What is the volunteer portal? - The portal is a custom-built system (leveraging the Salesforce platform) designed to assist volunteers with outreach by providing a simple platform to find contact information, giving history and provide updates on donor status.

Who has access to the AAF volunteer portal? Only current Alumni Annual Fund volunteers and Carleton staff have access to the portal.

- How do I log in to the volunteer portal?
- Help! My password isn't working/I've forgotten my password
- Ok, I'm logged in, how do I get started?
- How do I drop an assignment?
- How do I add an assignment?
- How do I find my assignments?
- How do I send an email in the portal?
- How do I enter interaction notes?
  - How do I update alumni contact information (addresses, emails, etc)?
- I am having a problem. Whom should I contact?
- How do I contact AAF Staff?
- How do I contact my AAF Board Member?
- Are there any people (staff, board members, other volunteers) who are particularly adept at using the portal that I can contact if I have questions?
- Is there a mobile app for the portal?
  - How does the app work?
- What do the listviews mean?
- What do the different column headings mean?
Alumni Annual Fund Volunteer Links

- Volunteer Portal Login
- Password Help for the Volunteer Portal
- Giving Volunteers
- Portal Training/Volunteer Resources
- Giving to Carleton
- Employer Matching Gifts Tool
- Alumni Annual Fund Staff Directory
- Commonly Asked Questions about Giving to Carleton College
- Three Oaks Society
- AAF Common Terms

What’s a Lybunt? An alum who gave Last Year But Unfortunately Not This year.

What’s a Sybunt? An alum who gives Some Years But Unfortunately Not This year.

What are the AAF Groups?
AAF groups are a coding system to indicate a donor’s history.
- T - Three Oaks Society members and prospects
  - (Ask = $1,000 or more - Classes 1931 - 2008)
  - (Ask = $500 or more - Classes 2009 - 2013)
  - (Ask = $300 or more - Classes 2014 - 2017)
- A - Have given every year for five years or more*.
- B - Have given 3-4 years of the past five years.
- C - Have given 1-2 years of the past five years.
- D - Have given at some point in the past but not in the last five years.
- E - Have never made an AAF gift to Carleton.

Who are Tony Pierre and Jitterbit?
Each day, a series of updates to the portal are applied either automatically (Jitterbit) or manually by a Carleton Staff member (Tony Pierre). These are simply routine maintenance.

Can I assign myself to myself in the portal?
No. If you assign yourself to yourself, the assignment will automatically revert to “unassigned” during the next update period.
What are Contact Preferences?
Contact preferences are the manner in which donors do (or do not) want to be contacted.

Please remember to always check contact preferences before you begin outreach.

- **Do Not Solicit** - Classmate has asked to be removed from active solicitations of any kind (or is assigned to staff only).
  - DNS codes are applied at the donor's or their family’s request OR if we hear from a volunteer who has spoken to them and assures us that the donor is no longer making their own financial decisions.
  - We recommend that AAF volunteers do not contact anyone who is marked as "Do Not Solicit/DNS" unless the volunteer has a close personal relationship with the classmate and knows that such contact would be welcomed.
  - These “DNS” alumni will receive all mail and email from the College that is not a direct solicitation.

- **Do Not Mail** - Classmate has asked not to be solicited by mail.

- **Do Not Phone** - Classmate has asked not to be solicited by phone.

- **Do Not Email** - Classmate has asked not to be solicited by email.

Special Handling
Sometimes when you consult the contact preferences, none of the categories listed above are checked. You should then figure out what (if any) special handling is required.

1. Scroll down through the Contact Record to the “Special Handlings” section.
2. Check for notes such as “Campus - No Mail from Carleton” or “Career Center - Do Not Phone.” These notes do not apply to AAF outreach.
3. Since these notes do not apply to your AAF outreach, you may proceed with contacting this classmate.
4. If you still have questions, please contact your AAF Staff Member.