

# Procedures for Using the Annual Fund Volunteer Site

For Class Agents, Reunion Gift Committee and 1812 Leadership Committee Members

*Updated 09/29/09 NDB*

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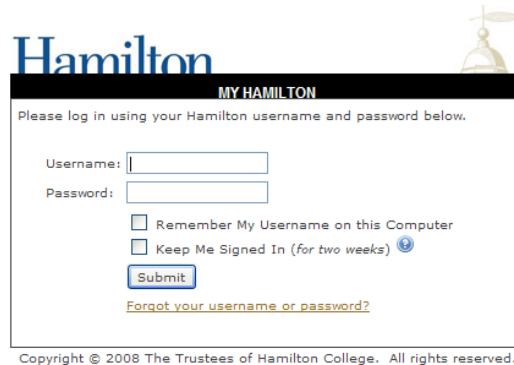
# Volunteer Site Home Page

## URL

www.hamilton.edu/afvolunteer

## Log In

You will be prompted to log in using your username and password. If you have forgotten either of them, click the “Forgot your username or password?” link in the log-in window and follow the prompts on the screen to have them e-mailed to you. If you need further assistance, please call the Annual Fund office at 866-729-0315.



## Messages

A current message from the Annual Fund office will appear at the top center of the Volunteer Site home page, updating you on the status of the Annual Fund.

### Annual Fund Volunteers

WELCOME, NIKKI

#### Messages

##### ■ 2/25/2008 - Mid-February Report

Annual Fund results on February 15 are very positive due to your diligent volunteer support of the campaign. Please accept my thanks. Gifts are up \$240,000 from the same time last year – which was a record year.

For the first time in months, alumni participation is up from last year which is important since our goal is 52% and we closed the 2006-07 fund year at 50.3%. Today, we have 33.7% of alumni who have made a gift or a commitment to give.

For the balance of the year we will focus on meeting our participation goals. Your calls and e-mails to class mates are the most effective way to achieve positive results. We are past the half-way point of our Leap Year Challenge. The 29 classes of 1979-2007 will earn \$29,000 (the equivalent of the average Hamilton scholarship package) from Charter Trustee Jack Withiam '71 if we secure an average of 29 gifts for each of the 29 days of this leap year. Please do what you can to support this effort – as I am certain you will.

The Leap Year Challenge results can be viewed online. Pledges and gifts can be made electronically as well.

Carissima,  
Jon Hysell '72, P'04  
Director, Annual Giving

## Screen Display

You will see the following links available on the home page. Descriptions follow for each of these links.

- View My Assignments
- Choose My Assignments
- View Class Agent Report
- View Results for All Classes

## View My Assignments

View this year's gift and pledge status, and contact information for your assignments. You can also report your calling results using an online form.

- 1) On the Volunteer Site home page, click "View My Assignments"
- 2) In a moment a screen will load and display your overall class results, followed by a list of your selected assignments

**'s Assignments**

Overall Class Results

Class Year	Prospects	Donors	Participation %	Goal	Needed	Annual Fund Total Pd	Restricted Total Pd	Total Pd
1972		4	0.0%	%		\$25,250.00	\$491.00	\$25,741.00

Click on a prospect's name to view calling information and report your results.

Find:

Name	Calling Agent	Ask Range	Current Yr Pd	Last Gift Date	Last Yr Pd	Pledge Due	Donor Status	Last Contact Result	Restricted Gifts
(h) [redacted] '72 (w) [redacted] <a href="#">More Info</a>	[redacted]	\$1,000		07/20/2007	\$805.00		LYBUNT		Y
(h) [redacted] '70 (w) [redacted] <a href="#">More Info</a>	[redacted]	<\$5,000		06/30/2007	\$2,000.00		LYBUNT		N
(h) [redacted] '72 (w) [redacted] <a href="#">More Info</a>	[redacted]	\$1,000		06/30/2007	\$514.00		LYBUNT		N
(h) [redacted] '73 (w) [redacted] <a href="#">More Info</a>	[redacted]	\$1,000		06/28/2007	\$5,000.00		LYBUNT		N
(h) [redacted] '72 (w) [redacted] <a href="#">More Info</a>	[redacted]	\$5,000		08/17/2007	\$7,500.00		LYBUNT		N

