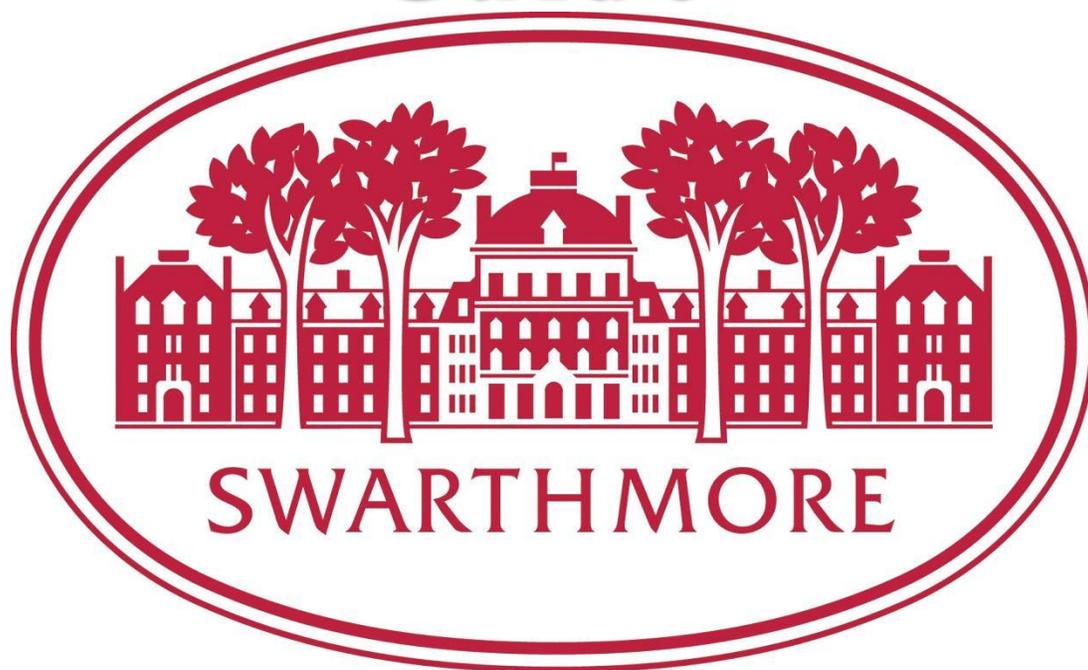


Reunion Fundraising Guide



2013-14

Reunion Guide: Table of Contents

Staff Support	p. 1
About the Annual Fund	p. 2
Reunion Gift Chair and Committee Job Descriptions	p. 3
Organizing the Reunion Gift Committee	p. 3-4
The 1864 Society	p. 4-5
Reunion Fundraising Strategies	p. 5-6
Reunion Timeline	p. 6
Making Successful Solicitations	p. 7-8
Possible Objections & Responses	p. 8-9
Gift Acknowledgements	p. 9
Class Awards and Reunion Records	p. 9
Fundraising Terms	p. 10

Staff Support

The staff of the Annual and Parent Giving office will assist you and make your job as easy as possible. You are the key to a successful Annual Fund, and we are here to help and work with you.

Meghan Harker

mharker1@swarthmore.edu
Assistant Director, Annual Giving
*Reunions: '69, '74, '79, '84

610-328-8410

Kara McDonald

kmcdona2@swarthmore.edu
Associate Director, Annual Giving
*Reunions: '99, '04, '09, '12

610-328-8622

Debbie Mulligan

dmullig1@swarthmore.edu
Administrative Assistant, Annual Giving

610-957-6200

Brian Myers

bmyers1@swarthmore.edu
Associate Director, Annual Giving
*Reunions: '89, '94

610-328-8306

Lisa Shafer

lshafer1@swarthmore.edu
Director, Annual & Parent Giving
*Reunion: '64

610-328-8009

Fritz Ward

fward1@swarthmore.edu
Associate Director, Annual and Parent Giving

610-328-8411

Annual Giving Office:

101 S. Chester Road
Swarthmore, PA 19081
anngive@swarthmore.edu
(610) 328-8009

Gifts online, by phone, or fax:

<http://gift.swarthmore.edu>
(800) 660-9714 Credit Card Hotline
(610) 690-5716 Fax

Introduction

Your class reunion is approaching! It will be part of the **June 6 – June 8, 2014** Alumni Weekend.

This handbook is designed to help you celebrate your reunion. It simply serves as a guide, providing best practices for reunion outreach and solicitation. You should feel free to inject your class' creativity, energy, and excitement to your outreach efforts. The most important thing? *Have Fun.*

About the Annual Fund

What is the Annual Fund?

- The most effective way that Swarthmore's supporters can contribute to the College.
- Includes three funds: the Alumni Fund, the Parents Fund, and the Friends Fund.
- Unrestricted gifts made from July 1 through June 30 of a given fiscal year.

Since its inception in 1941, the Annual Fund program has supported Swarthmore's values and priorities by fulfilling the most-pressing needs of the day. Its importance cannot be overstated—more than \$120 million of the endowment would be needed to replace the \$5 million that the Annual Fund is expected to generate this fiscal year. This vital revenue stream continually garners the support from more than half of the alumni body—a true testament to Swarthmore's tradition of philanthropy.

Perhaps the greatest measure of Annual Fund gifts is the far-reaching impact that they can have on campus. Because they are unrestricted, these gifts provide the College with the financial flexibility it needs to navigate a constrained fiscal environment. Annual Fund gifts enable Swarthmore to meet the immediate demands of its academic programs while maintaining a campus environment that appropriately challenges young minds. Dollars raised through the Annual Fund help support the operating budget at Swarthmore. Contributions are used to fund financial aid and faculty salaries, to purchase technology and equipment, and to maintain and operate Swarthmore's educational facilities.

Why are Unrestricted Dollars Needed?

Tuition and fees do not cover the full cost of educating a Swarthmore student, and the price of providing the needed financial aid continues to grow. In round figures, it will cost about \$81,902 to educate each student this year. This is considerably more than the \$55,750 in tuition and fees that the College charged. Although the numbers change from year to year, the actual cost has always exceeded the price by a wide margin. This gap is filled by gifts to the Annual Fund and endowment income, giving each student a "hidden scholarship."

Job Descriptions

Reunion Gift Chair

The Gift Chair (or Co-chairs) of the reunion class leads the Reunion Gift Committee in the planning and solicitation of Annual Fund contributions from classmates. This position requires strong leadership, knowledge of classmates, careful planning, and coordination with a member of Swarthmore's Development Office.

Responsibilities:

- Lead by example. Make a personally significant gift to Swarthmore before asking others to do the same.
- Consult with the Development Office (a staff member will be assigned to your class/reunion year) on a regular basis to develop strategies to achieve participation and dollar goals; and inform them of any new commitments received.
- Help identify and recruit classmates to serve as Gift Committee members and manage their assignments.
- Write at least one general reunion appeal, while working closely with the class agents from your class who will write at least two general Alumni Fund solicitations.
- Personally solicit Gift Committee members and any other classmates assigned.
- Maintain regular contact with your class through the solicitation letters, thank you notes, emails, and phone calls.
- Collaborate and work in concert with the class Reunion Activity Chair.
- Be knowledgeable about updates and news from campus; be available to answer questions from your classmates on Swarthmore-related issues.

Reunion Gift Committee Members

Responsibilities:

- Lead by example. Make a personally significant gift to Swarthmore before asking others to do the same.
- Follow up with an assigned group of classmates and on written solicitations in person, by phone or email, and obtain a commitment, if possible.
- Ensure that each donor is thanked personally through personal notes, email, or phone calls.
- Be knowledgeable about updates and news from campus; be available to answer questions from your classmates on Swarthmore-related issues.

Organizing the Gift Committee

The most important decision you will make will be who you enlist to join the committee. The selection process must be accomplished thoughtfully and strategically. Take into consideration the geography of your class, who is capable of making a major commitment, and who has a recognizable name within the class. Gift committee members must be prepared

to make their own specific gift or pledge commitment early. The make-up of the Gift Committee will vary from class to class, depending on the size and age of the group. Often there will be considerable overlap between gift and activities committees; smaller classes may have only one committee for all aspects of reunion planning. The Annual Giving office will assist in forming the committee.

Some tips for success:

- Use an individual's giving and volunteer history as a guide.
- Be inclusive. Recruit people who would like to be part of the effort.
- Choose classmates with giving potential and a strong desire to help with your class fundraising efforts.
- Be thoughtful: donors first, friends second. Then, when making calls, inform everyone who is already on board.
- Conduct screening and make sure everyone with potential is contacted.

Ingredients of Good Reunion Fundraising

There is no substitute for personal contact—classmates contacting fellow classmates by phone, email, Facebook, or mail to encourage attendance and giving provides the best results.

There are two measures of reunion success—participation and gifts. What percentage of your class will make a gift to the Swarthmore Annual Fund? Will you encourage your classmates to make a gift that is of a size meaningful to them in honor of your reunion?

Swarthmore encourages alumni to increase their annual giving during a reunion year. Over Alumni Weekend, the College will celebrate each class' fundraising successes, including announcing totals for Annual Giving and for all gifts and pledges received during the July 1—June 30 fiscal year.

A member of the Annual and Parent Giving office will be your contact for helping to establish goals, set a timeline for communication, and provide classmate information and best solicitation practices.

The 1864 Society

The 1864 Society, named for the year Swarthmore College was founded, celebrates the generosity of alumni, parents, and friends who have supported the College at a leadership level each year. Their generous gifts make it possible for current and future generations of students to become true world citizens, benefiting from the intellectual rigor and creativity that are distinguishing hallmarks of the Swarthmore experience.

The 1864 Society recognizes cumulative gifts to any Swarthmore designation during the fiscal year, and donors will automatically be enrolled at the levels listed below:

The 1864 Society	Giving Levels
Lucretia Mott Associates	\$100,000 and above
Rachel Jackson Associates	\$50,000 to \$99,999
Samuel Willets Associates	\$25,000 to \$49,999
Martha Tyson Associates	\$10,000 to \$24,999
Benjamin Hallowell Associates	\$5,000 to \$9,999
Deborah Wharton Associates	\$1,864 to \$4,999

The **Rose Garden Associates** is the leadership-level giving society for those who have graduated within the last 14 years.

Rose Garden Associates	Membership Levels
Years 1-4	\$100
Years 5-9	\$500
Years 10-14	\$1,000

Fundraising Strategies

The key to a successful reunion drive is strong leadership. The reunion volunteers establish the intensity, strategy, and tone of the drive. Volunteers must strive to successfully share the responsibilities to ensure that each member of the class is given the opportunity to participate at the most ambitious level within their means.

Start early

Planning should begin approximately 18 months in advance of the reunion. This will allow for time to gather input from past and fellow Gift Chairs, identify leadership donors, and, most importantly, discuss the upcoming reunion with your classmates.

Make it personal

It is imperative for you to make your own gift or pledge first. You set the bar and enable others to join you in supporting current and future Swarthmoreans. When making your appeals to individuals and/or couples to join the committee or make a gift, be as personal as possible.

Prioritizing your Reunion Outreach

With the help of Annual Giving staff, classmates' giving history, volunteer history, and known interest in supporting Swarthmore will be reviewed. Prospects/classmates will then be ranked to identify lead and other donors.

Set a goal carefully

The Annual Giving office will work with you to establish a class reunion goal. Lead gifts will help set the pattern of giving for everyone in the class and be predictive of the final total. Gifts of all sizes will be needed. Be realistic yet ambitious. The goal is extremely important, and as Alumni Weekend nears, it will be a valuable marketing tool.

Urge your classmates to attend

The Alumni Relations office will recruit leaders for planning events and increasing attendance. By collaborating with the Reunion Activities Chair(s), you can maximize results. Reunion attendance will, of course, increase the odds that alumni will make a gift.

Push for participation

While 90% of the gift total can be expected to come from 10% of the donors, the percentage of participating classmates is also a measure of the true success of the reunion drive. While everyone may not be able to make a leadership gift, their participation speaks volumes about their support of the College and its mission.

