CLASS AGENT HANDBOOK

Fiscal Year 2012
(July 1, 2011-June 30, 2012)
October 2011

Thank you for volunteering for your class and making Wesleyan a priority. Class Agent communication – through letters, emails, text messages, posts on social media networks, phone calls, and good old fashioned face-to-face interaction – remains the single most successful vehicle for engaging Wesleyan alumni and boosting participation in the Wesleyan Fund.

Our fiscal year 2012 Wesleyan Fund goals are $10.2 million and 52% participation – challenging but achievable! It will be particularly important for each of us to help our classes develop a more consistent pattern of giving in order to reach these goals. As you may know, 50% to 52% of our alumni give annually; an additional 25% of Wesleyan alumni give at least once every five years. If we can convince even a small percentage of those sporadic donors to give annually, the results would be extraordinary.

Our research, based on focus groups and surveys, indicates that a majority of alumni give to Wesleyan out of love and appreciation for the university and what it meant in their lives. They understand that Wesleyan can only maintain its transformative educational experience – providing creative and critical thinking for life – with their support.

With that in mind, we crafted our fall class agent letter and fall direct mail brochure to remind alumni of the inspiring conversations and exchanges of imaginative ideas they had with fellow students and faculty. The letter and brochure make the link between these memories and the importance of giving to preserve the future of the Wesleyan experience.

Our research also indicates that a substantial percentage of alumni are more motivated by support of a social cause, particularly helping to provide financial aid and access to Wesleyan for talented students who might not otherwise have the means to attend. In the second half of the year, we will shift our communications strategy to appeal to these alumni.

Of course, we cannot reach our classmates if we do not have good contact information. We rely on Class Agents and other class volunteers to help us maintain updated phone numbers, email addresses, employment changes, and moves. Having an outdated address can easily convert an annual contributor into someone who forgets to support Wesleyan this year.

You can also help us keep in touch with alumni through Wesconnect, which enables the entire Wesleyan community to stay informed about what is happening on and off campus, reconnect with friends, network, and much more. Log on, create a profile, and start connecting: http://wesconnect.wesleyan.edu.

Lastly, it is our responsibility as class volunteers to lead by example. Please make an early leadership gift commitment and talk to your classmates about increasing their gifts this year. We must continue to build a pipeline of donors, and increase the number of those who give at leadership levels.

Thanks again for being part of this exciting initiative. We have a lot to accomplish this year and I look forward to working with you.

Warm regards,

Ruth
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At a Glance

Wesleyan Fund Executive Committee

Suzanne Riordan Appel ’02
Leo Y. Au ’71, *At Large*
Norman R. Beaulieu ’89
Andrew J. Calica ’01, *Vice Chair*
Mosah Fernandez-Goodman ’04, MALS ’07
Delcy Ziac Fox ’81*
Alexandra Britten Funk ’91
Joshua Nathan Goldin ’00
Jordan Michael Goldman ’04
Peter Webster Harris ’07
Ellika Anna Healy ’10
Dina Kaplan ’93

*Past Chair

Steven A. Levin ’75*
Kurt L. Lyn ’87
Richard A. Moreau ’98
James Campner Novogrod ’02
Ruth E. Pachman ’78, *Chair*
Daniel Brown Penrod ’05
Jill Pearson Rappaport ’78, P’13
Raymond Sanchez ’00
Mark Schonberger ’75
Orin S. Snyder ’83, P’13
Richard P. Swanson ’77*
Elena Wethers Thompson ’91

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Class Agent Job Description

- Act as a liaison between classmates and the University
- Solicit classmates for annual gifts
- Recruit and work with Associate Agents to be in touch with classmates quarterly
- Review and edit Class Agent letters and other correspondence
- Attend National Committee meetings
- Host/attend regional meetings with fellow Class Agents and Associate Agents

- **Make a stretch gift commitment before asking others to give**
  - GOLD 2011-2008: $250+
  - GOLD 2007-2002: $500+
  - All other classes: $1,831+

