

THE
WESLEYAN
FUND



**CLASS AGENT
HANDBOOK**

Fiscal Year 2011
(July 1, 2010-June 30, 2011)

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October 2010

Thank you for your willingness to volunteer on behalf of your class; you play an important role in the overall success of the Wesleyan Fund, and I am grateful that you make time for the University. This year, greater consistency in giving and better alumni participation are strategic priorities across all fundraising efforts for Wesleyan. I look forward to working with you as we strive to reach these goals together.

Specific FY2011 Wesleyan Fund priorities are:

- To raise \$10.5 million for the Fund
- To strengthen and enhance our volunteer structure
- To continue to build a pipeline of donors who make leadership gifts, and increase the number of those at the \$5,000 to \$25,000 levels
- To expand our focus on 10th and 35th reunion classes
- To develop a stronger tradition of consistency in giving to achieve 52% alumni participation

Please utilize this handbook as a guide for the year. If you have any questions as you read through its pages, please call me or your Wesleyan Fund class contact.

Here's to a great year!

Warm regards,



Richard Swanson '77
Chair, The Wesleyan Fund

At a Glance

Wesleyan Fund Executive Committee

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Harvey M. Bagg, Jr. '63

Norman R. Beaulieu '89

Andrew J. Calica '01, *Vice Chair*

Mosah Fernandez-Goodman '04, MALS '07

Delcy Ziac Fox '81*

Joshua Nathan Goldin '00

Jordan Michael Goldman '04

Peter Webster Harris '07

Ellika Anna Healy '10

*Past Chair

Dina R. Kaplan '93

Seth F. Kaufman '70

Steven A. Levin '75*

Richard A. Moreau '98

Ruth E. Pachman '78, *Vice Chair*

Jill Pearson Rappaport '78, P'13

Orin S. Snyder '83, P'13

Richard P. Swanson '77, *Chair*

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Class Agent Job Description

- Act as a liaison between classmates and the University
- Review and edit Class Agent letters and other correspondence
- Attend National Committee meetings
- Host/attend regional meetings with fellow Class Agents and Associate Agents
- Recruit and work with Associate Agents to solicit classmates for annual gifts
- **Make an early leadership gift commitment before asking others to give**

Communications and Events Timeline

August:

- Class Agent Letter #1, *Draft*

September:

- Class Agent Letter #1, *Mailed*
- Red and Black Calling Begins

October:

- Wesleyan Fund National Committee Meeting, *October 13, 2010, NYC*
- Homecoming/Family Weekend, *October 22-24, 2010*
 - Reunion Volunteers Meeting
 - Class Volunteers Thank You Tailgate Party
- Prospect Assignments sent to Class Agents and Associate Agents
- Fall Direct Mail
- Parents Fund Letter

November:

- 10th and 15th Reunion Gathering, *November 4, 2010, NYC*
- Fall Direct Mail Follow-up Emails
- Donor Associates Calendar
- Annual Update
- Winter Class Agent Letter/Email #2, *Draft*

December:

- Winter Class Agent Letter/Email #2, *Mailed/Emailed*
- Donor Associates Solicitation Mailing
- Year-end Emails (early, mid, and late December)

January:

- Wesleyan Fund National Committee Meeting, *January 12, 2011, NYC*

February:

- Volunteer Leadership & Board of Trustees Weekend – AAEC/WFEC Joint Meeting, *February 26, 2011, Middletown*

March:

- Registration for Reunion opens
- Spring Direct Mail
- Spring Class Agent Letters, *Draft*

April:

- GOLD (Graduates of the Last Decade) Parties, *across the country*
- Direct Mail Follow-up Emails
- Spring Class Agent Letters, *Mailed*
- Wesleyan Fund National Committee Meeting, *April 28, 2011 NYC*

May:

- Reunion & Commencement Weekend, *May 19-22, 2011*
 - Class Volunteers Thank You Breakfast
- Last Chance Print
- Last Chance Class Agent Emails

June:

- Last Chance Weekly Emails
- Last Chance Class Agent Emails

****Monthly Communications:**

- Anniversary Cards
- Reunion Emails
- Red & Black Emails

The Wesleyan Fund

Class campaigns take place within the context of ongoing annual giving efforts of the Wesleyan Fund. The Wesleyan Fund encourages alumni to recall and renew their Wesleyan ties by making annual gifts that support all undergraduate students through scholarships, student services, and teaching and research.

Through their gifts, many alumni step up to new levels of annual giving, joining a Wesleyan Donor Association. These gifts meet critical needs by sustaining giving between reunion years. Donor Associates are recognized at the following gift levels:



TRUSTEE ASSOCIATES	\$250,000 OR MORE
PRESIDENT'S CIRCLE	\$100,000 TO \$249,999
FOUNDERS CLUB	\$50,000 TO \$99,999
WILLBUR FISK ASSOCIATES	\$25,000 TO \$49,999
COLLEGE ROW SOCIETY	\$10,000 TO \$24,999
JOHN WESLEY ASSOCIATES	\$5,000 TO \$9,999
1831 SOCIETY	\$1,831 TO \$4,999
DOUGLAS CANNON CLUB	GOLD LEADERSHIP GIVING
FOSS HILL CLUB	GOLD CONSECUTIVE YEAR GIVING
DAY SOCIETY	CONSECUTIVE YEAR GIVING
OLIN ASSOCIATES	PLANNED GIFT

All gifts—no matter the size—count. Collective smaller gifts amount to considerable sums. In fiscal year 2009-2010, alumni, parents, and friends contributed \$10 million to the Wesleyan Fund. It would take almost \$200 million in endowment to generate that same level of support.

Alumni participation is also an important indicator of the strength of an institution and a statistic watched closely by philanthropic foundations and organizations. In a very real sense, a commitment to annual giving is tantamount to an ongoing alumni vote of confidence for Wesleyan.

The Wesleyan Fund has two vital goals:

- **Dollars through the Wesleyan Fund: \$10,500,000**
- **Participation: 52%**

Your volunteer role is an incredibly important one as you work on behalf of the Wesleyan Fund. Not only will you help your class achieve its goals, but you will also build support for the University and maintain Wesleyan's commitment to academic excellence and enhanced financial aid.

Ways to Give to Wesleyan

- **By Credit Card**
 - Online at <http://give.wesleyan.edu>.
 - Over the phone, at **860/685-2110**.
 - If you would like to make an automatic **monthly credit card contribution**, please visit <http://givemonthly.wesleyan.edu> or call Kathi Srubas at **860/685-2110**.

- **By Check**
 - Please mail checks payable to: **Wesleyan University, 318 High Street, Middletown, CT 06459**.

- **By Securities Transfer**
 - Giving appreciated stock or bonds to Wesleyan University is usually more advantageous than giving cash because if you give appreciated securities held longer than one year, you can deduct their full fair market value, regardless of what you originally paid for them.
 - Your total deduction is limited to 30% of your adjusted gross income in any year, but you can take any unused deduction over five succeeding tax years.
 - You pay no capital gains tax on the donated securities! With these tax savings, the actual cost of your gift is less than if you made a cash gift.
 - If you are giving securities to fund a trust or a life-income gift such as a Charitable Remainder Trust or Charitable Gift Annuity, please contact the Office of Gift Planning at **860/685-2519** for special transfer instructions.
 - Browse the instructions on giving appreciated securities at <http://wesleyan.planyourlegacy.org>, or call **860/685-2110** for Wesleyan's DTC number and further information.

- **Matching Gifts**
 - Please visit <http://www.matchinggifts.com/wesleyan> to find out if your company will match your gift.

- **Gift Planning**

Planned gifts can benefit Wesleyan while helping you to save taxes, increase your income and pass more on to your heirs. There are many ways to make a planned gift:

○ Appreciated Securities	○ Deferred Gift Annuity
○ Real Estate	○ Charitable Remainder Unitrust
○ Interest on Family Business	○ Charitable Remainder Annuity Trust
○ Personal Property	○ Retained Life Estate
○ Bequests	○ Charitable Bargain Sale
○ Retirement Plan	○ Charitable Lead Trust
○ Life Insurance	
○ Charitable Gift Annuity	

Please contact Mark Davis, Director, Planned Giving, at **860/685-3660** or mdavis@wesleyan.edu for more information.

Solicitation Strategy

1. Consider your own commitment first

You will be a more credible solicitor if you consider your own gift or pledge before asking anyone else for one—particularly if you are asking for a “stretch” gift. It is difficult to convince others to do something when you have not yet convinced yourself. Once you have made your own commitment and have thought about why Wesleyan is important to you and deserving of alumni support, you can use this reasoning with others.

Many people, even those with years of experience, are uncomfortable at the thought of asking others for money. Much of this discomfort can be allayed by remembering that you are asking on behalf of Wesleyan, not for yourself. It may also help to consider a solicitation as a two-sided transaction that offers several benefits to the donor: a chance to invest in something worthwhile, the opportunity to give back and help others, and the sense of being part of a successful effort.

2. Make the ask personal

Whether in person, by phone or by letter, make your ask as personal as possible.

There are many ways to ask classmates to join the effort. The most effective ways are the ones most comfortable for you—and for your classmate. When people list their reasons for giving, the number one response is **“I was asked.”** So remember, the important thing that we do is ask, with conviction and enthusiasm!

Consider these possible approaches and plagiarize at will! :

Peer persuasion? “A number of us have decided to commit gifts in \$X range, and we would like you to consider joining us...”

Inspiration? “Your name on the Honor Roll at X Donor Associate level will encourage some of our classmates to follow your lead...” or “I’m coming to you, on behalf of our class, because we need a core group of leaders to anchor the gift effort...”

Humor? “Our class giving goal this year is \$1 million. But don’t worry, we’re only counting on you for half...” or “I hope you’ll give until it hurts, then give a bit more until it starts feeling good again...”

Humor and inspiration? “I get to make some easy calls along with the tough calls—everyone knows you’re a softy for Wesleyan...” or “President Roth is standing by on his cell phone so I can give him the news of your leadership gift...”

Thanking the classmate into giving again? “Your generosity toward our school makes me enthusiastic about volunteering on Wesleyan’s behalf. Thanks for your past inspiration. I hope you’ll continue that trend...” or “Your \$5,000 gift last year helped us reach our ambitious dollar and participation goals—your leadership gift really helped. Thanks! This year...”

3. Make the case for Wesleyan

Review this handbook and talk to your Class Contact in the Wesleyan Fund so that you can make a strong case for giving to Wesleyan. Also, check out the Fund website at <http://www.wesleyan.edu/fund> and President Roth’s blog at <http://roth.blogs.wesleyan.edu> for updated information as to what is happening around campus. And always remember that gifts through the Wesleyan Fund support financial aid and current students’ everyday needs; your efforts make a difference. Don’t be afraid to talk about why you give and why you are serving as a volunteer. Your own example is likely to be the most powerful argument you will bring to your solicitation.

4. During your solicitations...

Explain your mission

Weak lead: “Sorry to bother you...”

Strong lead: “I’ve been looking forward to speaking with you about our class and your annual gift.”

Make the case for giving

Weak lead: “I know that you just bought a house, started a new job, and had a child, so you’re in transition, and money is pretty tight, but...”

Strong lead: “We all have other commitments this year, but I hope you’ll put Wesleyan at the top of your list—giving back to the place that gave us a great start...”

Ask for a specific amount

By asking for a specific dollar figure, you convey the importance of the gift and signal the kind of commitment others are being asked to make. Where appropriate, remember to discuss the advantages of gifts of stock, Planned Giving, or matching gifts.

- Direct ask: “I hope you will consider a gift of X.”
- Peer ask: “A number of us are committing X, and we’d like you to join us” or “I’m considering a gift in the X-Y range and hope you will too.”
- Bottom-line ask: “We’re asking everyone to consider a gift of X. How do you feel about contributing at that level?”

Weak lead: “Can you believe they have you down for \$10,000?”

Strong lead: “I’ve committed \$10,000 to the gift effort for the following reasons...I hope you’ll reflect on your own experience and consider a commitment of X.”

Weak lead: “I feel very awkward doing this, but...”

Strong lead: “I don’t know whether this will shock or flatter you, but we’d like you to consider a gift of X.”

Don’t drop your ask amount too soon

Wait for a response and listen carefully. Address the root cause for the response and answer questions. Don’t assume that hesitation means no, and don’t provide an easy out by asking for a minimal gift.

Weak response: “I know it’s a lot of money...”

Strong response: (Silence)

Respond to objections

See the next section and review it before your calls.

5. Follow up after the solicitation

- a. Send your classmate a personal note of thanks.
- b. If your classmate prefers to think about a gift, agree on a specific follow-up plan.
- c. Take notes accurately to reflect commitments and questions, and report the outcome to your staff contact in the Wesleyan Fund.
- d. Of course, it is essential that we treat any sensitive information that your classmate may share with great respect; please discuss your results only with your staff contact.

Quick Responses to Common Objections

I give to other causes, or I feel as if my dollars have more impact closer to home.

- That's wonderful! But your support of Wesleyan will help educate people at the forefront of solving issues we all care about.
- Think about your charitable giving like investing—diversify your philanthropic portfolio.

Wesleyan is rich—it doesn't need my money.

- Yes, it does! Wesleyan does not have as large an endowment as most of its peers.
- For FY2011 the endowment draw will cover only about 14.5% of the annual budget.
- Tuition covers only approximately 70% of the true cost of a Wesleyan education per student per year. The remainder is made up through the endowment and annual gifts from alumni, parents, and friends.
- Wesleyan needs unrestricted funds to support academics, scholarships, and student life.

Why should I give? I don't always agree with what's happening at Wesleyan.

- Acknowledge the concern.
- Wesleyan has always reflected the changes in society at large.
- Consider whether, on balance, Wesleyan is true to its mission, and what value it contributes to the world and the lives of its alumni.

Wesleyan is too liberal (or too conservative).

- Wesleyan viewpoints are abundant—and they always have been.
- Wesleyan itself doesn't promote a specific agenda, but rather a liberal arts experience that is making a difference.
- The University is an open forum by design. It cultivates independent thought and academic excellence.

Wesleyan is no longer the place it was when I was there.

- Wesleyan has always reflected the changes in society at large.
- Today, Wesleyan students may live in a different time and climate, but their experience is fundamentally the same—they are here to learn as much as they can, to develop their passions, talents, and friendships in the few years that fly by much too quickly.

The only time I hear from Wesleyan is when they're asking for money. I don't feel close to Wesleyan.

- It's never too late to reconnect with Wesleyan.
- The University does care about alumni and values alumni involvement. Your knowledge and expertise are tremendous assets that can benefit the University. Alumni participation strengthens the Wesleyan community. Alumni are involved in many volunteer roles across the University, from serving on advisory boards and committees to tutoring and helping out at events. Talk to your Staff Contact about your interests and we'll help find the right way for you to reconnect.

This isn't a good time for me to make a gift, with the economy the way it is.

- Be sensitive, but don't take a reflex "no" as definitive.
- Wesleyan's needs continue. We are currently looking at more ways to economize without sacrificing our high standards. Annual gifts help Wesleyan meet ongoing needs, even in an unpredictable economy.
- Virtually everyone can make a modest gift; even a small gift will be appreciated and will count toward the class's participation goal. Participation in giving is an important measure of a university's strength.
- "Many of our classmates are considering a planned gift. In light of your circumstances, would this be something you would like to consider?"

