

University of Florida Foundation, Inc.
Prospect Tracking

Policy #: 3.09
Effective Date: July 30, 2018
Responsible Department: Operations

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 the fundraising database of record, which records and manages the solicitation of all prospects. All UF staff contacting or soliciting prospects for fundraising purposes must record activity in the database of record. Communications with any prospects with a qualification or relationship manager need to be coordinated through the manager and recorded in the system.

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 UFF Executive Vice President and, ultimately, to the UF President.

All mass marketing solicitations (e.g. mail, phone, email, etc.) must be coordinated and approved through the central annual giving program and require an appeal code. To request the appeal code, contact annualgiving@uff.ufl.edu.

Any changes to business rules or procedures will be recorded in the Relationship Management Guiding Principles document maintained by the Operations team.

4. **CLARIFICATION**

Requests for clarification of this policy should be sent to Data Services (datahelp@uff.ufl.edu).

Approved on July 30, 2018

A handwritten signature in black ink, appearing to read 'K. Rice', is written over a horizontal line.

Karen Rice, Associate Vice President

Revision history: Original version
Revised July 30, 2018