

THE LEARNING DO

UC Davis Development Officer Boot Camp

Purpose: Prepare development officers for success in major gift fundraising at UC Davis.

Goals:

- Provide a coordinated and systematic training course for Development Officers at UC Davis
- Provide a course which combines basic major gift fundraising competencies with unit based education and practical application activities
- All DO participation in one of the Academies whether a new development officer or tenured development officer
- Introduce new development officers to the UC Davis way of fundraising

Program Overview

- 9-week program
- 1 session per week
- Most module sessions are 2 hours long and are in person sessions
- Recommended for any new to UC Davis DO
- Current employees with supervisor recommendation
- Lauren Kidd will serve as Cohort Lead -attending each session and being point person for cohort members, guest lectures and managers
- Each module session will have a guest lecturer(s) DO to lead the training

MODULE 1 | Getting Started-Major Gift Fundraising at UCD

Guest Lecturers: Lauren Kidd, Keith Emrick, Allison Chilcott

Part One: Fundraising Need to Knows

Part Two: Prospect Management 101

Part Three: UC Davis Cultural Tips for Success

MODULE 2 | Prospect Identification and Qualification

Guest Lecturers: Jane Fortner, Beth Abad, Andrea Dickens

Part One: Identification

- Goals
- Types of Prospects
- Common Attributes of Prospective Donors
- AIS Prospect record overview
 - Bio tab and everything underneath
 - Giving information and gift documents

- Contact reports
- Current and closed proposals
- Capacity rating

Part Two: Prioritizing and Organizing Donor Outreach

Part Three: Securing a Qualification Visit

Part Four: UC Davis Cultural Tips for Success

MODULE 3 | Prospect Qualification Visits

Guest Lecturer: Leigh Ann Hartman, Andrea Dickens

Part One: Planning for a visit

- Goals
- Visit preparation

Part Two: The Visit

Part Three: Visit Follow-up

- Contact Reports
- Qualification/Disqualify

Part Four: Portfolio Management tools

- AIS
- PowerBi

Part Five: UC Davis Cultural Tips for Success

MODULE 4 | Cultivation

Guest Lecturer: Lauren Kidd, Andrea Dickens

Part One: Cultivation

Part Two: Cultivation Visits

- Strategic Questions
- Visit Follow-up
- Contact Reports

Part Three: Creating a meaningful cultivation strategy

Part Four: Tips and Tools to Stay Organized

- AIS
- PowerBi

Part Five: UC Davis – Cultural Tips for Success

MODULE 5 | Soliciting a Major Gift

Guest Lecturer: Jason Wohlman, Jessica LaBorde, Andrea Dickens

Part One: Pre-Ask Must Knows

- Policies and Guidelines (<https://devarintranet.ucdavis.edu/gift-administration-gift-reporting>; <https://ucdavispolicy.ellucid.com/manuals/binder/51>)
- Types of gifts
- Fund minimums

Part Two: Preparing for the Ask Visit

- Entering Proposals in AIS

- Ask Planned
 - Ask Planned for Planned gifts
 - \$1M and above asks
 - Proposal Services
- Part Three: The Ask Visit
- Soft Asks
 - Overcoming Objections
- Part Four: Visit Follow-up
- Contact reports
 - Updating the ask
- Part Five: UC Davis – Cultural Tips for Success

MODULE 6 | Closing a Gift

Guest Lecturer: Jessica LaBorde

Part One: How Advancement Services helps you close your gift

- Gift Agreements review
- DocuSign process
- GREAT review
- Timeline for gifts showing in AIS

Part Two: Closing gifts in AIS and Metric Credit

MODULE 7 | Strategic Portfolio Management, Trouble Shooting and Evaluation

Guest Lecturer: Gary Fisher, Shari Kawelo, Andrea Dickens

Part One: Successful portfolio management

- Metrics overview
- Qualified portfolio vs. portfolio

Part Two: Tools to help you stay organized

- AIS
 - Online strategy form review
 - Tasks
- Power BI
- Weekly Email

Part Three: ePerformance Annual Evaluation

- Fundraiser Career Ladder Program

Part Four: Annual Business Planning

Part Five: UC Davis Cultural Tips for Success

MODULE 8 | Donor Centered Stewardship

Guest Lectures: Michelle Poesy, Angie Joens, Christine McGuire

Part One: The Four Pillars of Donor Relations

- Stewardship
- Acknowledgement

- Recognition
- Engagement

Part Two: Building a Strategy

Part Three: UC Davis – Cultural Tips for Success

Part Four: Resources

MODULE 9 | Diversity and Equity & Inclusion

Guest Lecturer: Allison Chilcott, DEVAR DEI Committee Members

Boot Camp Graduation with Shaun Keister