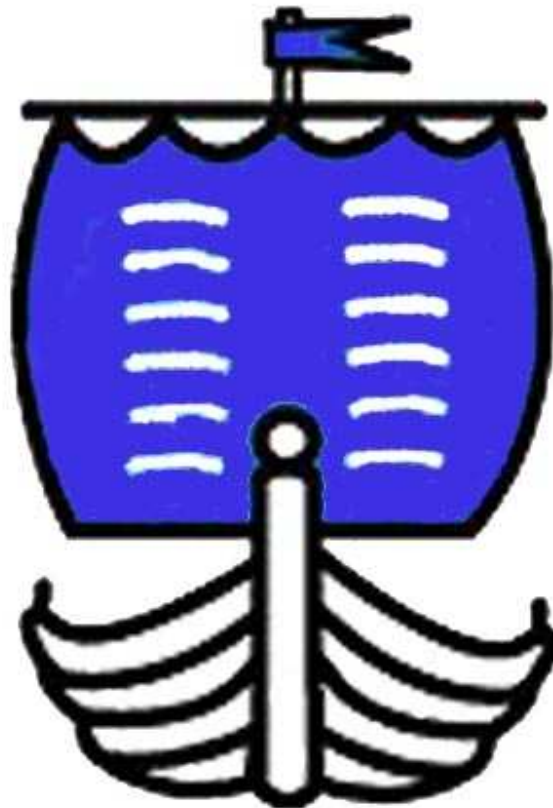


Today's donors provide the foundation
for tomorrow's support.



Viking Gift Committee
Handbook
2009-2010

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What is the Viking Decade and Viking Gift Committee?

The Viking Decade is a peer communication program focused on fostering alumni relations and philanthropy among alumni of the most recent decade (Classes of 2000-2009).

The Viking Gift Committee (VGC) is a division of the Viking Decade Program. It is a peer solicitation committee that communicates the importance of alumni donor participation and solicits financial support — at any level — for The Lawrence Fund.

Why is the Viking Gift Committee Important?

Communicates the importance of alumni donor participation

For many years, Lawrence has prided itself on an alumni donor participation rate hovering around the 50 percent mark, placing the college among the top 25 schools in the nation on this measure. In addition to the direct impact annual alumni gifts have on Lawrence's educational quality (by providing the money to buy library books, support faculty salaries, stock the labs, heat the buildings, cover scholarships and grants, etc.), a strong alumni donor participation rate is also a source of pride for the college and an index of alumni loyalty.

Moreover, publications such as *US News & World Report* compare alumni donor participation rates to rank colleges in terms of alumni satisfaction. Because corporation and foundation donors use alumni donor participation to assess alumni loyalty when determining philanthropic support, the faithfulness of alumni donors does impact the college's ability to gain support from these granting institutions.

Increases young alumni donor participation

While our overall alumni donor participation rate for 2008-09 was 43.2 percent, the rate among young alumni (Classes of '00-'08) was 25.7 percent (a slight decrease from fiscal 2009).

Comparatively, during the mid 80s young alumni giving ranked close to 50 percent. It is of particular concern that members of the nine most recent graduating classes are less likely to support Lawrence financially than were their counterparts two decades ago. This decline is of concern both because of its immediate impact and because of its future implications. Today's donors provide the foundation for tomorrow's support, so lessened participation from younger alumni now may mean less participation from those classes in the future as well — thus placing Lawrence's future quality at risk.

Peer solicitation = Increased donor participation

In an attempt to understand the reasons for the decline in alumni participation and to communicate the importance of alumni contributions at all gift levels, the development office started a peer solicitation project in 1997. Volunteers from three young alumni classes contacted their classmates to communicate the importance of alumni donor participation and to solicit financial support of the college at any level. **In the program's first year, young alumni participation rose over four percentage points.**

The program's success is still growing. For example, those in the Viking Decade solicited by members on the Viking Gift Committee in fiscal 2009 had a 36.2 percent participation rate, compared to those not solicited by their peers having a 21.9 percent participation rate. **It is evident, then, that the Viking Gift Committee — and *your* participation as a peer educator and solicitor — has the potential to maintain and improve Lawrence's donor participation.**

Overall Committee Goals

- 1) Increase awareness of The Lawrence Fund and its purpose and the importance of alumni contributions — at any level — to the college.
- 2) Solicit contributions and boost donor participation among young alumni.
- 3) Facilitate communication between classmates and rekindle fondness for Lawrence.
- 4) Gather updated information for Lawrence's alumni records (address, phone numbers, e-mail, occupation, graduate program/business, marriage, children, etc.)

