

SUBJECT: UCF Foundation Solicitation of Charitable Gifts	Effective Date: 1/11/12	Policy Number: 2-202.1
	Supersedes: 2-202	Page Of 1 3
	Responsible Authority: UCF Foundation Chief Executive Officer and UCF Foundation Chief Development Officer	

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

APPLICABILITY/ACCOUNTABILITY

The University of Central Florida Foundation's policy relating to solicitation of charitable gifts extends to all university employees and volunteers.

BACKGROUND INFORMATION

The Foundation is a tax-exempt charitable organization under Section 501(c)(3) of the Internal Revenue Code and a DSO of the University of Central Florida. The Foundation raises funds to provide the university with support for faculty, students, and programs.

The Foundation is managed by the Vice President of Alumni Relations and Development, who also serves as the CEO of the Foundation. The vice president supervises and manages all university fund-raising activities, including fund-raising programs, development employees, and cultivation, solicitation, and stewardship of donors.

POLICY STATEMENT

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 University of Central Florida Foundation. Development employees who regularly solicit gifts on behalf of the university report to the Vice President for Alumni Relations and Development. No solicitation can be made by any other individual for charitable contributions to the university without prior authorization from the Vice President for Alumni Relations and Development,

or designee, for solicitations in excess of \$5,000 or which involve a cost to the university. Development 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.

DEFINITIONS

CDO. The Associate Vice President for Development and the Chief Development Officer of the University of Central Florida Foundation.

CEO. The Vice President for Alumni Relations and Development and the Chief Executive Officer of the University of Central Florida Foundation.

DSO. This type of entity is a direct support organization of the University of Central Florida, which is organized for the benefit of the university as described in [Florida Statutes Section 1004.28](#).

Foundation. University of Central Florida Foundation, Incorporated.

Gift. An irrevocable transfer of personal property (e.g., cash, securities, books, equipment) or real property by a donor, for the charitable purpose designated by the donor. A gift is voluntarily transferred by a donor to the Foundation without compensation. There must be donative intent by the donor; therefore, the donor must release control over the gift. In addition, to have donative intent, there should not be any substantial benefit transferred to the donor in return for the gift. Such gifts may include cash, securities, property, bequests, and gifts-in-kind. If accepted by the foundation, these gifts are eligible for a charitable contribution to the extent allowed by law.

RELATED DOCUMENTS

CASE Code of Ethics

http://www.case.org/Samples_Research_and_Tools/Ethics_Resources_and_Issues/CASE_State_of_Ethics.htm

Donor Bill of Rights

http://www.case.org/Samples_Research_and_Tools/Principles_of_Practice/Donor_Bill_of_Rights.html

CASE Principles of Practice for Fundraising Professionals at Educational Institutions
http://www.case.org/Samples_Research_and_Tools/Principles_of_Practice.html

UCF Foundation gift acceptance general policy
<http://ucffoundation.org/document-library> (click Policy IQ link)

UCF Foundation policy on donations related to grant proposals with deliverables or conditions
<http://ucffoundation.org/document-library> (click Policy IQ link)

UCF Foundation donor recognition policy summary
<http://ucffoundation.org/document-library> (click Policy IQ link)

CONTACTS

University of Central Florida Foundation, 12424 Research Parkway, Suite 140, Orlando, FL 32826, phone (407) 882-1220

INITIATING AUTHORITY

Vice President for Alumni Relations and Development

POLICY APPROVAL (For use by the Office of the President)	
Policy Number: 2-202.1	
Initiating Authority: 	Date: 1/18/12
Policies and Procedures Review Committee Chair: 	Date: 2-17-12
President or Designee: 	Date: 1/20/12