AAF Volunteer Portal Handbook

Carleton

CONTENTS

WELCOME!

Welcome to the new Carleton Volunteer Portal! After nearly two years of work collecting feedback and ideas from volunteers, evaluating options, and building the new site, we are very pleased to share with you this new suite of tools to support you in your work for Carleton. Alumni volunteers are at the heart of our work; we could not do what we do without you. It is our hope that this new portal will greatly improve the resources available to you. In particular, the new portal offers more flexibility and customization in finding and viewing assignments, new tools for taking notes, adding task reminders, and communicating with fellow volunteers, and is completely optimized for mobile use.

This handbook is intended to complement the other training materials offered by the AAF team: live webinars, recorded videos, and individual coaching sessions. We will also offer significant training for the new portal at CAVE in August and all volunteers are highly encouraged to attend. For more volunteer resources and materials, please visit https://apps.carleton.edu/giving/volunteers/ or contact your AAF staff or board member.

And now, without further ado, we invite you to dive into the new system and explore its possibilities!

Warmly and with much gratitude,

The Alumni Annual Fund Board:

Karen Schilling '78, AAF Board Chair
Bill Gage '64 (1964-1969)
Jim Ginzer '73 (1970-1973)
Pam Luecke '74 (1974-1977)
Rick Valdivia '80 (1978-1981)
Don Frost '83 (1982-1986)
Deirdre Weaver '89 (1987-1991)
Eryn Deeming Kehe '96 (1992-1996)
Jane Cobler '98 (1997-2000)
Drew Weitz '02 (2001-2004)
Austin Lau '05 (2005-2006)
Jonathan Dille '08 (2007-2010)
Lyssa Searcy '11 (2011-2014)
Colby Seyferth '15 (2015-2018)
Dan Sullivan '19 (Student Representative)
Kathy Valyi '73 (Three Oaks Chair)

The Alumni Annual Fund Staff:

Becky Zrimsek '89
Maggie Patrick
Kimberly Barnes
Nichole Haan
Breanne Bischoff
Anita Fisher Egge '94
Nicole Schroeder
Mario Hess-Winburn
Nick Traxler

GETTING STARTED

We have custom-built our system to reflect Carleton and the AAF program; you will note that all information is the same, but the way you access that information is now in a new format. Follow the step-by-step instructions below to log in, and feel free to reach out to your staff member for help!

A. Logging In/Home Page Overview
   a. Open a web browser and go to https://carleton.force.com/volunteer
   b. Use your login credentials provided in your welcome email to log in to the volunteer portal.
   c. There are two ways to log in: using your alumni directory credentials or certain preferred email credentials
      i. You will receive a welcome email with log-in information and training materials.
   d. Once you are logged in you will be brought to your home page within the portal. We will review this page more later:

VIEWING AND SELECTING ASSIGNMENTS

B. Viewing assignments through "list views" under the Assignments tab
   a. Click on the Assignment Tab.
   b. To see all of your classmates, select My Carls on the drop down menu. Depending on your browser, you may need to hit the "Go" button to refresh and see the list. "My Carls" refers to all the people you have access to see. For most AAF volunteers, this means your class. For Board Members, this means a broader range of classes:

c. To see all your assignments within this fiscal year, select My Assignments Current FY on the drop down menu. Hit Go if necessary.

d. To see all assignments within past fiscal years, select My Assignments Past Years on the drop down menu. Hit Go if necessary. Please note that this list will not begin to populate until FY17.

e. To see all unassigned classmates, select Unassigned Carls on the drop down menu. Hit Go if necessary.

f. These lists are all sortable. Simply click on any of the column headers to sort in ascending or descending order. You can use these lists to review current assignments or to find new ones.

C. Viewing Individual Assignments

a. To view details of an individual assignment, click on the assignment's name. If referencing the screenshot above, use the links in the Assignment Name column. Below is a screenshot of what the page should look like after clicking the assignment name:

i. This page is an overview of the Assignment's basic information. Categories include:

ii. Stage- Not Started, In Contact, etc. These stages help you and your team keep track of your progress. You can update this yourself and are encouraged to do so. Double-click on the field and choose the new stage from the dropdown menu. Be sure to click the "Save" button at the top to preserve your changes. **Please note that all changes are LIVE!**

iii. Contact Information – phone number, email, etc.

iv. Open Activities – planned calls or emails related to this assignment.

v. Activity History – previous calls and emails related to this assignment.

vi. Stage History- says when the stage field has been changed.

