



## CLASS GIFT PROGRAM

### ***THANK YOU!***

As a member of the leadership team for your class, you hold a position of much honor and responsibility. Mary Baldwin College relies upon the success of her alumnae volunteers to successfully solicit their classmates for Annual Fund gifts. With your help, Mary Baldwin College will raise the funds necessary to achieve our vision of being a nationally recognized leader in transformative, personalized liberal arts education. YOU make the difference for Mary Baldwin College, her students, and her future.

You are a leader among your peers. As such, your letters to your classmates will provide a personal touch, which is a proven technique for successful solicitation of Annual Fund gifts. Your willingness to share the importance of the MBC Annual Fund means a great deal to the future of Mary Baldwin.

In order to help you be as effective a volunteer as possible, we have compiled a number of resources for you in this handbook. Here you will find not only a description of the Class Gift Program and its importance to Mary Baldwin College, but also some very helpful hints on how to fulfill your responsibilities. Together with your Class Leadership Handbook, you now have a wealth of information about Mary Baldwin today and the exciting happenings here on campus, and about President Fox's strategic plan to take us into the future.

This packet is designed to answer your questions and inspire you to approach your new role with enthusiasm and confidence. The staff of the Development Office will provide logistic support for your efforts, and is here to assist you in any way that we can. Please do not hesitate to contact us with any questions you may have regarding your role and responsibilities.

Thank you once again for your service as a member of your class leadership team. Your role is essential to the success of Mary Baldwin's fundraising efforts.

We look forward to working with you!

Sincerely,

The Development Team at Mary Baldwin College

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## **WELCOME TO THE MARY BALDWIN COLLEGE CLASS GIFT PROGRAM!**

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Through the Class Gift Program, alumnae can commemorate their Mary Baldwin days and invest in future generations of students. Everyone who has ever been a Mary Baldwin student is considered an alumna. Every alumna is a member of her class.

As a Class Gift Committee Member, you provide the framework for your Class Gift. With your help, the college will be able to reach most of your classmates and invite them to take part in our 10-year strategic plan, *Composing Our Future*, by participating in their Class Gift.

Teamwork and personal contact are the keys to a successful Class Gift effort. An effective Class Gift Chair and Class Gift Committee Members will make a coordinated effort to reach their classmates and encourage them to give back to their alma mater.

This handbook is designed as a resource for class volunteers who are fundraising for their Class Gift. It outlines the specifics of fundraising, and it is just one of the tools available to our volunteers. Your feedback is appreciated and your questions are welcome. Please feel free to send comments and suggestions regarding this handbook and the Class Gift Program to:

Jennifer Moriarty Hagen  
Director of the Annual Fund  
Mary Baldwin College  
PO Box 1500  
Staunton, VA 24402  
(800)622-4255 / (540)887-7385  
jhagen@mbc.edu

*We encourage you to contact us any time you need clarification, more information, or advice. We are here to help you make your Class Gift a tremendous success!*



### ***Why is the Class Gift Program so important?***

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The Class Gift Program is a vital source of financial support for Mary Baldwin College. Class gifts deliver dollars each year that allow Mary Baldwin to support its unique programs and opportunities that make the college so special.

Alumnae leaders like you are the pacesetters for Annual Fund giving. The goal of the Class Gift Program is for each and every one of your classmates to make a meaningful financial commitment to Mary Baldwin, and to sustain and deepen that commitment over time. Classmates can be more successful than staff members at generating enthusiasm and building momentum.

Every year, the Class Gift Chair and the staff liaison will set class dollar and participation goals for your class. Members of the Class Gift Committee solicit their classmates for new and increased Annual Fund gifts as well as other special gifts to the college each year, and also for a special commitment in honor of your Reunion.

Class members in reunion merit special treatment. When in a Reunion year, the ten Reunion classes compete amongst each other for the most dollars raised and highest participation numbers. We hope the competitive spirit will emerge and records will be broken. The combined Reunion Class Gift is symbolically presented to the college at Reunion Weekend. All gifts made to Mary Baldwin College during a reunion year, regardless of designation, count toward your Reunion Class Gift.

Your help is invaluable in increasing alumnae participation and dollars in the Annual Fund. The support of our alumnae will propel Mary Baldwin College forward as we take the next steps toward our vision of becoming a nationally recognized leader in personalized education.

***Thank you for volunteering for Mary Baldwin College!***

## **THE CLASS GIFT PROGRAM - AN OVERVIEW**

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Class Gift Program volunteers (also called **class agents**) ensure the Mary Baldwin College tradition of excellence by securing financial support of the Annual Fund among their classmates.

As a class volunteer for Mary Baldwin, you join hundreds of your fellow alumnae across the country. As a member of the Class Gift team, you are one of Mary Baldwin's greatest assets. Your perspective helps alumnae understand that through their annual giving they are "making an investment" in current and future students of Mary Baldwin College.

By encouraging your classmates to make a gift to the MBC Annual Fund, you add personal warmth and individuality to the College's own communication efforts. Requests for gifts from classmate to classmate are essential to the success of the Annual Fund. Your own gift sets an example of generosity that encourages participation, and your appeal helps classmates reconnect with what Mary Baldwin means to them individually.

### **Your Role**

Class agents have a two-fold mission each year of the 5 year term:

1. Communicate with your classmates about Mary Baldwin College
2. Invite your classmates to join you in your financial support of the Annual Fund

Class agents write a **minimum of two fundraising letters a year** to their classmates; agents also make phone calls, send email, and may make occasional personal visits to classmates to request support for the MBC Annual Fund. By **making their own gifts** to Mary Baldwin, class agents can then ask their classmates to join them in supporting Mary Baldwin – an especially effective request. As class officers, agents are also invited to **attend the annual Leadership Conference**, an opportunity to catch up with new developments on campus and to learn how to be an effective volunteer for Mary Baldwin College.

