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,

Andrew Tate ‘98
Annual Fund, Chair
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.

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 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.

THE PRESIDENT’S SOCIETY

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.

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, 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 if you have questions or need assistance.

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.

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.
Ways to Give

- Give Online: 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

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!