Detailed Objectives

- 1) Communicate these messages to classmates:
 - **All gifts count equally in our donor participation rate**, which is both a source of pride for the college and a means of securing grants from corporations and foundations.
 - **Every bit helps.** Even small gifts make a difference at Lawrence. For example, it takes \$25 or less to provide: basic lab equipment for science courses, a few hours of student tutoring, multi-media instruction materials for various courses, various supplies for theater productions, and much more.
 - **Many small gifts add up to a very significant amount.** Last year LU received over \$116,000 in gifts of \$50 or less. Each gift, no matter the amount, makes a positive impact in two ways: first it adds to total dollars raised and second it boosts participation.
 - **Each gift is important** not only because of the direct support it provides, but also because of the symbolic message it sends — no matter what the amount, your gift shows you care about Lawrence.
- 2) Get feedback from peers regarding their feelings for Lawrence, their reasons for giving or not giving, etc.

Viking Leadership Council

The Viking Leadership Council was a new addition to the Viking Gift Committee in 2007-08. It will consist of a representative from each class in the Viking Decade. This year, the Leadership Council will have representation of VGC members from the Classes of 2001, 2002, 2003, 2004, 2005, 2006, 2007 and 2009. Members of the Viking Leadership Council will be an additional point of contact between the college and

other Viking Gift Committee members. It is our hope that each council member will communicate with the VGC members from their class throughout the fiscal year about important information regarding The Lawrence Fund and help bolster competition between each class in the decade.

Member Responsibilities

Gift Committee Chair

- Make a gift or pledge to The Lawrence Fund early in the fiscal year.
- Lead the Viking Gift Committee effort; serve as the liaison between the development staff and the committee. Work with the development office in establishing program goals, messages, and methods.
- Refer problems to the development staff and provide feedback and suggestions for improving the program.
- Draft and sign letters on behalf of the committee.

Viking Leadership Council

- Make a gift or pledge to The Lawrence Fund early in the fiscal year.
- Serve as an additional point of contact between the development office and committee members.
- Review committee members' progress as reported by the development office and contact committee members regularly to review their progress and plans.
- Ensure that each committee member is making contacts and informing the development office and chair of progress.
- Participate in committee meeting(s) via conference calls and relay important information to committee members from their class.
- Assist the chair and development office as necessary in identifying and recruiting other committee members.

Gift Committee Members (including chair and council members)

- Make a gift or pledge to The Lawrence Fund early in the fiscal year.
- Review Viking Gift Committee materials; if appropriate, give council member and/or development staff feedback on program goals, messages, and methods.
- Each committee member will select 10-15 classmates whom they are willing to solicit personally over the course of the fiscal year as it fits into their schedule. With overlap among committee members' selections and early gifts by classmates, each committee member will end up soliciting about 10 classmates.
- Personally solicit about 10 alumni for gifts to The Lawrence Fund early in the fiscal year.
- Keep track of each contact using the forms provided; send these forms to the development office or e-mail contact results to kate.e.hatlak@lawrence.edu. Report regularly to the appropriate council

member or development staff about the results of these solicitations as well as any concerns and feedback from alumni that may affect the success of the program.

- After securing a pledge, promptly inform the development office so staff can record the pledge and send the appropriate pledge materials to the donor.
- Cultivate enthusiasm for the Viking Gift program among fellow alumni.

Development Staff

- Assist committee members with personal calls and solicitations.
- Send monthly updates to committee members — reporting new gifts/pledges.
- Communicate regularly with chair, council members, and committee members throughout the year.
- Schedule and assist in conference calls with chair and council members (every 6-8 weeks).
- Assist in drafting direct mail solicitations with chair.

