

**University of Florida Foundation, Inc. (UFF)
Strategic and Business Planning and Risk Assessment**

Policy #: 1.07
Effective Date: March 2, 2018
Responsible Department: Talent Management

1. PURPOSE

To identify when and how long-term strategic planning and annual business planning and risk assessment will occur.

2. APPLICABILITY

All strategic and business planning and risk assessment activities by or on behalf of UFF, in conjunction with Advancement.

3. POLICY

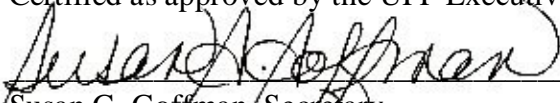
UFF employs a combination of planning and risk assessment tools including, but not limited to: strategic plan, fundraising or campaign plans, annual business plan, annual budget, annual emergency and operation continuity plans, and a self-assessment tool - management checklist for institutionally related foundations. A formal strategic plan will be developed approximately every five to ten years and reviewed annually by senior staff and the Executive Board.

Key risk assessment and planning activities should fit within an overall risk assessment process, and will be identified and managed in accordance with a process to be developed and implemented by the Executive Vice President.

4. CLARIFICATION

Requests for clarification of this policy should be sent to the Executive Vice President (tmitchell@uff.ufl.edu).

Certified as approved by the UFF Executive Board on March 2, 2018.



Susan G. Goffman, Secretary

Revision history: Original version
Revised March 2, 2018