

# Volunteer Portal - For Volunteers

Welcome to the **Blackbaud Volunteer Network Fundraising** tool! The [volunteernetworkfundraising.blackbaud.com](http://volunteernetworkfundraising.blackbaud.com) portal is the one-stop destination for volunteers such as yourself to review your assignments, track your contact progress, and complete your solicitations. The portal will guide you through the solicitation process, letting you know what your next action should be for each prospect as well as serving up phone scripts and other resources at the right moment whenever you need them. Below is a map outlining the various features of the tool to help you get started.

## Volunteer Network Fundraising Tour

**Notifications** are communications and announcements from your volunteer manager. Any new notifications will appear in top left of the screen. You can also access any notifications, past or present, via the *Notifications* button at the top right.

**Resources** is a repository for any documents provided to you by your volunteer manager. Examples include a volunteer toolkit, walk-thrus, or additional prospect data.

**My Prospects:** This section is a list of the prospects that have been assigned to you. Click on the name to see the profile detail and perform your next action.

**Dashboard:** Located at the top of the page, the Dashboard section allows you to monitor your progress as you work through your list. Results are instantly captured as you complete your contacts, providing feedback on your progress. The *Donors* chart displays the number of your assignments who have made a gift this year. The *Donors Thanked* chart displays the number of your assigned donors who you have thanked. You can also check the progress of your whole class and see how you rank against the other class years. Just click on the arrow on the right side of the Dashboard. Here you will be able to see your class's performance in terms of participation rate, dollars, or donors.

The screenshot shows the dashboard for 'Western Fund FY18'. It features two circular progress indicators: 'Donors' at 5/22 and 'Donors Thanked' at 2/5. Below these are two charts: a bar chart for 'Donors' and a bar chart for 'Donors Thanked'. A table titled 'My Prospects (22)' lists names, majors, last contact dates, and project outcomes. Callout boxes provide the following information:

- Click your Name** to find links to contact your manager, edit your settings or logout.
- Resources** is a repository for any documents provided to you by your volunteer manager.
- Notifications** are communications and announcements from your volunteer manager.
- The **Dashboard** shows how many of your assignments have donated this year and how many donors you have thanked.
- The **Next Step** bar lets you know where to focus next. This is a great place to get started.
- Click **Add Prospects** to find new assignments to solicit.
- The **My Prospects** section is a list of the prospects that have been assigned to you. Click on the name to see the profile detail and perform your next action.

## Getting Started

Getting started is easy. You can review your list of assignments in the bottom half of the page under **My Prospects**. This list displays information such as the prospect's name, major, the last date that you contacted them, and a column indicating your recommended next step. Just click on the name or the next action to pull up the prospect's profile. Here you will find a summary of this individual's information as well as quick links at the top to communicate by phone, text, or email. For help on your next move, consult the orange **Next Step** bar across the center of the page. This bar will help you determine where to focus next.

## Contacting a Prospect

1. To contact a prospect, just click on their *name* in your **My Prospects** list.
2. This will pull up a profile of the assigned prospect.
3. From here, you can see a summary of information available on this individual.
4. Click **View Scripts** to view Letter/Email, Phone and Text scripts provided by your manager.
5. After contacting the prospect, click the **Log Activity** button at the bottom right.
6. From here you will have an opportunity to provide notes about the interaction to your volunteer manager, as well as report an outcome and sign up for a recontact reminder.
  - a. **Report Outcome** – Possible outcomes include *Will Donate*, *Won't Donate*, and *No Response*. If the prospect agreed to donate, enter in the amount they agreed to, as well as how they indicated they would pay. You have options for *Online*, *Send Pledge Card*, or *Other*. If Other, please indicate in the notes the method of payment.
  - b. **Recontact Reminder** – If you need to contact the prospect again, use this to help schedule the next

