

Bryn Mawr Fund Volunteer Management System Guide

**BRYN
MAWR**
COLLEGE

www.givecampus.com/vms/BrynMawrCollege

Overview

The Bryn Mawr Fund Volunteer Management System is a tool designed in partnership with GiveCampus to make it easier for our Reunion Gift Committee volunteers to:

- Choose classmates to contact
- Contact those assigned classmates to solicit and thank

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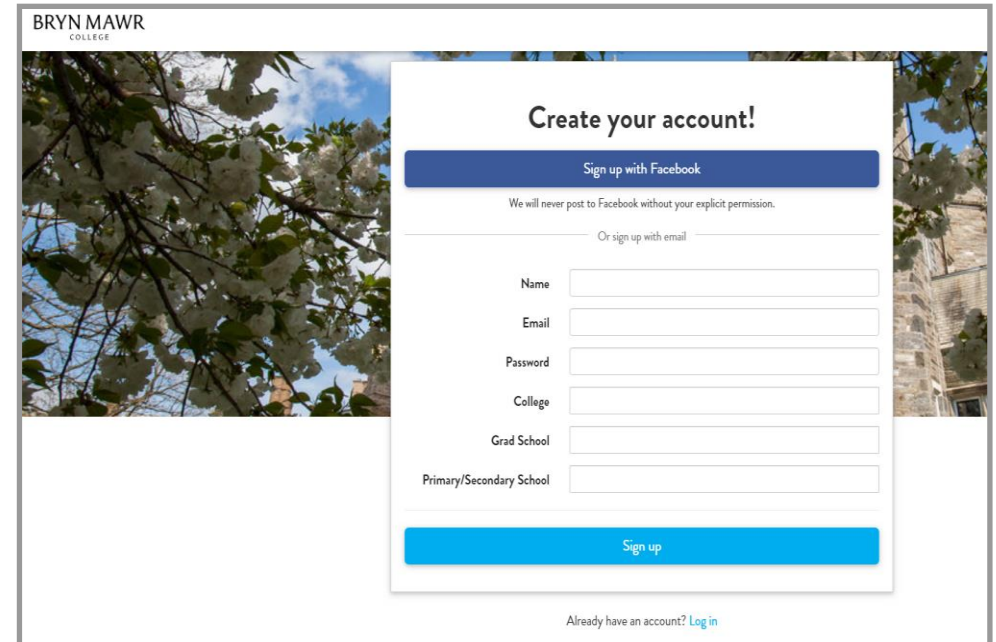
- 1) Signing up for an account
- 2) Searching and selecting assignments
- 3) The “My Assignments” page
- 4) Sending Emails
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www.givecampus.com/vms/BrynMawrCollege

First Step: Sign-up for a GiveCampus Account

- 1) Go to www.givecampus.com/schools/BrynMawrCollege/signup
- 2) Create an account using the email that Bryn Mawr College uses to send you emails. If you are unsure of the correct email associated with your account, contact your staff liaison.

Pro tip: It is easiest to use your email to create your account, but you can link it to Facebook later.



The screenshot shows the 'Create your account!' page for Bryn Mawr College. The page features a blue header with the college's name and a background image of white flowers. The main content area is white and contains a 'Sign up with Facebook' button, a disclaimer, and a section for signing up with email. The email sign-up section includes input fields for Name, Email, Password, College, Grad School, and Primary/Secondary School. A large blue 'Sign up' button is at the bottom of the form. A link for 'Already have an account? Log in' is located at the bottom right of the page.

- 3) Click on the confirmation link that was emailed to you to activate your account

Confidentiality Statement

The purpose of this Confidentiality Statement is to protect the privacy of all members of the Bryn Mawr community. Bryn Mawr Fund volunteers have access to information that is confidential and/or privileged and proprietary in nature. Bryn Mawr College requires that strict confidentiality be maintained with respect to all information obtained by staff and volunteers.

