



Volunteer Information Portal Training Guide

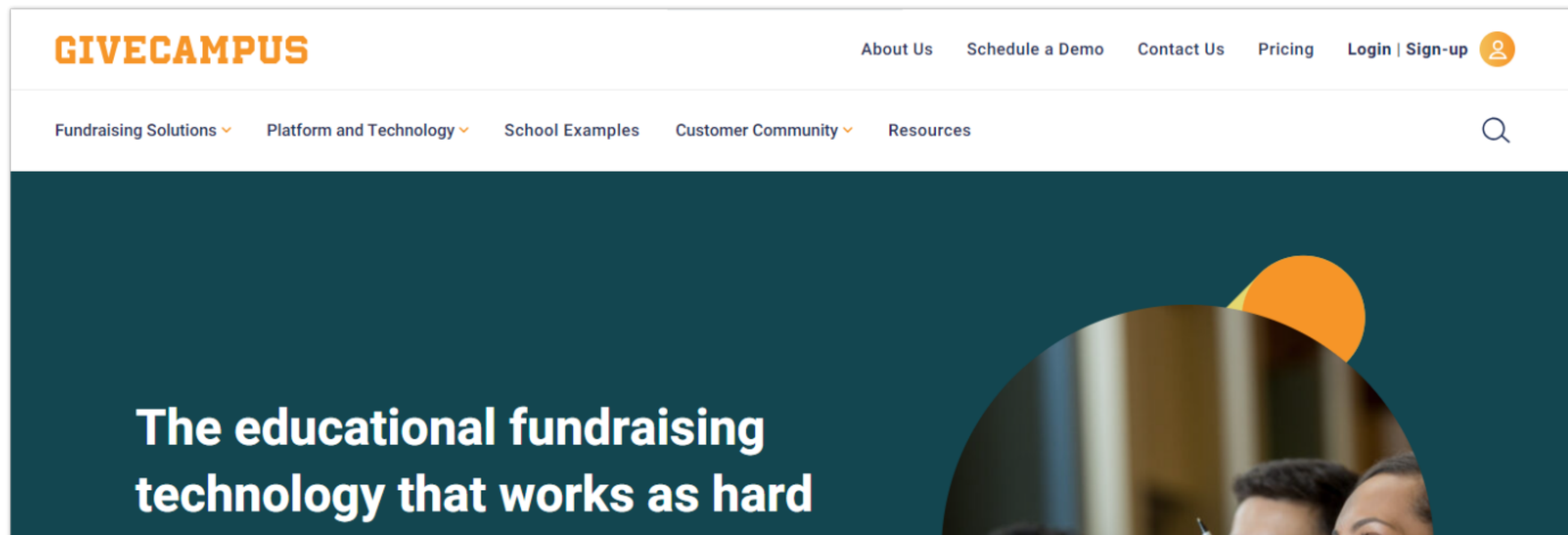
Phillips Academy 2026-2027

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Introduction

- VIP is Andover's secure online portal for managing outreach to your assignments powered by GiveCampus.
- Only active parent and alumni volunteers have access to GiveCampus.
- This document is designed as a self-guided tour through the Volunteer Information Portal.
- Should you have any questions, please reach out to your class's staff partner, or you may contact the Annual Giving Team at annualgiving@andover.edu



Logging In

Link



The screenshot shows the GiveCampus website's login interface. At the top, the navigation bar includes links for 'About Us', 'Schedule a Demo', 'Contact Us', 'Pricing', and 'Login | Sign-up' (which is highlighted with an orange box). An orange callout box with an arrow points to this 'Login | Sign-up' link, containing the text: 'Returning users can log in by visiting givecampus.com'. Below the navigation bar, the main content area features a 'Log in' form. The form has a 'Log in with Facebook' button, a disclaimer 'We will never post to Facebook without your explicit permission.', and a separator 'Or log in with email'. Below this are input fields for 'Email' and 'Password'. A 'Forgot password?' link is located below the password field and is highlighted with an orange box. An orange callout box with an arrow points to this link, containing the text: 'Forgot your password? You can reset it at givecampus.com/password/new'. At the bottom of the form is a 'Log me in' button. On the left side of the page, there is a dark teal banner with the text 'The education technology that as you do'.



Signing Up - New users

New users can create a GiveCampus account by visiting givecampus.com

The image shows a screenshot of the GiveCampus website with two main sections: a login page on the left and a sign-up page on the right. The login page has a 'Log in' title, a 'Log in with Facebook' button, and fields for 'Email' and 'Password'. The sign-up page has a 'Create your account!' title, a 'Sign up with Facebook' button, and fields for 'Name', 'Email', 'Password', 'College', and 'Grad School'. A dropdown menu for 'Primary/Secondary School' is open, showing a list of schools with 'Phillips Academy' highlighted. Annotations with orange boxes and arrows provide instructions for each step.

1. Click Login | Sign-up

2. Click "Need an account? Sign up"

For the Email field, enter your email address that Andover has on file (Not sure which one? Contact the Annual Giving Team).

Be sure the Primary/Secondary School field lists "Phillips Academy".

Sign up



Dashboard - Control Panel

Upon logging in, you will see your dashboard (shown below). You can use the menu bar on the left-hand side of your screen to navigate throughout the portal.

Volunteer Management

Class Volunteer Assignments (1)

Reporting

Search Constituents

Notifications **9**

Messages

Tasks

Notes

Email

My Templates

Resources

Tags

Make a Gift!

Samuel Phillips
Volunteer Dashboard

Days left this fiscal year **0**
July 1, 2022 - June 30, 2023

Class Volunteer Assignments

Assignments	Donors	Non-Donors
1	0	1

\$ Pledged	\$ Raised to Andover Fund
\$0	\$0

Class of **Stats**

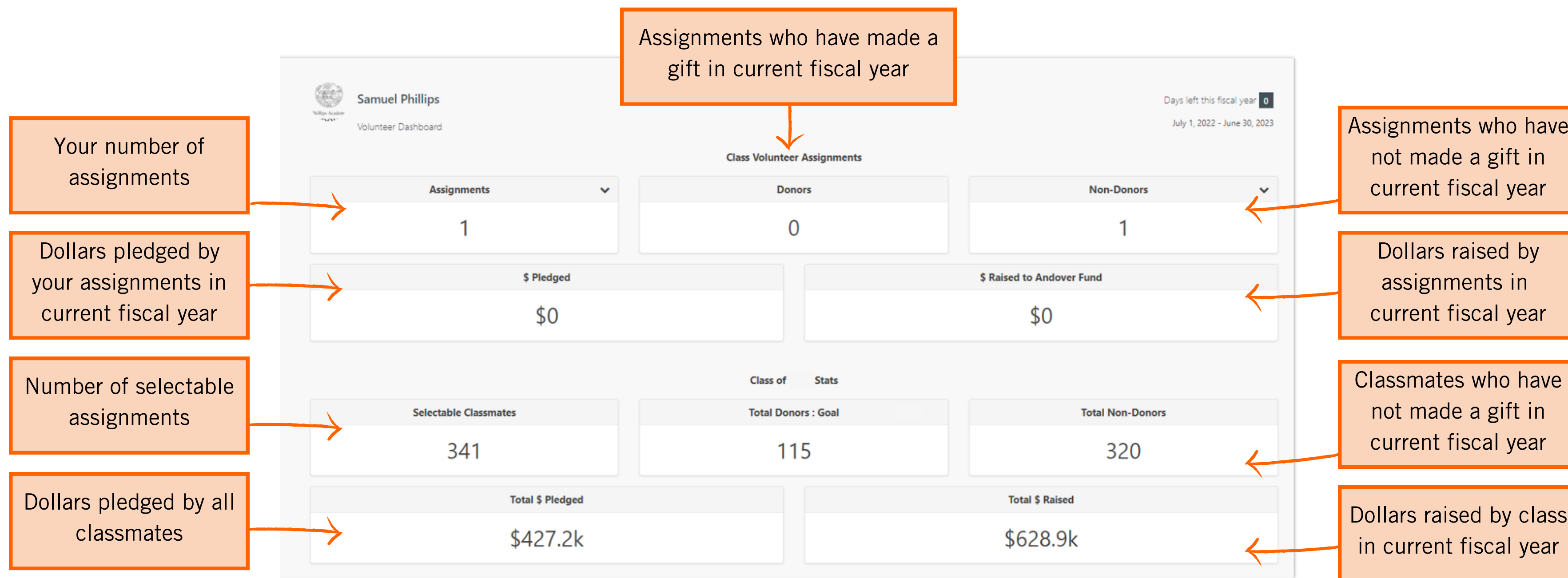
Selectable Classmates	Total Donors : Goal	Total Non-Donors
341	115	320

Total \$ Pledged	Total \$ Raised
\$427.2k	\$628.9k



Dashboard - Assignments and Class Snapshot

You will also see your Assignments and Class Snapshot.





Dashboard - Your list of Assignments

When scrolling down, you will find your list of assignments.

Pro tip: Use these filters to quickly identify assignments who have not been contacted, have not given yet, need to be thanked, etc.



The screenshot shows a dashboard interface. At the top, there is a 'FILTERS' section with several buttons: 'ALL' (highlighted in blue), 'ASKED BUT NO GIFT', 'GAVE BUT NO THANK YOU SENT', 'GAVE LESS THAN ASK', 'HAS GIVEN', 'HAS NOT GIVEN', 'HAS PLEDGED', 'LYBUNTS', 'NOT CONTACTED THIS FISCAL YEAR', 'PLEDGED BUT NO GIFT' (highlighted in blue), and 'SYBUNTS 1 & 2'. Below the filters, there is a list of assignments. The first assignment is 'John Smith'. To the right of 'John Smith' is a link 'Go to full record' with a dropdown arrow.



On your dashboard, your assignments are displayed as a list below your snapshot



Dashboard - Record Preview

If you click on a record in the list, the record expands in your dashboard to display helpful information.

If you would like, you can **email**, **add note**, and/or **call** your assignments directly from the record preview.

The **Outreach Tracker** helps identify assignments that need to be contacted.

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

Suggested ask: \$20

Total paid this FY: \$0

Suggested allocations: 19.78

Giving History Summary

Recent gift transactions

Date	Allocation	Payment Type	Gift Year	Amount
08/07/2009	Andover Fund	GF	2010	\$50
04/04/2008	Andover Fund	GF	2008	\$50
11/03/2006	Andover Fund	GF	2007	\$50
02/06/2003	Andover Fund	GF	2003	\$25
01/08/2001	Andover Fund	GF	2001	\$25
04/07/2000	Andover Fund	PP	2000	\$25
06/03/1999	Andover Fund	GF	1999	\$25
02/04/1998	Reunion Gift FY98	PP	1998	\$25

Annual Participation

2019 2020 2021 2022 2023

Annual Giving History

*Reflects the current year and the previous 5 years

1
0
-1

2019 2020 2021 2022 2023

The **Suggested ask** amount is a thoughtful number determined by the Annual Giving team. Volunteers are encouraged to use this number in their outreach.

The **Giving History** Summary shows an assignment's last 10 gifts.
PP = Pledge Payment
GF = Outright Gift

You can also see your assignment's **annual participation** totals for the last five fiscal years.



Dashboard - Viewing Full Records

John Smith

Go to full record

On the dashboard, click on “**Go to full record**” to view your assignment’s complete information.

The Full record includes:

- **Contact information** such as your assigned email and preferred address.
- The **Spouse** of the primary person listed at the top the record.
- Education, Employment, and Giving History.

You can also send an **email** and/or add a **note** from this page.

Assigned To:
Me: Samuel Phillips (Class Volunteer)

Personal

Address	
Home Address	
Spouse	
Affiliations	Alumnus/a
Email	@yahoo.com

Education

Class Year	Class of
Activities	
Degrees	

Employment

Employer	
Employer Match	No

Giving History

Ask Amount	19.78
Last Gift Details	\$50 to Andover Fund
Pledge Balance	None
Donor Status	Sybunt 10+

Date	Allocation	Payment Type	Gift Year	Amount
08/07/2009	Andover Fund	GF	2010	\$50
04/04/2008	Andover Fund	GF	2008	\$50

Send Ned an email
(Note: This will automatically generate a note.)

School Email Templates

Bullfinch Loyalty Society EOY 2023 Volunteer Template (Short) EOY 2023 Volunteer Template (Long)

FY23 CYE Template LYBUNT Email Never Donor/ 5+ SYBUNT Email - PA Non Sibbi - \$500 SYBUNT Email

Volunteer Created #2 Non Sibbi - \$250 FY22 AE Challenge Email (Alumni FY Donor) PA Giving Day template

Gift - Thank you PAGD Early Gift Effort Template Volunteer Created #1

PA Giving Day template for End of Tuition Day PAGD Volunteer Stewardship Template Volunteer Created #3

Pledge - Thank you FY22 AE Challenge Email (Alumni FY Non-Donor)

To share a campaign using your advocate link, select an active campaign and copy your personal link into the email:

Select your Campaign

Your personal link:

☐ Is this a gift conversation?

☐ Is this to thank them for a gift?

Subject

Message

Create a new note regarding Ned

What type of note is this?
Select note type

When was this contact?
2023 July 18

Save Note

Email & Notes Log



Selecting your Assignments

To search for Assignments, click "Search Constituents" in the navigation menu on the left side.

You can search for Assignments by name, or you can use Advanced Search to search by other criteria.

Search name here

☐ Use Advanced Search (Name, Current Location, Activities, Class Year, Donor Status)

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.

Reporting

Search Constituents

Notifications

Messages

Tasks

Notes

Email

My Templates

Ab	Paris, France	19		Never Donor	UNASSIGNED	Assign to Me
					UNSELECTABLE AS CLASS VOLUNTEER	
				Never Donor	UNSELECTABLE	UNSELECTABLE AS CLASS VOLUNTEER
Am	New York, NY	19	P.A. Track	Current Year	ASSIGNED TO	AS HEAD AGENT
						UNSELECTABLE AS

You can sort the Assignments by **Name, Current Location, Activities, and Donor Status**

If you find someone you wish to select as an Assignment, click "**Assign to Me**".



Sending Emails

There are three places you can find the send an email feature - the process will be similar in all three places:

The screenshot displays the Volunteer Management dashboard with three callouts illustrating where to find the 'Send Email' feature:

- 1) In the navigation menu on the left side of the page, click "Email"**: An arrow points from the 'Email' link in the left sidebar to the main content area.
- 2) In the Dashboard - Assignment Preview**: An arrow points from the 'Send Email' button in the assignment preview section to the callout.
- 3) In the Dashboard - Viewing Full Records**: An arrow points from the 'Send Email' button in the full record view to the callout.

Additional visible elements include the 'Volunteer Management' sidebar, 'Class Volunteer Assignments (1)' button, filter tabs (ALL, ASKED BUT NO GIFT, GAVE BUT NO THANK YOU SENT, GAVE BUT NO THANK YOU SENT), 'Go to full record' link, 'Outreach Tracker' section, 'Suggested ask: \$20', and 'Assigned To: John Smith'.



Sending Emails

You can choose one of the **Email Templates** to contact your Assignment or just type an email.

When you select an Email Template, the **full email will auto-populate for you**. You may make edits if you'd like to add a personal touch to it.

If you're using a **template**, be sure to leave the email tokens alone (ex: \$PREF_FIRST_NAME\$). These update with the recipient's information for each email sent.

If the email you are sending is a **Solicitation**, check the box for **"Is this a gift conversation?"**

If the email you are sending is a **Thank you**, check the box for **"Is this a thank you?"**

Send an Email

Class Volunteer - School Email Templates

BULFINCH LOYALTY SOCIETY
EOFY 2023 VOLUNTEER TEMPLATE (SHORT)
EOFY 2023 VOLUNTEER TEMPLATE (LONG)
FY23 CYE TEMPLATE
LYBUNT EMAIL
NEVER DONOR/ 5+ SYBUNT EMAIL - PA
NON SIBI - \$500
SYBUNT EMAIL
VOLUNTEER CREATED #2
NON SIBI - \$250

FY22 AE CHALLENGE EMAIL (ALUMNI FY DONOR)
PA GIVING DAY TEMPLATE
GIFT - THANK YOU
PAGD EARLY GIFT EFFORT TEMPLATE
VOLUNTEER CREATED #1
PA GIVING DAY TEMPLATE FOR END OF TUITION DAY
PAGD VOLUNTEER STEWARDSHIP TEMPLATE
VOLUNTEER CREATED #3
PLEDGE - THANK YOU

FY22 AE CHALLENGE EMAIL (ALUMNI FY NON-DONOR)

New Email

Subject

Thank you for supporting Andover!

Email message

Dear \$PREFERRED_FIRST_NAME\$,

Thank you so much for your recent gift to Andover. Your continued support is sincerely appreciated, and your generosity allows Andover to sustain its timeless values of *non sibi* and knowledge and goodness. Your gift demonstrates that the power of the Andover community is as visible today as ever.

Thank you again for continuing the legacy of achieving excellence at PA and educating youth from every quarter.

Sincerely,

\$EMAIL_SIGNATURES\$

☐ Is this a gift conversation?
☒ Is this a thank you?

Email Preview

NOTE: Please note that message formatting may vary depending on recipients' email providers.

Subject: Thank you for supporting Andover!

Dear Taylor,

Thank you so much for your recent gift to Andover. Your continued support is sincerely appreciated, and your generosity allows Andover to sustain its timeless values of *non sibi* and knowledge and goodness. Your gift demonstrates that the power of the Andover community is as visible today as ever.

Thank you again for continuing the legacy of achieving excellence at PA and educating youth from every quarter.

Sincerely,

Samuel

Once you choose your template, the **Email Preview** will populate the **name, signatures, and other fields**.



Sending Emails

If your gift and this email crossed paths, thank you!

- ☐ Is this a gift conversation?
- ☐ Is this a thank you?
- ☐ Send me a copy

If you'd like to receive the email, you can add yourself by selecting the "**Send me a copy**".

Recipients

- ☐ Ned
- ☐ Matt
- ☐ Andy

Select your recipient(s). Assignments who have already made a gift this year will have ***Has Given*** next to their name.

Roles

ALL CLASS VOLUNTEER DORMANT DONOR OUTREACH

Filters

These filters may only be selectable as certain roles.

ALL ASKED BUT NO GIFT EMAILED THIS FISCAL YEAR GAVE BUT NO THANK YOU SENT GAVE LESS THAN ASK HAS GIVEN
HAS NOT GIVEN HAS PENDING GIFT HAS PLEDGED LYBUNTS NOT CONTACTED THIS FISCAL YEAR NOT EMAILED THIS FISCAL YEAR
PLEDGED BUT NO GIFT SYBUNTS 1 & 2

Use the filters to refine your desired recipients and make your selection easier.

To proofread your email and check the formatting, you can send a test to yourself. Please note that this test will include placeholder content for any email tokens.

Note: If you click 'Send Test to Me', you (and only you) will receive an email containing the dummy content that you see in the Email Preview window to the right.

Send Test to Me

Send Email

When you are done with the message and selecting your assignments, just click **Send Email**.



