsible management of the donors’ gifts according to the donors’ expressed wishes.

2. APPLICABILITY

Donor Relations activities will be extended to all donors of charitable gifts to the Foundation. The Foundation is accountable for the administration of donor relations activities, which may be carried out in partnership with faculty, staff and University leadership.

3. POLICY

The Foundation will conduct donor relations activities on a consistent and thoughtful basis. Donor relations is defined as strategic activities that include but are not limited to acknowledgment, recognition, engagement and stewardship. Acknowledgment is providing donors with proof of receipt of their gifts as well as expressing gratitude for gifts. Recognition is giving positive attention to donors through a variety of vehicles that might include namings, donor rolls, recognition societies, donor events, donor walls or publicity. Stewardship is communicating the usage and responsible management of donors’ gifts in accordance with donor intent. Engagement is providing information, access or experiences that nurture donor relationships, increase affinity and foster loyalty.

Annual fund, major, principal-level, current use, endowed, planned and in-kind gifts will be appropriately acknowledged and stewarded to demonstrate management consistent with donor intent; their donors will be appropriately recognized and engaged.

4. CLARIFICATION

Requests for clarification of this policy should be sent to Director of Donor Relations and Stewardship.

Certified as approved by the Executive Committee on April 1, 2021.

Name: Rachel Schaefer

Title: Associate Vice President for Advancement Strategy and Chief Operating Officer

Revision History:

Adoption Date:

Revised:

RELATED DOCUMENTS:

University Policy 2-206.1

UCF Foundation Policies:

Annual Giving Stewardship Policy - Date of Initial Adoption and Effective Date 12/15/2004, Updated 5/13/2014

Donor Relations Policy - Date of Initial Adoption and Effective Date 6/1/2010, Updated 12/14/2010

Endowment Stewardship Policy - Date of Initial Adoption and Effective Date 12/15/2004, Updated 5/13/2014

Facilities Stewardship Policy - Date of Initial Adoption and Effective Date 12/15/2004, Updated 1/19/2012

Planned Giving Stewardship Policy - Date of Initial Adoption and Effective Date 12/15/2004, Updated 1/19/2012

History: