

CLASS AGENT HANDBOOK 2009-2010

Wel come to the class agent program for the 2009-10 fiscal year! Class agents play an integral role in the college's fund-raising efforts. Your letters provide a personal touch, which is a valuable asset in soliciting gifts from your classmates for The Lawrence Fund. Over the years, the class agent letters have consistently been among our best sources for gifts. Your willingness to share the importance of The Lawrence Fund with your classmates means a great deal to the future of Lawrence. We try to make this as easy and fun for you as possible. Please read through the handbook at your earliest convenience for these details, and feel free to contact us at (920) 832-6897 or annual.giving@lawrence.edu if you have any questions. The timeline below provides an outline of this year's program.

Thanks to all of you for your work on this project!

Benjamin C. Campbell '97
Associate Director of Annual Giving

Class Agent Program Timeline

Please make note of the following deadlines and pay particular attention to the shaded boxes.

| <i>Date</i> | <i>Who</i> | <i>Action</i> |
|--------------------|---------------------|---|
| May 14 | Lawrence | E-mails/mails FY10 Timeline and Fall Preferences Form |
| June 1 | Class Agents | E-mail or mail completed FALL CLASS AGENT PREFERENCES FORM by Monday, June 1. |
| Mid-July | Lawrence | E-mails/mails Fiscal Year 2008-09 Report and mails thank you postcards for agents to sign and send out. |
| July 31 | Class Agents | E-mail or mail text for fall agent-written letter by Friday, July 31. |
| Mid-August | Lawrence | Sends printed letters to class agents to add personal greetings, notes, and signatures. |
| August 31 | Class Agents | Return personalized letters to Lawrence (postmarked) by Monday, August 31. |
| September | Lawrence | Mails class agent letters to all alumni classes. |
| November 13 | Lawrence | Mails thank you postcards to agents to sign and send out. |
| December 31 | Class Agents | First contacts with three classmates should be finished by December 31. |
| February 11 | Lawrence | E-mails/mails Spring Preferences Form |
| March 1 | Class Agents | E-mail or mail completed SPRING CLASS AGENT PREFERENCES FORM by Monday, March 1. |
| March 16 | Lawrence | Mails thank you postcards to agents to sign and send out. |
| March 22 | Class Agents | E-mail or mail text for spring agent-written letter by Monday March 22. |
| Early April | Lawrence | Sends printed letters to class agents to add personal greetings, notes, and signatures |
| May 3 | Class Agents | Return personalized letters to Lawrence (postmarked) by Monday, May 3. |
| May | Lawrence | Mails class agent letters to all alumni classes. |
| June 25 | Class Agents | All end-of-year follow-up calls and e-mails to classmates should be finished by this date. |
| June 30 | Lawrence | The fiscal year ends! All gifts must be in to Lawrence. |
| Mid-July, 2010 | Lawrence | E-mails/mails Fiscal Year 2009-10 Report and mails thank you postcards for agents to sign and send out. |

PLEASE NOTE: It is very important that you adhere to this timeline, so that we can get your letters in the mail on time!

Procedures

- **Make your gift!** Start the year off right for your class by making your gift to Lawrence today. Lead your class to success by giving at a level that is personally meaningful. We encourage all class agents to consider joining one of our three giving clubs. Setting up a monthly charge to your credit card is an easy way to give more than you ever thought you could!

Join **The Founders Club** for twelve monthly payments of \$84 each, for a total gift of \$1,000.

Join **The Viking Club** for twelve monthly payments of \$42 each, for a total gift of \$500.

Join **The Heritage Club** for twelve monthly payments of \$21 each, for a total gift of \$250.

- Read through the enclosed information to get into the swing of the class agent cycle.
- Don't forget to let us know if you'll be signing or personalizing your letter. You can e-mail Ben to let him know by **June 1**.
- Next, start thinking about what your letter will say. Please go to the Class Agent website for sample letters - http://www.lawrence.edu/dept/development/Class_Agent/ca_samples.pdf
- Once it is written, send your letter to us **no later than Friday, July 31**. If you submit your letter by e-mail, you do not need to mail a hard copy. You should receive an e-mail confirmation within three business days that we received your letter text – *if you do not receive this confirmation, please call or e-mail to make sure we received it!*
- When you receive the printed letters (in mid August), please personalize them as you wish. Return them to Lawrence promptly (**no later than Monday, August 31**) for us to assemble and mail.
- Periodically you will receive a packet of **thank-you postcards** for your classmates who have given to The Lawrence Fund. All you need to do is sign them, write a short note of thanks, and drop them in your mailbox.

