

# DARS-Use Guidelines for University Fundraisers v1.5

These DARS-use requirements apply to all Central University development professionals working in the system. The guidelines are intended to ensure that consistent, accurate and up-to-date data is held in DARS for all constituents and prospects for the benefit of the Collegiate University.

## PROSPECT AREA:

### 1) *Prospect Plans*

- All active prospects should have a **prospect plan** (named using the *DARS Naming Convention*) with the lead fundraiser assigned as **Plan Primary Manager**
- The Plan Primary Manager is responsible for maintaining and updating the prospect plan
- Non-active prospect plans should be marked 'historical' – this requires incomplete **plan steps** and **opportunities** to be cancelled or updated to conclusion
- UODO Executives, VC / Pro-VCs, Heads of divisions/departments who are directly involved in team solicitation plans should be assigned as **Secondary Solicitors**  
*Note: staff members who are not direct DARS users, such as the VC / Pro-VC, should not be assigned to a Plan Primary or Secondary Manager role – assign as a **Secondary Solicitor** (UODO Executives should only be assigned into a Manager role on their own personal plans – use **Secondary Solicitor** to record Executive involvement in a team solicitation)*
- Parties working *external to the collegiate University* on behalf of the prospect/donor e.g. the prospect's trustees, advisors, colleagues, lawyers should be assigned as **Plan Participants**

### 2) *Plan Steps*

- Solicitation and background planning actions should be recorded as **plan steps** within the prospect plan (interactions with the prospect should be fed into the constituent Interactions section by selecting a step **Contact Method** e.g. Formal meeting, Incoming email)

### 3) *Prospect Assignments*

- The Central University fundraiser leading the relationship should be assigned as **UO Relationship Lead** (and also **Prospect Manager** for all non-alumni and organisations where the 'Central University' is the **Relationship Manager** on the constituent record)
- Prospects no longer managed by a fundraiser should have these assignments **end-dated**

### 4) *Gift Opportunities*

- '**Qualified**' prospects should have a gift **opportunity** recorded in the prospect plan (the opportunity should be regularly updated as the solicitation progresses to completion)
- '**Unqualified**' opportunities may be added for solicitation planning and initial categorisation of prospects at different giving levels (update to 'Qualified' when progressed)
- Updated 'Accepted' gift opportunities assist the Gift Registry to identify incoming donations
- Gift **acknowledgment letters** should be recorded in DARS as per the official process
- Pledged legacies should be reported to the UODO Legacies Officer and recorded in the **Planned Gifts** tab in the prospect page or within the prospect plan

### 5) *Prospect Interactions*

- Prospect **interactions** (e.g. meetings, correspondence) should be recorded by adding a prospect plan step with a **Contact Method** selected
- Items attached as step **Documentation** will also appear as interaction Documentation
- Non-plan related interactions can be added as an **interaction** via the constituent record
- Attach **Proposals** and **Gift Agreements** to plan Documentation; use the official process for recording completed and pending **Donor Reports**

## 6) Contact Reports

- **Contact Reports** should be produced for all prospect meetings and attached as **type** 'Contact Report' to the Documentation tab of the meeting prospect plan step / interaction

## 7) Clearance

- Clearance requests for alumni should be submitted via the formal Clearance System process
- Fundraisers should first seek internal clearance from an existing **UO Relationship Lead** when proposing a new prospect relationship (add a '*Relationship Lead clearance*' plan step)

***The prospect records, plans and fundraising parameters described above are best accessed, viewed and managed via the DARS Fundraiser page for the staff member assigned into a plan or step role.***

## **GENERAL CONSTITUENT RECORD:**

### **IMPORTANT**

- The single **Prospect Manager / UO Relationship Lead** is responsible for maintaining correct and updated information on the constituent record for all non-alumni and organisations
- The **UO Relationship Lead** is responsible for maintaining correct and updated information on the constituent record for the alumni of non-DARS colleges
- The relevant DARS-college **Prospect Manager** is responsible for maintaining correct and updated information on the constituent record for the alumni of that DARS college

### **1) General Constituent Information**

- Correct **contact details** (*address, phone and email*), name formats (*salutations and addressees*) and personal information should be maintained on the constituent record
- The information on the constituent record should comply with **DARS Data Protection rules**
- Sensitive or confidential items can be stored in a *site secure interaction*

### **2) Constituencies and Attributes**

- **Constituencies** (e.g. Prospect, Staff) and Attributes (e.g. Honours, CCB/VCC) should be maintained on the constituent record – **never end-date a Prospect constituency**

### **3) Education**

- Liaise with Academic Records and the DARS Helpdesk to record **Oxford education** detail
- Maintain Educational Involvement (e.g. club memberships) and Interests (e.g. drama, chess)

### **4) Relationships**

- Spouse and family **relationships** should be recorded where appropriate (as either a Relationship, or an Attribute - if it is not appropriate to create a record for the relation)
- **Primary Business** and employment relationships should be updated
- Key peer-to-peer relationships (e.g. colleagues, friends) should be updated

### **5) Group Memberships**

- All **Constituent Group memberships** (e.g. CCB/VCC, fellows, alumni groups) should be updated, where appropriate in liaison with the Relationship Manager of that Group

### **6) Solicit Codes, Communications and Mail Preferences**

- Solicit codes (e.g. *Do Not Contact, Do Not Solicit*) and the related category (e.g. *Central University, 'Internal Decision'*,) should be maintained by the Relationship Manager entity
- Constituents can be assigned to opt-in or opt-out of particular Oxford **communications**

***These prospect and constituent record guidelines apply to all individual, organisation and constituent group records on DARS (unless the item is only applicable to a specific constituent type)***