Communications and Events Timeline

**September:**
- Class Agent Letter #1, Draft
- Red and Black Calling Begins

**October:**
- Class Agent Letter #1, Mailed
- Wesleyan Fund National Committee Meeting, *October 13, 2011, NYC*
- Prospect Assignments sent to Class Agents and Associate Agents for personal outreach
  - Class Agents to follow up with Associate Agents
- Parents Fund Letter

**November:**
- Fall Direct Mail
- Homecoming/Family Weekend, *November 4-6, 2011*
  - Reunion Volunteers Meeting
  - Class Volunteers Thank-You Tailgate Party
- Fall Direct Mail Follow-up (Emails)
- Donor Associates Solicitation Mailing
- Annual Update

**December:**
- Donor Associates Calendar
- Year-end Emails
- End of Year Email - Final Push for Board Chair Joshua Boger ’73,P ’06, P ’09, Challenge (*December 31, 2011*)
January:
- Wesleyan Fund National Committee Meeting, January 18, 2012, NYC
- Spring Class Agent Letters, Draft

February:
- Volunteer Leadership & Board of Trustees Weekend – AAEC/WFEC Joint Meeting, February 24-25, 2012
- 5th & 10th Reunion Gathering, Date TBD, NYC
- Senior Gift Reception, Date and location TBD

March:
- Registration for Reunion opens
- Spring Class Agent Letters, Mailed
- GOLD (Graduates of the Last Decade) Invitation #1 - Announcing GOLD Challenge
- GOLD Invitation #2 - Announcing GOLD Party locations

April:
- GOLD Parties, April 5, 2012, cities across the country
- Wesleyan Fund National Committee Meeting, April 19, 2012, NYC
- Spring Direct Mail
- Parents Fund Email
- GOLD updates - #'s 1, 2, 3

May:
- Reunion & Commencement Weekend, May 24-27, 2012
  - Class Volunteers Thank-You Breakfast
- Personal Outreach by Class Agents and Associate Agents

June:
- Personal outreach by Class Agents and Associate Agents
- Direct Mail Follow-up Emails
- Last Chance Weekly Emails

**Monthly Communications:
- Anniversary Cards
- Reunion Emails
The Wesleyan Fund

The Wesleyan Fund has two vital goals:

- **Dollars through the Wesleyan Fund:** $10.2 million
- **Participation:** 52%

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

Your volunteer role is an incredibly important one as you work on behalf of the Wesleyan Fund. Not only will you help your class achieve its goals, but you will also build support for the University and maintain Wesleyan’s commitment to academic excellence and enhanced financial aid. **All gifts—no matter the size—count.** Collective smaller gifts amount to considerable sums.

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

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

<table>
<thead>
<tr>
<th><strong>WESLEYAN DONOR ASSOCIATIONS</strong></th>
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<tbody>
<tr>
<td><strong>TRUSTEE ASSOCIATES</strong></td>
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<tr>
<td><strong>PRESIDENT’S CIRCLE</strong></td>
</tr>
<tr>
<td><strong>FOUNDERS CLUB</strong></td>
</tr>
<tr>
<td><strong>WILLBUR FISK ASSOCIATES</strong></td>
</tr>
<tr>
<td><strong>COLLEGE ROW SOCIETY</strong></td>
</tr>
<tr>
<td><strong>JOHN WESLEY ASSOCIATES</strong></td>
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<td><strong>1831 SOCIETY</strong></td>
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<tr>
<td><strong>DOUGLAS CANNON CLUB</strong></td>
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<tr>
<td><strong>FOSS HILL CLUB</strong></td>
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<tr>
<td><strong>DAY SOCIETY</strong></td>
</tr>
<tr>
<td><strong>OLIN ASSOCIATES</strong></td>
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How You Can Help Wesleyan

