

# Advancement | UCF Foundation, Inc.

## Prospect Development and Research Policy

Policy# 9.00

Effective Date: March 6, 2019

Responsible Department: Prospect Development

### 1. **PURPOSE**

To support the university's advancement efforts by conducting ethical research on alumni, friends, and organizations.

### 2. **APPLICABILITY**

Advancement staff and volunteer leadership, university leadership, and university faculty as appropriate in support of fundraising efforts.

### 3. **POLICY**

The Prospect Development department utilizes a variety of methods and sources of publicly available information to determine a prospective donor's financial capacity, philanthropic inclination, and affinity to UCF to prioritize outreach and relationship building efforts by advancement staff and volunteers. The advancement database of record is utilized to implement and maintain an efficient prospect management system with the purpose of measuring and tracking the movement of the relationship with prospective and current donors. Advancement staff, university leadership and faculty, and volunteer leadership engaged in fundraising activities on behalf of UCF are authorized to request confidential prospect research in accordance with the procedures and guidelines established by the Prospect Development department.

### 4. **CLARIFICATION**

Requests for clarification of this policy should be sent to the Associate Vice President Strategy and Chief of Staff.



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Name: Michael J. Morsberger

Title: Vice President Advancement and Chief Executive Officer

Revision history:

Adoption Date: 12/15/2005

Revised: 1/19/2012

History: 553