### **Reunion**

At your most recent Reunion, your classmates elected the Gift Chair for a five year term. **For the first three years, you will serve simply as the Gift Chair or member of the Class Gift Committee. In the fourth and fifth years, your role will also include working with your fellow class officers towards your upcoming Reunion.** As a member of the Class Leadership team, you will play a vital role in the planning for your upcoming Reunion. In addition, you and your Class Gift Committee will work with your fellow class officers to encourage your classmates to make a special commitment to Mary Baldwin College in celebration of your milestone reunion year. (Please see timeline on page 12.)

### **The Annual Fund**

The Annual Fund is the yearly fundraising program for Mary Baldwin College. Funds raised are used to bridge the gap between what tuition and fees bring in, and the actual cost of operating MBC each year. In this way, gifts to the Annual Fund have an immediate impact for the students of Mary Baldwin, as the Annual Fund meets the most pressing needs of the College. Without Annual Giving, the only way Mary Baldwin would be able to balance its budget would be by dramatically increasing tuition or compromising the quality of the academic program. **Class agents are so important to the future of Mary Baldwin**, as they help us raise more than \$2 million dollars for the Annual Fund each year.

## *Why must Mary Baldwin ask for gifts?*

Tuition covers only about half of the actual cost to educate a Mary Baldwin student. MBC must raise the additional funds necessary to support the College's annual operating budget (all colleges and universities depend on this additional income).

It is also important to encourage as many people as possible to make a gift at some level to MBC. Smaller gifts added together amount to an important part of what is raised each year. Remember, it is not the size of the gift that matters, but your participation. Gifts of any size increase the alumnae participation rate, which can affect the College's ranking or its ability to obtain foundation grants. (Some foundations require a minimum participation rate for which we may not qualify, and foundations do take the actual rate of participation among alumni as a factor in determining recipients for their monies.)

Every gift in every amount is important. Large gifts add up quickly. Smaller gifts raise participation rates, which can improve our ranking, which in turn could mean additional grants and funding, increased value of your degree, and improved recruitment and retention of top students.

## *What is the Annual Fund?*

The Annual Fund is the yearly fundraising effort at MBC. It is designed to do two things:

1. Increase alumnae participation
2. Increase revenue for Mary Baldwin College

Tuition and fees do not cover all expenses at MBC. The Annual Fund fills the gap. Money raised for the Annual Fund helps us to enhance student aid, create new academic programs, upgrade campus facilities, and to recruit and retain top faculty.

## *What Funds Constitute the Annual Fund?*

- **Campus Fund:** The Campus Fund is used to support the substantial cost of preserving, maintaining, and enhancing our buildings and grounds.
- **Student Life Fund:** The Student Life Fund supports the hard work Mary Baldwin puts into creating a rich campus environment by providing students with opportunities to experience residence hall life, develop leadership skills, take part in a variety of sports, join academic societies, work on student publications, attend dances, participate in student government and/or join student organizations. This Fund will provide assistance to the Sena Center for Freshman Services and Career Planning, as well as the Heath Center. Gifts to this fund will help make life at Mary Baldwin all that it can be.
- **Academic Fund:** The Academic Fund is used to help Mary Baldwin attract and retain outstanding faculty and advisors as well as supply the resources necessary to maintain academic excellence for all students. This includes library acquisitions and research tools.
- **Scholarship Fund:** The Scholarship Fund is used to provide the financial assistance necessary to bring the best students to Mary Baldwin.
- **Undesignated Fund:** The College uses undesignated gifts to support all of the priorities in the four other funds.

## *Why is Participation So Important?*

Participation is vital to Mary Baldwin's success for a number of reasons.

- Alumnae and parents give because they are proud of Mary Baldwin and grateful for the opportunities offered to them by the college. Corporations and foundations consider Mary Baldwin's participation rate when deciding how much money to grant the college. (If alums don't give to Mary Baldwin, why should others?)
- The percentage of participation each year serves as the external barometer of "alumnae satisfaction" and allows Mary Baldwin to receive increased gifts and grants from corporations and foundations.
- Mary Baldwin depends on gifts from alumnae and parents. When they were students, the alumnae benefited from the gifts of the alumnae before them. It is the responsibility of every alumna to steward the college and carry on this tradition so that generations of students have the same opportunity to benefit from a Mary Baldwin College education.

### **Each gift adds to the Annual Fund and makes a difference!**

- Tuition and fees bring in only about half of the actual cost to educate a Mary Baldwin student. The college must raise the additional funds necessary to support the college's annual operating budget, primarily through private support.
- Without the Annual Fund, each student's tuition would be much higher.
- Every woman deserves an education. Mary Baldwin wants each student to receive every opportunity possible.

## *Why do we call?*

Fundraising over the phone is one of the most effective approaches because it is personal contact. Raising money is one purpose of the call, but not the only one. Calls from classmates help to build and strengthen relationships among all of you and with your alma mater. You share a common bond with every alumna with whom you will talk -- that bond is Mary Baldwin.

## *Why do people give to Mary Baldwin?*

- **They believe in the College's mission.** Alumnae appreciate the value of a good education and understand the importance of the College's goals.
- **They're interested in a specific program.** Perhaps the donor was a past participant or graduate.
- **They're involved in the College.** Donors may still be involved. They might attend alumnae events, Homecoming, or serve as a volunteer.
- **They want to give back.** Many feel they received so much from the College that it's their duty to create that opportunity for the next person.
- **You have influenced them.** You've convinced your classmates that their gifts are the key to the College's continued success.

## **ROLE DESCRIPTIONS**

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### **Gift Chair**

The Gift Chair is the hub of the Class Gift Program. Elected at Reunion by your classmates, you will work closely with your committee members and your fundraising staff liaison in order to maximize annual giving among your classmates.

Responsibilities Include:

- Make an annual leadership gift
- Attend a Class Leadership Conference at beginning of service
- Recruit Gift Committee members
- Solicit reunion gift commitments from all committee members
- Coordinate fundraising activities and communication amongst committee members and with your staff liaison
- With help from your staff liaison, set class giving and participation goals
- Develop a fundraising plan to solicit all class members using various fundraising means to include personal solicitation, direct mail, email and/or the student phonathon. (Your staff liaison will help with this.)
- Write personal thank you notes to all donors assigned to you
- Serve as a resource for the Development Office in identifying classmates' potential as prospects and/or volunteers
- Work with your fellow class officers in planning class events and Reunion, as well as share pertinent information you collect with other class officers (i.e. during occasional class officer conference calls)
- Attend Reunion Weekend
- Coordinate pledge fulfillment calls at the end of the fiscal year
- Assist with training of Gift Chair-Elect at the end of your term

### **Gift Committee Members**

As a member of the Gift Committee, you choose a group of your classmates you would like to contact. These are your "assigned" classmates whom you will contact to talk about MBC (among other things!) and encourage gifts to the Annual Fund.

Responsibilities Include:

- Make an annual leadership gift
- Contact classmates via phone, email, and/or letter asking for participation in your Class Gift.
- Steward all assigned donors with personal thank you notes
- Attend Class Leadership Conference at the beginning of volunteer service
- Submit regular reunion giving updates to Reunion Class Gift Chair
- Attend Reunion Weekend
- Serve as a resource for the Development Office in identifying classmates' potential as prospects and/or volunteers
- Assist with pledge fulfillment calls at the end of the fiscal year

## Class Officer Organizational Chart



## CONTACT INFORMATION – Annual Fund Office

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Mary Baldwin College Annual Fund  
PO Box 1500  
Staunton, VA 24402  
800-622-4255  
540-885-2011 (FAX)  
Email: [giving@mbc.edu](mailto:giving@mbc.edu)  
Website: [www.mbc.edu/giving/annualfund.asp](http://www.mbc.edu/giving/annualfund.asp)

- Gift or pledge inquiries
- Matching gift information
- Credit card contributions
- Stock gift information
- Electronic funds transfer information

## DEVELOPMENT STAFF

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The Development Staff works year-round on building support for the college. One member of the Development Staff will serve as your class liaison and will be available to you to answer any questions you may have. Your staff liaison will also provide logistical support for the activities of the Reunion Class Gift Committee.

**Jane Rapier Spence '98**, Major Gifts Officer  
[jspence@mbc.edu](mailto:jspence@mbc.edu)  
703-578-0870

**Staff liaison for class years 1958 - 1969**

**Lois Thatcher '07**, Major Gifts Officer  
[lthatche@mbc.edu](mailto:lthatche@mbc.edu)  
540-887-7011

**Staff liaison for class years 1970 – 1979**

**Melissa Leecy '96**, Major Gifts Officer  
[mleecy@mbc.edu](mailto:mleecy@mbc.edu)  
540-887-7011

**Staff liaison for class years 1980 - 1989**

**Jennifer Moriarty Hagen**, Director of the Annual Fund  
[jhagen@mbc.edu](mailto:jhagen@mbc.edu)  
540-887-7385

**Staff liaison for class years 1990 - 2004**

**Lesley Long**  
Development Operations Coordinator  
[llong@mbc.edu](mailto:llong@mbc.edu)  
540-887-7158

**Phonathon and Student Giving Program**

**\*\*\*\*\*NOTE:**

***Please note that these staff designations may change prior to Reunion 2008, as we intend to add more staff to assist with the Class Gift Program.***



## CONTACT INFORMATION - Alumnae Office Staff

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### The Alumnae/i and Parent Relations Office

172 N. Coalter St.

Staunton, VA 24401

800-763-7359

540-885-9503 (FAX)

Email: [alumnae@mbc.edu](mailto:alumnae@mbc.edu)

Website: [www.mbc.edu/alumnae](http://www.mbc.edu/alumnae)

- Registration information
- Find a lost classmate
- Memory book inquiries
- Class Notes
- Reunion Planning

## ALUMNAE/I AND PARENT RELATIONS STAFF

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The Alumnae/i and Parent Relations staff works year-round on reunion and the class leadership program. The staff is specifically responsible for maintaining positive alumnae/i relations through events, reunions, educational programs, and a variety of other services.

### Jennifer Brillhart Kibler '91

Executive Director of Alumnae/i and Parent Relations

[jbkibler@mbc.edu](mailto:jbkibler@mbc.edu) 540-887-7216

Responsible for the complete, integrated management of Alumnae/i and Parent Relations Staff.

Represents Mary Baldwin College to all constituencies.

### Tina Thompson Kincaid '93

Director of Class Leadership

[tkincaid@mbc.edu](mailto:tkincaid@mbc.edu) 540-887-7383

Responsible for the Class Leadership Program. Provides support and guidance to alumnae/i class leaders, serving as the main liaison between these volunteers and the college. Liaison to classes 1986 and earlier.

### Jenna Smith '97

Class Leadership Coordinator

[jsmith@mbc.edu](mailto:jsmith@mbc.edu) 540-887-7173

Provides support and guidance to alumnae/i class leaders, serving as the main liaison between these volunteers and the college. Helps plan reunions, works closely with a group of student leaders, and supports a variety of other alumnae/i activities and initiatives. Liaison to classes 1987 and later.

### Anne Holland '88

Senior Director of Events and Alumnae/i Education Programs

[aholland@mbc.edu](mailto:aholland@mbc.edu) 540-887-7171

Plans college events, both internal and external, including reunion, Alumnae/i Board meetings, Continuing Education Weekend, and Class Leadership Weekends.

### Carolyn Hensley

Office Coordinator

[chensley@mbc.edu](mailto:chensley@mbc.edu) 540-887-7007

Responsible for recruiting and coordinating volunteers for college fairs, inaugurations, and award ceremonies. Assists with Gift Shop and provides clerical support to office.

Insert 5 year program overview here

## **CLASS COMMUNICATIONS**

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### **Class Newsletters**

Class newsletters are one method by which your classmates will be informed about Reunion events and Reunion Class Gift information. Class newsletters are prepared in conjunction with the Class Secretary and mailed out by the Alumnae/i and Parent Relations Office twice per year. These newsletters may include the following:

- News about Reunion Weekend
- News about the college
- Message from the Reunion Gift Committee
- Reunion class goals for dollars and participation
- Listing of Reunion Gift Committee members

### **Class E-News**

Class E-News is another method by which your classmates will be informed about Reunion events and Reunion Class Gift information. Class E-News e-mails are prepared and sent by the Executive Director of Alumnae/i and Parent Relations. These messages can include the following materials:

- News about Reunion Weekend
- News about the college
- Reunion class goals for dollars and participation
- Progress toward dollar and participation goals
- Listing of Reunion Gift Chair and Committee members

### **Class Gift Solicitation Letters (samples on pages 22-24)**

Class gift solicitation letters are one method by which your classmates will be informed about Class Gift information. Class gift solicitations will be signed and approved by the Class Gift Chair. These letters will be prepared and mailed out by the Annual Fund Office up to four times per year, and may include the following information:

- Class goals for dollars and participation
- Progress toward dollar and participation goals
- Specific ask amount for each classmate

### **Class Websites**

We are pleased to announce that Mary Baldwin now hosts a website for your class on the MBC website. Your class website is the place to find up-to-date class news from your classmates, class officer information, alumnae updates, and the newest Mary Baldwin news. Check it out! To access your class website, visit [www.mbc.edu/alumnae](http://www.mbc.edu/alumnae), and click "Class Links" in the column on the left-hand side of the page.

## **GIVING TO MBC**

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Gifts of financial support to Mary Baldwin are a way for alumnae/i to invest in the future of the college and to have a direct impact on the students, faculty, and quality of education. Not only does your Class Gift benefit the college, it also allows you to share in our growth and success.

Types of gifts accepted by Mary Baldwin College:

- Cash gifts (credit card, electronic funds transfer, check)
- Matching Gifts
- Securities
- Planned Gifts
- Gifts-in-Kind

### **HOW TO MAKE A GIFT TO MBC**

#### **By Credit Card:**

ONLINE: Donors may use our convenient and secure server at [www.mbc.edu](http://www.mbc.edu) by clicking the “Give to MBC” button at the bottom of the home page. The direct link for the online giving form is [http://www.mbc.edu/forms/pub/alum/a\\_frm\\_donation.asp](http://www.mbc.edu/forms/pub/alum/a_frm_donation.asp)

BY PHONE: Your classmates may also make their gift over the phone by calling the Annual Fund Office toll free at (800)622-4255. They may also call your staff liaison directly.

Mary Baldwin honors MasterCard, Visa, and American Express.

#### **By Electronic Funds Transfer (EFT): (see *sample of EFT form on page 28*)**

Electronic Funds Transfer (EFT) is a convenient and cost effective way to support Mary Baldwin without writing a check. With EFT, the donation will be automatically deducted from the donor’s checking or savings account on the day she prefers. This gift can be made in monthly installments (i.e. \$100 per month for 5 months for a total gift of \$500.)

To make an electronic funds transfer:

- Call (800)622-4255 or
- Download the EFT form from <http://www.mbc.edu/giving/cashgifts.asp> and mail to:

Mary Baldwin College  
Office of Institutional Advancement  
PO Box 1500  
Staunton, VA 24402

#### **By Check:**

Make checks payable to Mary Baldwin College and mail to:

Mary Baldwin College  
Office of Institutional Advancement  
PO Box 1500  
Staunton, VA 24402

### **Matching Gifts**

Many companies have matching gift programs, which range from a 1:1 to a 4:1 match. For example, if an alumna contributes \$500 to Mary Baldwin and is employed by a company which matches gifts 1:1, the company will also contribute \$500 to MBC. The alumna receives recognition credit for a gift of \$1,000. This is an excellent and simple way to increase alumnae/i support of Mary Baldwin College. To take advantage of a matching gift program, the alumna contacts her personnel office to determine the company's process to match the gift. Some companies require a form to be completed by the donor and certified by the college; other companies utilize an electronic notification for a match. Many matching gift companies extend their benefits to spouses and retirees as well, so be sure to ask.

### **Securities**

Giving securities (stocks and bonds) to Mary Baldwin College can provide a double tax savings: The donor can deduct the average of the high/low value of the securities on the date of the gift and avoid capital gains tax on the appreciation.

A gift of appreciated securities, held for more than one year, entitles a donor to a charitable income tax deduction in the year the gift is completed. The deduction may be used to offset up to 30 percent of your adjusted gross income. Any deduction exceeding the 30 percent limit is carried forward for up to five additional years. Securities held for less than one year may also be donated, but the deduction will typically be based on what was paid for the securities. For more information on gifts of appreciated securities, please contact your staff liaison or your financial advisor.

### **Planned Gifts**

Planned gifts are any type of deferred gift, which is used to meet financial objectives, particularly when planning an estate. Some of the more common types of deferred gifts are will provisions, life insurance policies, and charitable gift annuities. A bequest is also one of the easiest ways to make a gift to the college. An existing life insurance policy may be transferred to the college, or the college may be named as the beneficiary of a policy. If you speak to a classmate interested in this, please inform your staff liaison so we can put them in touch with a Planned Giving Officer.



## SEVEN QUICK TIPS TO GET YOU STARTED

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1. *Make your own gift/pledge before approaching your classmates.*  
You'll be a more effective fundraiser and have your own example to use to motivate your classmates.
2. *Do your homework.*  
Read your handbook to become familiar with the case for support of the Annual Fund. Review Classmate Sheets to become familiar with information for each of the people you will contact.
3. *Be yourself.*  
The more personal you can make the request, the better. Find your style and use a combination of calls, letters, and e-mails for the most effective solicitation.
4. *Be purposeful.*  
Have an outline of a clear, businesslike presentation in mind before you begin contacting your classmates. Establish a rapport, state the case, and then come to the point as quickly as possible.
5. *Ask classmate to consider a specific amount.*  
Tell classmates how important their gift will be for MBC. Use yourself as an example.
6. *Keep on keepin' on.*  
Remember that an effective solicitation requires a steady pace of activity, not bursts of contact after long lapses in between.
7. *Have fun!*  
The most important fact to remember is that you are approaching classmates, like yourself, who are vitally interested in Mary Baldwin College – go squirrels!

## STEPS TO SUCCESS: ASKING FOR A GIFT

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### STEP 1: Prepare Yourself

- *Consider your own gift.* Having made your own reunion gift/pledge enables you to be even more convincing as you state the case for Mary Baldwin College.
- *Review the information in the Class Gift Program Volunteer Guide.* Be ready to answer this frequently heard question: "Why does Mary Baldwin need my gift?" Think about your own reasons for supporting MBC. Develop the statement in your words about why you believe this gift is important.
- *Review the Classmate Information Sheet.* The more you know about your classmate the easier it is to develop an approach that is tailored to her own MBC interests and experiences. Develop a strategy as you would for a business meeting, and don't hesitate to call on your staff contact for ideas.

### STEP 2: Contact Your Classmate

- A letter from the Class Gift Chair will be mailed from the Alumnae/i and Parent Relations Office identifying you as a member of the Class Gift Committee. This will inform all classmates that you will be calling them to talk about your Class Gift. If you wish to write your own note in addition to the standard letter, you may do so. Shortly after the letter(s) have been received, follow up with a phone call.

### STEP 3: Making the Contact

- No matter how diverse your experiences and interests, you and the classmate have Mary Baldwin College in common. Strengthen or stimulate the classmate's interest in the college through discussion of current activities. Use questions that will elicit a response such as "What do you remember about ...," "Have you heard from ...," "Have you thought about coming to the Reunion?" Most importantly, share your commitment and enthusiasm for Mary Baldwin ... it's contagious!!!

### STEP 4: Discuss the Importance of Support

- Remember to discuss the Smith Challenge as an exciting opportunity to make a real difference in the financial health of MBC.
- Mary Baldwin has a strong tradition of excellence in personalized liberal arts education. Encourage classmates to lend their financial support to help keep that tradition strong for future generations.
- Convey the meaning of her gift to the ten year strategic plan, **Composing Our Future**, and how it will allow the college to achieve her vision of becoming a national leader in providing personalized, transforming liberal education. (Fund our Future!)
- Emphasize that the percentage of our alumnae who give to Mary Baldwin affects her national reputation. For example, *U.S. News and World Report's* annual ranking of the top colleges and universities in the country considers the alumnae/i giving participation rate an important factor in determining national ranking.

- Discuss the lack of state support and the importance of private support from alumnae/i in keeping tuition increases to a minimum.
- Remind them that our small endowment compared to other colleges of our size and quality means we rely on private support from alumnae.
- Stress the significance of their gift in reaching your class dollar and participation goals.

**STEP 5: Ask for the Gift**

- Ask for a gift of the specific amount that you and the staff have decided is appropriate. Speak openly, “Will you consider a gift of \$\_\_\_?” You are much more likely to get a gift if you ask for a specific amount. Usually, a classmate is flattered to be thought of as capable of making a large gift, but will rarely volunteer more than the amount that you suggest.

**STEP 6: Pause**

- *Pause so that your classmate can think about your request.* The decision to give a sizeable gift can take several minutes, days, or weeks. If you are turned down after the first ask, remember that this is not uncommon if the request is for a substantial discussion. “May I call you back in a week to discuss this...?”

**STEP 7: Answer Questions and Objections** (see “How to Overcome Common Objections on p. 20 for many ideas and ways to answer these questions)

**STEP 8: Confirm the Gift**

- Confirm a gift amount if possible, so that it can be recorded and appropriate acknowledgments from Mary Baldwin can be sent.
- Gifts/pledges must be received in writing from a donor. Ask if they need another pledge envelope.
- Send a personal note to thank the donor when the gift/pledge is made.

**STEP 9: Celebrate Your Success!**

- Record the results of your contact on the volunteer contact report form once a gift/pledge has been made.
- Report to your Gift Chair or staff liaison every week, so that Mary Baldwin may follow-up in a timely manner.

**STEP 10: Complete All Contacts and Report Results**

- The status of all classmates will be evaluated during the first week of March; staff follow-up and necessary reassignment will take place.



### More Helpful Hints...

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- Reminisce—talk about your shared experiences at MBC. Have fun!
- Talk about Reunion Weekend and encourage them to attend. (Reunion Weekend 2008 will take place on campus in Staunton April 3-6, 2008.)
- Reiterate the Smith Challenge and encourage classmates to make a meaningful commitment to MBC.
- Besides raising money for the college, we are also trying to update our files; please help us get business and home addresses as well as new e-mail addresses, and notify the staff liaison of any changes.
- Don't forget to talk about the various ways to make a gift – EFT (electronic funds transfer), credit cards, stock, etc... This will help your classmate determine what best suits her finances while also demonstrating her support for Mary Baldwin.
- Don't forget to talk about matching gifts. They can double or triple their contributions at no cost to the donor!
- Share the things that make you proud of the Mary Baldwin of today.
- **Also see the “Calling Script” on page 26 of this handbook.**

## OVERCOMING COMMON OBJECTIONS

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**As you make your contacts, you will become familiar with a broad spectrum of responses from the classmates you contact. The following represent the most frequent objections to making a gift and suggestions for your response.**

***“I’ve already given.”***

Thank the donor for her support! Occasionally, there is a short lag between the time a gift is recorded and the time you receive an update from MBC. Tell her you will confirm her commitment with MBC and that you regret any confusion from the call.