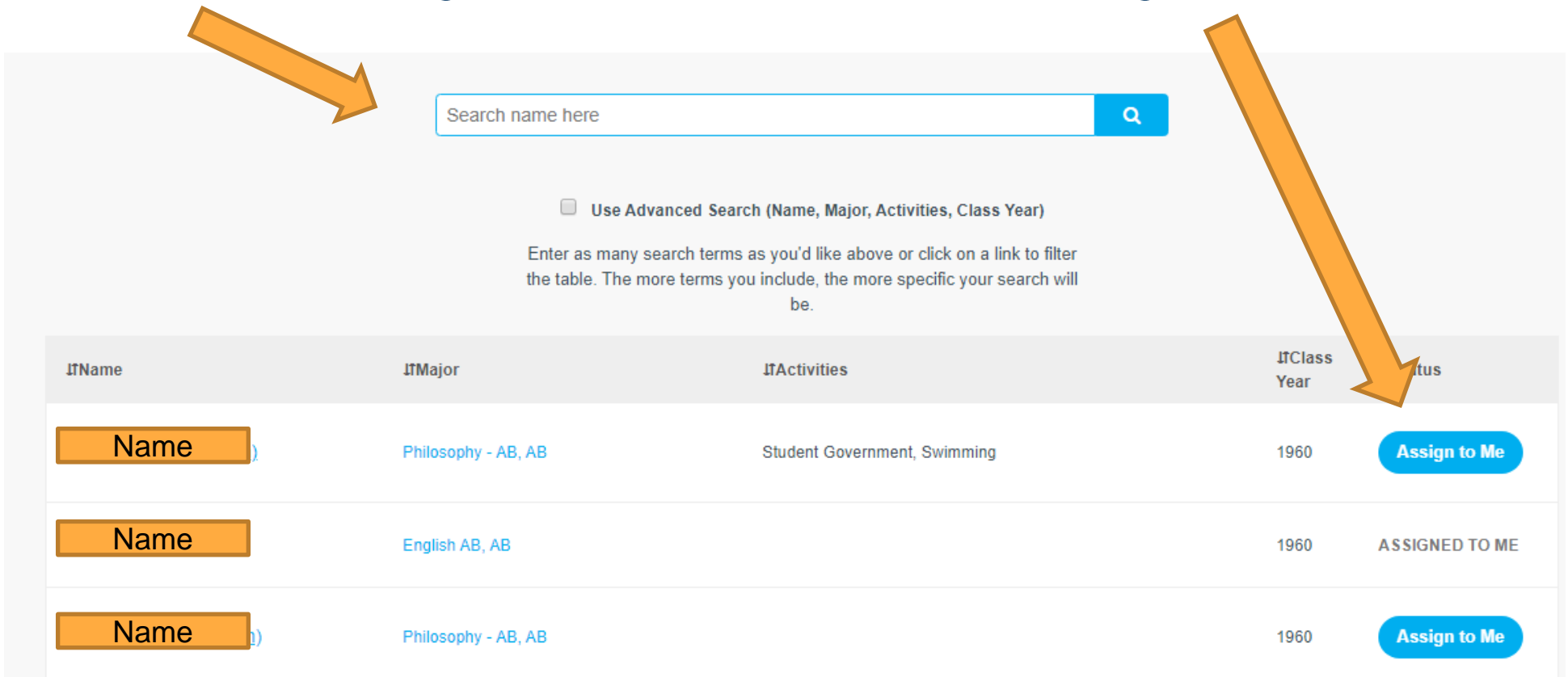
This includes, but is not limited to, information pertaining to donations of money or gifts, addresses, telephone numbers, email addresses, and other contact information. Electronic communications accessible by volunteers shall be treated as confidential documents and shall not be transferred via electronic or any other communication vehicle at any time. Any personal and financial information should not be disclosed or discussed with any third parties without prior written consent from Bryn Mawr College.

It is the policy of Bryn Mawr College that such information must be kept confidential both during and after volunteer service.

Searching & Selecting Assignments

Head to the “Search Constituents” tab to see a list of your classmates. If you’d like to see a bit more information about any of these individuals, just click on their name to view additional details.

Once you’ve found the classmate you’d like assigned to you by using the search bar or clicking on their name click on the “Assign to Me” button.



The screenshot shows a search interface with a search bar at the top, a checkbox for "Use Advanced Search (Name, Major, Activities, Class Year)", and a table of search results. Two orange arrows point to the search bar and the "Assign to Me" button in the first row of the table.