Communicate regularly

Use various forms of communication to keep everyone updated. The more classmates know, the more involved they will be. Discuss large and small gifts, new volunteers, upcoming meetings, and solicitation status. As always, keep your approach personal, and remember to motivate and thank everyone.

Reunion Timeline Sample Calendar

July 2013 to August 2013

- Enlist key committee members
- Set meeting dates and deadlines
- Set ambitious dollar and participation goals
- Mailing to announce class reunion gift drive

September 2013 to October 2013

- Kick off for committee via email and conference call
- Screening and rating of class members
- Assignments made for key donors
- First Reunion letter mailing
- Phonathon (student callers)

November 2013

- Phonathon continues (student callers)
- Peer solicitations via email and phone

December 2013 to January 2014

- Peer solicitations continue
- Second conference call

February 2014 to April 2014

- Peer solicitations continue
- Phonathon (student callers)
- Second Reunion letter mailing
- Third conference call
- Mass emailing

May 2014 to June 2014

- Mass emailing
- Follow up on pledges to finalize gifts
- Celebrate during Alumni Weekend!

Making Successful Solicitations

Solicitation

A donor is much more likely to make a gift if he/she is contacted or solicited over the phone, rather than only through direct mail pieces. This type of solicitation is much more effective because it provides a personal contact between the donor and a Swarthmore College representative—you. Alumni are more likely to respond with a generous gift when they have spoken with a classmate or peer who has convincingly expressed his or her own commitment and the importance of alumni support. *It is important to remember that you are, in almost every case, calling alumni who have shown an interest in Swarthmore College through prior leadership level gifts, volunteer work, or in other ways.*

Preparing for the call

- Make your own gift or pledge before you begin your calls. It's much easier to ask someone to "join me in supporting the Annual Fund" when you have made your own commitment to the College.
- Give yourself an uninterrupted block of time and plan to make several calls in a row so that your momentum can build.
- Get to know the alumni you are calling by reviewing their phoning card/spreadsheet before making contact.
- Know what's happening at Swarthmore College. Visit the College's website www.swarthmore.edu for current information and keep up to date with College happenings through the Bulletin and other avenues of news.
- Remember, you are asking fellow alumni to invest in the future of Swarthmore College—just as others invested in your future (or in your son's or daughter's future).

Contact Tips

- **Be positive and optimistic.** Keep a smile on your face; your frame of mind is reflected in your voice!
- This should be your **second touch** with your classmate. Start out by **thanking your classmate for his/her previous support**. Inform your classmate about the social planning and the reunion fundraising goals. Explain that his or her Annual Fund gift is counted in the reunion total.
- **A direct ask for a specific amount is a proven way to increase gifts.**
 - Specific ask amounts work because they make the College's needs clear.
 - Many donors get stuck in a giving pattern, and will give more if asked.
 - Not all alumni will give their 'ask amount' but will increase their giving over the previous year's gift.
 - It's possible to negotiate downward, impossible to negotiate up. Remember payment options. Emphasize credit cards (www.gift.swarthmore.edu). Inquire about matching funds (www.matchinggifts.com/swarthmore).

- **An indirect ask towards the reunion goal** is a technique used by volunteers who aren't as comfortable making the direct ask for a reunion gift. In this approach, the dollar amount of the gift isn't mentioned. For example, "Every year is important when giving to the College, but in our reunion year it is a time to elevate our individual gifts as well as our collective gift to support the mission of the College. Please consider giving the amount suggested by the College in our latest reunion appeal letter." "I hope you will consider giving at the gift level as suggested by the College." "Your participation in the reunion goal would be greatly appreciated."
- **Always try to record a specific pledge.** Often a prospect will confirm that he/she will be sending a gift to the College, but will not present a specific amount. It is very helpful and important that we secure actual dollar amounts both to benchmark our overall progress toward our goal and also to stop us from continuing to send the prospect gift appeal letters. We have greatest success with alumni fulfilling pledges of specific dollar amounts.
- **Significant gift increases often require time for consideration.** If appropriate, plan the next contact during this call.

Possible Objections & Responses

Be prepared to handle objections. Sometimes you will encounter a classmate that has specific criticisms. Listen to the best of your ability. Feel free to say, "I don't know; however, I will find out and I will get back to you." If information is requested, promise to get it and follow through.

