

**BECOME
MORE**

CAMPAIGN FOR
THE FUTURE
OF HOLY CROSS

REUNION GIFT EFFORT HANDBOOK

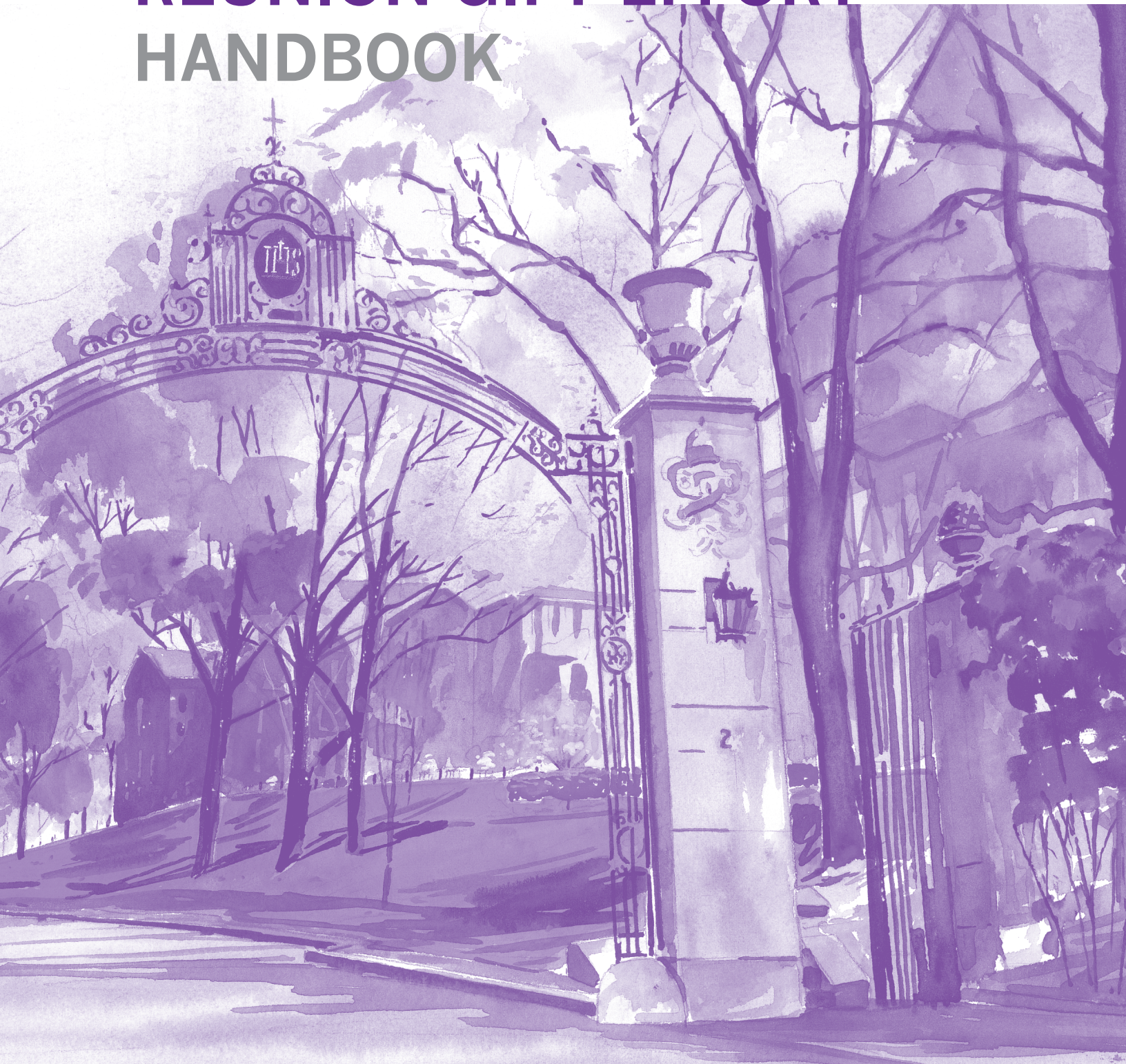


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WELCOME!

Thank you for investing your valuable time and resources in the College of the Holy Cross through your class reunion gift effort. Because of your leadership and meaningful involvement, the Holy Cross is strengthened in its mission to educate women and men who will make a positive difference in our world.

As you may know, we are in the leadership phase of a College-wide comprehensive campaign, Become More. On the eve of what promises to be an historic effort for Holy Cross, the coming months present a unique opportunity to strengthen the relationship between the College and our alumni. What you will accomplish in your reunion year will have a great impact on the overall campaign goals.

This guide presents an overview of how to organize a reunion gift effort, particularly within the context of the campaign.

We hope that you enjoy the experience of connecting with your classmates and championing the College's aspirations. Our team looks forward to partnering with you in the months ahead, and together we will work toward ensuring that Holy Cross continues to thrive.