Use Advanced Search (Name, Major, Activities, Class Year)

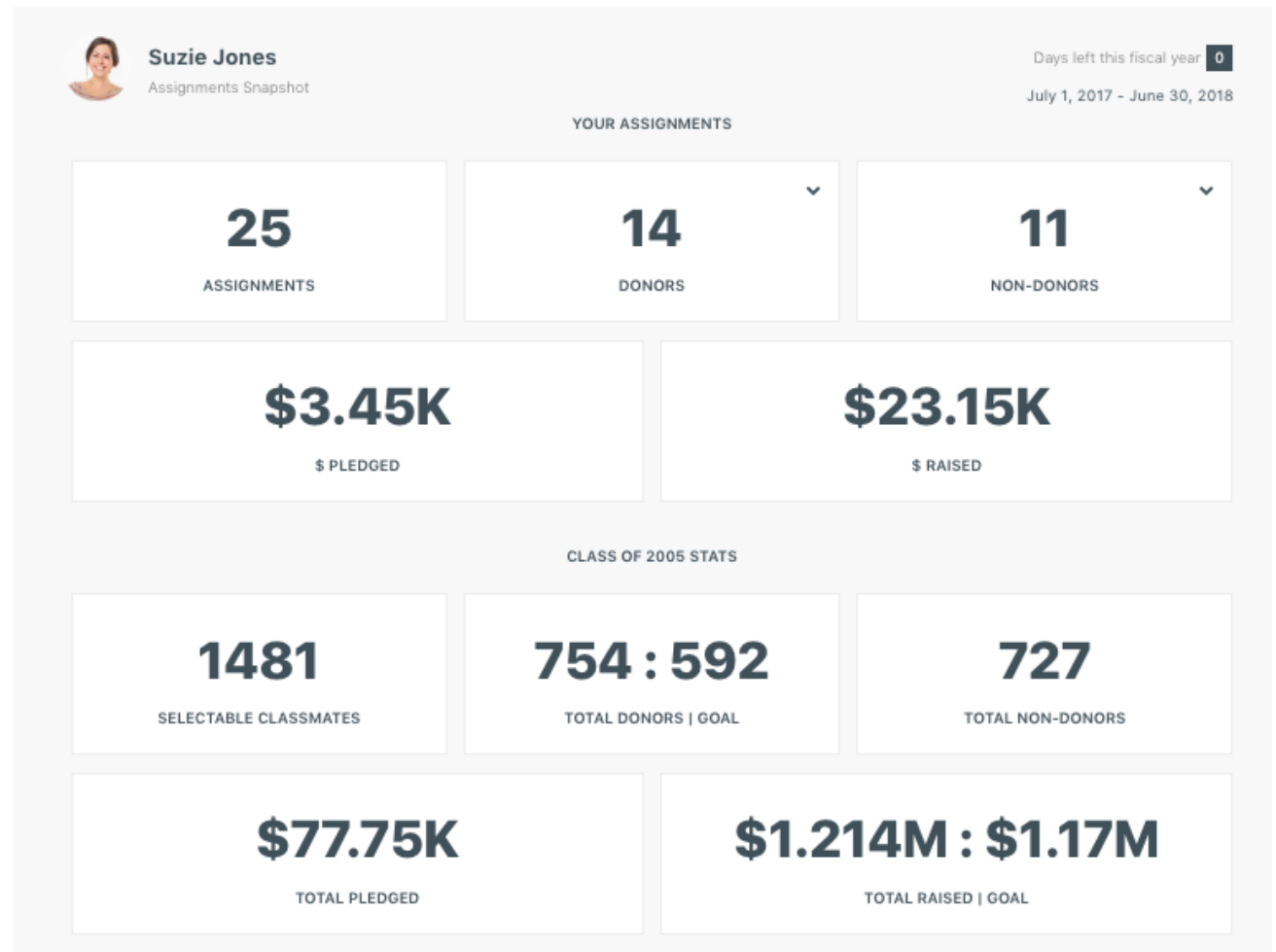
Enter as many search terms as you'd like above or click on a link to filter the table. The more terms you include, the more specific your search will be.

