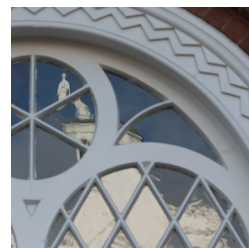




# Washington and Lee University

University Development • Annual Fund



CLASS AGENT MANUAL | 2018–2019



# Fundraising for W&L

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.

## **YOUR PRIMARY ROLE IN THE CLASS AGENT PROGRAM IS TO HELP US ACHIEVE THESE GOALS:**

- Increase overall undergraduate alumni participation and dollars to the Annual Fund
- Enhance communication between alumni and the university



Andrew Tate '98  
*Annual Fund, Chair*

Dear Class Agents,

The Class Agent volunteer network is an integral part of the success of the Annual Fund year after year. My wife Carson and I have both served as class agents and on reunion committees, so we understand first-hand the tireless efforts and spirit that ensure the continued success of the Annual Fund. To you and to all our volunteers, I am extremely grateful.

As you know, the Annual Fund contributes nearly eight percent of the university's operating budget each year and helps every single student by covering nearly \$4,897 in tuition in the current year. This helps elevate W&L from a great institution to an exceptional one. My personal goal this year is to successfully encourage donors to not wait until June to make their gift. While giving is the most important part, giving even a month or two earlier makes it much easier for our team to close the fiscal year with success.

The W&L experience is truly like no other, and together, we're helping bring these special experiences to others, now and in the future. As alumni and class agents, we play a key role in empowering W&L to reach even greater heights. It is truly amazing what we are able to accomplish together, and I can't wait to see what this year brings. Thank you for all you do.

Best regards,

## **OUR COMMITMENT TO YOU**

- To provide information and easy instructions to ensure class agents are equipped to represent W&L
- Ongoing staff support as needed
- Monthly communication with action plans, updates and other tips
- Prompt responses to your needs, questions, or concerns

# Talking Points/ Reasons to Give

- The Annual Fund creates a diverse community by enabling W&L to offer financial aid to every student who needs it.
- Annual Fund gifts enable the faculty to develop new courses and incorporate new technologies.
- Gifts to the Annual Fund make an immediate impact by providing opportunities for students to apply what they are learning in the classroom to real-world issues, developing skills that are essential to staying competitive in a global marketplace.

## It All Adds Up

- Gifts of **\$100** or less added up to **\$215,700** last year.
- Gifts of **\$500** or less added up to **\$887,335** last year.

### THE PRESIDENT'S SOCIETY is

Washington and Lee's recognition club honoring our most outstanding donors to the Annual Fund.



Leadership gifts, those of \$2,500 or more, typically account for close to 80 percent of the

Annual Fund. Membership is available to any donor who gives \$2,500 or more per year to the Annual Fund. There are tiered/reduced gift levels for younger alumni.

### THE 1749 CIRCLE is a special

philanthropic society recognizing and honoring the loyal alumni, parents, and friends who support the university consistently over time. This society is not about how much you give; it's about the simple act of giving, year after year. Membership is



granted after three or more years of consecutive giving. Currently, The 1749 Circle has over 13,000 members. These individuals have made a commitment to W&L year after year without fail.

### MATCHING GIFTS — Many

employers sponsor matching gift programs and will match any charitable contributions or volunteer hours made by their employees. The impact of your gift to Washington and Lee University could be doubled or even tripled. Encourage your classmates to visit [wlu.edu/support](http://wlu.edu/support), specifically the matching-gifts page to find out if their company has a matching-gift policy. Some companies match gifts made by retirees and/or spouses. Please email [matchinggifts@wlu.edu](mailto:matchinggifts@wlu.edu) if you have questions or need assistance.

### RECURRING GIFTS — Over the

course of a year you can make a more significant impact at W&L than you might be able to make if you give only once a year. Benefits of setting up a recurring gift include: set it and forget it; avoid unwanted mail and reminders from W&L, give in manageable increments that you can budget (the cost of a latte each month), and flexible plans that you choose from for automatic payments.

