50th Reunion Best Practices for Fund Raising Volunteers
Smith College Conference Center
September 11, 2014
TOPICS FOR DISCUSSION

1. Welcome
2. Facts & Figures
3. Preparation (pre-50th)
4. What Counts?
5. Solicitation Strategies
6. Volunteer Best Practices
50th REUNION FACTS & FIGURES
RECENT RESULTS: 1960-1964

<table>
<thead>
<tr>
<th>Class of</th>
<th>One Year $ Total</th>
<th>One Year $ SF Total</th>
<th>One Year Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1960</td>
<td>$6,152,702</td>
<td>$810,972</td>
<td>83%</td>
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<tr>
<td>1961</td>
<td>$1,462,487</td>
<td>$689,674</td>
<td>80%</td>
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<tr>
<td>1962</td>
<td>$2,605,193</td>
<td>$1,035,543</td>
<td>76%</td>
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<tr>
<td>1963</td>
<td>$6,562,249</td>
<td>$850,757</td>
<td>71%</td>
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<tr>
<td>1964</td>
<td>$4,124,116</td>
<td>$1,747,973</td>
<td>78%</td>
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RECENT SMITH FUND RESULTS: 1960-1964
RECENT SMITH FUND RESULTS: 1960-1964
IMPACT OF REUNION GIVING

30-40% of the Smith Fund total raised each year is from alumnae in classes celebrating reunion.

1964’s Smith Fund gift represented 12% of the FY14 Smith Fund total raised.

*Ivy Day, 1963*
PRE-50TH PREPARATION
BEFORE THE 50TH REUNION YEAR

- Identify and recruit good volunteers
- Work with your Smith Fund liaison to determine asks amounts (for high givers)
- Start soliciting top asks for multi-year commitments

Four Years Before
- Recruit fund agents to help with high end solicitations
- With staff, set target amounts for these top givers
- Solicit top givers for multi-year commitments

Three Years Before
- Add more helpers to expand personal outreach
- Fund agent outreach to all classmates

Two Years Before
- Work with class liaison on tailored appeals to top givers who haven’t pre-pledged
- Continue outreach to rest of class
BECOME FAMILIAR WITH SMITH FUND OPTIONS

- General Smith Fund Support (most common)
- Ada Comstock Scholarship
- Curricular Support
- Facilities Fund
- General Financial Aid Support
- International Programs
- International Scholarship
- Student Life
- Study Abroad
- Sustainability
WHAT COUNTS?
THE COMPOSITION OF A 50TH REUNION GIFT

Please see handout.

- The first priority for Smith is unrestricted cash through the Smith Fund. *That is your goal in your role as a Smith Fund agent, first and foremost.*
- There are other ways that classmates can contribute, for example to add to existing funds they have previously endowed. *We still will want them to also support the Smith Fund with a participation gift.*
- Brief discussion of other giving methods and designations
50th Reunion Solicitation Strategies
ELEMENTS FOR SUCCESS
College Outreach (Mail/Email) +
Personalized Outreach (Volunteer/Staff) +
Perseverance
= Success!
OUTREACH FROM THE COLLEGE (MAIL/EMAIL)

BASIC APPROACH:
- Special gifts (higher amounts) and participation solicitations (any/lower amounts)

TAking IT TO THE NEXT LEVEL:
- Personalized language to anyone who we think can give $10,000 or more
- Special language (but less hand tailored) to $1,875-$9,999
- Focusing on alumnae groups creatively as may be necessary for your class, such as regionally or otherwise
- Participation appeals below $1,875
- Consider different pieces to alumnae living abroad, alumnae who have said “I won’t ever give”, and non-degree alumnae

QUALITY PIECES, HAPPENING OFTEN:
- Mailings every other month (to different populations) alternating with engaging content (not only appeals), sometimes class-specific and sometimes from the college (i.e., letter from President McCartney to all alumnae)
SAMPLE CALENDAR: 50 TH REUNION YEAR

August
- Mailed letter to $10,000+ ask group
- Calls from Special Gift Agents to follow up on the letters
- Fund Chair should finalize any commitments not yet formalized for all of the fund team and class officers

September
- All alumnae letter from President McCartney
- Calls from Special Gift Agents to follow up on August letters
- Send thank you notes to donors

October
- Mailed class-specific letters to all non-donors (segments mentioned in prior slide)
- All class fund agents making calls to their assignment lists
- Send thank you notes to donors
<table>
<thead>
<tr>
<th>Month</th>
<th>Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>November</td>
<td>• All class fund agents making calls to their assignment lists</td>
</tr>
<tr>
<td></td>
<td>• Student phonathon support (as appropriate)</td>
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<td></td>
<td>• Send thank you notes to donors</td>
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<tr>
<td>December</td>
<td>• All alumnae letter from the college</td>
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<td>• Year end Smith Fund challenge effort with email appeals</td>
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<td></td>
<td>• Send thank you notes to donors</td>
</tr>
<tr>
<td>February</td>
<td>• Mailed class-specific letters to all non-donors (possibly a “gift report”)</td>
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<tr>
<td></td>
<td>• All class fund agents making calls to their assignment lists</td>
</tr>
<tr>
<td></td>
<td>• Send thank you notes to donors</td>
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March
- All alumnae letter from the college
- All class fund agents making calls to their assignment lists
- Student phonathon support (as appropriate)
- Send thank you notes to donors

April
- All class fund agents making calls to their assignment lists
- Possible second “gift report” or other mailed piece as appropriate
- 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
VOLUNTEER BEST PRACTICES
MAKING THE ASK: THE MAIN JOB OF THE FUND AGENT

- Prepare
- Plan
- Ask!
Connect with your Smith Fund liaison for details on campaign conversations in progress with Smith Philanthropic Officers

- We are all working together towards the same goals

Prepare *Your* Case for Support

- What’s happening on campus today?
- Why is Smith important to you?
- Use the tools for volunteers on our website
- Review your assignments and contact sheets
PLAN FOR YOUR CALLS

- Schedule time to make your calls
- Check in with Smith Fund staff for inspiration and encouragement
- If you don’t reach someone, clearly state follow up plans
MAKE THE ASK

- Principles
- Practice!
AN EXAMPLE...

INCREASING REVENUE:
THE CLASS OF 1968

- 50th reunion in FY18
- Already a strong base of annual participation
- Asking top prospects for five year gifts of $68,000
- Commitments made over time—starting in FY14
- All count in the five year total!
FINAL THOUGHTS
Thank You!