- Be in touch with your classmates quarterly
- Call 5 alumni to thank them for their gift
- Attend at least 3 on- or off-campus events by June 30
- Wear Wes clothing and put a Wes decal on your car window
- Log in and use Wesconnect at least 10 times
- Supply Wes with new contact information for 5 alumni by June 30
- Reconnect with 1 Wesleyan friend or make 1 new Wesleyan friend
- Facilitate 1 career connection between an alumnus/a and a student
## Fiscal Year 2011 Fundraising Results

### Allocation

<table>
<thead>
<tr>
<th>Area</th>
<th>Goal</th>
<th>Gifts</th>
<th>FY2010 Total Gifts</th>
</tr>
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<tbody>
<tr>
<td>Endowment</td>
<td>$18,000,000</td>
<td>$17,217,630</td>
<td>$12,069,195</td>
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<tr>
<td>Wesleyan Fund</td>
<td>$10,500,000</td>
<td>$10,201,724</td>
<td>$10,144,349</td>
</tr>
<tr>
<td>*Facilities</td>
<td>$1,900,000</td>
<td>$2,570,336</td>
<td>$3,776,618</td>
</tr>
<tr>
<td>Freeman</td>
<td>$2,100,000</td>
<td>$2,100,000</td>
<td>$4,200,000</td>
</tr>
<tr>
<td>Other Restricted</td>
<td>$4,500,000</td>
<td>$5,010,297</td>
<td>$3,924,375</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$37,000,000</td>
<td>$37,099,987</td>
<td>$34,114,537</td>
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<tr>
<td>FY2009 Gift-in Kind (entered in Millennium this Fiscal Year)</td>
<td></td>
<td>$636,400</td>
<td></td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td></td>
<td>$37,736,387</td>
<td>FY2010 gift-in-kind = $886,646</td>
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</table>

*Facilities gifts include gift-in-kind donations valued at $1,191,257

**Goal Gifts**

<table>
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<tr>
<td>$400,000,000</td>
<td>$189,910,565</td>
<td>$124,936,849</td>
<td>$64,973,716</td>
<td>$44,824,115</td>
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</table>
University Relations (UR) Departments

- Major Gifts
- Wesleyan Fund
- Research
- Gift Planning
- Stewardship
- Corporate & Foundation Relations

Fundraising

Alumni & Parent Relations

Career Center

Events

UR Operations
The folks behind the scenes
**UR Department Functions**

**The Fundraising Staff**

**Major Gifts**
Manage prospects rated at $100,000 and above

**Wesleyan Fund**
Manage prospects rated at $50,000 and below, and work with classes to achieve fundraising and reunion goals

**Research**
Identify new prospects and assign ratings, update research on existing prospects, monitor media and databases for Wesleyan “hits”

**Stewardship**
Create annual reports on scholarships, endowments, faculty chairs and prizes; install plaques and signs recognizing donors; plan dedication events; coordinate thank you letters

**Gift Planning**
Offer expertise on gift planning vehicles, supervise Wesleyan’s relationship with Kaspick & Company, liaison with the Wesleyan investment office, market gift planning, work closely with major gifts, stewardship and the Wesleyan Fund

**Corporate & Foundation Relations**
Manage all grant-writing (public and private), coordinate foundation visits for faculty and administrators, seek opportunities for corporate gifts
The Engagement Staff

Alumni & Parent Relations
Work with all regional volunteers, drive planning for regional events, work with the Alumni Association, staff affinity councils, coordinate parent programs, develop lifelong learning opportunities (including WESeminars)

Events
Plan all major on- and off-campus events (HC/FW, Reunion & Commencement, In The Heights, Cosby benefits, presidential receptions, etc.)

Career Center
Advise undergraduates, foster employer relations and promote on-campus recruiting (often with alumni), create networking opportunities for students and alumni, match students with appropriate opportunities for internships and jobs

The Operations Staff
Manage the donor data base, process gifts, work with Human Resources, oversee administrative support, develop and implement the on-line community
Fundraising Talking Points

• What does the Wesleyan Fund support?