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[Export All to Excel](#)

**s Totals**

Total Current Year Paid:	\$0.00
Total Pledges Due:	\$0.00
Total Last Year Paid:	\$30,939.00

- 3) Totals for Current Year Paid, Pledges Due and Last Year Paid for your assignments appear in the bottom left corner of the screen
- 4) You can search for specific classmates using the "Find" box in the upper left corner of the screen
  - a) In the text box, type in all or part of the first OR last name (not both) and click "Search"
  - b) To clear your selection and view the full list again, click "Clear"
- 5) Click on the individual you wish to call. An online version of our calling form will appear containing contact information and giving history. Use this information to reach out to your classmate.

## Calling Form

**Prospect Information** | **Report My Results**

Below is the information you need to make your call. When you are ready to report back to the Annual Fund office, click on the Report My Results tab above.

**Calling Agent:**  
0368133 1972 Nickname:

**Mail Rules:** AF Track Sources  
HamiltonG

**Spouse:** Sp Class:  
**Mail Rules:** AF Track:  
**Spouse Giving Pledged Paid:**  
Last Year  
This Year

**E-mail:**  
**Home Phone:**  
**Titles:**  
**Employer:**  
**Business Phone:**  
**Matching Gift?:**

**Children:**

**Consecutive Years Annual Fund Support:** 20

**Vol. Roles:**

**Major(s):**  
**Society:**  
**Undergrad Activities:**

Last Gift Year	High Gift Year	High Gift Amount	Annual Fund		Other Support	
			Year	Gift	Gift	Matching gift
2007	1994	\$2,500.00				
2006-07			\$805.00	\$0.00	\$405.50	\$0.00
2005-06			\$350.00	\$0.00	\$1,290.00	\$0.00
2004-05			\$300.00	\$0.00	\$100.00	\$0.00
2003-04			\$250.00	\$0.00	\$0.00	\$0.00
2002-03			\$500.00	\$0.00	\$150.00	\$0.00

**Track History**  
-

**Spouse Track History**  
-

- 6) When you've completed your call, select the "Report My Results" tab at the top of your screen
- 7) Using the drop down selection box, choose a result (e.g. "Gift by Credit Card")
- 8) You can enter additional information about your results in the text box provided
- 9) Once you've completed your report, click the "Submit" button. A confirmation screen will appear saying "Your results were successfully reported" and will provide you with links back to the home page or to view your assignments.

## Calling Form

**Prospect Information** | **Report My Results**

Click one result and add comments when appropriate.

-- select --

Submit

## Choose My Assignments

Select classmates to call.

- 1) On the Volunteer Site home page, click "Choose My Assignments"
- 2) In a moment a screen will load that displays all available members of your class to call, listed in alphabetical order
- 3) You can narrow down the list by using the "Select From Prospects" drop-down list near the top of the screen. Select from one of the following options:

- a) With the same class year (this is the default)
- b) With the same interests
- c) That were assigned to me last year
- 4) Make your selections by clicking the checkbox to the left of the person's name you want to call; a check mark denotes an active selection
- 5) To view additional pages of available assignments, use the arrows at the bottom of the screen (e.g. page 3 of 20)
- 6) When you have finished making your selections, click the "Continue" button at the bottom of the screen
- 7) This will bring you to a confirmation screen. Please review your selections carefully. When your review is complete click "Confirm"
- 8) You will receive an e-mail confirmation of your selections shortly

**Choose My Assignments**

Check the box in front of all the people you would like assigned to you. You can re-sort by any column by clicking on the column header. When complete, click the **Continue** button below. Selections can be made multiple pages prior to clicking Continue. If you would like to call people outside of your class, please call the Annual Fund office at 866-729-0315.

Select from prospects: with the same class year

Select	Class	Name	Sponsor Name	Sponsor Class	City	State	Country	Interests	Cancer Yrs Giving	Last Gift Date	Last Contact Result	Prior Agent
<input type="checkbox"/>	1972				Port Washington	NY						
<input type="checkbox"/>	1972				Orchard Park	NY						
<input type="checkbox"/>	1972				Rhinewood	WI						
<input type="checkbox"/>	1972				Hastings-on-H...	NY						
<input type="checkbox"/>	1972				Amherst	NY						
<input type="checkbox"/>	1972				Williamstown	NJ						
<input type="checkbox"/>	1972				Buffalo	NY						
<input type="checkbox"/>	1972				Harrisburg	PA						
<input type="checkbox"/>	1972				Fairport	NY						
<input type="checkbox"/>	1972			1974		Panama						
<input type="checkbox"/>	1972				New Hartford	NY						

## View Class Agent Report

View a list of all class agents in your class, and see the overall status of their calls.

