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**Development Policies**

**Major Gift Proposal Policy and Procedure**

Date: September 1, 2014

Subject: **Major Gift Proposal Policy & Procedure**

1. Definitions:
2. Major Gift – any gift of $25,000 or more
3. Proposal – the formal written document used to solicit a major gift, presented to a prospect for consideration.
4. Categories of Proposals:
	1. $25,000 – $99,999\*
	2. $100,000 - $999,999
	3. $1,000,000 and above
5. Policy: *All major gift ($25,000 and above) solicitations requiring a proposal will fall under the guidance of this policy.*
6. *Proposals from $25,000 - $99,000 will be created by the Office of Principal Gifts and returned to the respective development officer.*
7. *Proposals from $100,000-999,999[[1]](#footnote-1) will be coordinated by the Office of Principal Gifts and will be designed by the staff of the UCF Marketing and Communications Department and then returned to the respective development officer by the Office of Principle Gifts.*
8. *Proposals from $1,000,000 and above will coordinated by the Office of Principal Gifts and will be designed by the staff of the UCF Marketing and Communications Department and returned to the respective development officer by the Office of Principal Gifts.*
9. Procedure to request and the development of a formal proposal

The following procedure will be adhered to when developing a formal, major gift proposal:

1. **Gifts between $25,000 and $99,999**
2. The soliciting development officer will complete the UC Foundation Major Gift Proposal Request Form (Attached) in its entirety and email to the Office of Principal Gifts executive assistant.
3. After the Proposal Request Form has been reviewed by the Office of Principal Gifts, the text from the request will be inserted into a pre-developed template and sent to the soliciting development officer for approval.
4. Once approved, the document can be printed in-house for delivery to the respective development officer prior to the solicitation meeting.
5. On rare occasions, a proposal at this level can be customized. This request should be made 4-6 weeks prior to the actual solicitation meeting to allow time to develop and review that proposal.[[2]](#footnote-2)

\**In special cases (such as the prospect is a trustee, or requires special care) a proposal at this level will be customized by the staff of the UCF Marketing and Communications Department and will be coordinated through the Office of Principal Gifts and returned to the respective development officer.*

1. **Gifts between $100,000 and $999,999**
2. The soliciting development officer will complete the UC Foundation Major Gift Proposal Request Form (Attached) in its entirety and email to the Office of Principal Gifts executive assistant.
3. Once approved by the AVP for Principal Gifts, a meeting will be scheduled with the soliciting development officer, the proposal team (writer & designer) from the UCF Marketing and Communications department.
4. A draft proposal will be returned to the soliciting development officer for review and approval.
5. Once approved, the proposal will be professionally printed and returned to the development officer for presentation to the Donor.
6. **Gifts of $1,000,000 or more**
	1. The soliciting development officer will complete the UC Foundation Major Gift Proposal Request Form (Attached) in its entirety and email to the Office of Principal Gifts executive assistant.
	2. Once approved by the AVP for Principal Gifts, a meeting will be scheduled with the soliciting development officer, the proposal team (writer & designer) from the UCF Marketing and Communications department.
	3. A draft proposal will be returned to the soliciting development officer for review and approval.
	4. Once approved, the proposal will be professionally printed and returned to the soliciting development for delivery to the prospect.
7. **Timeline for submission to completion of proposal**
	1. Proposals in the $25,000-$99,999 range will have a draft proposal returned to the soliciting development officer within 3 business days of the initial request. Exceptions will occur if the proposal is to be customized.
	2. Proposals in the $100,000-$999,999 range will have a draft proposal returned to the soliciting development officer within 3 weeks of the initial request.
	3. Proposals in the $1,000,000 and above range will have a draft proposal returned to the soliciting development officer within 4-6 weeks of the initial request.
	4. Special requests that circumvent this timeline will be considered on a case by case bases and will not be the norm. Justification for such request will be required on the initial request form.



**MAJOR GIFT PROPOSAL REQUEST FORM**

All written proposals used in the solicitation of philanthropic support for UC require a submission of the below outlined form. If you have questions, please contact Andrea Krautle, Executive Assistant - Office of Principal Gifts at andrea.krautle@uc.edu or 513-556-6294.

For further guidance, please refer to the Major Gift Proposal Policy and Process.

The following information is required to formally request a major gift proposal:

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| **Date of Request:** | Click here to enter a date. |
| **Development Officer:** | Click here to enter text.  |
| **Phone:** | Click here to enter text. |
| **Email:** | Click here to enter text. |
| **College/Unit:** | Click here to enter text. |
| **Provide contact information for all individuals that will appear on proposal (i.e., name, title, college, email, and phone).** | Click here to enter text. |

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| --- | --- |
| **Prospect Type:** | Individual [ ]  Corporation [ ]  Foundation [ ]  Other [ ]  |
| **Prospect Name:** | Click here to enter text. |
| **Prospect Address:** | Click here to enter text. |
| **Spouse Name (if needed):** | Click here to enter text. |
| **Organization Name:** | Click here to enter text. |
| **Organization Address:** | Click here to enter text. |

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| --- | --- |
| **Gift Type:** | Click here to enter text. |
| **Solicitation Amount:** | Click here to enter text. |
| **Solicitation Meeting Date:** | Click here to enter a date. |
| **Project Name:** | Click here to enter text. |
| **Project Purpose:** | Click here to enter text. |
| **Why is Prospect interested in this Project?** | Click here to enter text. |
| **What is the connection to UC?** | Click here to enter text. |
| **Summarize the Prospect’s giving history and include to what areas or projects gifts were made:** | Click here to enter text. |

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| --- | --- |
| **Gift Impact:** | Click here to enter text. |
| **What will happen because this gift materializes?** | Click here to enter text. |
| **What would not happen if this gift doesn’t materialize?** | Click here to enter text. |
| **Attach any and all additional background on the college, unit, program (i.e., strategic plan, white paper, etc.).** | Additional background? If yes, please provide attachment.Yes [ ] No [ ]  |
| **All proposals require photos.** | Please attach photos. |
| **Do you have specific, high-resolution (>300dpi) photos you would like to include with this proposal?** | If yes, please attach photos.Yes [ ] No [ ]  |
| **Special Instructions:** | Click here to enter text. |

1. All solicitations of $100,000 or more require a formal, written proposal and will be guided by this policy. [↑](#footnote-ref-1)
2. See the steps for $100,000 and up proposal development outlined below for further details. [↑](#footnote-ref-2)