



Volunteer Management System (VMS)

Culver has partnered with GiveCampus to create an online volunteer portal for our class volunteers. This new portal will allow you to:

- Choose your assignments and have immediate information
- Receive up-to-date information; information is refreshed daily from Culver's database
- Reach out to assignments efficiently with pre-loaded email templates
- Receive notifications when your assignments make a gift

Creating Your Account

1. Go to www.givecampus.com and select *Sign Up* in the upper right hand corner of the screen. If you already have an account, select *Log In*.
2. If you do not already have an account, sign up for an account using the email address that has been loaded into the VMS for you.
 - a. If you've been a GiveCampus advocate in the past (ex. for Day of Giving or Reunion), you will use the same account for the VMS.
 - b. **Do not select Sign up with Facebook** but rather create your account by filling in the requested information.
3. You will receive an email from GiveCampus at the email address specified. Click the link in the email to verify your account. (Note: The link will expire in 24 hours.)
4. Upon logging in, you will be asked to complete a confidentiality agreement. Please read closely, you will be expected to abide by the agreement during your term as a class leader.

Create your account!

~~Sign up with Facebook~~

We will never post to Facebook without your explicit permission.

Or sign up with email

Name: Sarah Conrow

Email: sarah.conrow@culver.org

Password:

College:

Grad School:

Primary/Secondary School: Culver|

Culver Academies

Sign up

CULVER ACADEMIES VOLUNTEER CONFIDENTIALITY AGREEMENT

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I acknowledge that during the course of my volunteer role with the Culver Academies Advancement Office, I will have access to certain information not generally known to the public or campus community, including private individual giving. I understand that this information is Confidential Information and agree that it is not to be shared at any time. I understand the need to safeguard the Confidential Information of Culver's alumni, parents, friends, donors, employees, and prospects, in any format including, but not limited to, database records, email, any other electronic format, hard copy, voicemail or conversation.

Specifically, I affirm that:

- 1) All Confidential Information provided to or generated by me, both hard-copy and electronic, is highly confidential. It is not to be discussed with anyone not conducting Culver business.
- 2) I understand the need to exercise confidentiality in the handling of individual and institutional information.
- 3) I understand the importance of exercising care and assuring the privacy of my computer system passwords, the physical security of my work area, and the proper storage, transmittal, and disposal of Academy-based information stored on any media.
- 4) I will not give data to persons not authorized to access it. I understand that the Academy expressly forbids the disclosure of private data or the distribution of such data in any medium, except as required by my volunteer duties and responsibilities.
- 5) I am ethically obliged to report any attempted or successful violation of institutional or personal security or privacy.
- 7) I will not disclose my volunteer password to other individuals and will not use another person's password. If I have reason to believe that my volunteer password has been compromised I will alert the Advancement Office of Culver Academies immediately by calling 975-642-7490.

Failure to adhere to this policy may result in damage to Culver Academies and its relationships. It may also result in my exclusion from future volunteer positions.

I have read, understand and agree to abide by the terms of this volunteer confidentiality agreement.

Sarah Conrow

* Print your name as displayed: Sarah Conrow

Agreed on: 2/20/2016

Sign Agreement

Selecting Assignments

Assignments are classmates you will be responsible for connecting with and eventually soliciting. Once you're logged in you will be ready to begin selecting your assignments.

1. Search for your classmates to add to your assignments by selecting the **Search Constituents** tab
 - a. Search and sort for individuals by name or location
 - b. Assign yourself to your classmates by selecting *Request Assignment*
 - i. You will be prompted to fill in a quick rating and leave an optional comment
 - ii. Most selections will be approved quickly by your staff liaison

Note: If a classmate is marked *unselectable* in the status column, they are already assigned to someone else. Please reach out to your staff liaison if you have any questions.