The classmate may have made a gift in the last fiscal year (which ended on June 30, 2007). If that’s the case, thank her for the gift, explain that we are in a new fiscal year and ask for a pledge for this fiscal year in honor of their Reunion. Tell them they will have until June 2007 to make the payment on their pledge.

If you are asking a classmate for a second Reunion gift, thank her for the first gift; explain that their additional gift is vital for your class to meet its goal and maximize the Smith Challenge gift. Tell her she has until June 2008 to make a second gift.

If she already gives at same or reduced level as in the past, explain that her increased gift will help reach the class goal and send a strong message of a support.

***“I don’t want to commit right now” or “I need to talk with my spouse about this financial decision.”***

Tell the classmate you understand that it is an important decision. Ask if it will be okay for you to call back after she has had a chance to think it over or talk with her spouse. Try to set a specific time to follow up your request.

***“I don’t like the direction Mary Baldwin College is heading.”***

This general statement usually masks a specific complaint. Try to get your classmate to specify the complaint and acknowledge the concern. If you can respond accurately and completely to their specific complaint, please do so. Often, simply listening to someone’s concerns and offering your opinion dissipates their anger. If they continue to be upset about something specific at MBC, let your Annual Fund staff liaison know and she will respond to the concern.

***“Mary Baldwin College has plenty of money, they don’t need my money.”***

Tuition and fees cover only 50% of the entire cost associated with keeping Mary Baldwin open and viable. Student services and academic programs are dependent on the success of the Annual Fund. More money raised through the Annual Fund means more money available for lab supplies, faculty salaries, sports programs, and especially as scholarships for deserving students. When more scholarships are available it is easier to attract and retain motivated, exceptional students who will increase the value of a Mary Baldwin College education, which, in turn, makes the admissions process easier. It all begins with an Annual Fund gift – the heartbeat that drives the success of the college!

***“My gift doesn’t matter.”***

All gifts matter, both large and small. Alumnae/i participation in the Annual Fund affects the college’s ranking in reports such as *U.S. News & World Report* guide to colleges. The participation by alumnae/i also impacts the college’s ability to secure grants from national foundations and corporations who also weigh alumnae giving participation when determining grant awards.

***“Mary Baldwin only contacts me when she wants money.”***

Verify if classmate is receiving the college magazine published twice a year. Communication with our alumnae/i throughout the year, primarily via mail and email, is one of the college’s top priorities. And the MBC News Web site ([www.mbc.edu/news](http://www.mbc.edu/news)) is updated weekly, often daily.

## CLASS GIFT SOLICITATION LETTERS

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The Annual Fund Office will mail between two and four solicitation letters per year to your classmates. These letters will be signed by the Class Gift Chair. (Below, please find an example of such a letter.) You will be notified when these letters will be mailed, and we ask that you follow-up with your assigned classmates by phone or email.



Name  
Address  
City/State/Zip

January 27, 2008

Dear :

Reunion 2008 is quickly approaching! We hope you have made your plans to join me for the celebration. It has been 30 years since the class of 1978 graduated from Mary Baldwin, and we are looking forward to seeing you on campus again. It will be a great opportunity to visit with old friends and teachers and to meet some new classmates, as well.

I encourage you to help us reach our goals for this year's reunion: 100% attendance at Reunion Weekend and 100% participation from our class in this year's Annual Fund.

This year's Annual Fund is a very special one – not because we can support it as members of a reunion class, but also, because Bertie Deming Smith '46 has offered to match our annual fund gifts up to \$600,000. So, your gift to the MBC Annual Fund is more important than ever because it will be matched by Mrs. Smith.

Please keep in mind also that the Annual Fund most directly benefits the students of Mary Baldwin. Alumnae support for this Fund helps to provide financial aid and scholarships, campus enhancements, improved academic programs and extracurricular activities for all students. So, your Annual Fund gift is an excellent way to help others benefit from the Mary Baldwin tradition that we all value.

But most of all, please contribute to the Annual Fund this year in recognition of your reunion and capitalize on the opportunity presented by Mrs. Smith's generous challenge. A response card and envelope are enclosed for your convenience.

Thank you for supporting your alma mater. I look forward to seeing you back on campus for Reunion 2008!

Yours truly,

Class Gift Chair

## PERSONAL NOTES TO CLASSMATES

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One of your responsibilities as a member of the Class Gift Committee is to maintain contact with your assigned classmates. Here you will find a few examples of personal notes written by Gift Chairs or Gift Committee members to their classmates.

These examples give you an idea of what to write in a note asking for a gift (“solicitation note”), a thank you note for a gift or pledge that you secured from your classmate (“confirmation note”), and a general thank you note for a gift from a classmate whom you did not personally solicit (“thank you note”).

