

**University of Florida Foundation, Inc. (UFF)
General Provisions for Solicitations**

Policy #: 2.03
Effective Date: March 2, 2018
Responsible Department: Operations

1. PURPOSE

To provide for general policies regarding solicitation of gifts for the benefit of the University of Florida.

2. APPLICABILITY

All gift solicitations for the benefit of the University and its units and affiliated entities.

3. POLICY

UFF has established Management Guiding Principles to encourage a donor-centric approach to fundraising. Fundraisers must follow these guidelines when soliciting gifts for UF.

All telefunding activities will be conducted by Annual Giving on behalf of the colleges, units, and general University.

Corporate and Foundation Relations (CFR) is responsible for enhancing the University's relationships with corporations and foundations, and for coordinating fundraising strategies, proposals, and solicitations to the corporate and foundation sectors. CFR will assist and advise all unit development officers in effective cultivation and solicitation strategies, and, where appropriate, assist with proposal development.

Gift Planning provides expertise in the planning, cultivation, and solicitation of planned gifts to UF. Because the documentation and execution of many planned gifts may be complex in terms of protecting both UFF and the donor, Gift Planning must review all documents relating to such gifts prior to execution by the donor and acceptance by UFF. The donor will always be advised to seek his or her own outside legal and tax advice before executing a planned gift. Minimum gift amounts and policies for different types of planned gifts are set by the Finance Advisory Committee of the Board of Directors.

Donors are actively discouraged from naming UFF as the personal representative of their estate. Individual Advancement employees may not serve as personal representative of an estate involving a gift to UFF, except with the approval of the Executive Vice President when UFF is the only beneficiary of the donor's entire estate and only for so long as no challenge has been made to the disposition of the estate


Specific or residual documented bequests will be recorded by Gift Planning. “Planned gifts” include charitable remainder and lead trusts, charitable gift annuities, gifts of insurance policies, Tigert Fund gifts, and retained life interests.

The Prospect Strategy and Research Department provides research services, confidential background materials, and informational summaries on prospective donors in connection with fundraising for UF. Advancement staff and UF administrators engaged in fundraising are authorized to request confidential prospect research in accordance with guidelines and procedures established by the Prospect Management, Research and Analysis Department.

4. **CLARIFICATION**

Requests for clarification of this policy should be sent to the Associate Vice President/COO (ksprague@uff.ufl.edu).

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



Susan G. Goffman, Secretary

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Updated department name March 16, 2020