IIName	IICurrent Location	IIClass Year	IIStatus
Adams_Ashley	Chicago, IL	2007	ASSIGNED TO ME
Agu_Ebube	Corona, CA	2007	PENDING APPROVAL
Aguon_Britnee	Tippecanoe, IN	2007	Request Assignment

Tracking Your Assignments

1. Select the *My Assignments* tab
2. View high level stats on your assignments and your class as a whole

YOUR ASSIGNMENTS

1 ASSIGNMENTS / 1 PENDING	0 DONORS	1 NON-DONORS
\$0 \$ PLEDGED	\$0 \$ RAISED	

CLASS OF 2007 STATS

214 SELECTABLE CLASSMATES	4 : 61 TOTAL DONORS GOAL	211 TOTAL NON-DONORS
\$0 TOTAL PLEDGED	\$300 : \$7.5K TOTAL RAISED GOAL	

Tracking Your Assignments Continued...

3. Scroll down past the reporting tiles to view your full list of assignments.
 - a. Use the filters to sort your assignment list to view the most relevant people.

FILTERS **ALL** HAS GIVEN HAS PLEDGED HAS NOT GIVEN NO CONTACT THIS FY ASKED BUT NO GIFT PLEDGED BUT NO GIFT

GAVE LESS THAN ASK GAVE BUT NO THANK YOU SENT

Amaya Ali	HAS GIVEN	100% of suggested ask	Go to full record	▼
Johan Allison	HAS GIVEN	50% of suggested ask	Go to full record	▼
Erin Bentley	HAS GIVEN	100% of suggested ask	Go to full record	▼
Presley Hartman			Go to full record	▼

4. Select the name of your assignment to view their Assignment Screenshot

- a. View:
 - i. Information about your most recent outreach efforts
 - ii. Giving history
 - iii. Giving towards their suggested ask amount
 - iv. Your last note/email about this assignment

5. View your assignment's full record by selecting Go to full record at the top of the Assignment Screenshot

- a. View:
 - i. Contact info.
 - ii. Relatives
 - iii. Education info.
 - iv. Employer
 - v. Giving history

Johan Allison HAS GIVEN 50% of suggested ask [Go to full record](#)

Send Email Add Note Call

Outreach Tracker

Have you contacted this fiscal year?	No
Have you had a gift conversation?	No
Have you thanked them?	No

Suggested ask: \$100

Total paid this FY: \$50

Detailed giving history

Recent gift transactions

Date	Allocation	Type	Amount
06/12/2017	Alumni Fund	gift	\$50
04/18/2014	Alumni Fund	gift	\$75
12/17/0006	Alumni Fund	gift	\$50
12/17/0006	Alumni Fund	gift	\$50