### Solicitation note:

*Date*

*Dear Classmate,*

*I know you have already received a letter from the college asking for your participation in our Class Gift. I hope you feel, as I do, that the terrific education students are receiving at MBC deserves your support.*

*Gifts to MBC provide students with the support they need. Your gift will help MBC provide financial aid, academic resources, and student activities.*

*This year, the Smith Challenge is an incredible opportunity to raise a remarkable \$1.2 million for our alma mater. I hope you will accept the challenge and join me in making a gift of \$xxx this year. A contribution can be made anytime before June 30, 2008. Remember to include corporate matching gifts from your company, if applicable.*

*I will call you in a few days to see if you have questions, and to encourage your gift.*

*Thank you for your consideration.*

*Fondly,*

*Class of '78*

**Confirmation note:**

*Date*

*Dear Classmate,*

*It was great to talk to you by phone last night. I'm amazed at how much we could remember from our years at MBC. Don't forget to put Reunion Weekend (April 3-6, 2008) on your calendar. I hope to see you there.*

*A sincere thank you for your generous pledge of \$5,000 for our Class of 1968 Gift. I am enclosing a gift/pledge envelope for your use in sending your gift to MBC. Your gift is vital in helping MBC continue her great tradition of providing an excellent education to prepare women for leadership in the world. It also will help us meet our Class Goal of \$100,000 and the Smith Challenge.*

*Sincerely,*

*Class of '68*

**Thank you note:**

*Date*

*Dear Classmate,*

*I have been advised by Mary Baldwin College of your recent generous leadership gift to MBC. Thank you for your contribution this year, and for taking advantage of the incredible opportunity presented by the Smith Challenge.*

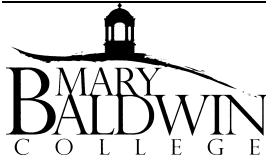
*I look forward to seeing you on Reunion Weekend, April 3 – April 6, 2008. It will be fun to see all the exciting things happening at our college.*

*Again, thank you for your gift which helps keep Mary Baldwin strong.*

*Sincerely,*

*Class of '78*

**CLASSMATE INFORMATION SHEET SAMPLE**



Thank you for supporting our Reunion Class Gift!

**Perforation:**  
Mail top to  
classmate, bottom

Amount of Gift-\$ \_\_\_\_\_

Please send payment in before March 15, so your gift will be included in our Reunion Class Gift figure for Reunion Weekend.

Note any changes and return this card with your gift payment. Thank you!

**Donor Solicitation Assignment Information**

ID#: «C1NMID»

«C1NKNM» «C1LNAM»

«C1SFFX»

Class: «MKDSAI»

Mail Code: «MKW9AF»

Preferred Mail Name: «C1PRFX» «C1PRFN» «C1LNAM»

Maiden Name: «C1BTNM»

Home Tel. No.: «C2APHN»

Home E-mail Address: «C2ATTN»

Address:

«C2ADR1»

«C2ADR2»

«C2CITY», «C2STAT» «C2ZIP»

Business Tel. No.: «N8APHN»

Business E-mail Address:

Make any  
address/telephone  
changes or  
corrections here

*Confidential*

*Please note changes here:*

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Tel. No. \_\_\_\_\_

Business Tel. No. \_\_\_\_\_

Home E-mail Address \_\_\_\_\_

Business E-mail Address \_\_\_\_\_

Solicitor:

Ask Amount: \_\_\_\_\_

Gift/Pledge Amount: \_\_\_\_\_

Year to Date AF Giving:

2004-2005: \_\_\_\_\_

2003-2004: \_\_\_\_\_

2002-2003: \_\_\_\_\_

2001-2002: \_\_\_\_\_

2000-2001: \_\_\_\_\_

Amount to  
ask classmate  
for.

Matching Gift Co. (Name & No.): \_\_\_\_\_

Credit Card # \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Expiration date \_\_\_\_ / \_\_\_\_ / \_\_\_\_ VISA/MC (circle one)

Notes:

Make note of any comments or  
information that may be helpful to  
the Annual Fund Office.

## CALLING SCRIPT

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### 1. **Introduce yourself:**

“Hi, this is your Mary Baldwin classmate \_\_\_\_\_. I am calling today as a member of our Class of \_\_\_\_\_’s Class Gift Committee. Is this a good time for you to talk?”

### 2. **Establishing a rapport:**

Ask about her experience since leaving MBC.

### 3. **Discuss the Importance of Support:**

“The purpose of my call this evening is to follow up the letter you received recently from \_\_\_\_\_, our class’s Gift Chair (or the letter may be from you). As the letter said, we will be celebrating our Reunion Weekend April 3-6, 2008. Will you be able to attend?”

“Another reason for my call is to talk about our Reunion Class Gift.”

“Our Reunion Class Gift goal is \$\_\_\_\_\_ and your gift is vital for getting us to that goal. In addition, we have the exciting opportunity to make a real difference for MBC with this year’s special Smith Challenge. If all of us celebrating a Reunion this year can raise \$600,000 as a group, our fellow alumna Bertie Deming Smith ’46 has pledged to match it with a \$600,000 gift of her own. This is a truly wonderful opportunity and I hope you will join me in accepting this challenge by making a special commitment to MBC.

### 4. **Ask for the Gift:**

For previous donors:

“Last year (or recently) you were terrific to support the college with a gift. As we strive to reach the \$600,000 set by Mrs. Smith, would you consider helping with a gift of \$\_\_\_\_\_?”

For first time donor:

“In order to reach this ambitious goal and receive the Smith Challenge matching gift, we need everyone’s generous support. Would you consider a leadership gift of \$\_\_\_\_\_?”

### 5. **Pause, Wait for Response, and Confirm Gift:**

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- **If the answer is “YES:”**

“That’s great! Thank you for your support!”

**CHECK:** “If you would like to write a check, I’ll send you a gift/pledge envelope and inform Mary Baldwin of your commitment.”

**CREDIT CARD:** “If you would like to use a credit card, you can go to MBC’s website at [www.mbc.edu](http://www.mbc.edu) and click the “Give to MBC” button at the bottom of the homepage. To make your gift over the phone, just call Mary Baldwin toll-free at (800)622-4255.

**SECURITIES:** “Giving a gift using appreciated securities works very well. If you would be interested in specific information about that, the phone number to call at MBC is 800-622-4255. I also can have the Annual Fund Office send you information about making gifts of stock.”

