
The University of Dallas ensures that all Prospective External Funders are solicited in a coordinated manner across the University community, in compliance with the UD gift acceptance policy, proper University accounting and legal principles and in support of strategically advancing the University's academic mission.

- 1.1. **Scope.** Any activity in which the University enters into a contractual agreement, will act as the fiscal agent, will be liable for the expenditure of funds or use of property and required to maintain an accounting of the same, and/or will receive funding from an entity outside of the University of Dallas is subject to the requirements of this Policy, regardless whether the project will be conducted by faculty, staff, students or university volunteers or partners.
- 1.2. **Applicability.** All faculty, students, staff, volunteers, and contractors are expected to comply with this policy with respect to any solicitation activity involving the University of Dallas.

2. GENERAL SOLICITATION POLICY

The Office of Advancement coordinates all solicitation activity on behalf of the University of Dallas. Any member of the University community wishing to engage in solicitation activity must obtain clearance in advance of any planned contact (mail, telephone, email, personal visit or other) from the Office of Advancement.

- 2.1. **Grants and contracts.** Research and teaching grants and contracts are distinct forms of solicitation activities but still must be coordinated through the Office of Advancement because they are subject to pre-award review of contractual obligations made on behalf of the University. The pre-award process will be coordinated by the Office of Advancement in close coordination with the Office of the Provost, Finance and General Counsel.
- 2.2. **Right to refuse gifts.** The University reserves the right to refuse any gift that:
 - 2.2.1. Violates local, state or federal law;
 - 2.2.2. Violates UD policies or procedures;
 - 2.2.3.

2.2.6. Involves unlawful discrimination;

2.2.7.

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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

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