Online Tools for Bates Fundraising Volunteers
2013-14 Volunteer Manual
Welcome

The Online Tool for Fundraising Volunteers was designed to make your work as a volunteer fundraiser easier, more efficient and more fun. Each year, you are assigned a number of “prospects” to solicit a gift from for the Bates Fund. With this online tool, you are now able to sign into a secure location, view your prospects' contact information and giving history. You will also be able to view in real-time when a gift from one of your assigned donors is received by the college, allowing you to send prompt thank you notes and emails.

Each contact you have with a prospect, whether you are at an event or on the telephone, needs to be recorded in this tool. Your personal contacts with donors will be shared with the Bates College Office of Advancement within 24 hours, making the collaboration between you and Bates more productive. Likewise, if a gift is received by the College from one of your assigned prospects, you will be notified in a timely manner, allowing the thank you process to take place immediately. Bates knows its excellence is not only sustained by its remarkable students, faculty, administrators, and staff, but by you, a dedicated volunteer. You are an integral part of advancing the College.

Let's Get Started

The Online Tool supports three essential functions:

- **Displays relevant information.** The tool shows information on the people Bates Fund volunteers need to contact. If the information is available in the Bates database, the interface displays:
  
  - Contact information (phone, email etc)
  - Employment information
  - Family information (spouse, children etc)
  - Confidential Bates giving information

- **Tracks the status of prospects.** The online tool allows volunteers to track the status or contact result of their interactions with their assigned prospects. It will display if a person needs to be called, has already made a pledge, or even if they have refused.

- **Allows volunteers to thank assigned donors more promptly.** Finally, the online tool allows volunteers to enter the results of their contacts and pass this information seamlessly to the Bates database. When a gift is received as a result of a volunteer’s efforts, the volunteer will be notified (by a system generated weekly email) to send a thank you note or email.

*Please note: The online tool does not accept credit card information at this time. This option will be available in a later phase of the product.*
**Table of Contents**

- Section 1 How to Log in: Page 4
- Section 2 Explanations of Tabs and Columns: Page 8
- Section 3 Steps to Complete a Contact: Page 15
- Staff Contacts: Page 16

*Please closely review and become familiar with Section 2 before making your first contact. If you should need assistance, please contact a member of the Bates Fund staff. See page 16 for staff contact information.*
Section 1: How to Log in

1. Visit the Bates College home page (www.bates.edu) and choose the link “Garnet Gateway” located at the bottom of the home page.
2. You will then need to sign in using your user ID and PIN. If you have used the Online Tools previously, and do not recall your PIN, you can enter your User ID, and select Forgot my PIN. A new PIN will be sent to you via email, be sure to use an active email address we have on record. If you do not know your user ID or PIN, please call the Bates College Help Desk at 207-786-8222 during business hours, M-F, 8 – 4:30. Advancement staff do not have the ability to assist you with your PIN.
3. Once logged in, you will see a screen with multiple tabs across the top. Choose the “Volunteer” tab.

4. Click “Fundraising Volunteer.”
5. After choosing the “Volunteer” tab, you will be asked to read and “sign” a confidentiality agreement. This is an annual requirement for all volunteers. Read the agreement thoroughly, enter your PIN, and choose “Accept.”

You will now enter the “Home” page of the web tool. This page lists who to contact if you need assistance. On this page as well as all tabs, there is a “Getting Started” section that displays helpful tips. If you click “Resources for Volunteers” you will be directed to a web page with training manuals as well as a training video for the tool. (www.bates.edu/advancement-volunteer-tools.xml)
Section 2: Explanation of Tabs and Columns

**TABS:** Within the Volunteer Tab, there are six additional tabs across the top of the screen. Please review the explanation of each tab below.

1. **All**
   This tab displays ALL of your assigned prospects, regardless of their “status.” For example, people you have not contacted as well as people you have contacted and have made pledge or have refused.

2. **Call List**
   This tab displays only the people you have not yet contacted.

