



'MY FUNDRAISER' PAGE OVERVIEW FOR UODO FUNDRAISERS

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The 'My Fundraiser' page is a useful tool for all fundraisers working with major giving prospects. The page contains a number of selectable tabs (detailed below) which allow a fundraiser to:

- review and access all **prospect plans** in which they are assigned a role i.e. Primary Manager, Secondary Manager or Secondary Solicitor
- review and access the DARS records of prospects for which they are assigned the **Prospect Manager** or **UO Relationship Lead**
- view a summary of all planned, pending and completed plan **steps** for which they are assigned as the step owner
- view a summary of all **gift opportunities** within plans in which they are assigned a role
- view an overall prospect summary showing counts at each plan stage

The main 'My Fundraiser' page view shows detail including the fundraiser's address, phone number, email, start date and security site as defined in the system (e.g. UODO: Humanities). It also provides total *Qualified Opportunity* and *Pending Ask* amounts for that fundraiser.

Note: If you view another staff member as a 'Fundraiser' you will, in most cases, be shown identical information to that which they are shown when they view their own 'My Fundraiser' page.

'My Fundraiser' Page Tab Descriptions

First Tab: Prospects and Plans

This tab is displayed by default when a fundraiser opens their 'My Fundraiser' page (or views another staff member as a 'Fundraiser'). The page is divided into two sections as outlined below:

1. Prospects and Plans

The top section of this page lists all **plans** in which the selected Fundraiser has an assigned role, either as *Primary Manager*, *Secondary Manager* or *Secondary Solicitor* (which can also be designated as a volunteer, academic, College senior executive etc):

- Plans from all sites are listed if the fundraiser is assigned to one of the above roles within the plan (i.e. not just the plans assigned to the Fundraiser's own site)
- **Last Step** shows the date of the last completed plan step.

Note: a **yellow alert triangle** will appear to the left of this date if over three months has elapsed since a step was the last marked completed in the plan

- **Next Step** shows the date of the next pending plan step
- **Plan Stage** shows the most recent pending step stage (e.g. Cultivation, First Meeting, Making Ask), or if there are no pending steps it shows the last completed step stage. If a plan contains no pending or completed steps the latest planned step will be listed as the plan Stage.
- **Opportunity Amount** shows the expected or actual ask amount for **Qualified** plan opportunities only – if the opportunity is **Unqualified** (or with any other opportunity status assigned) an amount will not be listed
- All columns of information can be sorted alphabetically, numerically or chronologically by clicking on the column title
- Users can open a selected **plan** by double-clicking on the listing, or clicking on ‘Go to’ with the plan listing highlighted

IMPORTANT: Prospect plans marked as ‘Historical’ do not appear in this list – this enables a fundraiser to maintain an active working list of plans in this list by marking old plans historical

2. Prospect Assignments

The lower section of this page lists all **prospects** for which the fundraiser is assigned as *Prospect Manager* or *UO Relationship Lead*:

- Dates shown in **Last Step** and **Next Step** are listed as defined in Section 1
- All columns of information can be sorted alphabetically, numerically or chronologically
- A prospect will be listed **twice** if the fundraiser is both their *Prospect Manager* and *UO Relationship Lead*
- Users can open a selected **prospect page** by double-clicking on the listing, or clicking on ‘Go to prospect’ with the prospect listing highlighted

Second Tab: Opportunities and Asks

This page lists a range of **gift data** relating to plans in which the fundraiser has an allocated role (*Primary Manager*, *Secondary Manager* or *Secondary Solicitor*). Displayed are all *expected*, *accepted* and *rejected ask amounts*, *received revenue*, and *overdue asks* and *responses* within these plans. Users can click through via the numbers listed in each category to view the plan details.

Third Tab: Pending Steps

This page lists all pending steps *owned* by the fundraiser within plans.

Fourth Tab: Planned Step Summary

This page numerically lists all planned and pending steps *owned* by the fundraiser within plans, with tables showing the numbers by **contact method** and **plan stage**. Users can click through via the numbers displayed in each category to view a detailed list of planned and pending steps (this list can be further refined using the filtering fields at the top of the page).

Fifth Tab: Completed Clearance Requests

For Central University fundraisers, this tab lists a complete pipeline of alumni Clearance requests to colleges in plans for which the fundraiser is Primary Manager.

For detailed information on the Clearance process, and how to track requests and responses in DARS via this tab, please consult the *DARS Key Processes - UODO Clearance Process* document in the DARS Document Library, accessed at: <http://www.admin.ox.ac.uk/dars/documents/>

Sixth Tab: Completed Step Summary

This page numerically lists all completed steps *owned* by the fundraiser within plans, with tables showing the numbers by **contact method** and **plan stage**. Users can click through via the numbers displayed in each category to view a detailed list of completed steps (this list can be further refined using the filtering fields at the top of the page).

Seventh Tab: Prospect Summary

This page provides an overall numerical summary of prospect plans in which the fundraiser has an allocated role (*Primary Manager, Secondary Manager or Secondary Solicitor*), with tables showing the numbers by the fundraiser's **role within the plan** and **plan stage**.

Eighth Tab: Opportunity Pyramid

This page shows a pyramidal representation of gift opportunities (selectable by opportunity status) for the fundraiser. *It is **important to note** that these gift tiers **do not** correspond with UODO pyramid gift tiers at present.*

Ninth Tab: Campaigns

Not utilised by UODO at present

Tenth Tab: Prospect Requests

Not utilised by UODO at present

Eleventh Tab: Appeal Interactions

Not utilised by UODO at present

The latest version of this document can be downloaded at <http://www.admin.ox.ac.uk/dars/documents/>