D. Viewing Additional Contact Information
   a. The Assignment page includes basic information and should show enough to allow you to make your contacts, especially if you know the person. If you feel you need more information, click on the contact's name in Primary Contact field. Then you will see:

i.   This page includes much more in-depth information that may be useful to know if the Assignment has recently had a change in situation or relationship with the College. Descriptions of the fields on this page are as follows.

ii.   Contact Details – Includes Name, Class Year, Spouse, and Volunteer Solicitor if assigned.

iii.   Contact Preferences – Instructions as to how to interact with this alum.

iv.   Phone, Email Contact Information – Phone and email information.

v.   Address Information – The Mailing Address of the alum.

vi.   Employer Information – Work information, including whether they or their spouse/partner appear to be eligible for a Matching Gift through their employer.

vii.   This Year's Giving – Details on this year's ask and gift.

viii.   Past Giving – Details on past giving through the past reunion cycle.

ix.   Related Lists – Related lists details people connected to this alum (siblings, children, etc.). If the alum does not have any of these records, the Related List will not appear.

x.   Assignments – This year's donation ask and the Volunteer assigned to it.

xi.   Special Handling – Details any Special Handling records related to this alum. **Please pay special attention to these fields as they indicate the Assignment's contact preferences. It is very important that we honor their contact requests!**

xii.   Activity History – Lists past activities with this alum, like calls or emails.

xiii.   Open Activities – Planned calls or emails with this alum.

xiv.   Children – The alum's children.

xv.   Graduate Degrees – The alum's educational history beyond Carleton.

xvi.   Carleton Engagements – Volunteer Activities that this alum has taken, and record of interactions with Carleton Staff.

xvii.   Geocodes – Carleton Clubs the alum belongs to.

E.   Switching From Contact To Assignment

a.   Scroll to the bottom of the contact page and look for the Assignments sub heading.

b.   Click on the Assignment name to navigate to the Assignment page.

i.   All work will be done on Assignment pages and not Primary Contact pages.

c.   You may also use the back button on your browser to return to the Assignment page from the Primary Contact page.

F. Adding/Dropping An Assignment As an Assistant Agent
   a. Go to the Assignments tab. Using the List Views, navigate to Unassigned Carls.
   b. Click on a classmate name.
   c. Click the Change Assignment button toward the top of the page – the window below will appear after clicking change assignment:
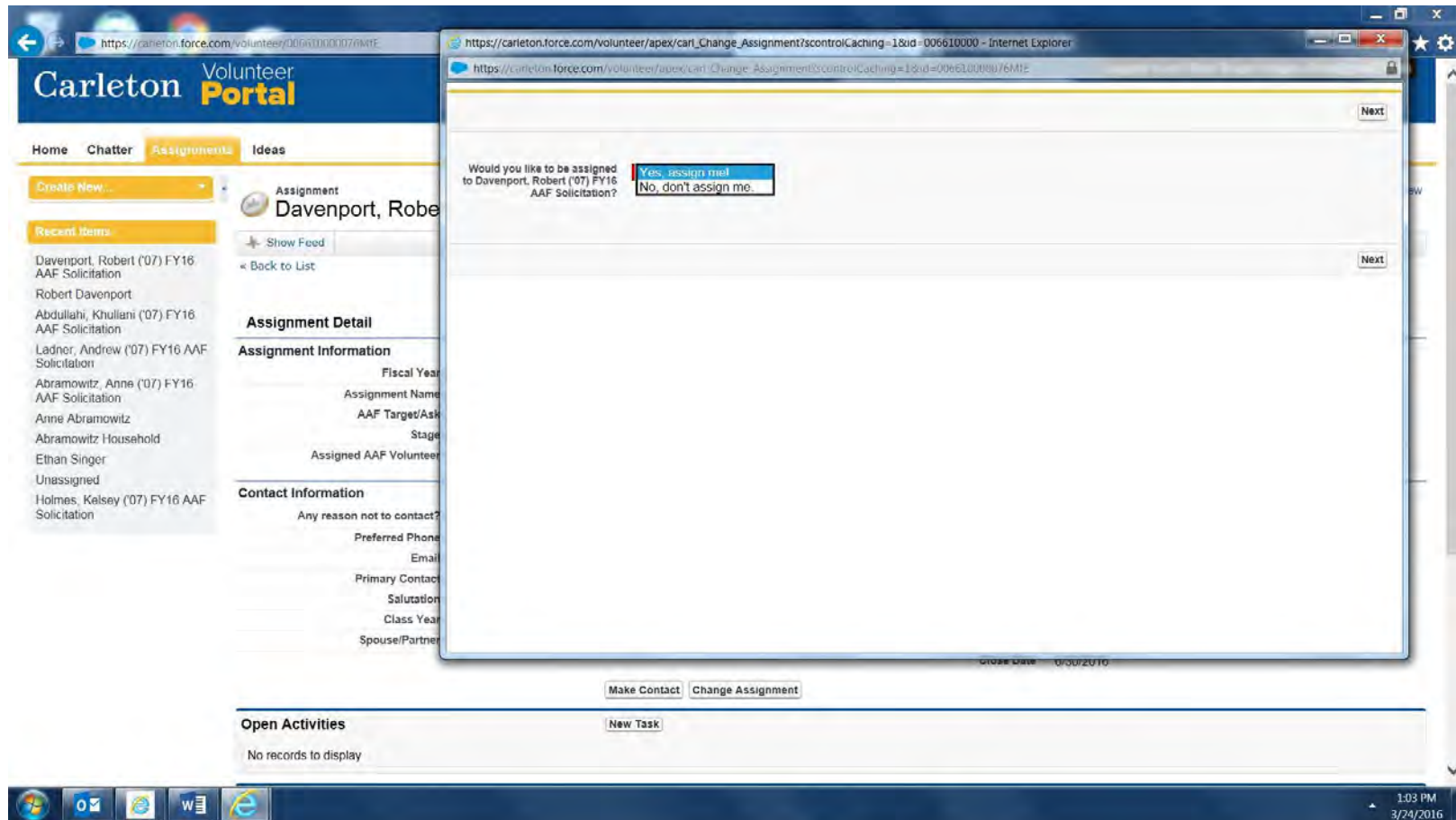
   d. From the drop down menu ensure that "Yes, assign me!" is selected.
   e. If you clicked this button by mistake, select "No, don't assign me" or click the red X in the top right of the pop-up window.
   f. After your selection is made click, Next and then click Finish.