Viking Gift Committee Timeline

Date/Month	Who	Action
August	Lawrence	<ul style="list-style-type: none"> Mails/e-mails class lists needed to chose solicitation assignments.
August	VGC Members	<ul style="list-style-type: none"> Submit solicitation list and any updated contact information (address or employment) to Lawrence
September	Lawrence	<ul style="list-style-type: none"> Mails/e-mails handbook, solicitation contact forms, and other materials needed to begin calling classmates. First direct mail solicitation (class agent letter) sent to young alumni (2001- 2009) who have not made a gift/pledge.
October-March	VGC Members	<ul style="list-style-type: none"> Contact 10 alumni for their support of The Lawrence Fund. Report all new gifts/pledges and updated contact information to the development office.
November	Lawrence	<ul style="list-style-type: none"> Second direct mail solicitation sent to all young alumni who have not made a gift/pledge. All <i>unassigned</i> young alumni begin to be called by student phonathon.
December	Lawrence	<ul style="list-style-type: none"> Holiday e-mail solicitation sent to all alumni who have not made a gift/pledge.
February	Lawrence	<ul style="list-style-type: none"> Third direct mail solicitation sent to young alumni who have not made a gift/pledge.
March	Lawrence	<ul style="list-style-type: none"> All <i>assigned</i> young alumni begin to be called by student phonathon, unless requested otherwise by a committee member.
May	Lawrence	<ul style="list-style-type: none"> Fourth direct mail solicitation (class agent letter) sent to all young alumni who have not made a gift/pledge.
June	Lawrence	<ul style="list-style-type: none"> End of year e-mail solicitation sent to all young alumni who have not made a gift/pledge.
June 30	Lawrence	<ul style="list-style-type: none"> Fiscal year ends! All gifts must be in to Lawrence.

Simple Step-By-Step Instructions for Making Your Calls

Review the information you have received.

- This handbook will help you in making your calls effectively.
- If you have questions, call **Kate Hatlak '08 (800-283-8320, Ext. 6552 or 920-832-6552)**.

Psych yourself up!

- **You are doing a good and worthwhile thing for Lawrence** — helping your college give a first-class education to 1,400 deserving students each year. Keep that in mind as you call.
- **Plant the seed.** Maybe they won't give right when you call them, but they may respond to the next mail appeal.

MAKE YOUR CALLS — EARLY, EARLY, EARLY!

- Don't wait! Get on the phone and call your friends NOW. **The longer you wait, the harder it is to make the calls and the less time you give them to make it more affordable (giving early = more installments).**
- **Once a gift is made to Lawrence — that individual will not be contacted by Lawrence (solicited via letter, e-mail, or phone call) until the following fiscal year!**
- Think about making your calls all at once rather than one at a time, or put yourself on a schedule to make your calls.
- Use humor. You can quickly deflate awkwardness by making a gentle joke.
- Anecdotal evidence shows that one of the top reasons why LU grads give money back to their alma mater is the thought that their gifts will help fund scholarships for students. **Emphasize this point.**
- **Let your friends know the purpose of your call up front**, then spend some time catching up before asking for their gift.
- *Ask for a specific amount!* Begin with the suggested ask amount and work your way down from there.
- Mention the Viking Gift Committee goal — 50 percent participation! (Last year the committee reached 36.2 percent, this year we're confident we can reach and even surpass 50 percent!)
- If a classmate is resistant to your initial solicitation, persist and explain that even small gifts do have a symbolic importance and do make a difference at Lawrence. Offer to call again in a few weeks.

Notify Kate of any pledges by returning the Forms.

- As soon as you secure a pledge, contact Kate Hatlak '08 via phone or e-mail with the news so the pledge can be recorded and your classmate can receive an acknowledgement from the college.

Celebrate your success and say THANK YOU!

- Don't forget to thank them for giving to The Lawrence Fund. Once you notify Lawrence of their gift, the development office mails a thank-you letter to them.

Tips on How to Solicit

The following suggestions are for both **personal visits** and **telephone conversations**. There are no big secrets, but those who enjoy and believe in what they are doing are most successful!