How to contact us

We're here to help you! If any questions or problems arise, please let us know.

Address: Office of Annual Giving • Lawrence University
P.O. Box 2697 • Appleton, WI 54912-2697

Fax: 920-832-6784

Phone: 920-832-6936 or 1-800-283-8320 (Please ask for me by name.)

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FREQUENTLY ASKED QUESTIONS

What are our goals?

In the past, we have pushed participation as the most important reason to give to Lawrence. It helps us in the U.S. News rankings, helps us receive grant funding, and shows prospective students that alumni care about their alma mater. But participation for participation's sake is not a reason to give. Participation should be a fantastic side effect from alumni who love Lawrence and want to see the college succeed. *Our goals are to:* • *get our alumni excited about giving back to Lawrence* • *build a stronger Lawrence Fund that can provide today's students with the tools they need to succeed in college and in life* • *help people believe in the power of a Lawrence education and want to share that with as many people as possible.* Alumni are Lawrence's strongest supporters – with your help, we can grow The Lawrence Fund to support the college now and into the future.

Challenge your classmates to increase their giving – by a little every year. Not only do we need broad donor support, we also need our loyal donors to help us keep up with the rising costs of educating our students. Encourage your classmates to increase their total gift by breaking it up into manageable chunks! They can easily increase their giving by calling our office to set up a monthly, quarterly or semi-annual pledge.

What is the difference between a class secretary and a class agent?

Class agents help raise money. Class secretaries keep the alumni relations office and *Lawrence Today* informed about their classmates and often help plan reunion activities. Occasionally, an individual may serve in both capacities for his or her class.

Am I the only class agent from my class?

Not necessarily. Some classes may have more than one agent.

How long do I serve as class agent?

Class agents serve from reunion to reunion (usually five years), with the option at the end of that term to renew their position or pass it on to another classmate.

What is the relationship between the alumni office and the development office?

The alumni and development offices work closely together to involve alumni in a continuing supportive relationship with the college. The development office oversees all fund-raising activities with alumni and other friends of the university (e.g., the class agent program, phonathon, annual giving, planned giving, and milestone reunion gifts). The alumni relations office focuses attention on all programs other than fund-raising (e.g., class reunions, class secretary program, alumni club and chapter activities, and alumni career consultant program).

What are the dates of the Lawrence University fiscal year?

The Lawrence University fiscal year begins on July 1 and ends the following June 30. Annual gifts for fiscal year 2009-10 must be received by June 30, 2010 to be counted.

What is your pledge system?

Instead of sending a gift right after receiving a solicitation letter, some people send in a *pledge* to give later in the fiscal year. Other people plan their giving in advance by making a two- or three-year pledge, so that they receive reminders for that pledge instead of our regular cycle of calls and mailings. Pledge payments can be scheduled monthly, quarterly, semi-annually, or annually.

Who will NOT receive a letter from me?

- Anyone who has requested that his or her name be removed from our mailing list.
- Anyone for whom we have no current mailing address.
- Anyone who has already made a gift or pledge.

What if I spend extra money on this project?

If you have any personal expenses, such as phone calls, stationery, or additional postage, the development office can reimburse you or credit you with an additional gift. Please make certain that you send an itemized list of expenses so that you may be properly reimbursed or receive appropriate gift credit. The cost of printing the letter and all postage will, of course, be paid by Lawrence.

What else can I do to improve the response of my class?

If you have chosen to write your own letter for the March mailing, any amount of extra personal attention you can add to your letter or your approach will make your efforts even more successful, and your class's response even greater. Consider using names and phrases that only your classmates would recognize, or refer to events that might be well remembered by your class. Many class agents take the time to sign each letter and write a postscript. Doing so only takes a short period of time, and it really is a terrific way to make your letter stand out from other letters they receive.

How do my letters fit into the alumni fund-raising picture?

