Donors: Access to Prospective Donors for Gifts of $5,000 or More

Last Updated: 04/04/1984

Effective Date: 02/03/1984

Policy Number: 07.00.06

Policy Statement:
The University of Oregon Foundation is responsible for ensuring that donors are solicited in an equitable and effective manner and that prospect tracking becomes part of the permanent record for future activities.

Whenever anyone plans to contact a prospective donor for gifts of $5,000 or more the dean or development officer of the school, college, or other unit will inform the executive director of the Foundation indicating the name of the donor (individual, corporation, or foundation); the purpose of the solicitation; the amount requested; and the approximate date for solicitation. When the solicitation is designed for a gift-in-kind or underwriting special activities, notice of the solicitation will be filed with the Foundation director at the same time the proposal is sent to the prospective donor. The Foundation director and staff, in reviewing the request, will consider the prospect's affiliations and interests, giving record, previously approved solicitation, and match of prospect and project. If the Foundation director does not endorse the solicitation and when after discussion with the interested party or parties, the matter is not resolved, an appeal may be made to the Vice-President for University Advancement who shall consult with the appropriate vice-president and/or the President before making a decision.

Reason for Policy:
To provide guidelines for soliciting prospective donors for gifts of $5,000 or more; to outline procedures to follow prior to initiating solicitation efforts.

Reviewed and Approved By:
President's Staff
Date: 04/04/1984
Issued by: Vice-President for University Relations
Date: 04/04/1984

Revision History:
02/03/1984 Approved by President's Staff
04/04/1984 Revised
Reissued by Vice-President for University Relations
02/08/2010 Policy number revised from 7.000 to 07.00.06
11/04/2010 Repealed. University Foundation owns this policy and the Foundation is an entity separate from the University of Oregon. Foundation policies are found on a separate website at http://www.uofoundation.org/resources/policies.php