



Middlebury Annual Giving: Middlebury Volunteer Portal Walkthrough



## What is the Middlebury Volunteer Portal (MVP)?

**A digital platform that offers a one-stop resource for class agents. MVP is designed to make it easier for our volunteers to:**

- **Find their classmates and add them to their assignment list**
- **Contact those assignments**
- **Solicit and thank those assignments**

**MVP replaces our previous site, *Agents in Action* and offers superior functionality by offering:**

- **Easier viewing of historical giving information for classmates**
- **Gift tracking and notifications when classmates make a gift**
- **Built-in email templates to ask, remind, and thank**
- **Integration with Give Campus crowdfunding during campaigns like the MoveMidd Challenge, Race to Reunion, etc.**

# What do I need to do to get started?

1. Go to [go.Middlebury.edu/MVP](https://go.Middlebury.edu/MVP) (once you sign up, you'll go to the same URL to log in)

The screenshot shows the GiveCampus website interface. At the top left is the 'GIVECAMPUS' logo. At the top right, there are 'SIGN UP' and 'LOGIN' buttons, both circled in red. A search bar with the text 'Search schools and campaigns' and a magnifying glass icon is also present. The main content area is a 'Log in' form. It features a blue button for 'Log in with Facebook' and a teal button for 'Log me in'. Below the Facebook button is a disclaimer: 'We'll never post to Facebook without your permission.' Below that is a link 'Or log in with email'. The form includes input fields for 'Email' and 'Password', both with eye icons for visibility. A 'Forgot password?' link is located below the password field. At the bottom of the form, there is a link 'Need an account? Sign up', which is also circled in red. Annotations include a green arrow pointing from the 'SIGN UP' button to the text '2. You'll need to create an account by clicking SIGN UP'. Another green arrow points from the 'Log in with Facebook' button to the text '2a. You can also opt to sign in with your Facebook account, if the email is the same as the address on file with Middlebury'. A red arrow points from the 'SIGN UP' button to the 'Sign up' link at the bottom of the form.

2. You'll need to create an account by clicking SIGN UP

Middlebury Volunteer Portal is the site, Give Campus is the third-party vendor, so you'll sometimes see their branding

2a. You can also opt to sign in with your Facebook account, if the email is the same as the address on file with Middlebury



Put in your name (first and last), your preferred email, and create a password

### Create your account!

Sign up with Facebook

We'll never post to Facebook without your permission.

Or sign up with email

Name: John Coburn

Email: jcoburn@middlebury.edu

Password: .....

College: Middlebury College

Grad School: [dropdown]

Primary/Secondary School: [dropdown]

Sign up

Select Middlebury College from this drop-down menu

Then, click the "Sign up" button

Already have an account? [Log in](#)

This is your personal dashboard, it's the first thing you'll see when you log in

**Thomas Mann**  
Assignments Snapshot

Days left this fiscal year **2 3 6**  
July 1, 2019 - June 30, 2020

**YOUR ASSIGNMENTS**

<b>4</b> ASSIGNMENTS	<b>0</b> DONORS	<b>4</b> NON-DONORS
<b>\$0</b> \$ PLEDGED	<b>\$0</b> \$ RAISED	

Up top you'll see your name on the far left and the number of days left in the fiscal year to the right

Here you can see our dummy account, Thomas Mann, has four assignments, none of whom have given

Middlebury

Thomas Mann

My Assignments

**Search Constituents**

Notifications

Messages

Tasks 1

Notes

Email

Resources

Connect Facebook

Sign out

Thomas Mann

Days left this fiscal year **261**

YOUR ASSIGNMENTS

<b>3</b> ASSIGNMENTS	<b>0</b> DONORS	<b>3</b> NON-DONORS
<b>\$0</b> \$ PLEDGED	<b>\$0</b> \$ RAISED	

CLASS OF 1998 STATS

<b>501</b> SELECTABLE CLASSMATES	<b>8</b> TOTAL DONORS	<b>578</b> TOTAL NON-DONORS
<b>\$0</b> TOTAL \$ PLEDGED	<b>\$510</b> TOTAL \$ RAISED	

If you want to add more classmates to your assignments list go to **SEARCH CONSTITUENTS** on the left-hand menu

- My Assignments
- Search Constituents
- Notifications
- Messages
- Tasks 1
- Notes
- Email
- Resources
- Connect Facebook
- Sign out

 Use Advanced Search (Name, Location Zone, 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.