**BEQUEST:** “If you wish to become a member of The Kiracofe Society by naming MBC in your will, you may call the college at (800)622-4255 and the Development Office will be glad to answer any questions you may have.

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- **Unspecified response:**

“In order for me to inform MBC of your support, it would be very helpful for me to put you down for a specific gift to MBC. Would you consider a gift of \$\_\_\_\_\_? If you make your pledge now, we can include your gift in our totals, but you have until June to fulfill your pledge by the end of the fiscal year.”

- **Negative response:**

“I’m sorry that you won’t be able to support Mary Baldwin with a leadership gift this year, but I do hope that we will be able to count on your support at a level where you feel more comfortable. Participation is an important component of our success and every class member’s gift counts toward our goal.”

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\*\*\*\* ***If you do get a gift or pledge on the phone, be sure to ask your classmate if she or her spouse works for a matching gift company.***

“Do you or your spouse work for a company which matches gifts? If so, you can really add to your gift in a significant way. And the matching gift will count in your personal yearly giving total. When you make your gift, please go to your Human Resources Office and pick up a form. Fill it out and send it in to the Annual Fund Office, PO Box 1500, Staunton, VA 24401. They will take care of the rest.”

Insert EFT form

# GIVING CLUBS

Mary Baldwin has two sets of giving clubs: Traditional and Young Alumnae. For each set, *the amount of the annual gift determines membership in the gift club.*

<b>Society</b>	<b>Traditional Amount</b>
The Rufus Bailey Society	\$20,000 and up
The Mary Julia Baldwin Society	\$10,000 to \$19,999
The President's Society	\$5,000 to \$9,999
The Hill Top Society	\$2,500 to \$4,999
The 1842 Society	\$1,842 to \$2,499
The Columns Society	\$1,000 to \$1,841
The Ham and Jam Society	\$500 to \$999
The Apple Day Society	\$250 to \$499

## **YOUNG ALUMNAE/I PROGRAM (graduated in 2003 or sooner)**

This program is meant to acknowledge the special commitment of young alumnae/i who are just getting started in their lives and careers.

IF AN ALUMNA/US HAS GRADUATED WITHIN THE LAST 5 YEARS, THEY WILL QUALIFY FOR GIVING SOCIETY BY MAKING A GIFT EQUAL TO 50% OF THE TRADITIONAL THRESHOLD AMOUNT.

For example, if a 2003 graduate makes a gift of \$500, she qualifies as a member of the Columns Society. If a 1973 graduate makes a gift of \$500, she qualifies as a member of the Ham and Jam Society.

Asking a classmate if she would like to become a member of a specific gift club is an effective way to ask her to increase her giving level.

## GLOSSARY OF GIVING TERMS

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- Ask Amount** This is the dollar amount to be requested from a classmate. It can be found in the middle of the page on the left hand side of the classmate information sheet.
- Annual Fund** This consists of gifts from alumnae/i, parents, and friends, which support the college's day-to-day operations. The fund is called "annual" because the money given in any year supports that year's operating budget. With each new fiscal year, the college returns to its constituencies to ask for renewed annual support. The Annual Fund provides MBC with the flexibility to devote valuable resources to the areas where they are needed most.
- Annual Fund gifts may be designated to any of the following funds:
- |                    |                    |
|--------------------|--------------------|
| -Academic Fund     | -Scholarship Fund  |
| -Campus Fund       | -ADP Loyalty Fund  |
| -Student Life Fund | -Undesignated Fund |
- Capital Gifts** Gifts that are used for capital purposes. Building projects and the endowment are two examples.
- Endowment** A permanent fund from which only a portion of interest and gains is spent. The endowment principal is invested under the guidance of an officer of the college and Board of Trustees. Endowment funds come from gifts designated for this purpose by the donors and through unrestricted capital gifts that the Trustees designate for endowment. Unrestricted Annual Fund gifts are not placed in the endowment.
- Giving Societies** Mary Baldwin College has a number of giving societies to recognize leadership commitments. When you ask a classmate to make a leadership gift, you are asking her to join one of these special giving societies. The giving levels are:
- |                     |                                |
|---------------------|--------------------------------|
| \$20,000 and up     | The Rufus Bailey Society       |
| \$10,000 - \$19,999 | The Mary Julia Baldwin Society |
| \$5,000 - \$9,999   | The President's Society        |
| \$2,500 - \$4,999   | The Hill Top Society           |
| \$1,842 - \$2,499   | The 1842 Society               |
| \$1,000 - \$1,841   | The Columns Society            |
| \$500 - \$999       | The Ham and Jam Society        |
| \$250 - \$499       | The Apple Day Society          |

- Kiracofe Society** Established in 1987, The Kiracofe Society recognizes those who have included Mary Baldwin College in their estate plans. These gifts include charitable remainder trusts, charitable lead trusts, and charitable gift annuities, life estates in real property, life insurance, and bequests. They may be unrestricted or designated for the permanent endowment.
- Leadership Gift** A gift that acts as a guide for other classmates to follow. This amount is determined by each Class Gift Committee.
- Matching Gift** Many companies match their employees' gifts to college and universities. Thus, a \$500 gift made by a matching gift company employee becomes a \$1,000 gift or more (depending on the match). Please strongly encourage your classmates to complete the matching gift paperwork provided by their employer's human resource department. (Please see the enclosed "Matching Gift Companies" pamphlet that lists a large number of major employers who match gifts. This is not a comprehensive list, so if you do not see the company listed, still instruct your classmate to check with their human resources department to see if they have a gift matching policy.)
- Reunion Class Gift** The goal of Reunion Class Gifts is to increase support to the Annual Fund by maximizing the high interest in class reunions. Reunion giving allows alumnae to evaluate their support of the college and make a stronger commitment in honor of their reunion as a tribute to Mary Baldwin College.
- Unrestricted Gifts** Gifts given to MBC that are used to meet the most pressing financial needs of the college.