ITName	ITMajor	ITActivities	ITClass Year	Status
Name	Philosophy - AB, AB	Student Government, Swimming	1960	Assign to Me
Name	English AB, AB		1960	ASSIGNED TO ME
Name	Philosophy - AB, AB		1960	Assign to Me

Tracking Progress via “My Assignments”

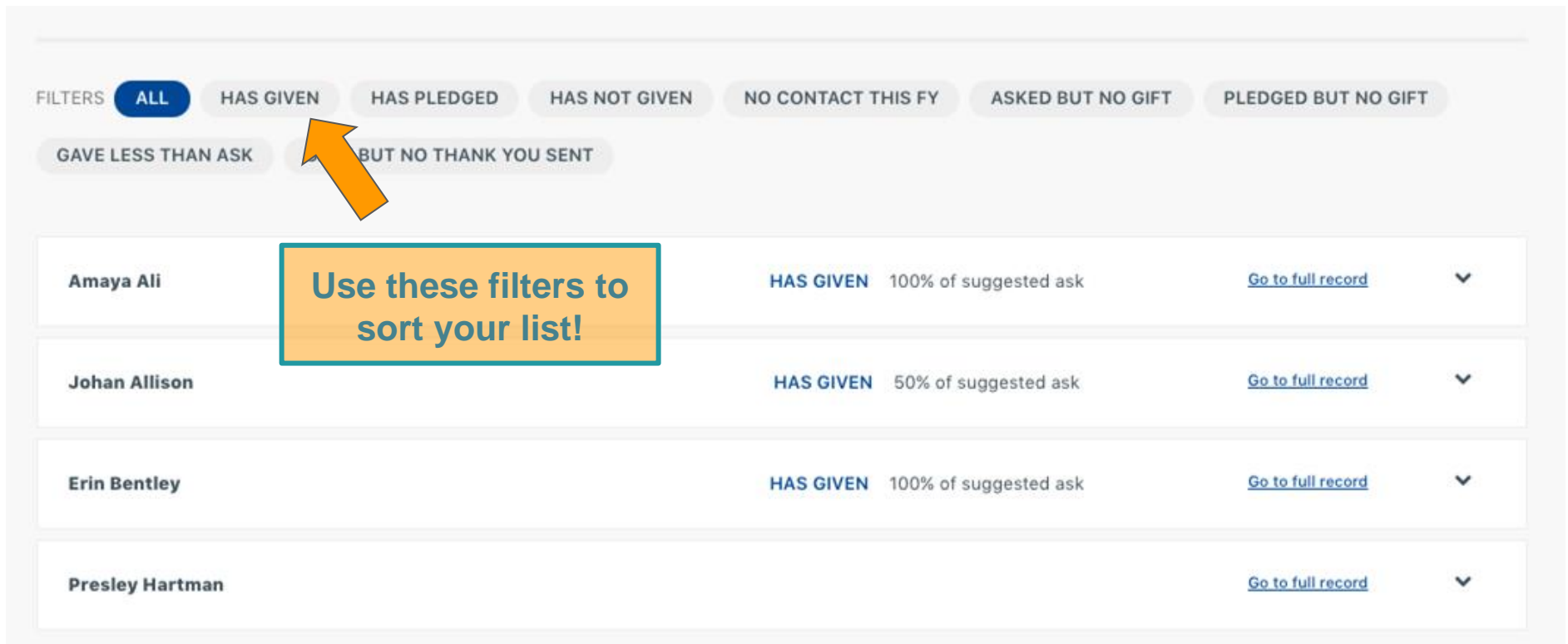
Once you have selected your assignments and they have been approved, you will see them on the “My Assignments” page.

You can navigate to this page at anytime from the left navigation bar in the VMS. On this page, you will have high level statistics about your assignments and your class as a whole.



The “My Assignments” page - Assignment List

Scrolling down past the reporting tiles, you will see a full list of your assignments. You can use the filters to sort your assignment list to see the most relevant people including those who “Have Given,” “Have Not Given,” etc.



The screenshot displays the 'My Assignments' page interface. At the top, there is a 'FILTERS' section with several buttons: 'ALL' (selected), 'HAS GIVEN', 'HAS PLEDGED', 'HAS NOT GIVEN', 'NO CONTACT THIS FY', 'ASKED BUT NO GIFT', 'PLEDGED BUT NO GIFT', 'GAVE LESS THAN ASK', and 'BUT NO THANK YOU SENT'. An orange arrow points to the 'HAS GIVEN' filter. Below the filters is a table of assignments. A callout box with the text 'Use these filters to sort your list!' is overlaid on the table. The table lists four individuals: Amaya Ali, Johan Allison, Erin Bentley, and Presley Hartman. Each row shows their name, status ('HAS GIVEN'), percentage of suggested ask, a link to 'Go to full record', and a dropdown arrow.

