

W&L's Class Agent Program

The success of Washington and Lee's Annual Fund each year is driven in large part by the work of Class Agent volunteers, who are the principal solicitors of gifts for the Annual Fund. Your connections are key. Class Agents inspire and connect with thousands of their classmates, sorority sisters, pledge brothers, teammates, and friends to make a lasting impact on the University through gifts to the Annual Fund.

REQUIRED QUALIFICATIONS FOR ALL AGENTS: Class Agents must be willing to solicit their classmates for gifts to the Annual Fund, as well as provide classmates with news and updates about W&L. Class Agents must be comfortable using email and navigating the W&L website (including logging into the Volunteer Management Site), as those channels are the primary means of communication between the Annual Giving office and volunteers. Class Agents must make a personal commitment (gift or pledge) to the Annual Fund by December 15 of each fund year. Class Agents agree to sign a confidentiality statement to protect the sensitive nature of our alumni giving records.

SUPPORT FOR ALL CLASS AGENTS FROM THE ANNUAL GIVING OFFICE:

- Regular training and support from an assigned Annual Giving office liaison.
- Occasional opportunities on campus and off campus to receive in-person training and meet other volunteers.
- Monthly memos with updates and direction from the office of Annual Giving.
- Electronic access via the Volunteer Management Site to regularly updated reports on all classmate gift activity and status of prospective donors.
- Postage and stationery provided, plus reimbursement for reasonable expenses such as printing and office fees.
- The Annual Giving staff handle production and mailing of all Class Agents' personalized letters and handle sending blast emails on their behalf.

RESPONSIBILITIES FOR ALL CLASS AGENTS:

- Make an Annual Fund commitment (gift or pledge) by December 15 of each Fund year.
- Maintain and personally contact between 20-30 assigned classmates through individual phone calls, emails, and notes (10-15 for Associate Class Agents). Work with Annual Giving staff to select classmates between October 1st and November 10.
- Assignments may change during the course of the year to meet class needs.
- Work with Annual Giving staff and fellow lead agents on a fall and spring appeal sent via direct mail, with optional follow-up email.
- During the 1st outreach period (end of calendar year/ December) connect with classmates to encourage end of year giving.
- During the 2nd outreach period (Spring/March), encourage the fulfillment of pledges by those classmates with outstanding pledge balances and focus on last year's donors.
- During the 3rd outreach period (April, May, June), work class specific 90/60/30 plan. (TBD with your staff liaison based on class needs and goals.)
- Log in on a regular basis to the Volunteer Management Site for updates on individual and class progress.
- Acknowledge the support of each assigned donor by sending a personal note of thanks.
- With assistance from the Annual Giving office, recruit associate agents.
- Attend regional and/or on-campus Class Agent training events when applicable.
- Participate in scheduled Class Agent calls on a regular basis.
- Time commitment may vary and may be discussed with the Annual Giving staff liaison.

If you are interested in becoming a Class Agent, please contact the Annual Giving office at 540-458-8420.