g. If the assignment you want is owned by someone else, you have the option to write to this person and request ownership.

h. To drop an assignment, simply go through these same steps and select the appropriate response on the drop down menu.

G. Adding/Dropping An Assignment As A Class Agent or Board Member

a. Go to the Assignments tab. Using the List Views, navigate to Unassigned Carls.

b. Click on a classmate name.

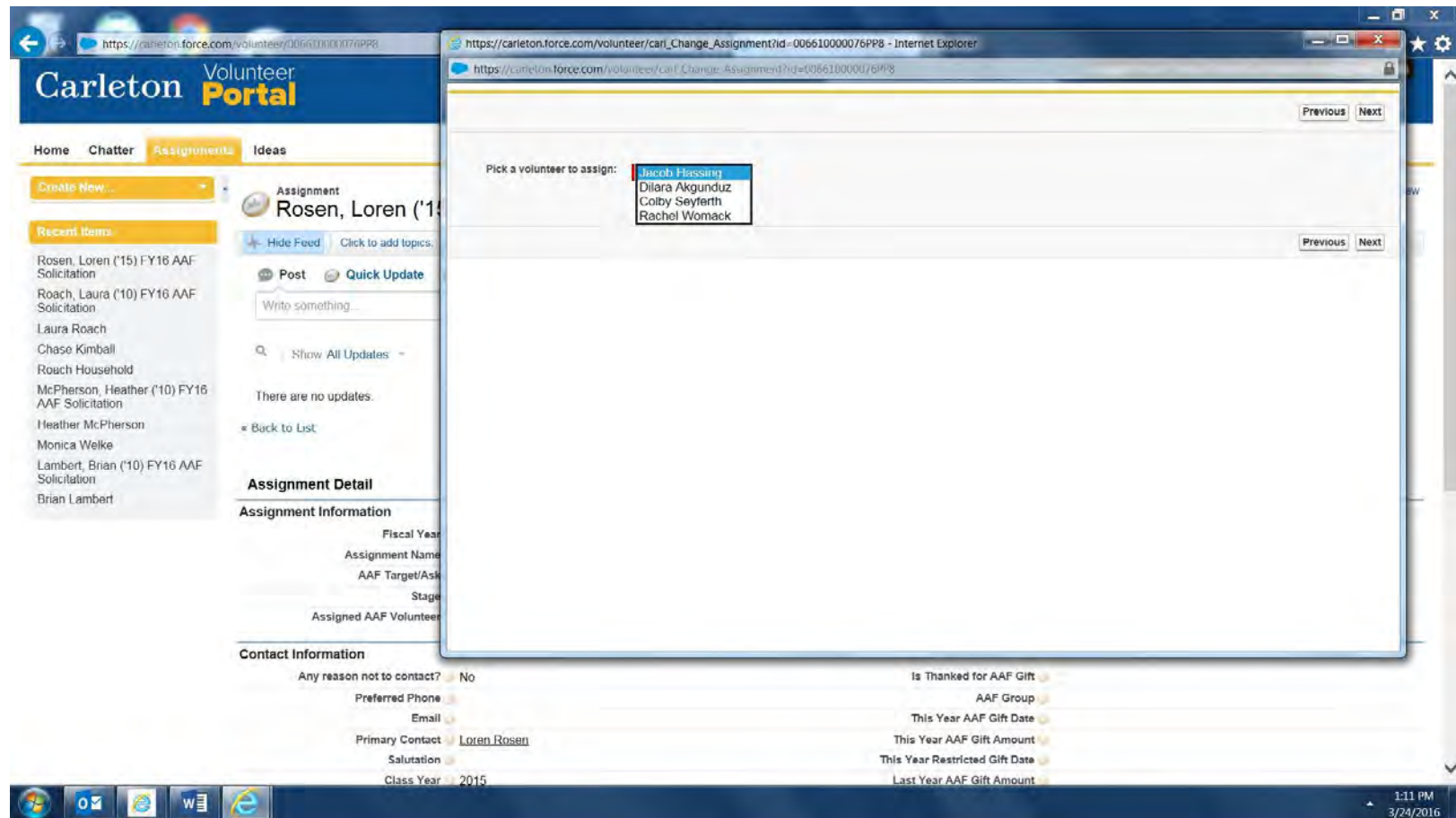c. Click the Change Assignment button toward the top of the page – the window below will appear after clicking change assignment. If you select to assign the person to yourself, follow the rest of the process outlined above for Assistant Agents. To assign to someone else:

d. If you select, "Another Volunteer" you will then see:

e. Select the volunteer within the class that you would like this person to be assigned to.
f. To reassign to another person, simply go through the previous steps and select another person. As a Board Member or Class Agent you have the ability to change Assignments without getting approval from the person that has that Assignment. While many classes prefer this option, please be sure to check in with your team before adding or dropping their assignments.

g. You may only drop assignments assigned to yourself. To drop an Assignment, follow the same process but follow instructions to drop the Assignment.

QUIZ TIME!

Let's test your knowledge. Using the instructions above, try the following tasks. Remember, all changes in this system are LIVE, so only make changes you actually want to record!

- ➢ Find your current Assignments.
- ➢ Find classmates who are unassigned.
- ➢ Add an Assignment to yourself.
- ➢ Find your list of current Assignments again.

You're making great progress! Practice the above tasks a few times until you feel confident. Don't forget to call your staff member if you need help!

Now, on to making contact!

MAKING DOCUMENTING CONTACTS

A. Using the skills you learned above, navigate to one of your Assignments
   a. Click Make Contact at the top of the page – you will be brought to the pop-up window below after clicking Make Contact:
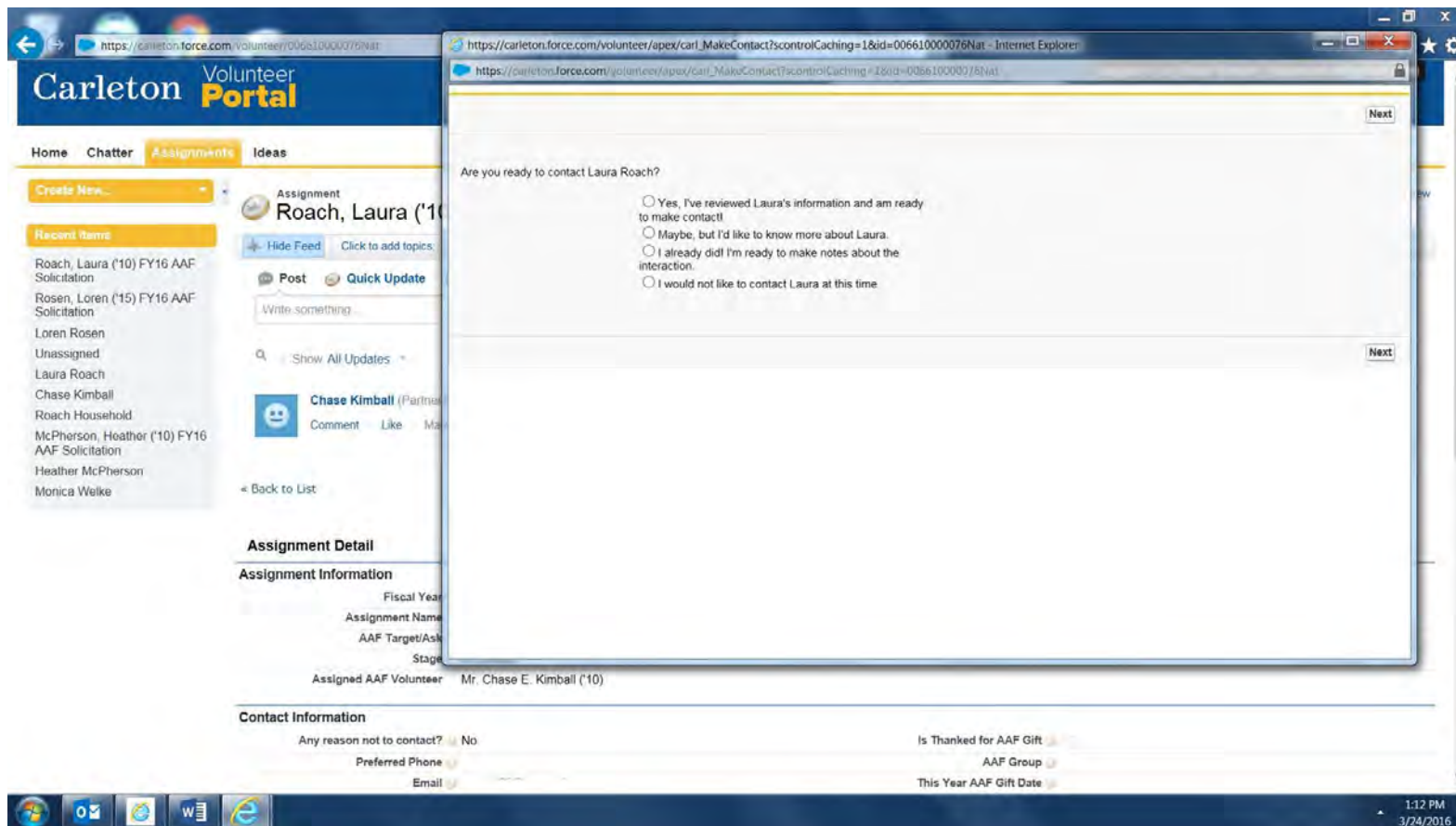
b. Select "Yes. I've reviewed [donor's name] information and am ready to make contact!" Click Next. The screen will then give a summary of relevant details on the alum. You have the option to use a guided script to help you with your call or email.

