

**University of Dallas**

**Advancement**

**Solicitation Policy**

**POLICY AVS**  
Responsible Executive:  
Vice President

- 2.2.6. Involves unlawful discrimination;
- 2.2.7. Could damage the reputation of the University;
- 2.2.8. Might jeopardize the University's tax-exempt status; or
- 2.2.9. Provides a donor with goods or services of financial value in exchange for the donor's gift, unless such value is fully disclosed in the time and manner required by local, state and federal law and regulations.

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### 3. NEW FUNDING INITIATIVES

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In its role as coordinator of external solicitation activity, the Office of Advancement may require that a proposed new project or program requiring solicitation of external funding receive prior approval from the Strategic Review Team through the Strategic Review Process to ensure:

- 3.1. the project and/or funds to be pursued is consistent with the mission of the University, and its policies;
- 3.2. when applicable, university resources (staff, equipment, infrastructure, renovations, cost-sharing, facilities, etc.) are available to support the proper use of external funds and assist with legal and reporting obligations for the proposed project; and
- 3.3. the ongoing financial sustainability of the proposed project.

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### 4. DEFINITIONS

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- 4.1. **“Prospective external funder”** refers to all external prospective source of funding, such as individuals (alumni, parents, and friends), foundations, corporations, associations, governmental entities, and private, non-governmental entities.
- 4.2. **“Solicitation activity”** refers to the requesting of any external funding, which may include gifts of cash, securities, real estate, gifts in kind (such as 2.1(ac)4(t)3u ovetndsod

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3. Coordinate solicitation activity.
  4. Manage the strategic planning process.
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Other Offices / Departments

1. Work with the Office of Advancement, and in accordance with this Policy, when engaging in solicitation activity.
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## 6. PROCEDURES

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Task	Procedure
Develop and maintain strategic planning process	<ol style="list-style-type: none"> <li>1. Develop strategic planning process.</li> <li>2. Notify persons likely to engage in solicitation activity.</li> </ol>
Manage strategic planning process	<ol style="list-style-type: none"> <li>1.</li> </ol>