My relative wasn't admitted to Wesleyan.

- Acknowledge the pain of this experience.
- "Where did your child/grandchild go to school? What was his/her experience like?"
- Wesleyan's admission staff has a tough job: they received more than 10,000 applications for approximately 700 places. They try to balance the "legacy factor" with all other considerations.

All the practical things I learned came in graduate school or through my work.

- Remind them of the value of a liberal arts education as a foundation for graduate education, professional success, and lifelong learning.
- A Wesleyan education teaches students to think critically, and it provides the foundation from which graduates can make the most of graduate school and workplace opportunities.

Wesleyan doesn't care about science; everyone is a writer or an artist.

- Actually, science majors have increased 40% over the past three years and there has been increased demand for science classes from both science majors and non-majors.
- Wesleyan is in the top ten of baccalaureate colleges sending students on to Ph.D. programs in the sciences. A high number of our faculty has received competitive Career Awards from prestigious organizations such as the NSF (National Science Foundation) and NIH (National Institutes of Health).
- Wesleyan's current major academic initiative is the College of the Environment, an interdisciplinary program in which the sciences play a key foundational role. There is high student interest in this program.
- Wesleyan is unusual among liberal arts schools in the opportunity it gives undergraduates to work side by side with practicing laboratory scientists during the academic year and in summer research internships. One of the agencies supporting these programs is the Howard Hughes Medical Institute (HHMI). In April 2008, HHMI announced a new \$1.4 million grant toward the Wesleyan Hughes Program 2008-2012. The various facets of the program support student independent and team research, advanced laboratory courses, equipment for faculty, outreach efforts to broaden exposure to science and increase representation of underrepresented groups, interdisciplinary thinking and collaborations, and public understanding of science.

Wesleyan doesn't care about sports, and being on a team was an important part of my experience.

- Wesleyan has a strong tradition of great scholar-athletes and we are honoring that history with our Athletic Hall of Fame; the fourth class will be inducted during Homecoming/Family Weekend '10—including the '69 undefeated football team.
- We've started a new era in Cardinal football this year, with Mike Whalen '83 returning to his alma mater as head coach. He had a terrific record coaching at Williams and is bringing high energy, expertise, enthusiasm, and expectations to Wesleyan.
- Highlights of last year (2009-10) included:
 - Softball: Won their first-ever NESCAC tournament title. Qualified for the NCAA Division III tournament. Placed 3 players on the all-NESCAC first team.
 - Men's Soccer: Ended regular season ranked 1st in New England, 4th nationally. Made it to Sweet 16 round of NAAs. Freshman goalie had 9 shutouts. 6 All-NESCAC players.
 - Baseball: Second straight year in NESCAC tournament. 2 players on All-NESCAC first team (one with a .418 batting average, the other a 7-3 record pitcher). A third player set the all-time Wesleyan career RBI record.

Why should I give to the Wesleyan Fund? Doesn't the endowment need help?

- Yes, both need support. Your Wesleyan Fund gift has the same buying power for the University as a gift twenty times its size to the endowment. Your Wesleyan Fund gift allows the University to implement programs and initiatives today.

2010 – 2011 Wesleyan Fund Class Agents

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Alumni Resources

Wesleyan Fund Homepage: www.wesleyan.edu/fund

Online Giving Page: give.wesleyan.edu

President Michael S. Roth's Framework for Planning Wesleyan's Future:
2020.blogs.wesleyan.edu

President Roth's Blog: roth.blogs.wesleyan.edu

National Committee Facebook Page: <http://www.facebook.com/group.php?gid=50482470291>

Accessing Wesleyan E-mail: www.wesleyan.edu/alumni/helpdesk/faq.html#email

Forgot Password: www.wesleyan.edu/alumni/helpdesk/faq.html#password-reset

Homecoming/Family Weekend 2010: www.wesleyan.edu/hcfw

Reunion & Commencement 2011: www.wesleyan.edu/rc