

Advancement | UCF Foundation, Inc.

Annual Giving and Philanthropic Engagement Policy

Policy # 4.02

Effective Date: 05/05/2020

Responsible Department: Annual Giving and Philanthropic Engagement

1. PURPOSE

To implement and facilitate effective strategies for annual giving-level acquisition, renewal and upgrading gifts via face-to-face fundraising. Strategic engagement activities and direct marketing channels may include, but are not limited to, direct mail, phone-a-thon, e-solicitation and social media. Annual giving fundraising efforts are focused, in part, to provide a donor pipeline to the University of Central Florida Foundation Inc.'s (Foundation) major and principal gifts programs.

2. APPLICABILITY

This policy applies to all annual fund engagement activities and solicitations aimed at alumni, parents, students, faculty, staff and friends of the University of Central Florida (University).

3. POLICY

Annual Giving and Philanthropic Engagement concentrates on donor acquisition, renewal, and upgrading of gifts while creating a habit of giving on an annual basis with its constituents. Utilizing all avenues of solicitation is critical to the annual giving program allowing for mass appeals as well as personal dialogue to occur between the University and its constituents. The strategic execution of these solicitation vehicles forms a strong platform for the University's philanthropic support.

Annual Giving and Philanthropic Engagement coordinates the annual solicitation of University alumni, parents, students and friends on behalf of the University, and in collaboration with the University's colleges and units.

Alumni, parents, students, and friends of the University will be solicited in a manner coordinated for optimal effectiveness by Annual Giving and Philanthropic Engagement in accordance with Foundation guidelines. In order to help prevent duplication of effort and confusion among prospects, direct marketing solicitations including, but not limited to, direct mail, phone-a-thon, e-solicitation and social media will not be conducted elsewhere on campus unless approved by Annual Giving and Philanthropic Engagement. The Annual Giving and Philanthropic Engagement staff will work with colleges or units to develop and coordinate layout, design, timing and message of appeals.

Coordination of annual giving prospects among colleges and units will be handled by the Annual Giving and Philanthropic Engagement office, whose staff will evaluate all of its solicitations for effectiveness, efficiency and overall quality. Periodic status reports will be provided to the appropriate college or unit. Analyses will be used to suggest enhancements to the unit's annual giving efforts.

Annual Giving and Philanthropic Engagement will coordinate annual solicitation schedules and strategies for all constituencies, and will assign all appropriate solicitations with an appeal code.

Additionally, the Annual Giving and Philanthropic Engagement office is responsible for strategically engaging key segments of prospects. The Young Alumni Council, Parent and Family Philanthropy Council and 4EVER Knights are targeted with specific philanthropic engagement opportunities that include unique events, meetings and focused solicitations.

4. CLARIFICATION

Requests for clarification of this policy should be sent to the Assistant Vice President, Annual Giving and Philanthropic Engagement.

Name: Michael J. Morsberger

Title: Vice President Advancement and Chief Executive Officer

Revision history:

Adoption Date: 12/15/2004

Revised: 01/19/2012

History: 533, 555, 556