Creating Templates

Templates enable you to send an email to multiple assignments with just a few clicks. In addition to using the Andover-created templates, you also have the ability to create your own templates.

The screenshot shows the 'My Email Templates' interface. On the left, a sidebar menu under 'Volunteer Management' includes 'Notifications', 'Messages', 'Tasks', 'Notes', 'Email', and 'Resources'. The 'Email' menu item is highlighted with an orange box and labeled '1) Go to **My Templates** on the menu bar'. An orange arrow points from this box to the 'Email' menu item. The main content area is titled 'My Email Templates' and features a table with columns: Name, Subject, Description, and Status. Below the table is a 'New Email Template' form with fields for 'Description *', 'Subject *', and 'Template Format'. In the top right corner of the main area, there are two buttons: 'Email Signature' and 'Create new Template'. The 'Create new Template' button is highlighted with an orange box and labeled '2) Click **Create new Template**'. An orange arrow points from this box to the 'Create new Template' button. To the right of the form is an 'Email Preview' section showing a sample email with a blue header bar containing a note: 'NOTE: Please note that message formatting may vary depending on the device used to view the email.' Below the header bar, the email body shows 'Reply to: Samuel Phillips (annualgivingpa@gmail.com)' and a 'Subject:' line.

1) Go to **My Templates** on the menu bar

2) Click **Create new Template**



Creating Templates

New Email Template

Name *

Thank you note

Description *

Thank you note for donations made during FY23

Subject *

Thank you for supporting Andover!

Template Format

Formal Template

Email tokens

[Add full name](#)
[Add preferred first name](#)
[Add nickname](#)
[Add email signature](#)
[Add first name and spouse name](#)

[Add ask amount](#)
[Add last gift designation](#)
[Add last gift amount](#)
[Add last gift date](#)

Select the campaign for your personal advocate link email token to direct to:

-- Select One --

Hello \$PREFERRED_FIRST_NAME\$,

☐ Default as Gift Conversation
This will create a gift conversation note for the constituent

☐ Default as a Thank You Note
This will mark the note as a thank you

Create Email Template

Email Preview

NOTE: Please note that message formatting may vary depending on recipients' email providers.

Reply to: Samuel Phillips (annualgivingpa@gmail.com)

Subject: Thank you for supporting Andover!

Hello Taylor,

Under the **Template Format**, please select **Formal Template**.

To add personalization, insert **email tokens** throughout your template. The tokens will update to include the recipient's information for each send.

Be sure to check the appropriate box if the template is a **Gift Conversation** or **Thank You Note**.



Creating Email Signature

If you would like, you can create your email signature through My Templates and insert the token at the end of your template text and/or emails.

The screenshot shows the 'My Email Templates' interface. On the left is a sidebar menu with 'Volunteer Management' at the top, followed by 'Class Volunteer Assignments (1)', 'Tasks', 'Notes', 'Email', 'My Templates' (highlighted with an orange box and an arrow pointing to it from step 1), 'Resources', and 'Tags'. The main content area is titled 'My Email Templates'. At the top right of this area are two buttons: 'Email Signature' (highlighted with an orange box and an arrow pointing to it from step 2) and 'Create new Template'. Below these buttons is a large text editor box titled 'Email Signature' with a toolbar containing icons for bold, italic, link, unlink, list, and text color. An 'Update Email Signature' button is at the bottom of the text editor. Below the text editor is a table with columns 'Name', 'Subject', 'Description', and 'Status'. An arrow points from step 3 to the 'Description' column header.

1) Go to **My Templates** on the menu bar

2) Click **Email Signature**

3) Type your desired signature and click **Update Email Signature**.



