Bryn Mawr Fund Volunteer Management System Guide

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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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.

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.
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.

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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.

Use these filters to sort your list!
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.

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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

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.)
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.

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