Alumni gifts through the Wesleyan Fund provide critical funding for financial aid, faculty salaries, teaching and technology tools, and the ongoing maintenance of the campus. Your gift, in conjunction with thousands of other alumni, parents, and friends, makes the Wesleyan experience possible for hundreds of students.

• How does a gift to the Wesleyan Fund help grow the endowment?

To assure economic sustainability now and long into the future, Wesleyan has made a strategic change in the allocation of fundraising dollars. The largest donations are now directed to the endowment, which the University is determined to strengthen. The University will be depending more than ever on the commitment of the entire Wesleyan community- everyone giving back every year, and stretching from time to time. Annual giving is the engine that will drive economic sustainability for Wesleyan. Your gift can assist the endowment project directly, too. Once contributions to the Fund reach the goal of $10.2 million, every dollar after that will go to the endowment.

- Endowment is at $601.5 million, up from $550 million last year.
- Wesleyan’s endowment is currently more liquid than many of our peer institutions, which leaves us in a good position going forward.

• A gap of $15,000 per student is offset by alumni and parent gifts. Wesleyan’s annual cost per student in FY11 was $69,000: $54,000 in tuition, room, and board expenses; and $15,000 of which is a “grant” from alumni, parents, and friends through their support of the Wesleyan Fund and the endowment.

• Approximately 44% of the student body receives financial aid thanks to Wesleyan alumni and parents. Scholarships for all four undergraduate classes totaled $41.3 million in 2010-2011, which is one of the most generous financial aid programs in the country.

The Wesleyan Fund fiscal year ends on June 30, 2012
Quick Responses to Common Objections

I give to other causes, or I feel as if my dollars have more impact closer to home.
• That's wonderful! But your support of Wesleyan will help educate people at the forefront of solving issues we all care about.
• Think about your charitable giving like investing—diversify your philanthropic portfolio.

Wesleyan is rich—it doesn't need my money.
• Yes, it does! Wesleyan does not have as large an endowment as most of its peers.
• For FY2012 the endowment draw will cover only about 12.7% of the annual budget. This represents a reduction in the endowment draw and supports Wesleyan commitment to preserve the value of its endowment.
• Tuition covers only approximately 70% of the true cost of a Wesleyan education per student per year. The remainder is made up through the endowment and annual gifts from alumni, parents, and friends.
• Wesleyan needs unrestricted funds to support academics, scholarships, and student life.

Why should I give? I don’t always agree with what’s happening at Wesleyan.
• Acknowledge the concern.
• Wesleyan has always reflected the changes in society at large.
• Consider whether, on balance, Wesleyan is true to its mission, and what value it contributes to the world and the lives of its alumni.

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

Wesleyan is no longer the place it was when I was there.
• Wesleyan has always reflected the changes in society at large.
• Today, Wesleyan students may live in a different time and climate, but their experience is fundamentally the same—they are here to learn as much as they can, to develop their passions, talents, and friendships in the few years that fly by much too quickly.

The only time I hear from Wesleyan is when they’re asking for money. I don’t feel close to Wesleyan.
• It’s never too late to reconnect with Wesleyan.
• The University does care about alumni and values alumni involvement. Your knowledge and expertise are tremendous assets that can benefit the University. Alumni participation strengthens the Wesleyan community. Alumni are involved in many volunteer roles across the University, from serving on advisory boards and committees to tutoring and helping out at events. Talk to your Staff Contact about your interests and we’ll help find the right way for you to reconnect.
This isn’t a good time for me to make a gift, with the economy the way it is.
- Be sensitive, but don’t take a reflex “no” as definitive.
- Wesleyan’s needs continue. We are currently looking at more ways to economize without sacrificing our high standards. Annual gifts help Wesleyan meet ongoing needs, even in an unpredictable economy.
- Virtually everyone can make a modest gift; even a small gift will be appreciated and will count toward the class’s participation goal. Participation in giving is an important measure of a university’s strength.
- “Many of our classmates are considering a planned gift. In light of your circumstances, would this be something you would like to consider?”