The development office raises money for Lawrence through mail appeals, phone calls, and personal visits. In fiscal 2010, Lawrence will send four fund-raising letters to alumni. Two of these letters come from class agents. The phonathon employs students throughout the academic year to make phone calls updating our alumni records and requesting gifts to The Lawrence Fund. Development staff members and volunteer peer solicitors visit or make personal phone calls to select alumni who may have the potential for a significant gift. The development office also tries to utilize e-mail whenever possible, be it a holiday reminder to make a gift before December 31 and beat the tax deadline, or to simply make an opportunity to thank all the generous alumni who give to Lawrence each year.

What if I have conflicts with the timeline?

We have tried to arrange the schedule to avoid asking you to work on your letters over the winter holidays, but we are happy to accommodate individual schedules. *If you foresee any difficulties or delays in submitting your letter text on time or personalizing your letters and mailing them to us for either letter, please let us know in advance so we can make alternate plans.*

THE CLASS AGENT PROGRAM **and its role in Lawrence fund-raising**

The Class Agent Program

You are a leader in your class – your role as class agent expresses your endorsement of Lawrence’s mission and The Lawrence Fund’s purpose: to keep Lawrence thriving from year to year. In addition to your endorsement, you lead your class by setting an example. Your own support of The Lawrence Fund – financially and philosophically – shows your classmates how much Lawrence means to you. With your service, you lead the way into Lawrence’s successful future.

Importance of Your Job

Class agent letters traditionally receive a better response than most other solicitations sent by Lawrence. As a class agent, your goal is to motivate your classmates to give to The Lawrence Fund by communicating the importance of broad-based financial support from alumni at all gift levels. These letters are the vehicle through which we can convey the importance of alumni giving *in the words of a respected peer*, and thus increase our alumni donor participation rate. Through this letter, we are counting on you to convince your classmates that giving is an important and rewarding experience. If, for some reason, you cannot write your own text, please let us know ASAP so that we can make other arrangements.

The Lawrence Fund

The Lawrence Fund consists of all gifts received within a given fiscal year (July 1 - June 30) from alumni, parents, friends, corporations, and foundations in support of Lawrence’s current expenses for educational programs and operations. All unrestricted gifts, and those gifts restricted for currently budgeted operations, are placed in The Lawrence Fund. This fund helps bridge the gap between what it costs to operate Lawrence and the funds received from tuition, endowment income, and grants. Since The Lawrence Fund supports the basic necessities of operating the college, it is the foundation of the college’s entire fund-raising effort.

The Milwaukee-Downer Sesquicentennial Scholarship

Many Milwaukee-Downer alumnae choose to make an unrestricted contribution, but they also have the option of designating their gift to a special segment of The Lawrence Fund, the Milwaukee-Downer Sesquicentennial Scholarship. Each year, in the spirit of Milwaukee-Downer women’s education, a freshman woman is selected to receive funding from this scholarship, and continues to receive the scholarship for the duration of her time at Lawrence. Thanks to the generosity of the Downer alumnae, this scholarship has been expanded to support a full “generation” of women students – one freshman, one sophomore, one junior, and one senior! Giving to the Milwaukee-Downer Sesquicentennial Scholarship is a way for Milwaukee-Downer alumnae to carry on the tradition of Milwaukee-Downer learning and heritage.

The Importance of Alumni Giving

In addition to the direct impact annual alumni gifts have on Lawrence's educational quality (by providing the money to buy books, pay the faculty and staff, stock the labs, heat the classrooms and residence halls, cover scholarships and grants, etc.), a strong alumni donor participation rate is also a source of pride for the university and an index of alumni loyalty. Publications such as *US News and World Report* compare alumni donor participation rates to rank colleges in terms of alumni satisfaction. Corporate and foundation donors use alumni donor participation to assess alumni loyalty when determining philanthropic support. The world is watching, meaning that the faithfulness of alumni donors can have a direct impact on the college's ability to attract prospective students and win funding from corporations and foundations.

A Personal Call for Support

In the fall, we ask you to consider choosing three classmates to call or e-mail to encourage their support of The Lawrence Fund. You may choose whoever you like! In spring, we will also provide you with a short list of your classmates who have given in recent years but have not yet renewed their support. You can call, e-mail, or write notes to these alumni, reminding them of our June 30 fiscal year-end and encouraging their support before then. This is an optional activity, but we do hope that you will participate.