c. After you have made your contact, click Next to move onto the next screen, which will allow you to log notes on the interaction.

d. Go through the Interaction Notes Screen:

      i. Contact Method – choose Email, Text, Phone, etc.

     ii. Interaction Detail – choose Left VM, Will Give, Will Not Give, Considering, and Would like a reminder later.

      iii. Log any comments about the interaction that are helpful. **Please note that these comments will be viewable by a wide range of staff and volunteers, and possibly even the alum. Share as much as is helpful but keep comments professional!**

      iv. Select whether AAF staff needs to be notified – choose this option and leave comments if the interaction indicated any kind of change in the alum's relationship to the College (example, added Carleton to their will, their child was accepted as a student, etc).

      v. Click if Notify Career Center should be notified if the alum indicated interested in volunteer as an internship sponsor, class speaker, etc.

      vi. Select Update Contact Information if contact information needs to be updated.

          1. You will be prompted to fill in pertinent details on the next screen if you check this box. Select whether this information is new or corrected and include whatever updates you have.

      vii. If you indicate from the dropdown menu that the Assignment asked for a reminder later, you will be given an option to give yourself a reminder on the next screen.

  e. Returning to the beginning of this process, if you select "Maybe, but I'd like more information about Laura" on the very first question, you will be prompted to exit the screen and view the Contact Information section by clicking the Assignment's underlined name in the "Primary Contact" field.

  f. Clicking "I already did. I'm ready to make notes about the interaction," skips ahead to the Interaction screen, which we just reviewed above. The only difference here is that you will not be prompted with a script.

  g. Clicking "I would not like to make contact at this time," just simply prompts you to exit the screen and allows you to take no further action on the assignment. You can also click the red X in the top right corner of the pop-up screen if you opened it by mistake.

QUIZ TIME!

What a great start! Now that you've learned some of the most critical functions of the new portal, let's try them out. Remember that all interaction notes and staff notifications you log are live!

- ➢ Find a script that can help you plan your call or email with an Assignment.
- ➢ Log notes on an interaction with an Assignment.
- ➢ Notify staff of an important update regarding an Assignment.
- ➢ Find your list of current Assignments again.

Now on to a few fun extra functions that make the system even more helpful!

TASKS AND CHATTER

The new portal allows you to create tasks (with optional reminders) to help you and your team stay on track toward your goals. It also allows for Chatter – a function akin to social media conversations that allows you to interact with staff and volunteers in real time and share stories, update progress, or discuss tasks and strategies.

B. Creating a Task
   a. Navigate to the Assignment that you would like to create a Task for.
   b. Scroll down to Open Activities section and choose New Task. This screenshot below is what you will see after clicking new task:

c. Choose who is assigned this activity. It will automatically default to the person who is entering the task.

d. Pick a Subject like that is easily recognizable in a list of tasks.

e. Select a Due Date for the task (When you would like this task to be complete)

f. Select the proposed communication method for the contact.

g. Use the comments section to enter notes on the interaction – if you are assigning a task to another team member, be sure to be explicit so they know what you are asking of them.

h. The Related To field pre-populates with the Assignment that you started from.