My relative wasn’t admitted to Wesleyan.
- Acknowledge the pain of this experience.
- “Where did your child/grandchild go to school? What was his/her experience like?”
- Wesleyan’s admission staff has a tough job: they received more than 10,000 applications for approximately 700 places. They try to balance the “legacy factor” with all other considerations.

All the practical things I learned came in graduate school or through my work.
- Remind them of the value of a liberal arts education as a foundation for graduate education, professional success, and lifelong learning.
- A Wesleyan education teaches students to think critically, and it provides the foundation from which graduates can make the most of graduate school and workplace opportunities.
- Wesleyan is committed to offering students the opportunity to test and advance their practical skills in real-world situations, through work and research internships. These internships are administered through the Career Center in conjunction with the Allbritton Center for the Study of Public Life and the Patricelli Center for Social Entrepreneurship.

Wesleyan doesn’t care about science; everyone is a writer or an artist.
- Wesleyan is in the top ten of baccalaureate colleges sending students on to Ph.D. programs in the sciences. A high number of our faculty have received competitive Career Awards from prestigious organizations such as the NSF (National Science Foundation) and NIH (National Institutes of Health).
- Many undergraduates take advantage of the opportunity--unusual at liberal arts schools--to conduct laboratory research alongside faculty and graduate student mentors during the academic year and/or in an intensive summer program funded in part by the prestigious Howard Hughes Medical Institute. In summer 2011, 108 undergraduates on campus worked full-time for six weeks on independent research projects in the life sciences. Frequently, Wes undergraduates are cited as co-authors with science faculty of articles published in professional journals.
- Wesleyan faculty have developed several new courses as part of an initiative called Science Across the Curriculum, which encourages science learning among nonmajors. Each class is co-taught by a professor in the sciences and a professor in the arts, humanities, or social sciences. For instance, in “Religion, Science, and Empire,” students explore how, over five centuries, scientific advances have worked to increase globalization.
- Last year Wade Hsu ’10 won the Leroy Apker Award of the American Physical Society. This prize is presented to the most outstanding physics student among all Ph.D.-granting institutions in the U.S. (including Harvard, MIT, etc.) The Apker Award is sometimes called a “mini-Nobel Prize,” justifying Wade’s teachers’ comments that he is “the best of the best.”
Wesleyan doesn’t care about sports, and being on a team was an important part of my experience.

- Wesleyan has a strong tradition of great scholar-athletes and we are honoring that history with our Athletic Hall of Fame; the fifth class will be inducted during Homecoming/Family Weekend ’11. Stop by the Freeman Center to see the Hall display.
- We started a new era in Cardinal football last year, with Mike Whalen ’83 returning to our alma mater as head coach and prospective Athletic Director. He had a terrific record coaching at Williams and is bringing high energy, expertise, enthusiasm, and expectations to Wesleyan—now with some of his own recruits on the team.
- Highlights of last year (2010-11) included:
  - Running back Shea Dwyer ’10 was a finalist for the Gagliardi Trophy—Division III’s counterpart of the Heisman
  - Men’s soccer made it to the semi-finals of the NESCAC tournament.
  - Three softball players won All-NESCAC honors, and two of them were named to the third team All-New England.

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

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

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

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

- **By Securities Transfer**

- **Matching Gifts**

- **Gift Planning**
  Planned gifts can benefit Wesleyan while helping you to save taxes, increase your income and pass more on to your heirs. Please contact Mark Davis, Director, Planned Giving, at **860/685-3660** or [mdavis@wesleyan.edu](mailto:mdavis@wesleyan.edu) for more information.

For more information please visit our website at [www.wesleyan.edu/fund/waystogive.html](http://www.wesleyan.edu/fund/waystogive.html).
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