With many thanks,

Tracy W. Barlok
Vice President of Advancement

REUNION GIFT EFFORTS

As a class leader, you are in the best position to help the College communicate broadly, yet personally, to your classmates about Holy Cross' most important priorities. The College has momentum and vision – but needs resources to sustain progress towards our goals. Every gift that you raise will count toward the College's campaign, and every contribution brings us closer to our goals.



Reunion gift efforts always aim to inspire high levels of class participation and to secure leadership contributions in support of Holy Cross' highest priorities.

This year brings renewed energy to these efforts as class reunion gifts will count toward the College-wide campaign. All reunion gift efforts should involve well-lead gift committees led by dedicated volunteer leadership. From the 5th reunion to the Purple Knights, reunion gift efforts build community and form the

backbone of the Holy Cross Fund, often raising more than 30 percent of the Holy Cross Fund total.

Holy Cross continues to succeed thanks in large part to our loyal alumni leaders, who have provided guidance and support for generations. Your gifts, time and resources impact the lives of our students who go on to make their mark on the world as men and women for others.

Simply put, as a reunion volunteer, your hard work and dedication matters. Thank you for investing your time, energy and talent in this important process, and please know that the College and your class liaison are ready to partner with you to achieve our shared goals for Holy Cross.

Sincerely,

Christene K Riendeau
Director, Reunion Fundraising and
Class-based Giving

REUNION GIFT CHAIR RESPONSIBILITIES

- › Provide an important example by giving generously and early
- › Identify and recruit classmates to serve on the gift committee
- › Solicit gift committee members and leaders within the class
- › Conduct committee meetings and conference calls
- › Author/sign class letters regarding the gift effort
- › Be available to your class liaison

REUNION GIFT COMMITTEE MEMBER RESPONSIBILITIES

- › Give a leadership gift or pledge
- › Participate in gift committee meetings and conference calls
- › Solicit leadership gifts
- › Assist with participation effort during final weeks of the fiscal year
- › Be available to your class liaison

PLANNING A REUNION GIFT EFFORT

Holy Cross reunion gift efforts follow a model that has proven successful year after year. Below are some general guidelines and strategies, however, keep in mind that this framework provides flexibility for each class given its stage in life and gifting history.

Every class has its own distinct characteristics: leadership, personality, history and wealth. Younger classes differ from older classes as activities, interests, understanding of philanthropy and capacity for giving evolve and grow.

Gift committees are usually led by a chair or co-chairs, who typically are the most visible and most generous members of the class. Chairs set the bar, the strategy and the tone of the overall gift effort. These class leaders work together with the Holy Cross development team to establish and accomplish goals that align with the College's most important priorities and projects.

Once leadership is established, identifying volunteers to serve as gift committee members comes next. This is a unique opportunity to capitalize on the distinctive talents, relationships and resources of your classmates. Ideally, the reunion gift committee will broadly represent the class and consist of individuals who represent various class segments.

Throughout the course of the reunion gift cycle, reunion gift chairs and committee members will build involvement, enthusiasm and ultimately, commitment to individual gifts and pledges from classmates. Reunion gift committee meetings, conference calls, social events and regular class letters and communications are standard components of any successful reunion gift effort.

Throughout the reunion cycle, you will work closely with your class liaison and other members of the development staff, such as leadership and principal gift officers and the gift planning department.

Your class liaison will manage all administrative details for your gift effort. That said, the more your liaison knows about your class, the more prepared he or she will be when coordinating necessary resources and establishing solicitation assignments to maximize results.

It is important to collaborate early with those managing the programming aspects of Reunion and Reunion Weekend (most often the Class Chairs). Synergy among all reunion elements facilitates success in the Class' overall reunion experience and gift effort.

Finally, the Holy Cross development team has found that the most successful reunion efforts often maintain close connections in non-reunion years through regular communications, social events and get-togethers, as well as through social media, such as dedicated class Facebook pages.

KEY POINTS FOR SUCCESS

START EARLY

- › Begin your effort 12-18 months in advance.
- › Build a strong committee: consider inviting classmates who represent different aspects of your class, and include both those who can make a leadership gift and others who will focus on participation.
- › Identify classmates not on the committee who can make leadership gifts.
- › Rely on your class liaison to help you determine your goals and strategies.
- › Consider why you and so many alumni give to Holy Cross:
 - Loyalty and a desire to help others as they were helped
 - Pride in the class' previous accomplishments
 - Expression of one's interest in the College through a leadership gift

YOUR PERSONAL DECISION

- › Ask yourself, "What has Holy Cross meant to me?"
- › Think about how you can make a difference.
- › Consider making Holy Cross your top philanthropy. Think about making a multi-year pledge or comprehensive gift.
- › Decide about your gift in advance of asking others.

ENLIST THE HELP OF OTHER COMMITTED CLASSMATES

- › Set gift level expectations by using a gift table.
- › Consider sharing your gift plans and ask others to stretch as you have.
- › Realize that a substantial part of your class' total will come from the committee.
- › Make your expectations clear and share them early.
- › Have a thorough understanding of the College's reunion counting rules.
- › Help prepare your classmates by facilitating "ongoing training" and sharing of experiences at scheduled meetings.

