

DART, DAR Training for Frontline Fundraisers

<p>SERIES 1 DART 201 -204 May-June, Sept Total Hours: 5</p>	<p>DART 201 - Expectations of the Role</p> <ul style="list-style-type: none"> •Welcome •Professionalism •Professional Brand •How do we define success? •ROI & Metrics for Frontline Roles •Visits and Solicitations <p>1 hr</p>	<p>DART 202A - Frontline Fundraiser Collaboration – How our Teams work together</p> <ul style="list-style-type: none"> •Org. chart •Schools •Special initiatives •Regional •International •Principal Gifts/Parent Philanthropy •Annual Giving •Alumni Engagement •Team structure and expectations <p>1½ hr</p>	<p>DART 202B - Frontline Fundraiser Collaboration – Philosophy and cases</p> <ul style="list-style-type: none"> •Benefits of prospect review with peers to devise prospect strategy •Potential team matrix of DAR staff to deal with planned giving prospects and regional cities •Leveraging collaboration to close the largest gift possible <p>1 hr</p>	<p>DART 203 How We Work With External Offices at BU; Endowment Primer</p> <ul style="list-style-type: none"> •All Presidential and/or Provost Contacts •Presidential and Provost briefing process •Admissions •Financial Aid •Endowment 101 <p>1 hr</p>	<p>DAR 204 – Advancement Information Strategies</p> <ul style="list-style-type: none"> •Prospect Analytics •Business Intelligence •Prospect Research •Prospect Management •Gift Accounting •Records Management •DAR Apps <p>1 hr</p>
<p>SERIES 2 DART 205-208 Sept-Nov Total Hours: 4 ¼</p>	<p>DART 205 - Alumni Engagement & Events</p> <ul style="list-style-type: none"> •Overview Alumni Engagement Programs team •Overview of Strategic Alumni Engagement & Operations team •Overview of Development & Campaign Events team •Development & Campaign vs. Alumni Events <p>1 hr</p>	<p>DART 206 - DevComm & Annual Giving</p> <ul style="list-style-type: none"> •DevComm overview: Invitations, Email blast coordination, Proposals, One pagers, Case for support, Atlas, Submission Form •Annual Giving overview: Department and Program, Annual Giving, Giving Day, DXO Program, LAG Program, Dean’s Appeals <p>1¼ hr</p>	<p>DART 207 – Stewardship & Donor Relations</p> <ul style="list-style-type: none"> •Principles of Stewardship •Stewardship is heavily involved with solicitation and close •Stewardship Role •Gift Agreement Role •Space Naming/Plaques/Signage <p>1 hr</p>	<p>DART 208 – Foundation Relations and Planned Giving</p> <ul style="list-style-type: none"> •Foundation Relations overview: Types of Foundations , Foundation vs. individual fundraising, How Foundation Relations and gift officers can work together •Planned Giving overview: Program and services, Benefits-collaboration & blended gifts, Gift vehicles and resources, Campaign bequests–PG documentation, Estate administ. process <p>1 hr</p>	
<p>SERIES 3 DART 301-304 Nov-Dec Total Hours: 4</p>	<p>DART 301 - BU History, Institutional and DAR</p> <ul style="list-style-type: none"> •Institutional History •History of Fundraising at BU •Choose to Be Great •Participants Develop "Elevator Pitches" •Campus Tour •BU Today <p>1 hr</p>	<p>DART 302 - Achieving Excellence – Best Practices in Frontline Fundraising/Prospecting and Outreach</p> <ul style="list-style-type: none"> •BBEC •Outreach Trends •Proven Methods •Research Methods and Fundraiser Tools •Legal Issues with Outreach <p>1 hr</p>	<p>DART 303 - Nuts and Bolts of Getting on the Road</p> <ul style="list-style-type: none"> •Securing an Appointment •Conducting a Discovery visit •Itineraries •Travel Expectations •Contact Reports •Following Your Qualification Visit •Swag for donors <p>1 hr</p>	<p>DART 304 – Transformational Giving</p> <ul style="list-style-type: none"> •Principal Gifts •International Giving •International Engagement •Special Initiatives •Case study <p>1 hr</p>	
<p>SERIES 4 DART 401-402 Jan Total Weekly hours: 2</p>	<p>DART 401 - Relationship Building and Solicitation—an art or a science?</p> <ul style="list-style-type: none"> •How to Ask •Negotiation of a Gift •When to ask & Preparing Proposals •Gift Acceptance Policy <p>1 hr</p>	<p>DART 402 - Fundraising Blackbelt</p> <ul style="list-style-type: none"> •Advanced Prospect Strategies •Mini-Campaigns and Initiatives •Ethics in Fundraising •Tools for Time Management <p>1 hr</p>			
<p>SERIES 5 DART 501 Jan Total Weekly hours: 1</p>	<p>DART 501 – Respectful workplace</p> <ul style="list-style-type: none"> •For Fundraisers and Constituents •DAR Reporting policy •DAR and BU Resources •Microaggressions •Bystander Interventions <p>1 hr</p>				

