

Advancement | UCF Foundation, Inc.

Solicitations Policy

Policy# 9.04

Effective Date: 10/20/2020

Responsible Department: Development

1. PURPOSE

This policy establishes the University of Central Florida Foundation, Inc. (Foundation) as the philanthropic repository for the University of Central Florida (University).

2. APPLICABILITY

This policy applies to any voluntary irrevocable transfer of personal property (e.g., cash, securities, books, equipment) or real property by a donor to the University, for the charitable purpose designated by the donor.

3. POLICY

Fund-raising encompasses all gift solicitations on behalf of the University and generally supports and encourages both unrestricted gifts to the University and designated gifts to academic and other University programs. All gifts designated to benefit the University will be directed to the Foundation. The Foundation is a tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code and a Direct Support Organization (DSO) of the University. Foundation employees who regularly solicit gifts on behalf of the University report to the Vice President for Advancement and Chief Executive Officer (CEO) of the Foundation. No solicitation can be made by any other individual for charitable contributions to the University without prior authorization from the Vice President for Advancement and CEO of the Foundation, or his/her designee, for solicitations in excess of \$5,000 or which involve a cost to the University. Foundation employees are held to the highest standards of ethical conduct in fund-raising, are trained and educated in ethical fundraising standards and principles, and are provided with resources to remain familiar with professional standards, including the Council for Advancement and Support of Education (CASE) Code of Ethics, the CASE Donor Bill of Rights, and the CASE Principles of Practice for Fundraising Professionals at Educational Institution.

4. CLARIFICATION

Requests for clarification of this policy should be sent to the Senior Associate Vice President for Advancement.

Name: Michael J. Morsberger

Title: Vice President for Advancement and Chief Executive Officer

Revision History:

Adoption Date:

Revised:

History: 534, 537, 540, 557