



UNIVERSITY OF CENTRAL FLORIDA

Office of the President

SUBJECT: UCF Foundation Donor Solicitation and Recognition	Effective Date: 11/6/2020	Policy Number: 2-202.2
	Supersedes: 2-202.1; 2-206.1	Page Of 1 3
	Responsible Authority: UCF Foundation Chief Executive Officer	

DATE OF INITIAL ADOPTION AND EFFECTIVE DATE: 01-18-06

APPLICABILITY/ACCOUNTABILITY

The University of Central Florida Foundation's policy relating to donor solicitation and recognition extends to any person, whether employed by the university or not, soliciting charitable donations on behalf of or for the benefit of the University of Central Florida or any direct support organization of the University of Central Florida.

BACKGROUND INFORMATION

The University of Central Florida Foundation, Incorporated ("Foundation") is a tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code and a direct support organization of the University of Central Florida ("University"). Advancement is a department within the university and provides the employees who are designated to work on Foundation matters. The Foundation raises funds to provide the university with resources for scholarships, and to provide the university with support to supplement its programs.

The Foundation is managed by the Vice President for Advancement, who also serves as the CEO for the Foundation. The Vice President for Advancement supervises and manages all university fund-raising and alumni engagement activities, including fund-raising programs, alumni engagement programs, Advancement employees, and cultivation, solicitation, and stewardship of donors.

POLICY STATEMENT

Fund-raising encompasses all gift solicitations on behalf of the university and its direct support organizations and generally supports and encourages both unrestricted gifts to the university and designated gifts to academic and other university programs.

A gift is defined as an irrevocable and voluntary transfer of money or property by a donor for the charitable purpose designated by the donor. The donor does not receive a substantial return benefit, as defined by the Internal Revenue Service, and must release control over the gift. Such gifts may include cash, securities, property, bequests and gifts in kind.

All gifts designated to benefit the university or its direct support organizations will be directed to the Foundation and the Foundation will be the entity responsible for issuing charitable receipts. Advancement employees who regularly solicit gifts on behalf of the university or its direct support organizations report to the Vice President for Advancement.

Gifts or philanthropic grants will be directed to the Foundation unless the gift or grant involves sponsored research, an institutional review board (IRB) for the protection of human subjects, Institutional Animal Care and Use Committee (IACUC) for the protection of animal subjects, use or rights to use or own intellectual property or faculty fellowships and graduate assistantships. When a gift or philanthropic grant relates to research, the Foundation, UCF Office of Research, and the UCF Research Foundation will collaborate to determine the best placement of the gift or grant in accordance with UCF Policy 4-210 Distinguishing Gifts from Sponsored Awards and UCF Policy 4-214 Proposal and Acceptance of Sponsored Awards for Research and Development.

Notwithstanding those solicitations covered by UCF Policy 4-210, no solicitation can be made by any other individual for charitable contributions to the university without prior authorization from the Vice President for Advancement, or designee, for solicitations in excess of \$5,000 or which involve a cost to the university. Advancement employees are held to the highest standards of ethical conduct in fund-raising and other advancement work, 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.

The Foundation is solely responsible for maintaining the university's only authorized alumni and donor constituent data base, thereby protecting records as confidential and exempt under Florida statute.

In addition to the solicitation of gifts, the Foundation is responsible for the applicable donor recognition for gifts. It is the Foundation's policy to recognize donors in a timely and consistent manner to maintain the long-term relationships and comply with Internal Revenue Service rules and regulations.

Any waivers set forth the above policy shall be approved in advance by the Foundation CEO. Waivers must be documented in writing and signed by the CEO and appropriate university department head.

RELATED DOCUMENTS

UCF Foundation Gift Acceptance Policy
<https://www.ucffoundation.org/policies>

UCF Foundation Donor Recognition
<https://www.ucffoundation.org/policies>

UCF Policy 4-210 Distinguishing Gifts from Sponsored Awards
<https://policies.ucf.edu/documents/4-210.pdf>

UCF Policy 4-214 Proposal and Acceptance of Sponsored Awards for Research and Development
<https://policies.ucf.edu/documents/4-214.pdf>

CONTACTS

University of Central Florida Foundation, 12424 Research Parkway, Suite 250, Orlando, FL 32826, Phone (407) 882-1220

INITIATING AUTHORITY Vice President for Advancement

POLICY APPROVAL (For use by the Office of the President)	
Policy Number: 2-202.2	
Initiating Authority: <u>Michael Morsberger</u>	<small>Digitally signed by Michael Morsberger Date: 2020.11.04 14:38:04 -05'00'</small> Date: <u>11/4/2020</u>
University Policies and Procedures Committee Chair: <u></u>	Date: <u>10/21/2020</u>
President or Designee: <u></u>	Date: <u>11/6/2020</u>

History: 2-202 1/18/2006; 2-202.1 1/20/2012