FORMAL DONOR REPORTING IN DARS

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The aim of this process is to ensure that all submitted donor reports and agreed donor reporting schedules are consistently recorded and fully measurable in DARS. Formal donor reports are attached to a specific type of prospect plan step and also appear as constituent interactions.

1) Recording and attaching a formal Donor Report into DARS

A donor report is recorded as a prospect plan step and stored as an attachment in the step *Documentation* tab. By selecting a step Interaction *Contact method* the report automatically feeds through to the constituent **Interactions** page.

- Add a *completed*-status step with a stage of '**Stewardship – Donor report**' into the associated prospect plan with an Interaction *Contact method* selected (generally an *Outgoing letter* or *email*) – the step *Owner* is the staff member responsible for the report
  Note: Use the term 'donor report' in the step *Objective* text*
- To attach the donor report, enter the step *Documentation* tab and add the document with an attachment *type* of 'Donor Report' (this now also appears as **Interaction** *Documentation*)

2) Creating a *pending* Donor Report schedule in DARS

If the University has formally agreed to provide a donor with a defined schedule of donor reports (or periodic reports are deemed to be the best way to manage an ongoing relationship post-gift) this process enables staff to record a simple timetable in DARS for this future reporting.

- For each scheduled donor report, add a *pending*-status step with a stage of '**Stewardship – Donor report**' into a prospect plan with an Interaction *Contact method* selected (generally an *Outgoing letter* or *email*) – the *Step Owner* is responsible for submitting the future report
  Note: Use the term 'donor report' in the step *Objective* text*
- The *Expected Date* is the date when the donor report is due e.g. a report due in August 2017 could be listed as a *pending* step with an Expected Date of 01/08/2017
  Note: Future *pending* donor reports will appear listed in the constituent **Interactions** page
- When submitted, mark the step *completed* and attach the report into step *Documentation*

Fundraisers and donor relations staff can use the *Pending* step functionality available in the DARS Fundraiser page or querying to review a timetable of scheduled donor reporting.

3) Major donors that <u>do not require formal UODO donor reporting</u> for a gift

- Donors not requiring formal UODO reporting, *such as those being stewarded directly by a faculty or department*, should have a step with a stage of '**Stewardship – Donor report**' added into the relevant prospect plan with a step status of *declined*. Cancelled reporting schedules should have the steps marked *cancelled* (with details in the step Comment).

* Although not a formal system requirement, this text appears as the Interaction *Summary* and assists the identification of formal donor reports in the constituent **Interactions** page