i. Name – This also defaults to the Assignment, but you can use the Look Up (the magnifying glass icon) function to choose another contact. Sometimes this field is blank. **Please always be sure to fill in both the Related To and Name fields for every task – this ensures the tasks will stay on the right person's record from year to year!**

j. Select Status and Priority – these fields are useful for reporting and reminder lists.

k. Recurrence – use this field to create a recurring series of tasks.

l. Reminder – click this box to set a date and time to get a reminder. **Note that the system does not automatically set reminders so you must be sure to fill in these details if you want a reminder!**

C. Sending An Email

a. Navigate to the Assignment you'd like to email.

b. Go to the Activity History section and click Send an Email. The screenshot below is what you will see after clicking send an email.

c. To use a pre-made template click Select Template. You are always encouraged to customize each message, but these templates will help you get started and save you lots of time.

d. In the To field, do not enter an email address. Instead use the Look Up function by clicking on the magnifying glass. Search for and select the name of the Assignment you want to email and the system will automatically populate the right email address.

e. The Related To - pre populates with the Assignment you started from.

f. The BCC function automatically blind copies you on the email. This allows you to continue the conversation from your personal email if you like.

g. Fill out the other fields as necessary, then click send. **Remember, all functions are live! Only send emails you actually want to send!**

D. Chatter

a. To view the Chatter screen, click on the Chatter tab at the top. You will then see the following:
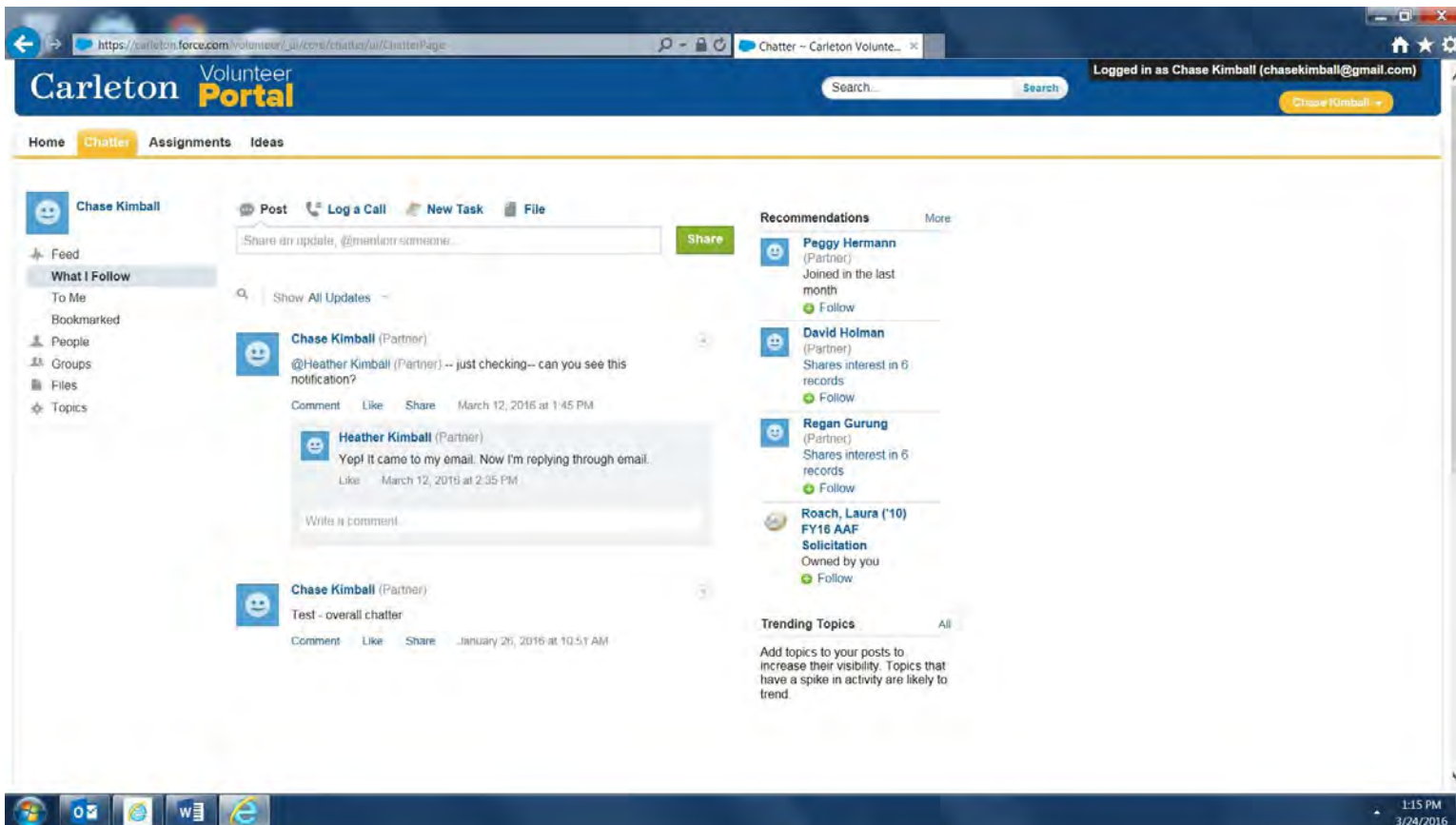
b. Chatter provides an easy way to communicate with others in the portal community. This feature is very similar to social media in that you can tag individuals in your posts. Chatter is not a substitute for Interaction Notes. Chatter is better for in-the-moment conversations and updates, rather than relationships summaries you want to preserve long-term.

