

# THE LEARNING DO

## UC Davis Development Officer Boot Camp Resource Manual Outline

### **MODULE 1 | Getting Started-Major Gift Fundraising at UCD**

- Fundraising Policies and Guidelines
- University Development Policies and Guidelines
- DEVAR Intranet- Org Charts
- UC Davis Health DO Assignments
- UC Davis Health and DEVAR Acronyms
- UC Davis Foundation Board Intranet Link, Job Description, Org Chart

### **MODULE 2 | Prospect Identification and Qualification**

- Sample Outreach
- PMATS Definitions
- PMATS Policy, Guidelines and Key Concepts
- Prospect Management and Research Homepage

### **MODULE 3 | Prospect Qualification Visits**

- Strategic Questions for Development Officers
- Contact Report Essentials
- Strategic Next Steps: Using TASKS in Advance
- Task Management- Quick Start Guide for using Tasks to Manage Strategy

### **MODULE 4 | Cultivation**

- Sample Cultivation Strategies
- Strategic Questions for Development Officers
- DEVAR Intranet- Prospect Management and Research

### **MODULE 5 | Soliciting a Major Gift**

- Endowed Support One Pagers from Proposal Services
- UC Davis Endowment Funds Payout and Fee Structure
- \$1M Approval Form
- DEVAR Intranet- Gift Administration and Gift Reporting
- UC Davis Policy and Procedure Manual- Chapter 260

## **MODULE 6 | Closing a Gift**

- DEVAR Gift Agreement Checklist
- Dollar Guidelines for Naming Gifts
- Gift Fees
- How to DocuSign a document
- Naming Minimums
- UC Davis Policy and Procedure Manual- Chapter 200- Naming Properties, Programs and Facilities
- UC Davis Private and Public Support- Gifts, Grants, Contracts Chart
- Advancement Services- Gift Administration Policies & Guidelines

## **MODULE 7 | Strategic Portfolio Management, Trouble Shooting and Evaluation**

- Prospect Management and Research Unit Liaisons List
- Self Service Prospect Research Tools
- Sample Annual Business Plans
- Gift Reporting Standards and Policies for Planned Gifts DO Metric Credit
- Metrics per Unit
- DEVAR Intranet- Business Plans
- DEVAR Intranet- Metrics

## **MODULE 8 | Donor Centered Stewardship**

- Diane Bryant Stewardship Plan Example
- DEVAR Intranet- Donor Relations
- Leadership Giving Society Benefits Grid
- UC Davis Giving Societies

## **MODULE 9 | Diversity and Equity & Inclusion**

- DEVAR Intranet- Diversity, Equity & Inclusion Committee
- UC Davis Principles of Community
- UC Davis Reporting Resources
- UC Davis- Diversity, Equity & Inclusion Resources

## **Additional DEVAR, UC Davis, UC Resources**

- About UC Davis
- Aggie Tip Sheet
- DEVAR Intranet- Meeting Dates
- DEVAR Intranet Unit Pages- School and Unit Programs, UC Davis Health, University Development

- DEVAR Mentorship Program
- DEVAR Newsletters
- DEVAR Reporting Tools
- DEVAR Social Committee
- DEVAR Staff and Visual Directory
- DEVAR Strategic Plan
- DEVAR Training Program
- UC Board of Regents
- UC Davis Administration
- UC Davis Leadership
- UC Davis Rankings
- UC Davis Timeline
- UC Davis Health Leadership
- University of California Leadership
- University of California Timeline