3. **Follow-up**
   This tab displays anyone with whom you did not finish a conversation. Prospects are moved to this page because the contact you had with them was not completed with a solicitation. Examples include:
   - Your phone conversation was cut short for any reason (the call was dropped or the prospect had to attend to dinner, etc)
   - You left a message for the prospect.
   - You visited at an event, but did not have the chance to make a solicitation.

4. **Pledges**
   This tab displays anyone with a pledge to this year’s Bates Fund, including pledges of an unspecified amount. You are asked to remind a prospect of his/her pledge once before calendar year-end (the month of December) and once before fiscal year-end (the month of June). Once you have reminded a prospect, he/she stays in this tab until the pledge has been paid (the College receives the gift).

5. **Gifts**
   This tab displays donors who have fulfilled (paid) their pledge. Donors stay in this tab until you have marked them as “thanked” in the contact results drop down menu (more on this in Contact Results Section).

6. **Complete**
   This tab displays prospects who have made a gift to the College and been thanked as well as those prospects who have refused to pledge to the College. Ideally, this is where all your prospects should be by June 30.
**Process Flow Chart**
How your prospects move from the “Call List” tab to the “Complete” tab

```
KEY
- Tabs on Volunteer Web Tool
- Contact Result
```

Diagram showing the flow from "Call List" to "Complete".
Columns: There are six columns located on all tabs. Please review these columns and become familiar with the information.

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Contact Info</th>
<th>Bates Fund</th>
<th>Amount</th>
<th>Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reminded</td>
<td>Crimson, Scarlet O.</td>
<td><a href="mailto:scrimson@primarycolors.net">scrimson@primarycolors.net</a></td>
<td>Bates Fund</td>
<td>$1,500</td>
<td>1984</td>
</tr>
<tr>
<td>Incomplete</td>
<td>Doe, John P.</td>
<td><a href="mailto:jdoe@collegeland.com">jdoe@collegeland.com</a></td>
<td>Bates Fund</td>
<td>$500</td>
<td>1987</td>
</tr>
<tr>
<td>Refused</td>
<td>Holmes, Judy A.</td>
<td><a href="mailto:jholmes@blubber.com">jholmes@blubber.com</a></td>
<td>Bates Fund</td>
<td>$1,500</td>
<td>1983</td>
</tr>
<tr>
<td>Pledged</td>
<td>Jetson, George</td>
<td><a href="mailto:gjetson@future.com">gjetson@future.com</a></td>
<td>Mount David Society</td>
<td>$1,855</td>
<td>1972</td>
</tr>
<tr>
<td>Pledged</td>
<td>Puffin, Lizza M.</td>
<td><a href="mailto:lissamp@puffinco.net">lissamp@puffinco.net</a></td>
<td>Mount David Society</td>
<td>$10,000</td>
<td>1988</td>
</tr>
</tbody>
</table>

1. **Status**
   Depending on what (if any) contact you have had with a prospect, it will display under the status column. Statuses include:
   - Not Contacted
   - Pledged
   - Refused
   - Incomplete
   - Given
   - Reminded (only available in when prospect is in “Pledges” tab.
   - Thanked (only available when prospect is in “Gifts” tab.

2. **Name**
   This is the prospect’s name. When you are ready to get started, you will click the name to bring you to the prospect’s profile page.
3. **Contact Info**  
Includes home phone number and preferred email address. If Bates has an email on file, the email address will display here. If Bates does not have an email on file, “request email” is displayed. Both “request email” and the email address itself are clickable and will lead you to an email screen. If no email is on file, please ask the prospect to update this information with you.

4. **Bates Fund**  
This column displays the different Bates Fund “programs” in which a prospect falls, depending on ask amount, class year or alumni / parent affiliation. Please review the list and explanations below.