"I cannot give right now."

A pledge may be recorded at any time. If a commitment is made at the time of contact, pledge reminders will then be sent periodically as a reminder that the gift needs to be paid. A pledge payment can be spread out over several months, with completion by June 30.

"I support other causes that have greater need."

By giving to the Annual Fund, you are ensuring that there will be future generations of men and women who will work for and with these causes. Supporting the Annual Fund allows today's students to become tomorrow's leaders.

"I will not give because of a particular Swarthmore College policy or issue."

Allow your prospect to voice his/her opinion. If he/she asks you for your opinion about the issue, use your own judgment. Do not argue with the person. Depending on the issue, it may be appropriate to close the call as quickly as possible. If you wish to respond, try to "own" your answer, e.g. "It has been my experience that . . ." Please note any specific requests for additional information or if follow-up by a college administrator would be appropriate.

If possible, remind your classmate that Annual Fund gifts benefit people, specifically the current students of Swarthmore College. The largest portion of the money raised provides financial aid and faculty support. Choosing not to support the Annual Fund affects the student body and faculty.

“I just sent my gift.”

That’s wonderful. The phone call would then be turned into a thank you call. Thank your classmate for supporting the Annual Fund.

Gift Acknowledgments

Each volunteer is responsible for thanking donors he or she has solicited. A personal handwritten note or email is an important part of the fundraising process. A donor who believes that his/her gifts are appreciated each time one is made is more likely to continue giving than someone who received personal attention one time but not in the following fund years. The College will provide pre-stamped note cards for your convenience.

Class Awards & Reunion Records

McCabe Trophy - The class with the highest Alumni Fund percentage of participation among those graduating within the last 10 years.

Kay Bassett Award - The class with the greatest increase in dollars raised over their previous year's gift to the Alumni Fund (excluding the 50th).

President's Cup - The class with the largest total gift to the Alumni Fund (excluding the 50th Reunion class.)

Water Tower Trophy - The class with the highest percentage of participation among the Garnet Sages (classes that have celebrated their 50th reunion and have 20 or more solicitable members.)

The Class of 1937 Award in Memory of Dean Hunt - The class with the highest percentage of participation prior to their 50th Reunion.

Reunion Giving & Participation Records for the Annual Fund

Reunion	Dollars	Participation
2 nd	\$8,460 (1980)	56.92% (1960)
5 th	\$18,400 (2001)	67.20% (1983)
10 th	\$62,841 (1994)	58.50% (1979)
15 th	\$62,289 (1985)	58.13% (1992)
20 th	\$105,055 (1984)	75.61% (1990)
25 th	\$161,232 (1975)	76.60% (1987)
30 th	\$126,283 (1972)	77.67% (1982)
35 th	\$319,225 (1972)	77.30% (1952)
40 th	\$200,485 (1960)	80.09% (1964)
45 th	\$173,457 (1955)	87.15% (1962)
50 th	\$220,509 (1957)	94.50% (1939)
55 th	\$130,689.08 (1955)	83.56% (1951)

Fundraising Terms

College Fiscal Year: July 1 – June 30th

The Annual Fund: The College's highest fundraising priority, which provides money to maintain a balanced budget and flexibility to help support the operating budget at Swarthmore. Contributions are used to fund financial aid and faculty salaries, to purchase technology and equipment, and to maintain and operate Swarthmore's educational facilities, among many other initiatives.

Affinity: The group with which someone has a close relationship during /after college.

Appeal: The solicitation letter asking for a gift to the Annual Fund. The appeal consists of a personalized letter with a specific ask amount and a reply envelope.

Ask or Ask Amount: The amount the alumnus/alumna is asked to contribute toward the reunion goal.

LYBUNT: Refers to alumni who gave to the Annual Fund **Last Year but Unfortunatly Not This year.**

SYBUNT: Refers to alumni who gave to the Annual Fund **Some Year but Unfortunatly Not This year.**

BRE: Refers to Business Reply Envelope. The College generally provides BREs in appeal letters.

Segmenting: The separation of alums by specific criteria; i.e. class year, sports team, affinity. Segmenting is often used to send appeals aimed at a certain constituency.