The screenshot shows the 'Prospect Profile' for 'Brenda Fisher' (Clogg Brothers). It includes a 'Giving History' bar chart, 'Contact Information' (Email, Mailing Address, Phone, Home Address), and an 'Activity' table. A 'What's Next?' section prompts the user to 'Make initial contact with this prospect view scripts to get started'. Buttons for 'View Scripts', 'Log My Activity', and 'Report Outcome' are visible. The footer indicates '© 2017 Blackbaud LLC. Privacy Policy'.

contact. You can choose *One Week*, *Two Weeks*, or *Select Date* to set a specific date. The tool will then remind you when you should contact the prospect again. Leave notes to remind you and inform your manager of the results from this contact (such as "Left a voicemail. Will re-contact next week").

7. Based on the results you reported, the *What's Next* action in the prospect list will update to suggest your next action.

**Western Fund FY18**

**Prospect Profile**  
Brenda Fisher  
Clogg Brothers

**Scripts**

Script Type: Letter/Email Script  
 Email: brenda.fisher@reheer.info  
 Home Address: 1132 SILVER ROCK PL, Bldg. 986 50019  
 Letter/Email Subject: Make a Difference at Western University  
 Copy Script

**Report Outcome**

**Donation**

Donation Status: Will Donate  
 How Will They Pay? Online  
 How Much? \$ 500

## Thanking Donors

Once a prospect has donated, you will see the option to **Send Thank You**. If you have indicated in your previous contacts that the prospect will donate, but the donation has not yet been received, the *What's Next* action will say, "send thank you (donation pending)." Once the donation has been received by the school, it will read, "send thank you (donation received)." Once the thank you is sent, the donor will be added to your Donors Thanked on the Dashboard and appear as "Complete" in the *What's Next* field. To send the thank you, click on the prospect's name in My Prospects, and then click "Send Thank You". After you have thanked the prospect, click "Log Activity" and then "Submit".

**I Want To...**

Send Thank You | Log My Activity | Edit Outcome | View Scripts

**Activity**

Date	Type
10/01/2016	Email
04/14/2012	Email

**Scripts**

Script Type: Letter/Email, Phone, Text, Thank You

Thank You Script  
 Email: xiaoping.jenkins@reheer.info  
 Mobile Phone: (123) 456-7890  
 Primary Phone: (123) 456-7890  
 Home Address: 15439 PO BOX Sacramento, CA 95851  
 Facebook: N/A  
 Thank You Subject: Thank You Email  
 Copy Script

Xiaoping.

Thank you for your donation to Western University! Your gift is important and makes a difference to current and future Westerners.

Back | Log Activity

## Adding Prospects

The Blackbaud Volunteer Network Fundraising tool provides an easy way to help you find additional prospects to solicit. To get started, click the **Add Prospects** button at the top right of the *My Prospects* list. The tool will start by recommending prospects to you based on the appropriate criteria such as class year, major, or interest who appear to be good potential donors. You can also click *show all prospects* on the right to list all of the prospects in your respective interest group, such as class year. Or, you can also search for a specific individual using the search bar at the top of the window. Just type the first or last name or both to find the prospect in the list. To view a prospect, click on their name for the list. This will bring up their profile. If this an individual you would like to add to your prospect list, just click the *Add Prospect* button at the top right of the profile. Now you will see them in your *My Prospects* list.

**add prospects**

search all prospects...

recommended for you [show all prospects](#)

name	preferred class year	assignment
Jeffrey Geiser	1985	N/A
Brenda Morse	1985	N/A
Ulysses Clements	1985	N/A
Julie Walsh	1985	N/A
Janice McCluggage	1985	N/A
Massoumeh Brandt	1985	N/A
Mary Jones	1985	N/A
Melissa Beck	1985	N/A

done

## Questions

For any questions on using the tool, just click on your *name* in the top right of the screen and choose **Contact Manager** from the drop

down. This will give you options of email clients for you to use to contact your volunteer manager.