Adding Notes

Every email you send will be archived in Notes for your reference. You can also add conversations you had with your assignments outside the platform. There are three places you can find the "Add Note" feature - the process will be similar in all three places:

The screenshot shows the Volunteer Management dashboard. On the left is a navigation menu with options: Messages, Tasks, Notes, Email, My Templates, and Resources. The 'Notes' option is highlighted with an orange box and labeled '1) In the navigation menu on the left side of the page, click "Notes"'. The main area displays a list of assignments with filters like 'ALL', 'ASKED BUT NO GIFT', 'GAVE BUT NO THANK YOU SENT', 'GAVE LESS THAN ASK', and 'HAS'. An 'Add Note' button is highlighted with an orange box and labeled '2) In the Dashboard - Assignment Preview'. Below this, there's a section for 'Assigned To: John Smith' with buttons for 'Send Email', 'Add Note', and 'Call'. The 'Add Note' button is highlighted with an orange box and labeled '3) In the Dashboard - Viewing Full Records'. Other elements include 'Class Volunteer Assignments (1)', 'Outreach Tracker', and a 'Suggested ask: \$20'.



Adding Notes

Select the assignment the note is about.

Select what type of note this is:

- Update contact information
- Gift conversation
- Non-gift conversation
- Other

Click "Create New Note".

Add the date of contact

New Note

Who is this note about?
Select constituent

What type of note is this?
Select note type

When was this contact?
2023 July 20

Save Note

Create New Note

Notifications

You will receive notifications when your assignments make a gift or pledge. You also may be notified if the Annual Giving staff unpairs you with an assignment at some point throughout the year. Unpairing occurs if an individual requests to not receive solicitations, or is in conversation with a major gift officer, among other reasons. If you are unpaired from a classmate, please note that there is no action needed by you.

Volunteer Management

Class Volunteer Assignments (1)

Reporting

Search Constituents

Notifications

Messages

Tasks

...

✓ made a gift! 01/24/23 03:02 AM

✓ made a gift! 12/27/22 02:56 AM

✓ You have been unpaired from Victoria 03/22/22 10:26 AM

✓ You have been unpaired from Jim 12/09/21 03:06 PM

✓ Your pairing with Jim was approved 12/08/21 03:08 PM

✓ You have been unpaired from Anna 12/08/21 03:08 PM

Messages

Use messages to contact Andover staff partners directly from the VIP. A yellow notification will appear in the menu bar when you receive a new message.

Management

Class Volunteer Assignments (1)

Reporting

Search Constituents

Notifications

Messages

Tasks

Notes

Email

Messages

Sara Peach Messier - 11/03/20 10:44AM

Yes, of course. How about tomorrow at 2pm?

Click to view conversation >

Send a Message

Resources

Resources is a hub of information for volunteers, including access to the Annual Giving volunteer guide, newsletters, examples of Andover appeals, campaign information, and more.

Volunteer Management

Class Volunteer Assignments (1)

Reporting

Search Constituents

Notifications

Messages

Tasks

Notes

Email

My Templates

Resources

My Resources

Andover Fund Appeals

Name	Description	Category	Created	Updated
Health & Wellness Appeal - Infographic	Infographic included in the FY21 Health & Wellness appeal. Sent on 3/2/2021 and 3/4/2021.	Andover Fund Appeals	03/01/21 03:04PM	09/22/21 04:24PM
Health & Wellness Appeal	Appeal sent on 3/2/21	Andover Fund Appeals	03/02/21 12:21PM	09/22/21 04:24PM
FY22 Andover Fund Appeal #1	This mail appeal was sent to PA alumni on 10/11/2021.	Andover Fund Appeals	12/28/21 01:23PM	09/12/22 03:22PM
Andover Fund Appeal #2	This mail appeal was sent to PA alumni on 11/23/2021.	Andover Fund Appeals	12/28/21 01:24PM	12/28/21 01:24PM
Andover Fund Appeal #3: PA Giving Day 'Save the Date'	This mail appeal was sent to all PA alumni on 2/11/2021 to announce the date of PA Giving Day 2022.	Andover Fund Appeals	02/14/22 10:35AM	02/14/22 10:35AM

Campaign Information



Phillips Academy
ANDOVER