



## DEPARTING FUNDRAISER DARS CHECKLIST

**Author: Sami Marjanen (Prospect Data Officer)**

The purpose of this document is to provide **departing fundraisers** with a standard process, prior to their departure, for dealing with the data and system components they leave behind on DARS.

In order to stop the potentially large build-up of **redundant items** in parts of the system it is important for the departing fundraiser to address the key areas described below. Fundraisers should also be aware of which data areas are required to be retained in the system after their departure.

**Note:** All departing staff members are required to submit a completed **User Access Form** to the DARS Helpdesk

### 1) Prospects Plans and Assigned Fundraiser Roles

The departing fundraiser should firstly, in consultation with their team and/or line manager, decide upon a hand-over schedule for their current pool of prospects. Consideration should be given to all prospect relationships recorded on DARS i.e. where the fundraiser is assigned to a role such as the **Prospect Manager** or **UO Relationship Lead**, and the **Prospect Plan(s)** managed by the fundraiser.

**ACTIONS:** *if the prospect relationship remains 'active' i.e. is to be assigned to another fundraiser*

- Identify which fundraiser\* will take over the 'active' prospect relationships (if a replacement is not yet identified a colleague in the departing fundraiser's team or area should assume an interim role)
- Where the departing fundraiser is assigned the **Prospect Manager** and/or **UO Relationship Lead** add an **end date** to the listing and assign the new fundraiser's name into this role

#### **Considerations for Prospect Plans**

- Where the departing fundraiser has a role within a Plan apply an **end date** and replace with the the new fundraiser

**ACTIONS:** *if the prospect relationship becomes 'inactive' i.e. is not assigned to another fundraiser*

- Where the departing fundraiser is assigned the **Prospect Manager** and/or **UO Relationship Lead** add an **end date**.

#### **Considerations for Prospect Plans**

- 'Close' any Prospect Plans by taking the following steps :
  - i) Mark the Plan as **Historical** ('planned' and 'pending' steps need to be marked 'cancelled')
  - ii) Update any active Opportunities to reflect that the Plan is 'closed'
  - iii) Amend the Plan name by adding the word 'HISTORICAL' into the short description after the Naming Convention codes (this is not strictly required, but does aid in future reviews by replacement fundraisers in post)
- The departing fundraiser should remain the **Primary Manager** of the 'closed' Plan

If more than 250 records require a fundraiser assignment to be 'bulk changed' in the system please contact the DARS Helpdesk

**IMPORTANT NOTE:** Prospect Plans, Interactions and Documentation should **not be deleted** by a departing fundraiser. These are to be retained in DARS as a historical record of the relationship.

## 2) Queries

The departing fundraiser should review all **queries** created or maintained by them in DARS. Use the following methods to locate the queries owned by an individual DARS User:

- a) When logged in, a User is able to tick the **'Only show my queries'** box to list all queries created by them (ensure that all other filtering fields such as **'Name'** are blank)
- b) The User, or any other User, can filter query **'Name'** for their 3-initial code e.g. ABC
- c) Sort the **'Added by user'** column

### **ACTIONS:**

- Transfer any queries used on an ongoing basis to another current staff member (or the designated replacement) by agreement. This is performed by amending the **name** of the query (changing the 3-initial code in the DARS Naming Convention), the **description**, and the **security site** if necessary.
- **Delete** all remaining queries that are no longer required by the fundraiser's work area.

## 3) Export Processes

Departing fundraisers should review all **export** processes created or maintained by them and complete the processes described in the Queries section (deleting exports requires enhanced System rights\*\*).

## 4) Research Groups

Departing fundraisers should review all **research groups** created or maintained by them and complete the processes described in the Queries section (deleting research groups requires enhanced System rights\*\*).

## 5) Personal Constituent Information

Departing fundraisers should also update their own DARS constituent record in the following areas:

- Personal information (contact details, relationships, constituencies etc) should be reviewed and end dates added where necessary
- Add end dates to any formal group memberships in DARS e.g. all UO Development Office staff should add an end date to their UODO group membership
- **OPTIONAL** Provide new employment and contact details such as address and email if desired i.e. if moving to a new employer or address

\* It is a system requirement that the individual be designated a **Fundraiser** in DARS, and will have completed the fundraising component of DARS training

\*\* Submit a work request (ITSM) to the DARS Helpdesk along with the completed **User Access Form**

---

The latest version of this document can be downloaded at

<http://www.admin.ox.ac.uk/dars/documents/>