- Bates Fund: Includes any alumni prospect with an ask amount of $1,854 and less.
- Mount David Society: Includes any alumni or parent prospect with ask amount of $1,855 and above.
- Class of xxxx: Includes any Reunion 2013 class (all classes ending in a 3 or a 8)
- Parents Fund: Includes any parent prospect with an ask amount of $1,854 and less.

5. **Amount**  
In the “All” tab, the amount listed is either the “ask amount” or the amount pledged or given.

6. **Class**  
Displays the class year an alumnus/a associates with, or the class year of the parent’s youngest Bates graduate.

By clicking a name in the “Name” column, you will be brought to the prospect’s profile page that shows information on the prospects and has a contact notes field for you to take notes on your call or visit. See page 11 for the prospect profile page.
Once you have selected a name in the “Name” column, you will be presented with the prospect’s profile page. Review these areas before making a call:

- Personal Information: Name, Class, Marital Status, Children
- Add to Contact Record: Ask for, Contact Type, Contact Notes
- Preferred: Home, Work, Cell
- Contacts: Name, Address, Email
- Contact History: Event, Comments

It’s very important that you review all available information on this page before you make a call or go on a visit. How many children does the prospect have? What was his or her last gift amount? Is there an email on file? Reviewing this information will prepare you for the contact and also call out any information you need to update with the prospect. On the following page, there is a closer look at these three sections.
Let's take a closer look at these three sections:

**Personal Information:**

- **Name:** Doe, John P.
- **Class:** 1987
- **Marital Status:** Married
- **Spouse:** Doe, Jane
- **Children:**
  - Bart Glancy (M)
  - Ian F Glancy (M)

Personal information includes the prospect’s name, class year when prospect is an alumnus/a, marital status, and child information. If children are Bates students or alumni, class year will be associated with each child’s name.

**Contact Information:**

- **Preferred:**
  - Home: (555) 555-3333
  - Work: (555) 555-4444
  - Cell: Not on file
  - Email: jdoe@collegeand.com

- **Home:**
  - Aisle 17
  - Walmart, VA 00555

Contact Information includes any information Bates has on file. If you notice an area that reads, “not on file” please ask the prospect to update this information with you. You should enter this information in the contact notes field (see page 14).

**This section includes past contact notes and Bates information regarding giving and activities. Review the tabs and explanations below.**

- **Contacts:** Your comments regarding past interactions with this prospect are stored here. If available, review past comments to better prepare for the call.
- **Gifts:** This shows a 5 year giving history for the prospect’s household. You will see giving for Friends of Bates Athletics (FBA), the Bates Fund (not including FBA), and for overall giving (which will include any non-Bates Fund gifts).
- **Pledges:** Pledge information reflects Bates Fund and Bates Parents Fund pledges only. Pledge amount due reflects balance due by June 30.
- **Activities:** Shows past and current Bates activities in which the person is/was involved.

**Recording your interaction with a prospect:**

- **Contact History:**
  - September 29, 2010:
    - **Contact type:** Event
    - **Contact result:** Incomplete
    - **Pledge Amount:** None
    - **Staff Followup:** None
    - **Comments:**
      I was talking to John and we got cut off. He was in the car and we will try to connect on th (... more)
Whether you visited a prospect or had a phone conversation, you must record the type of contact, the result of the contact and enter comments about the interaction. These are all required with every single contact, even if you just left a message or sent a thank you note for a gift.

Contact Type
- Options include:
  - Event
  - Mail/Email
  - Phone Call
  - Visit

Contact Result
- Options include:
  - Incomplete (use this result if your call was unexpectedly cut short, you saw a prospect at an event or on a visit but were unable to solicit a gift, etc. Any interaction that did not result in a solicitation).
  - Left a message
  - Pledged
  - Refused to pledge
  - Unspecified pledge amount

Fund
- Options include:
  - Bates Fund
  - Bates Parents Fund
  - Other (specify in contact notes): Use this when the donor wants to split a pledge between two funds or would like to support a different fund (like Friends of Bates Athletics).
Section 3: Steps to complete a contact