Name	Status	Progress	Action
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

The “My Assignments” page - Snapshot View

Clicking on the names of any of your assignments will open up their “Assignment Snapshot”. From this view you can see information about your most recent outreach efforts, information about your assignments giving history, giving towards their suggested ask amount, and your last note/email about this assignment.

The screenshot displays the 'Assignment Snapshot' for Johan Allison. At the top, it shows the name 'Johan Allison', the status 'HAS GIVEN 50% of suggested ask', and a link to 'Go to full record'. Below this are three action buttons: 'Send Email', 'Add Note', and 'Call'. The main content is divided into several sections:

- Outreach Tracker:** A table with three rows, each with a question and a 'No' response.

Outreach Tracker	
Have you contacted this fiscal year?	No
Have you had a gift conversation?	No
Have you thanked them?	No
- Suggested ask: \$100:** A progress bar showing 'Total paid this FY: \$50' and '50%' completion.
- Detailed giving history:** A table titled 'Recent gift transactions' with columns for Date, Allocation, Type, and Amount.

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:** A row of six circles representing years 2012 through 2017. The 2014 and 2017 circles are filled with a blue checkmark, indicating participation.
- Annual giving history:** A bar chart showing giving amounts for 2012 through 2017. The y-axis ranges from 0 to 100. The bars for 2014 and 2017 are present, with 2014 at approximately 75 and 2017 at 50. A note below the chart states: '*Reflects the current year and the previous 5 years'.
- Tags:** A section with a text input field 'Enter a name for tag' and a 'Create Tag' button.

Complete a Quick Action

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**
50%

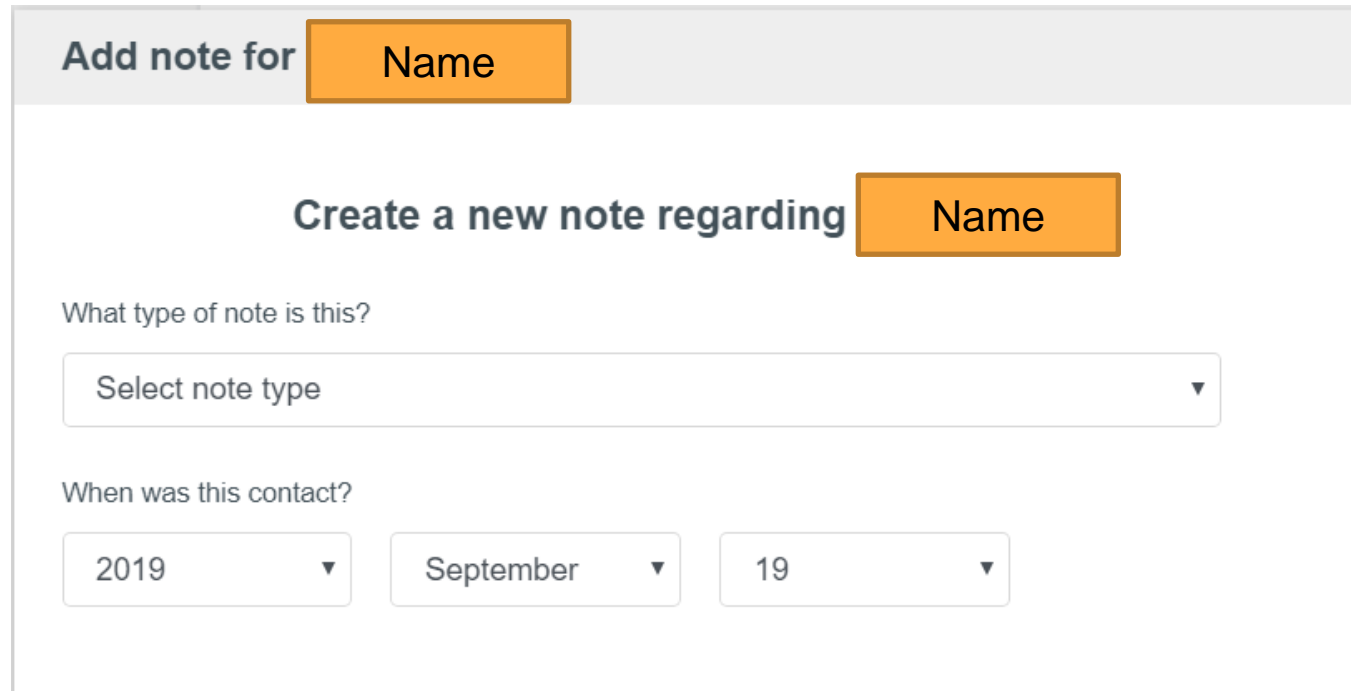
Detailed giving history
Recent gift transactions