c. Type your message in the Post box.

d. You can tag a user specifically or a group. To do so, type the @ symbol. A search box will pop up to allow you to find and select someone's name.

e. Type the rest of your message and click Share.

f. You can also log a call, create a task, or share files with your teammates by choosing the options at the top of the screen. These work flows follow similar processes to those we have already explored in this manual.

g. Each class team should have a group. Choose Group from the left sidebar to see and chatter to the groups you belong to.

h. You can configure your Chatter email and mobile notifications to fit the type and frequency you desire. You can indicate how you want to receive notifications (email, mobile, etc) and how often (live, daily digest, weekly digest, etc). Click on your name in the upper right hand corner and select My Settings.

    i. From the settings screen, click on Chatter on left-hand menu.

    ii. Click Email Notifications

    iii. Select your Chatter Email Notification preferences.

    iv. Click Save.

QUIZ TIME!

Whew. You're over the toughest part! Using the instructions above, try the following tasks. Remember that all interaction notes and staff notifications you log are live!

➢ Create a recurring task for yourself to check-in on a project or Assignment .

➢ Create a one-time task with reminder.

➢ Post a welcome message to your class Chatter group. If you're feeling adventurous, tag a friend too!

➢ Review and adjust your personal notification settings.

Alright, almost there. Let's check out reports!

REPORTING

In addition to the many new tools available to help you in your work contacting Assignments when fundraising for the AAF, we still offer many reporting tools that help you see how your class is progressing toward its goals. Many of these reports will look similar to reports in the old portal, but offer additional charts or lists of names.

i. Three initial reports display as your dashboard and are visible as soon as you log in to the portal.
   i. The first report displays your Assignments by stage. As you contact more of your assignments and more of them give, this chart will begin to display how many people are in which stage. The stage is automatically updated once a that person has pledged or donated. Please note that you may have assignments you have already contacted, but because you contacted them before we had the new portal, their stages won't update until you change them in the new system.

ii. The second report shows your class progress toward your participation goal.

iii. The third report shows the next five people you could contact, so that you don't even have to go to the Assignments tab if you want something quick and focused. These are currently displayed by Ask amount; based on feedback from volunteers after regular usage we may change this to other criteria.

j. Other reports are located in a list in the left panel of the homepage. Click each one to view visualizations of the data; be sure to scroll down to see lists of names that might be associated with a chart. You should be able to see not only how many people are in different categories, but exactly who those people are!

QUIZ TIME!

Alright! You are almost there. Try out some of the suggested tasks to help you explore the reports. We hope the titles and data are intuitive; feel free to explore on your own but do feel free to reach out to your staff member with questions. Try to answer the questions below by figuring out which report provides the relevant information:

➢ How far is your class towards its dollar goal?
➢ How many donors from the T group are in your class?
➢ How do you find a list of all fellow volunteers in your class?
➢ How does your class participation rate compare to others in your decade?

My Class Non-Donors

Report Generation Status: Complete

Report Options:
Run Report Hide Details

My Class Non-Donors by Group

AAF Group
- A
- B
- C
- D
- E
- T

10: 7%
24: 17%
47: 33%
25: 17%
17: 12%
21: 15%

Record Count

Large | Medium | Small

Filtered By: **1 AND (2 OR 3)**
1. **Class Year** equals 1960
2. **This Year AAF Gift Amount** equals 0
3. **This Year AAF Gift Amount** equals

Grouped By: Class Year   AAF Group
Sorted By: Class Year ↑ ▼ > AAF Group ↑ ▼

Assignment Name	Last Year AAF Gift Amount	Assigned AAF Volunteer	AAF Target/Ask
Class Year: 1960 (144 records)			
AAF Group: A (24 records)			
('60) FY16 AAF Solicitation	$500.00	Mr. Francis M. Carroll ('60)	$250.00
('60) FY16 AAF Solicitation	$50.00	John D. Zimbrick, Ph.D. ('60)	$200.00
('60) FY16 AAF Solicitation	$350.00	Mr. M. Stephen Cook ('60)	$200.00