Here are some suggestions:

- **Find common ground.** A visit or call to a classmate can bring back memories of class activities and accomplishments. Finding something to talk about should be easy.
- **Listen.** Pick up cues from your classmates. Try to understand their interests, dreams, values, and concerns.
- **Discuss common concerns.** Discuss the educational and social experiences Lawrence has made possible — the lasting friendships and successful careers that began at Lawrence. Show that broad participation involving gifts of all sizes will make similar experiences available for present and future generations. No student ever pays the full cost of his or her education. We have all been helped by our college education to succeed, and we owe it to ourselves and to future Lawrentians to give something back.
- **Discuss participation goal.** This is the most important part of your message, and the theme of the Viking Gift Committee. Roughly 50 percent of all Lawrence alumni give to the college every year, but only 26.9 percent of young alumni contributed last year. Thus, in soliciting contributions, *focus on the need for participation, especially in young alumni classes.*
- **Tell your classmates about the Gift Committee and introduce the focus of the gift.** Turn the conversation to the Viking Gift Committee project, emphasizing the importance of giving and the need to increase class participation.
- **Talk about your own commitment.** Why are you involved? Why are you investing your time and money? What did the education you received from Lawrence mean to you? How is it helping you achieve your goals, and how is it contributing to your success?
- **Introduce a starting figure** for consideration. Requests for a specific dollar amount more often result in a commitment than “Can you give something?”
- **Keep on bargaining for a pledge amount;** when you secure a pledge, thank them!
- **Ask for any updated information** (address, alternate phone number, e-mail; program of study or occupation, title, spouse, children, or other news).
- **Inform Lawrence of the pledge immediately so the donor receives a pledge card.** (You can also choose to send pledge cards yourself. Ask Kate for details.)

Always remember to:

- Cover essential information but be flexible in your approach.
- **SMILE** while you talk on the phone! Classmates can hear enthusiasm in your voice.
- Use your best judgment — you know your classmates and Lawrence!
- Remember it may take several contacts before you secure a pledge. Be patient and persistent!

Useful Information

Development Office

The development office oversees all Lawrence fund-raising activities, including those involving parents, alumni, corporations, foundations, and friends of the college. Kate Hatlak '08, assistant director of annual giving, who works with Viking Gift Committee volunteers.

Expenses

If you have personal expenses, such as phone calls, stationery, or additional postage, the development office will be happy to reimburse you or credit for an additional gift. Please make certain that you send an itemized list of expenses so that you may be properly reimbursed or sent a receipt for tax purposes.

Fiscal year

Lawrence University's fiscal year begins July 1 and ends June 30. We encourage donors to send their annual gifts for **fiscal 2010 by May 31, 2010; however, all gifts received by June 30, 2010 will count for the fiscal year.**

The Lawrence Fund

The Lawrence Fund consists of all gifts received during a given fiscal year from alumni, parents, friends, corporations, and foundations in support of Lawrence's current expenses for educational programs and operations. 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. **Think of The Lawrence Fund as the college's checkbook that is used to pay the monthly bills and the endowment is its 401(k).**

Personal touches

Since the solicitation comes from you instead of the development office, there is a personal appeal in your approach unique to your style and personality. Any amount of extra personal attention you can add to your approach will make your efforts even more successful, and your classmates' response even greater. You are encouraged to discuss any aspects of the Viking Gift Program with the chair, council members, or Kate. We are here to help you be successful. Creativity and originality are the keys; use your imagination!

Pledges & Payment Plans

For each pledge, try to secure an amount and month due. People are more likely to pay a pledge for a specific amount, and the sooner LU receives pledge payments, the better. **Emphasize that their gift can be paid with a credit card at monthly, quarterly, semi-annual, or annual intervals.** These payment plans are popular and convenient for alumni. Anyone interested in these payment plans should indicate this on his or her pledge envelope or call the development office.

Volunteer Assignment Report Codes

On the volunteer assignment report, the special request column shows codes representing specific solicitation exclusions requested by the alum. These codes are:

- P** He/She has requested to not be solicited via phone by Lawrence (employees, phonathon students).
- M** He/She has requested to not be solicited via mail by Lawrence.
- R** He/She has requested to not be contacted at all by Lawrence.

These requests only limit Lawrence development officers and phonathon callers from soliciting them. As a volunteer, you have personal connections with your contacts and are not bound by these requests. However, you may want to adjust your approach and be sensitive to the fact they have made such a request.

2009-10 LAWRENCE FACTS

Goals: Last year The Lawrence Fund received \$3.6 million, more than \$2.81 million of which came from generous alumni like you. Last year's alumni goal was \$3.06 million, so our overall efforts were a little short. The official goals for The Lawrence Fund in 2009-10 are to receive \$4 million overall, including \$3.04 million from alumni. Of course what we would *really* like is for the alumni to enthusiastically zoom past this year's official goal!