- 1) On the Volunteer Site home page, click "View Class Agent Report" link
- 2) In a moment a screen will load that displays all class agents in your class, and the status of their calls
- 3) To see a person's profile, click on their name

**Class Agent Report**

Overall Class Results

Class Year	Prospects	Donors	Participation %	Goal	Needed	Annual Fund Total Pd	Restricted Total Pd	Total Pd
1972	184	5	2.7%	60%	105	\$3,425.00	\$886.00	\$4,311.00

Class Agents

Agent Name	Detail	Class Year	Total Prospects	Total Donors	Participation %
	[see detail]	1972	10	0	%
	[see detail]	1972	4	0	%

# View Results for All Classes

View a list of all classes to see how yours compares to others, and to see how the Annual Fund is doing overall.

- 1) On the Volunteer Site home page, click “View Results for All Classes”
- 2) In a moment a screen will load that displays all classes and their current giving totals as compared to last year
- 3) You can send this list to Excel for further review by clicking the “Export to Excel” link in the upper left corner of the screen

## Overall Class Results

Updated on 09/29/09  
[\[Export to Excel\]](#)

Class Year	Class Gift Chair	# in Class	Participation Goal	Needed for Goal	# Pldg/Pd This Yr	% Pldg... This Yr	\$ Pldg/Pd This Yr	# Paid This Yr	% Paid This Yr	\$ Paid This Yr	% Paid Last Yr	\$ Paid Last Yr
1935	Rathbun	7	100%	7	0	0%	\$0	0	0%	\$0	100%	\$5,525
1936		6	75%	5	2	33.3%	\$140	0	0%	\$0	100%	\$840
1937	Gray	6	90%	5	2	33.3%	\$600	0	0%	\$0	88.9%	\$1,200
1938	deCourcy	5	75%	1	3	60%	\$660	3	60%	\$660	75%	\$10,470
1939	Bate	12	80%	10	3	25%	\$500	0	0%	\$0	76.9%	\$1,220
1940	Ross	14	100%	13	4	28.6%	\$20,190	1	7.1%	\$100	100%	\$29,450
1941		9	60%	5	1	11.1%	\$50	0	0%	\$0	55.6%	\$1,610
1942	Pomillo	22	65%	13	4	18.2%	\$350	1	4.5%	\$50	69.6%	\$13,296
1943	Small	32	62%	19	6	18.8%	\$25,785	1	3.1%	\$125	57.6%	\$126,826
1944	Root	23	85%	18	6	26.1%	\$7,400	2	8.7%	\$1,750	87.5%	\$30,363
1945	Adams	33	100%	31	2	6.1%	\$2,000	2	6.1%	\$2,000	100%	\$60,867
1946	Kent	30	70%	19	3	10%	\$11,440	2	6.7%	\$11,340	75.8%	\$32,365
1947	Mussel...	9	65%	5	1	11.1%	\$100	1	11.1%	\$100	60%	\$5,976
1948	Horowitch	29	85%	24	5	17.2%	\$10,710	1	3.4%	\$10,000	84.4%	\$22,695
1949	Swarts	52	80%	39	9	17.3%	\$11,580	3	5.8%	\$730	80.4%	\$45,125

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## Tips/Troubleshooting

- Most of the online reports use columns that can be re-sized to different widths as necessary. Simply put your cursor over the right edge of the column header (like you would when re-sizing a column in Excel) and drag it to the desired size.
- Most of the online reports can be re-sorted by clicking on a column header for the column you want to sort on. Each time you click a column header it will re-sort by ascending, then descending order.
- Some of the reports outlined above are too long to display on the screen and have pages that you can scroll through using the arrows at the bottom of the screen, or by using the scroll bar on the right side of the screen
- If you have problems or questions with the Volunteer Site, please feel free to call the Annual Fund office at 866-729-0315.