Annual participation
2012 2013 2014 2015 2016 2017

To complete a quick action, select one of the following options:

- Send an email
- Add a contact note
- Or call them

Adding a Contact Note



The screenshot shows a web form for adding a contact note. At the top, there is a grey header bar with the text "Add note for" followed by an orange button labeled "Name". Below this, the main content area has a heading "Create a new note regarding" followed by another orange button labeled "Name". Underneath, there is a question "What type of note is this?" followed by a dropdown menu with the text "Select note type" and a downward arrow. Below that, there is a question "When was this contact?" followed by three date selection dropdowns: "2019", "September", and "19", each with a downward arrow.

Contact notes track communications you've had with a classmate:

- Quick recap of phone or email conversation
- Updated contact information (change of address, new phone number etc.)

View the Full Record

The image shows two overlapping screenshots of the GiveCampus interface. The top screenshot shows a card for 'Kip Abbott' with tags 'LEADERSHIP COUNCIL' and 'SOCCER', and buttons for 'Send Email', 'Add Note', and 'Call'. A link 'Go to full record' is visible in the top right corner, with an orange arrow pointing to it. The bottom screenshot shows the full record page for Kip Abbott, Class of 2005, with a 'Request unpairing' button and buttons for 'Send Email', 'Add Note', and 'Call'. The page includes a 'Tags' section with 'SOCCER' and 'LEADERSHIP COUNCIL' tags, and sections for 'Personal', 'Education', and 'Employment' information.

Personal

Email	kip.abbott460@givecampus.com
Phone Number	Home: (574) 673-7296 x12248 Cell: 1-504-018-6062
Home Address	6037 Gottlieb Alley East Omariburgh, OK, United States
Spouse	Turner Abbott
Affiliation	Alum

Education

Class year	2005
Major	History
Activities	

Employment

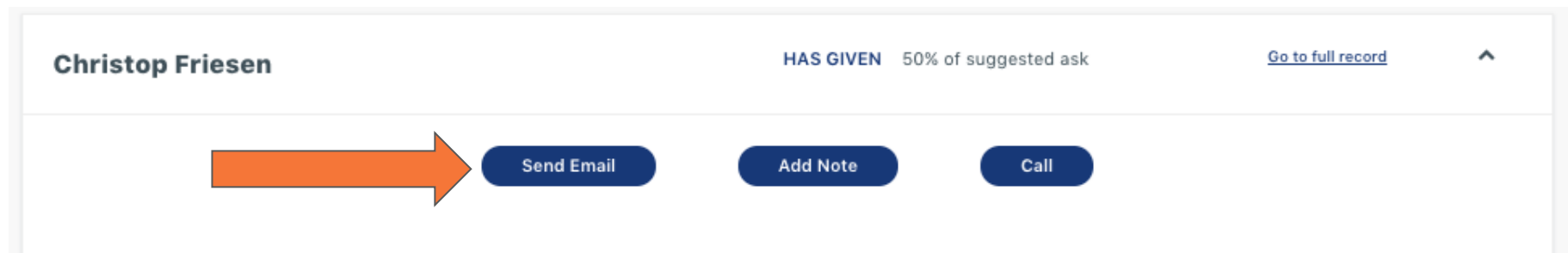
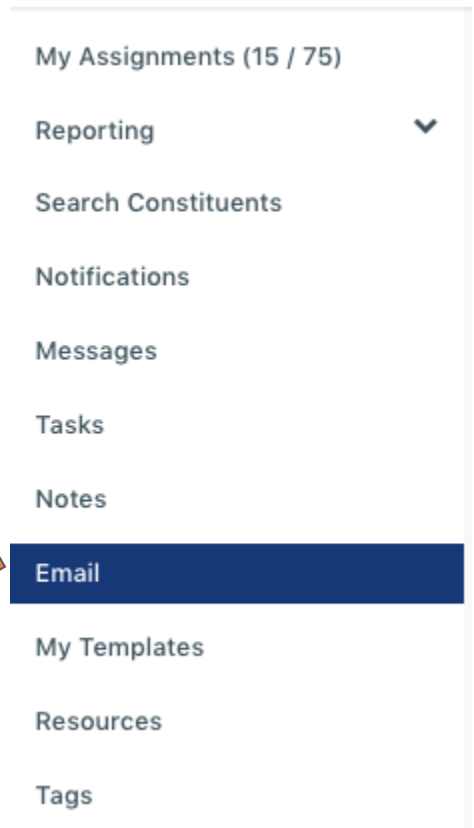
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On the “My Assignments” page you have the option to “View Full Record” for any of your constituents. Click here to see additional details about your Assignment including contact information, employment, and giving history.