Enrollment: Approximately 1,500 students. Lawrence consistently has the strongest student academic profile of any college or university in Wisconsin, and ranks among the best colleges nationwide. Students come to Lawrence from 46 states, the District of Columbia, the Virgin Islands and 51 other countries.

Need-Blind Admissions: Consistently rated as a "Best Value" liberal arts college in *U.S. News & World Report*, Lawrence adheres to a need-blind admissions policy, admitting students on the basis of their ability and accomplishments rather than their financial circumstances.

Financial aid: More than 90 percent of Lawrence students receive need-based and/or merit-based financial aid each year. In 2008-09, Lawrence distributed \$18.9 million to provide financial assistance to students. The average need-based aid package totaled more than \$26,400.

Endowment: Approximately \$214 million. Each year 5 percent of the endowment's interest earnings are allocated to help cover the college's expenses.

2008-09 contributions from alumni to The Lawrence Fund: \$2.8 million

2008-09 average gift to The Lawrence Fund from alumni: \$458

Donor participation rate: 43.2 percent, which puts Lawrence among the top 25 colleges and universities in this country on this important index of alumni loyalty.

2009-10 tuition: \$34,326

2009-10 room & board: \$7,053 (full board)

Björklunden: A 425-acre estate bequeathed to Lawrence University in 1963 by Donald and Winifred Boynton, located in Door County, Wisconsin. Björklunden hosts weekend retreats for classes and student clubs throughout the school year, as well as adult education seminars in the summer. During the 2008-09 year, 1,845 student participants (obviously some students came more than once!) attended 127 different weekend programs at Björklunden.

Annual operating support for Björklunden is provided in part by members of The Boynton Society, a giving club honoring the generous and dedicated donors who contribute \$250 or more annually. Recently, Björklunden underwent a major expansion—doubling the size of the lodge. The expansion has increased the number of summer adult education seminars to three and will allow more student groups and classes to utilize the lodge during the school year.

SAMPLE

Viking Gift Committee Contact Form

Name _____ Home _____ Work _____

Largest Gift _____ Most Recent Gift _____ Other Notes _____

CALL DATE								
OUTCOME								

*Suggested codes: Y = yes N = no Con = considering CB 11/5 = call back Nov. 5
NA = not available*

PLEDGE AMOUNT: _____

Try asking for: • \$99-\$107 (class year) • largest past gift • \$19.99-\$20.07 (class year) • \$10, \$5

DUE to Lawrence by: December January February Other _____

Encourage gifts ASAP! Lawrence's fiscal year ends June 30, 2007

COMMENTS: *Include feelings towards Lawrence, reasons for giving/not giving, updated information (address, phone, e-mail, business, marriage, children).*

NOTE: *This is a SAMPLE of the contact form. This is an easy way for you to run through your calls with just one form for each person, providing basic background information and allowing you to document the essentials of the call. Regardless of whether you find these sheets useful, they are essential to the development office, so please be sure to complete and return each form. Make sure you have them handy when you make your calls; document dials, pledges, due dates, and other comments as necessary.*

Please inform the development office of gifts and pledges (amounts and dates due) as soon as possible
so we can mail a pledge card right away.

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

Fax to: 920-832-6784

E-mail Solicitation Procedure

What an exciting new adventure

With the prevalence of e-mail in our working and social lives, a common method of communication (and often times, the most efficient) has become e-mail. With this in mind, the Viking Gift Committee is encouraged to use this form of communication as a means of peer solicitation. If you feel more comfortable, or perhaps more effective, utilizing e-mail rather than the telephone when contacting alumni, then by all means, e-mail is the way to go!

And it's so easy

Instead of documenting all of your correspondence and dealing with the expense and delay of the U.S. Postal Service, simply forward the "e-mail reply" from your fellow Lawrentian to the development office. The e-mail serves as the pledge confirmation.

What do I say?

A few members of the Viking Gift Committee have tested this method with some success. See page 14 for an example. Keep in mind that in a telephone conversation an initial refusal can easily be retorted with a request for a miniscule \$5. Therefore, if you receive a "no" in an e-mail response, a follow up message such as "oh — c'mon, you could at least give \$5" would still be appropriate!

What procedure do I follow?