Name	Current Location	Activities	Class Year	Status
NAME	California South (Exc LA)	Habitat for Humanity Int'l	1998	<a href="#">Assign to Me</a>
NAME	Atlanta Area	Swimming-Women's, Italian Club (Il Circolo), Asian Culture Club, Artemis, Reunion Weekend 2013	1998	<a href="#">Assign to Me</a>
NAME	New Jersey North	Reunion Class Agent, Sigma Epsilon (SE), Reunion Weekend 2013	1998	UNSELECTABLE
NAME	Kentucky	Squash, ISO-International Student Org., Muslim Stu Assoc/Islamic Soc	1998	<a href="#">Assign to Me</a>
NAME	Texas South	RHA/Comms Residential Adv-Fmr, Org Latinamerica y Espanola, House Director-Former, Alianza Latinamericana y Carib, Reunion Weekend 1998	1998	<a href="#">Assign to Me</a>

You can search here for a specific classmate or scroll through the list below.

You can click the "Advanced Search" box to search by activity, location, etc.

If a classmate is available to be added to your list, you will see "Assign to Me."

If a classmate is NOT available, you will see "Unselectable" or the name of the assigned agent.

If you want to see more info on a classmate, click on the name.

A classmate might be "Unselectable" for a variety of reasons that include, but aren't limited to:

- Giving status (they have already given)
- Personal request (they do not want to be contacted about giving)
- Assignment status (they are assigned to a staff member)

You will also be assigned (1993), their spouse.

NAME

Class of 1994

Assign to Me

### Personal

Phone Number	Home: (222) 111-1234
Location	Addison County
Spouse	<a href="#">Alumni Spouse (1993)</a>
Email	<a href="mailto:alumni@email.com">alumni@email.com</a>

### Employment

Job Title	Assoc. Dir. of Annual Giving
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If you click on a classmate's name, you'll get a limited view into the classmate's profile.

You will only see children or spouse information listed if they are also Middlebury Alumni or current students.

If you decide to assign this classmate to yourself, click the "Assign to Me" button in the upper left.

- My Assignments (4 / 100)
- Reporting
- Search Constituents
- Notifications
- Messages
- Tasks
- Notes
- Email
- My Templates
- Resources
- Tags
- Connect Facebook
- Sign out

**Thomas Mann**  
Assignments Snapshot

Days left this fiscal year **2 3 6**  
July 1, 2019 - June 30, 2020

### YOUR ASSIGNMENTS

<b>4</b> ASSIGNMENTS	<b>0</b> DONORS	<b>4</b> NON-DONORS
<b>\$0</b> \$ PLEDGED	<b>\$0</b> \$ RAISED	

FILTERS: **ALL** HAS GIVEN HAS PLEDGED HAS NOT GIVEN NO CONTACT THIS FY ASKED BUT NO GIFT  
PLEDGED BUT NO GIFT GAVE LESS THAN ASK GAVE BUT NO THANK YOU SENT

NAME	<a href="#">Go to full record</a>	⌵
NAME	<a href="#">Go to full record</a>	⌵
NAME	<a href="#">Go to full record</a>	⌵
NAME	<a href="#">Go to full record</a>	⌵

[Give some feedback!](#) ⬆

To get back on your dashboard, click on “My Assignments.” Any new selections will be listed on the list of classmates assigned to you.

You can click on the “carrot” to open a menu of quick contact actions, like “Send Email” or “Add Note.”