Windows Explorer

SHARING IDEAS AND SUGGESTIONS

The portal is designed for YOU, so we want to hear how it's going! We have built a handy "suggestion" box that will allow you to share thoughts on the new portal and communicate with one another to determine what is most helpful for the majority of volunteers. Click on the Ideas tab to view and post ideas. As people begin to share ideas, the list will populate with everyone's posts:

A. To post your own idea, click Post Idea and fill out the necessary fields in window below. Because every class has different strategies, goals, and histories, please share context as much as possible and offer ideas for how your suggestion might benefit all teams (next page):

B. As suggested ideas begin to appear in the list, you will have the opportunity to "upvote" or "downvote" suggestions. The more an idea is promoted, the better the staff will know how to prioritize updates and improvements as we roll out future iterations of the portal. If you like another idea, click promote; if an idea doesn't apply to you or your class, you can ignore it. Please only choose to demote ideas that directly apply to you and your class and that may inhibit your work. We look forward to hearing from you!

THE PORTAL ON A MOBILE DEVICE – IT IS MOBILE-FRIENDLY!

When testing needs and platforms with our volunteers, one of the most common requests we heard was for a mobile-friendly system. We are very pleased to now be working with a portal that is completely mobile friendly, and supported nearly universally for all devices and operating systems.

A. You can access the portal through an app or through a mobile browser.
B. On your phone or tablet, go to the app store and search for the the Salesforce1 App. Download the app and login using your same credentials as the website. You may want to log in to the new portal the first time via desktop and then get the app set up later.
C. If you don't want to download the app, you can to the URL within a web browser on your mobile device: carleton.force.com/volunteer. Sign in using the same credentials you use to log in to the desktop version.
D. The basic Assignment and Chatter functions that are available in the desktop version are available in the mobile version.
E. You can view your assignments in the mobile version and log a call.
F. Hyperlinked fields allow you to initiate a call or email automatically from your mobile device.
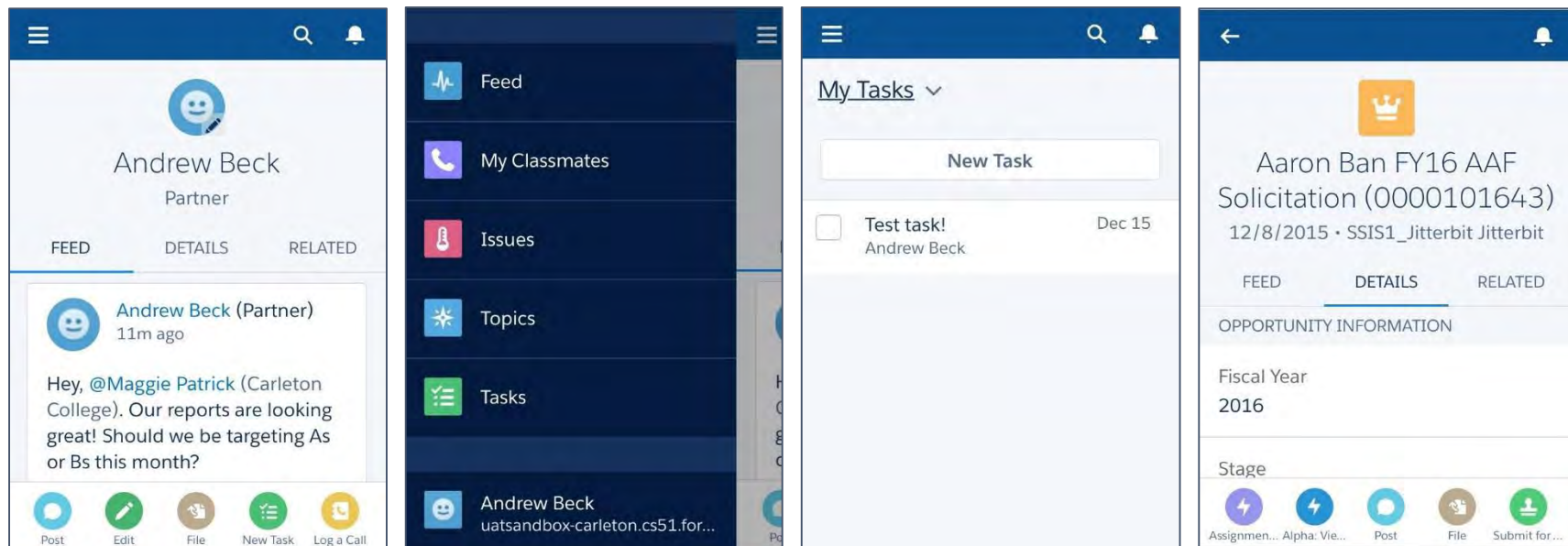
YOU MADE IT!

We can't wait to see what the new portal will bring to the AAF. Thank you for your patience and feedback as we explore the new system together. Onward for Carleton and the AAF!