Annual participation

2012 2013 2014 2015 2016 2017

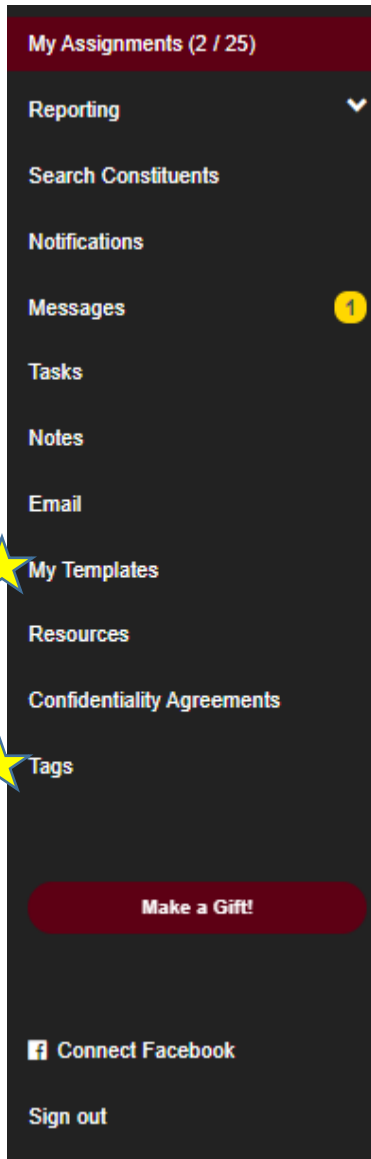
Annual giving history

*Reflects the current year and the previous 5 years

Tags

Enter a name for tag Create Tag

Using the Navigation Menu



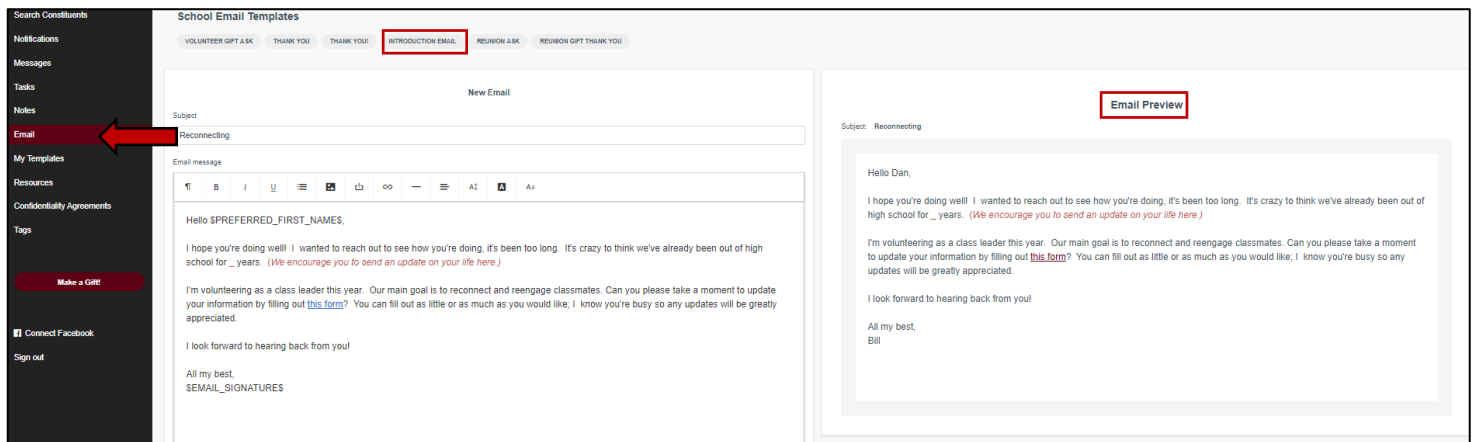
- **My Assignments** highlights the assignments you've selected. You can filter your assignment lists by selecting/deselecting the prepopulated filters. *Note: More than one filter can be selected at a time. Ex: "Has Given" and "Gave but no thank you sent" filters can both be selected.*
- **Reporting** highlights your personal volunteer statistics.
- **Search Constituents** allows you to search for and select classmate assignments.
- **Notifications** show your recent activity summary. You'll see when an assignment is approved or assigned to you by your staff liaison. In addition, you will be notified when as your assignments make gifts.
- **Messages** allow you to send a note to your fellow class volunteers and your staff liaison.
- **Tasks** help track future to-do list items and persist until the task is marked complete.
- The **Notes** feature is a place for you to store your actions and reminders.
- **Email** allows you to email your assignments using pre-loaded templates directly from the portal.
- ***My Templates** allows you to create and save your own email templates you might send frequently to classmates.
- **Resources** will house documentation provided by your staff liaison that will make your work easier.
- ***Tags** are optional, customizable filters that can be added to assignments. For example, a volunteer might add a Tag of "Close Friend" to identify Assignments with whom they have a particular close relationship with. These tags will appear as filters on the My Assignments page and on the Email page, and can be used concurrently with each other as well as with the 8 standard filters.

* Advanced feature that will not be covered during initial training. Training documentation covering these tools can be found in the resources.

Sending Emails through the VMS

Email is one of the most important tabs on your navigation menu. This tool allows you to send individual emails through mail-merged messaging to several assignments at once. Create your own email or use one of the pre-loaded templates created by Culver. To start, we recommend using the pre-loaded templates.

1. Select the *Email* tab on the left hand menu bar
2. Select the *Introduction Email* template
 - a. Notice the email populating in the *Email Message* box.
 - b. View the *Email Preview* to the right of the *Email Message* box.
3. Revise the body of the message as you see fit.



4. We recommend sending a test email to yourself by selecting *Send Test Email to Me* button to ensure the email looks correct.
5. Select the Recipients (your assignments) you would like to send the email to by checking the boxes next to their names.
 - a. Notice the filters that you can select and deselect as you are sorting through your assignments.
6. When you're ready to send the email to your classmates, select the *Send Email* button.

