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.

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.

Tracking Your Assignments

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

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.

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

Using the Navigation Menu
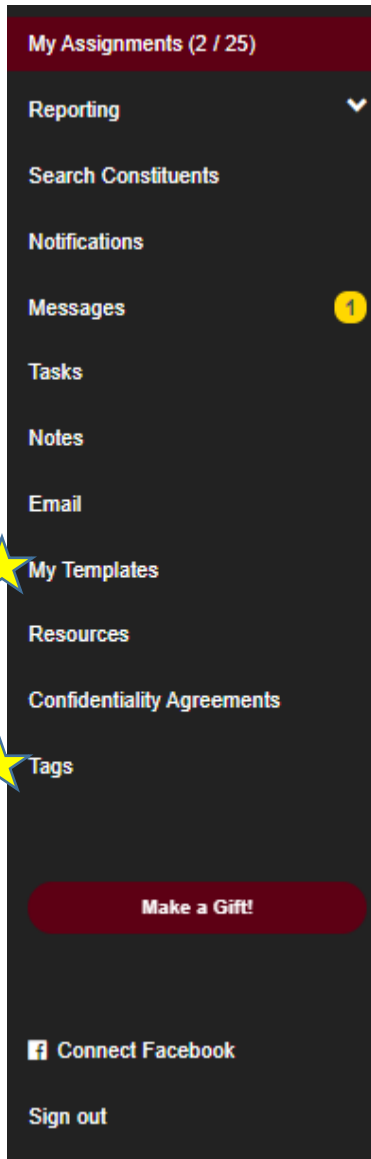
- **My Assignments** highlights the assignments you've selected. You can filter your assignment lists by selecting/deselecting the prepopulated filters. *Note: More than one filter can be selected at a time. Ex: "Has Given" and "Gave but no thank you sent" filters can both be selected.*

- **Reporting** highlights your personal volunteer statistics.

- **Search Constituents** allows you to search for and select classmate assignments.

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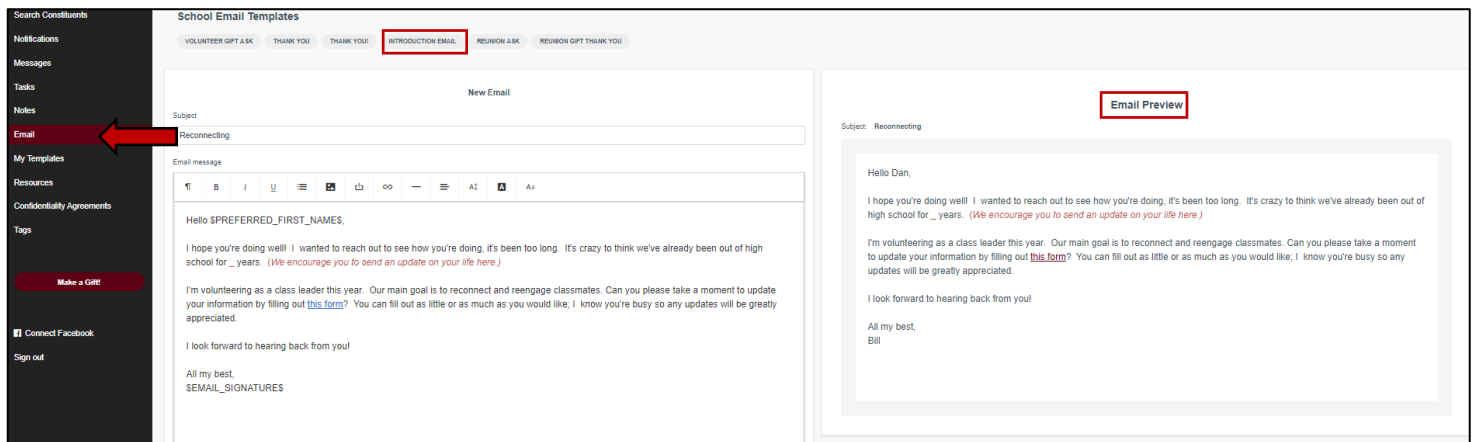
4. We recommend sending a test email to yourself by selecting *Send Test Email to Me* button to ensure the email looks correct.
5. Select the Recipients (your assignments) you would like to send the email to by checking the boxes next to their names.
   a. Notice the filters that you can select and deselect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