

University of Florida Foundation, Inc.
Prospect Tracking

Policy #: 2.04
Effective Date: September 8, 2007
Responsible Department: Administration

1. **PURPOSE**

To avoid multiple solicitations that could confuse the prospect or diminish the effectiveness of the solicitation and to provide for prospect resolution.

2. **APPLICABILITY**

All UFF and UF faculty, staff, development officers, and volunteers soliciting gifts on behalf of UF or its units.

3. **POLICY**

UFF maintains a Prospect Tracking System (PTS) which records and manages the solicitation of prospects. All contacts and solicitations of prospective donors of \$2,000 and above must be reported by unit development officers and coordinated through the PTS. All contacts and solicitations of any unmanaged prospects must be coordinated through and approved by the Florida Fund. Such solicitations require an appeal code assigned by the Florida Fund.

Many donors give to multiple units on campus and such cultivations are to be encouraged. If two or more development officers or units wish to approach a prospect with a proposal within the same timeframe, the development officers are expected to discuss and resolve the conflict. If a satisfactory resolution cannot be reached, the question will then be considered by the appropriate managers and deans or directors. Failing satisfactory resolution, further appeals may be made to the Vice President for Development and Alumni Affairs and, ultimately, to the UF President.

4. **CLARIFICATION**

Requests for clarification of this policy should be sent to Director of Prospect Research (dmenoher@uff.ufl.edu).

Certified as approved by the Executive Committee of the UFF Board of Directors on:
September 8, 2007

A handwritten signature in black ink, appearing to read "Susan G. Goffman". The signature is written in a cursive style with a large, stylized initial 'S'.

Susan G. Goffman, Secretary

Revision history: Original version