## TIPS FOR OUTREACH

- **Suggest a specific amount.** The direct approach, such as "Would you consider making a gift of \$\_\_\_\_\_ amount?" may work best for you.
- **Encourage participation.** W&L needs everyone to help reach its goal through their continuous support. Remind your fellow alumna/us that "We're all in this together." Even a small gift can make a big impact.
- **Report feedback.** Your ability to connect with alumni on a personal level provides W&L with greater access and insight into what is most important to them. The more informed the university is, the greater the opportunity to be proactive in addressing needs.
- **Be informed.** Visit the [www.wlu.edu](http://www.wlu.edu) website to familiarize yourself with this year's strategic plan and the university's mission statement.

## OVERCOMING OBJECTIONS

- **"I already gave."** Check to make sure the gift was in this fiscal year July 1–June 30. If not, report back to the alumna/us and ask if they would renew their gift for this year.
- **"I cannot afford to give because of (graduate school, new baby, retirement, new house)."** Alumni participation is critical to W&L's ranking and continued success. It also increases the value of your degree. Your gift, no matter the amount, is extremely important. There is leadership in the act of giving. May we count on you for a gift of \_\_\_\_\_? Often, class agents will ask for a gift in the amount of their class year. For example, the Class of 2010: \$20.10, \$201.00, \$2,010.00.

# Ways to Give

- ▶ Give Online: [support.wlu.edu/af](https://support.wlu.edu/af)
- ▶ Call the Annual Giving Office **540-458-8420**
- ▶ **Mail a check**, payable to Washington and Lee University, to:  
Washington and Lee University  
204 W. Washington Street  
Development Building  
Lexington, VA 24450-2116

## Class Agent Checklist

- ✓ Lead by example. Make your gift or pledge by 12/31
- ✓ Review your class goals and discuss strategy with your Annual Fund staff liaison
- ✓ Attend Class Agent and Reunion Chair Weekend
- ✓ Actively communicate and stay connected with your Annual Fund staff liaison
- ✓ Support Annual Fund challenges
- ✓ Utilize the Volunteer Management System (VMS)
  - ❑ Make selections, review assignments
  - ❑ Export class report monthly
  - ❑ Login frequently to review real-time progress to goals
- ✓ Connect with your assignments during the outreach periods and cycle through new contacts as the year progresses
- ✓ After your assignment makes a gift, be sure to follow-up with a thank you
- ✓ Ask your staff liaison about regional calling nights
- ✓ We want to get to know you better. Send us a picture and one fun fact about yourself to [annualfund@wlu.edu](mailto:annualfund@wlu.edu)

## Your Impact As a Class Agent

- ▶ **Drive** Participatory Gifts
- ▶ **Increase** Alumni Engagement
- ▶ **Keep your finger on the pulse** of the alumni community
- ▶ **Make an immediate difference** for student education

## Class Agent Fiscal Year 2018–2019 Timeline

### September

- Recruitment of new class agents
- Review class goals

### October

- Make selections for personal outreach

### November

- Familiarize yourself with new VMS
- Class Agent and Reunion Chair Weekend (11/2-3)

### December

- Support the Impact Challenge – 1st outreach period
- Work SYBUNT and lapsed donors
- Connect with classmates to encourage end-of-year calendar giving

### January

- Review end-of-calendar year reports
- Follow-up with fall LYBUNTS

### February

- Prepare for Spring Challenge

### March

- 2nd outreach period and Spring Challenge
- Encourage the fulfillment of pledges and focus on LYBUNTS

### April

- Class agents will shift to 90/60/30 day plan based on class needs — 3rd outreach period
- Class agent spring solicitation

### May

- Review assignments, pledges and class progress to goal
- Finalize class specific strategy for next 30 days

### June

- Final outreach efforts
- Celebrate success!