1. Click a name on the “Call List” tab.
2. Click the name of the prospect you wish to contact.
3. Review personal information to prepare for the call.
4. If any contact information is listed as “not on file” remember to ask the prospect to update this information with you.
5. Once the call is complete, enter the Contact Type, Contact Result, Pledge Amount (if pledge was confirmed) and contact notes.
6. Review all the information you have entered. You are always required to enter contact notes. In the contact notes, enter any updates you received, (new baby, new home, recently retired, new email address, new job, etc). You should also enter information regarding any follow-up a Bates staff member needs to have with the prospect (the prospect requested information on the museum or the football team, etc) or if there are any special instructions about the pledge, i.e. it needs to be split between the Bates Fund and Friends of Bates Athletics. Remember to click the “Flag for Bates staff follow-up” to make sure someone at Bates follows up with this prospect if needed. Click Submit.
7. This will bring you to an email form (to the left). The email form will be populated with sample text. Please personalize this text. There is a character limit. You can also choose to “Copy Me” and a copy of the email will be sent to your preferred email address. Once you have completed personalizing the sample text, re-read for spelling mistakes and click send. You can also skip this step but you are encouraged to always send an email.
8. You will now return to the Tab you were working from (i.e. the “Call List” tab.)
Resources

Bates Home Page
www.bates.edu

Tools and Resources for Volunteers
www.bates.edu/volunteer

Help for Online Tools
volunteer@bates.edu

To make a gift:

By Mail:
The Bates Fund
2 Andrews Road
Lewiston, ME 04240

By Phone: 888-522-8371

Online:
www.community.bates.edu/makeagift

Bates Fund Staff

Leah Wiedmann Gailey ’97
Assistant Vice President for College Advancement
207-786-8344 / lgailey@bates.edu

Hayley M. Anson ’06
Associate Director of Annual Giving-BOLD
Contact for BOLD Volunteers
207-786-6129 / hanson@bates.edu

Evan Bagley ’10
Annual Giving Coordinator-BOLD
207-786-8373 / ebagley@bates.edu

Cristin Bates
Associate Director of Annual Giving
207-755-5991 / cbates@bates.edu

Melody Beaulieu
Administrative Assistant, Annual Giving
207-786-6225 / mbeaulieu@bates.edu

Grace Bell
Administrative Assistant, Annual Giving
207-786-6487 / gbell@bates.edu

Amy Bureau
Associate Director of Annual Giving, Reunion Contact for Reunion Volunteers
207-755-5992 / abureau@bates.edu

Daphne Comeau
Administrative Assistant, Annual Giving
207-786-8256 / dcomeau@bates.edu

Nina T. Emmi ’10
Associate Director of Annual Giving-Class Giving
207-755-5993 / nemmi@bates.edu

Munroe Graham ’13
Annual Giving Coordinator
207-755-8372 / mgraaham4@bates.edu

Genevieve Leslie
Director of Reunion Fundraising and Programming
207-786-8255 / gleslie@bates.edu

Brad MacCachran
Bates Fund Gift Officer/Mount David Society
207-755-5974 / bmaccach@bates.edu

Ashley Shinay
Director of Mount David Society Giving
Contact for Mount David Society Volunteers
207-755-5994 / ashinay@bates.edu

Penney Ward
Office Manager, Annual Giving
207-755-5977 / pward@bates.edu

Parent Engagement and Development Staff

Stephanie Brady
Associate Director of Parent Engagement Development
207-786-6488 sbrady@bates.edu

Meredith LaChapelle
Administrative Assistant, Parent Engagement and Development
207-755-5976 / mlachape@bates.edu

Alli Lambert
Director of Parent Engagement and Development
207-786-6239 / mlambert@bates.edu

Curt H. Lyford ’04
Associate Director of Parent Engagement and Development
Contact for Parents Fund Committee Members
207-755-5987 / clyford@bates.edu