Sending Emails

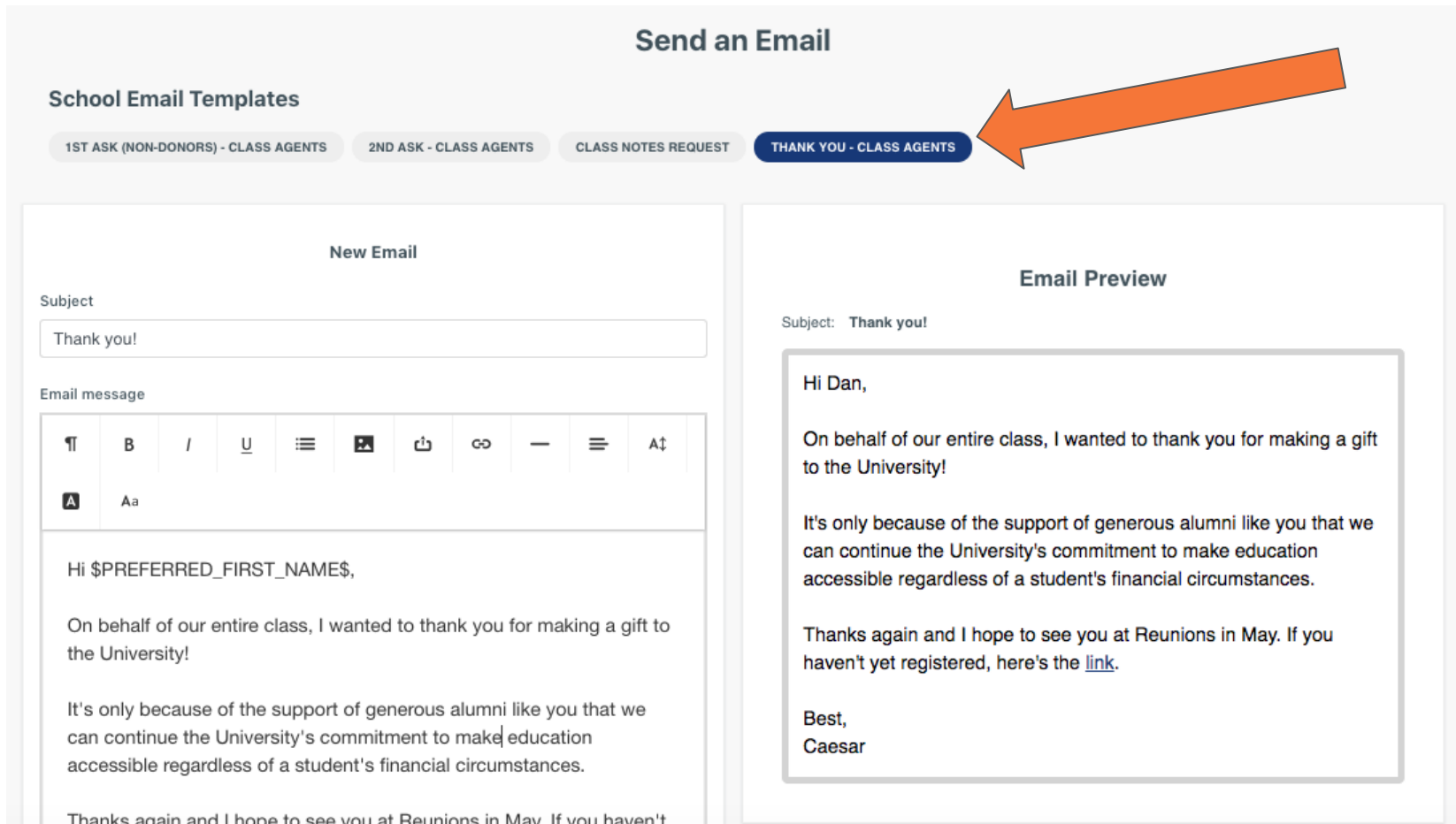
Sending emails has never been easier! Through the VMS you may send emails in a few different ways:

1. From the Email page
2. From the My Assignments page or a constituent's Full Record using the "Send Email" button



Sending Emails: Email Page

1. Click “Email” on the navigation bar
2. Select a pre-made Email Template OR begin drafting your own email



The screenshot displays the 'Send an Email' interface. At the top, there is a navigation bar with the title 'Send an Email'. Below this, a section titled 'School Email Templates' contains four buttons: '1ST ASK (NON-DONORS) - CLASS AGENTS', '2ND ASK - CLASS AGENTS', 'CLASS NOTES REQUEST', and 'THANK YOU - CLASS AGENTS'. An orange arrow points to the 'THANK YOU - CLASS AGENTS' button. The main content area is split into two panels. The left panel, titled 'New Email', has a 'Subject' field containing 'Thank you!' and an 'Email message' field with a rich text editor toolbar. The right panel, titled 'Email Preview', shows the subject 'Thank you!' and the email body content: 'Hi Dan, On behalf of our entire class, I wanted to thank you for making a gift to the University! It's only because of the support of generous alumni like you that we can continue the University's commitment to make education accessible regardless of a student's financial circumstances. Thanks again and I hope to see you at Reunions in May. If you haven't yet registered, here's the [link](#). Best, Caesar'.

Sending Emails: Send Email Button

The “Send Email” button allows you to send an email to a single assignment from their My Assignments Snapshot page or their Full Record

- Click the “Send Email” button
- Select a pre-created email template or draft your own message
- Mark whether this is a Gift Conversation or Thank You

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

Send Email Add Note Call

Send email to Christop Friesen

Send Christop an email

(Note: This will automatically generate a note.)

School Email Templates

1st Ask (non-donors) - Class Agents 2nd Ask - Class Agents Class Notes Request Thank you - Class Agents

Is this a gift conversation? Is this to thank them for a gift?

Subject

Message

Send me a copy

Send Email

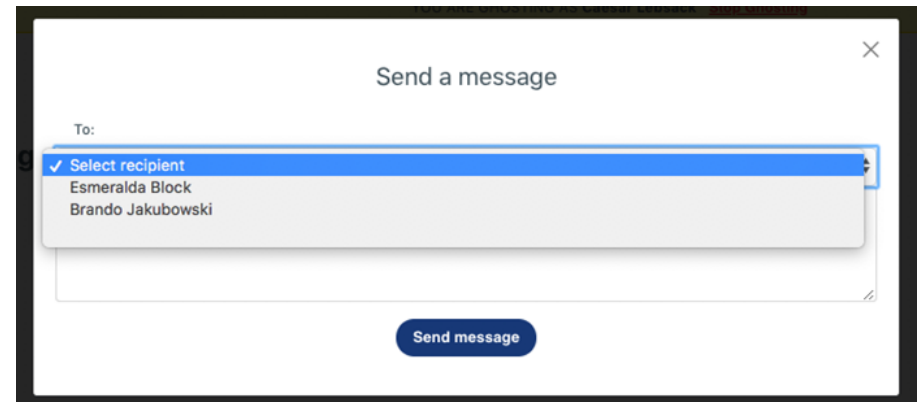
- Click “Send Email”. If you’d like to receive a copy in your inbox, check the box beside “Send me a copy”

Messages

Through Messages you will be able to communicate with your staff liaison as well as, if your role allows, other Volunteers. All messages will be stored in the VMS for easy reference and when you receive a message, you'll be sent an email notification providing a link to the message.

To access and send messages:

- Click on the “Messages” tab and then the “Send a Message” button
- Select the recipient to whom you'd like to send the message
- Enter your message and press “Send Message”



Tasks, Notes, My Resources

Tasks

- Here you can set tasks for your self and check them off when they are completed

Notes

- Here you can see a full list of all the notes you have made about your assignments

Resources

- Here is where you will find your monthly Greensheets. This is also where this user manual can be found.