

Development & Alumni Relations System (DARS)
Best Practice Guidelines



College Clearances tab in the DARS Fundraiser page
 Version 1.0, last updated 26 September 2013

COLLEGE CLEARANCES TAB

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College fundraisers can view the complete DARS (post October 2009) clearance history for all relationship-managed alumni of the college in the **College Clearances** tab on their *Fundraiser* page. By double clicking on a line the user can enter the requesting University fundraiser's prospect plan containing the clearance step to review progress.

Note: Only official clearance requests and responses which have been processed by the UO Clearance Coordinator are listed in the College Clearances tab

Qualified opportunity amount: £0.00
 Pending ask amount: £0.00
 Requested amount: £0.00

Spouse: Position title: Start date: Position site:

Prospect and Plans Opportunities and Asks Pending Steps Planned Step Summary Clearance Requests **College Clearances** Completed Step Summary Prospect Summary Opportunity Pyramid Campaigns

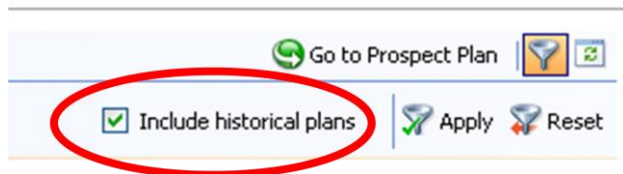
Relationship Manager	Lookup ID	Prospect Name	Surname	Step Status	Step Response	Response date	Clearance Type	Matric	Degree	Clearance On
St Peter's College	8-10			Completed	Accepted	27/08/2013	Clearance to approach	1984	BA P	Andrew Thor
St Peter's College	8-10			Completed	Accepted	05/03/2013	Clearance to approach	1989	BA A	Kate Longwc
St Peter's College	8-10		ton	Completed	Accepted	05/03/2013	Clearance to approach	1986	BA C	Kate Longwc
St Peter's College	8-10			Completed	Accepted	21/01/2013	Clearance to approach	1976	MCh	Kate Longwc
St Peter's College	8-10		ers	Completed	Accepted	19/12/2012	Clearance to approach	1949	BA A	ogy^
St Peter's College	8-10			Declined	Deferred	05/12/2012	Clearance to approach	1962	BA M	E & RUS)
St Peter's College	8-10			Completed	Accepted	05/11/2012	Clearance to approach	1987	BA P	Kate Longwc

College Clearances tab – column headings review

Click on the tab header to sort the columns *alphabetically* or *by date* (the tab default order is the most recent clearance **response date** at the top)

- **Relationship Manager** The Relationship Manager is in almost all cases the matriculating (first) Oxford College of the alumnus/a
- **Step Status/Step Response**
 - **Completed** = Clearance was **accepted** by the College Prospect Manager
 - **Declined** = Clearance was **rejected** or **deferred** (response note from the College Prospect Manager suggests potential for re-submission)
- **Response Date** Date that the College Prospect Manager responded to the clearance request
- **Clearance Type** *Clearance to approach* or *Clearance to ask* (Note: this may change with review of Clearance Protocols)
- **Clearance Owner** Clearance processed by the College Prospect Manager (shows historic Prospect Manager clearances)
- **Current Prospect Manager** The current Prospect Manager may be different to the Clearance Owner (above) at the time of request
- **Plan Primary Manager/Plan Name** The requesting University fundraiser and their prospect plan (name) containing the clearance step
- **Plan Historical?** Plans marked **historical** by the requesting fundraiser i.e. this prospect (plan) relationship is not proceeding

IMPORTANT To see all active *and* historical alumni clearance prospect plans ensure that the **circled** box below is ticked at top right within the tab



Note: the College Clearances tab is viewable by all college staff with DARS prospect area / fundraiser access

The latest version of this document can be downloaded from the DARS wiki pages located at

<https://www.darscentral.ox.ac.uk/>