Since this is still a relatively new thing for Lawrence, it would be great to have sample e-mail solicitations for future Viking Gift Committee volunteers. You are not required to save and forward all of your correspondence with your assigned alumni, but it would certainly be helpful if you would forward messages that seem well received. However, *please forward all affirmative e-mail responses*, so that the development office may send out a pledge card within **two days** of when your classmate told you yes.

Make sure you have your facts right. Putting a few statistics in your e-mail can have a great impact on your reader, but please be sure they are accurate. When writing your e-mail, also keep in mind that we still need the same information that you would record during a telephone conversation. Verify their current mailing address and telephone number. Secure a specific pledge amount if possible, and **ALL pledges must have a month due (aim for as early as possible and remember all gifts must be received by JUNE 30, 2008)**. If you'd like Lawrence to proof your e-mail (or letters!) and send it back to you, we'd be glad to!

Online giving growing in popularity!

Please include the link to our online giving form where your classmates can immediately make a gift on their credit card: www.lawrence.edu/alumni/giving

Sample E-mail Solicitation

Hello John:

This is an “official” e-mail. Remember last year, when I called you and hit you up for money for The Lawrence Fund? I’ve been recruited again, but this time it’s a lot easier (and cheaper) because I’m e-mailing you instead.

I’m serving on the Viking Gift Committee. This committee was established because the number of young alumni that give to Lawrence is pretty darn low (the participation rate of young alumni was only 26.2 percent last year compared to the overall alumni donor participation rate of 45.8 percent). This is the deal: Lawrence is asking you to donate. The size of your donation is not nearly as important as your participation. When LU appeals to corporations, wealthy people, etc. for grants or big chunks of \$\$, they report how many alumni contribute to Lawrence. The reason being, if alumni give to Lawrence that is evidence it is a worthwhile institution with satisfied alumni. I know all this stuff because of my years at LU working in the development office calling alumni for phonathon.

So, will you please give \$25? If you can’t/don’t want to give, I am just the messenger and certainly won’t take it personally.

Could you e-mail me back? Please tell me:

1. Yes or No.
2. If “Yes” then how much \$\$ you can pledge and which month will you give in?
3. Any changes in your address in the past year?

Then I’ll forward that information on to Lawrence and they will send you an envelope.

I know this e-mail is all business, but I didn’t want to be deceptively chatty and then write, “Oh, by the way, the reason I’m sending this e-mail to you is to hit you up for some of your hard-earned cash, etc.”

I hope life is treating you well.

Whether or not you plan to give, please respond to this message and let me know.

Thank you very much,

Emily

Sample Snail Mail Solicitation

Date

Name

Address

City, State Zip

Dear Name,

It is difficult to believe that we graduated from college two and half years ago. For the first time this year, when I visit Lawrentian.com many of the names appear unfamiliar even as the articles have, in general, remained constant.

After graduation, we remain part of the Lawrence community with a special role as stewards and keepers of the light, so to speak. Our alma mater exists as a school that continues to provide the best opportunities to its students, and counts on our support to do so. I feel we were lucky to have graduated while Lawrence was still enjoying the benefits of the bull market, and am glad to be able to give back as a young alum.

The best way that you can help is to make a donation, at a level that is personally meaningful, to help ensure that future generations of Lawrentians have the opportunities we had. Major donors and foundations often base their grants to Lawrence in part on the alumni participation rate, so even a modest donation like \$10 has a vastly magnified impact. As you proceed through the holiday season, please think about Lawrence and the ways you can continue to make a difference.

Sincerely,

Sam Solicitor

Contacting the Development Office

Please remember that we're here to help.
If any questions or problems arise, feel free to contact us!

Annual Giving Staff

Kate Hatlak '08

Assistant Director of Annual Giving

Direct Phone: 920-832-6552

E-mail: kate.e.hatlak@lawrence.edu

Dolores Howse

Annual Giving Coordinator

Direct Phone: 920-832-6897

E-mail: dolores.m.howse@lawrence.edu

Address: Office of Annual Giving

Lawrence University

PO Box 2697

Appleton, WI 54912-2697

Toll-Free Phone: 800-283-8320

Fax: 920-832-6784

Your efforts on behalf of the college and The Lawrence Fund are a vital part of the continuing life of this college. We deeply appreciate your interest in helping Lawrence maintain its tradition of excellence

THANK YOU!