TOGETHER for SMITH

Pre-50th Reunion Fundraising Best Practices
November 4, 2016
TOPICS FOR DISCUSSION

1. Introductions
2. 50th Reunion Cycle Stats
3. Preparation (pre-50th)
4. The BIG 5-0: Reunion Year!
5. Leverage Planned Gifts
6. Q & A
## 50th Reunion Results: 1962-1966

<table>
<thead>
<tr>
<th>Class</th>
<th>45th Five Year Total</th>
<th>Five Year Total</th>
<th>One Year Total</th>
<th>Five Year Average Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1962</td>
<td>$6,774,070</td>
<td>$9,249,280</td>
<td>$2,605,193</td>
<td>61%</td>
</tr>
<tr>
<td>1963</td>
<td>$933,272</td>
<td>$2,343,482</td>
<td>$6,562,249</td>
<td>59%</td>
</tr>
<tr>
<td>1964</td>
<td>$1,712,717</td>
<td>$5,523,664</td>
<td>$4,124,116</td>
<td>59%</td>
</tr>
<tr>
<td>1965</td>
<td>$1,659,545</td>
<td>$3,964,098</td>
<td>$3,002,479</td>
<td>54%</td>
</tr>
<tr>
<td>1966</td>
<td>$2,473,913</td>
<td>$6,363,579</td>
<td>$2,206,081</td>
<td>61%</td>
</tr>
</tbody>
</table>
50th Reunion 5 YR Revenue Totals

$0, $1,000,000, $2,000,000, $3,000,000, $4,000,000, $5,000,000, $6,000,000, $7,000,000, $8,000,000, $9,000,000, $10,000,000

5 YR $ Total

- 1962
- 1963
- 1964
- 1965
- 1966
50th Reunion Five Year Average Participation Rates

- 1962: 60%
- 1963: 58%
- 1964: 56%
- 1965: 54%
- 1966: 52%

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Early 50th Reunion Planning

- Identify and Recruit Good Volunteers
- Create a Communication Plan with Class Officers
- Brainstorm on Cultivation Strategies
- Familiarize Yourself with Smith Fund Tools
- Re-education of Classmates: Why Give?
Four Years Out

- Recruit Fund Agents
- Attend Trainings and Webinars
- Create Communication Plan with Class Officers
Three Years Out

- Set Your Special Gift List
- Work on Cultivation Strategy
- Plan Mini Reunions and/or Top Donor Campus Event
Two Years Out

- Need More Volunteers?
- Follow Up with Top Donors Regarding Gifts
- Do You Have a Social Media Strategy?
The Big 5-0!!!
Reunion Year
Planning Your 50th Reunion Year

**Summer**
- Prepare Appeal Letter to be Mailed in August
- Create Segments that work for your class: Special Gifts, International, Alumnae that did not graduate, Nevers
- Special Insert on How Gifts Can Add Up

**Fall**
- Contact from Fund Agents to follow up on August letters
- Coordinate with Class Officers Fall Newsletter and Other Communication
- Send thank you notes to donors

**December**
- All alumnae letter from the college
- Year end Smith Fund challenge effort with email appeals
- Prepare January Memorial Appeal
Planning Your 50th Reunion Year

February/March
- Mailed class-specific letters to all non-donors
- Coordinate with Class Officers Newsletter and Other Communication
- Determine if a Class Challenge is Needed and Sponsors
- Reunion Registration Begins

April
- Contact classmates who are registered for Reunion but not Donors
- Possible second class appeal
- Student Phonathon support and/or challenge initiative
- Send thank you notes to donors

May
- REUNION
- Volunteer outreach to any non-donors who are on campus
- Follow-up with classmates whose pledges remain unpaid
- Send thank you notes to donors
Creative Approaches for Success

• Get All of Class Volunteers Onboard (house reps, reunion chairs, parade sign volunteers, etc.)
• Have Mini Reunions Regionally
• Spring Back to Smith Event for Top Donors
• Segment your appeals and enlist corresponding volunteers
• Utilize Challenges on Revenue or Participation
• Leverage Planned Giving Opportunities
Leveraging Planned Gifts

50th Reunion

• Annuities
  • Hold conference calls with class fund teams to teach basics of gift annuities
  • Collaborate with fund team & individual gift officers on strategies for class members where an annuity is a part of the mix

• Bequest Intentions
  • Share Grécourt Society class membership list
  • Work with classes & individual donors to “book” their bequest intentions for (discounted) credit
Smith Fund Volunteer Tools

Online resources:
www.smith.edu/thefund
and click “Tools for Volunteers”.

www.facebook.com/groups/SmithFundVolunteers/
Thank You!!!