Another option is clicking here to access the alum’s full record.

The screenshot shows a CRM interface with a dark sidebar on the left and a main content area. The sidebar contains navigation items: My Assignments (4 / 100), Reporting, Search Constituents, Notifications, Messages, Tasks (with a yellow circle containing '1'), Notes, Email, My Templates, Resources, Tags, Connect Facebook, and Sign out. The main content area has three tabs: PLEDGED BUT NO GIFT, GAVE LESS THAN ASK, and GAVE BUT NO THANK YOU SENT. Below the tabs is a card for a donor profile. The card has a green header with the text 'NAME' and a 'Go to full record' link. Below the header is a row of three blue buttons: 'Send Email', 'Add Note', and 'Call'. An orange box highlights these three buttons, and an orange arrow points to the 'Call' button. Below the buttons is a table titled 'Outreach Tracker' with two rows: 'Have you contacted this fiscal year?' with 'No' and 'Have you had a gift conversation?' with 'No'. To the right of the table is the text 'Total paid this FY: \$0'. At the bottom of the card is a section titled 'Giving history summary' with the sub-heading 'Recent gift transactions' and a single entry: '\$100 to Friends of the Art Museum on 12/06/2005'.

To complete a quick action, you'll see a limited view of their profile where you can

- Send an email
- Add a contact note
- Or call them (if you have an app or program like Skype on your computer)

Middlebury

Thomas Mann

My Assignments

Search Constituents

Notifications

Messages

Tasks

Notes

Email

Resources

Connect Facebook

Sign out

NAME

Go to full record

Send Email Add Note Call

Outreach Tracker

Have you contacted this fiscal year? No Total paid this FY: \$0

Send email to NAME

NAME

Is this a gift conversation?

(Note: This will automatically generate a note.)

School Email Templates

General Ask General Ask Reunion Year Thank You Message

Subject

Message

Send me a copy

Send Email

You can either choose a template from the buttons or write your own message and hit send.

The screenshot displays the Middlebury CRM interface. On the left is a dark sidebar with navigation options: My Assignments, Search Constituents, Notifications, Messages, Tasks (with a yellow notification badge), Notes, Email, Resources, Connect Facebook, and Sign out. The main content area shows a contact profile for 'NAME'. At the top right of the profile is a 'Go to full record' link. Below the name are three blue buttons: 'Send Email', 'Add Note', and 'Call'. An 'Outreach Tracker' section contains a question 'Have you contacted this fiscal year?' with a 'No' response. To the right, it shows 'Suggested ask: \$100' and 'Total paid this FY: \$0'. A modal window titled 'Add note for NAME' is open, showing a form to 'Create a new note regarding NAME'. The form includes a dropdown for 'What type of note is this?' (currently set to 'Select note type'), and date pickers for 'When was this contact?' (set to 2017, October, 13). A 'Save Note' button is at the bottom of the modal.

If you just want to add a contact note just select the note type (there are four options) and hit save.

Contact notes track communications you've had with this classmate. It can be as simple as 'Reached out to Debbie via e-mail to ask for Reunion gift' or inserting a brief recap of a detailed conversation you've had with this person.

# THANK YOU!

**Saying thank you is the most important step in this process.**

**We thank you for your dedication to this work and our commitment to make Middlebury accessible to students regardless of their financial need.**

**We also know that you will be sure to thank your classmates for their contributions to Middlebury and their engagement with their alma mater.**

## IMPORTANT NOTE:

**Give Campus will send a message when a gift arrives. PLEASE check your junk/clutter folder.**

**Volunteers report that those emails often end up classified as junk/clutter and require you to provide permission for them to be delivered to your email Inbox.**



# Middlebury

**Contact us for a walk-through if you run into any issues.**

**You're always welcome to be in touch with questions and comments at [supportmiddlebury@middlebury.edu](mailto:supportmiddlebury@middlebury.edu)**

**Thank You!**