SET AMBITIOUS, YET ACHIEVABLE GOALS

- › Three goals should be set: Total Gift, Holy Cross Fund and Participation.
- › The top 10 percent of your donors will lead the way in setting your goal.
- › Set a goal that is high yet realistic. Records are nice but not always achievable. Consider your class' history.
- › Keep your goal open until six months before your reunion, and try to raise 95 percent of your goal before reunion weekend.

ABOUT SOLICITATIONS

- › Identify the right volunteer or staff member to ask for the most generous gift possible.
- › Gift committee members should always make their commitments before soliciting others.
- › Don't underestimate a person's willingness to give a big gift.
- › Be specific. If you want a six-figure gift, ask for one.

COMMUNICATE REGULARLY

- › Make communications short and personal.
- › Celebrate the work of gift committee members. Thank classmates personally for their contributions.

The reunion gift committee and certain members of the development staff will solicit gifts from the top prospects (this group usually represents about 10 percent of the class, yet could equate to as much as 90 percent of the gift total). *The gift amount and solicitation strategy must be discussed in advance so that the best person is asking for the right gift.* Your class liaison will facilitate these discussions.

Participation Chairs, typically the Class Chairs, are responsible for soliciting the rest of the class and have a goal that is usually 10-20 percent higher than non-reunion year participation totals.

ORGANIZING YOUR REUNION GIFT COMMITTEE

To conduct a successful reunion gift effort, it is important to enlist classmates to serve as early as possible. Further, the most effective leaders often set an example of their level of commitment to Holy Cross with the timing and size of their gifts.



GALVANIZING A TEAM

Organizing a reunion gift committee is a strategic process that should ideally start early. Gift Chairs are first identified, solicited and enlisted. In turn, they work to assemble the rest of the gift committee with the help of their class liaison and other members of the development team.

Collectively, the gift committee is responsible for personally soliciting classmates across the gift range.

True success depends on proportional giving, or giving according to capacity. Donors who are able to make larger gifts should not carry the full load by themselves. Participation at all levels of the gift spectrum produces significant dollars, especially in the aggregate, and demonstrates overall support for the College. Strong participation in a reunion is a vote of confidence in Holy Cross' mission and engages alumni whose philanthropic capacity may grow over time.

ADVICE WHEN ORGANIZING AN EFFECTIVE REUNION GIFT COMMITTEE

- › Start early. Working closely with your class liaison, solicit and enlist class leaders 12-18 months in advance of the reunion.
- › Solicitation may precede, be a part of, or follow enlistment. However, setting clear gift-level expectations while encouraging leadership is always important.
- › Use an individual's giving, potential to inspire others and volunteer history as a guide when considering possible leaders in your class.
- › Look for those who will commit to doing the work and completing assignments. Also, keep in mind that you may decide to include individuals as committee members in recognition of their generosity, regardless of their desire to solicit classmates.
- › Be inclusive from a geographic perspective.
- › Realize that most reunion gift dollars will be generated from your gift committee members.
- › Understand the importance of comprehensive gifts and multi-year pledges.

GOAL SETTING

Setting goals for your reunion gift effort raises sights, inspires your work and provides the class with context of what the gift committee would like to achieve.

WHAT IS AMBITIOUS AND ACHIEVABLE?

Making these decisions can be a complex process, but having certain information will help. Early in your gift effort, your class liaison will supply reunion gift histories of your class and your peer classes, your class individual giving histories, current reunion records and materials that provide a baseline of potential ask amounts.

Further, reunion gift committee members often may provide unique insights on suggested ask amounts. Early commitments from gift chairs, co-chairs and committee members are usually an indication of what the class will be able to achieve.

Setting a specific Holy Cross Fund goal and a comprehensive goal helps ensure that a class' fundraising effort remains closely connected with the College's ongoing needs. Your class liaison will help you define this goal within the context of your broader, total gift.

COMPARE REUNION GIFT HISTORIES

The achievements of earlier classes offer a rough idea of what your class could accomplish, yet gift totals of adjacent classes can also vary widely. Differences typically stem from gifts in the top levels. One or two exceptional gifts can make a significant difference in the bottom line, so assess whether your class has this kind of potential.

REVIEW YOUR OWN PRIOR REUNION RESULTS

As a class matures, its own track record may serve as an indicator for the next reunion gift effort. That said, there is an ever-present opportunity to identify new donors or engage those who have not yet been involved. The class giving history can help spur ambitions to achieve the greatest potential and inspire both new and seasoned alumni.

CONSIDER REUNION RECORDS

Is your class motivated by breaking records or is a College record too much of a reach? Decide what would be the most realistic and most energizing goal. With your class liaison, analyze how many gifts would be needed at each level to determine what would be attainable.

ESTIMATING GOALS

Your class liaison will work closely with you in order to build a gift pyramid that projects the number and size of gifts needed to meet each goal. A good rule of thumb is to have four prospects for each gift at the upper levels and two prospects for each gift at the lower levels.

ASSESSING CLASS GIVING POTENTIAL

Reviewing a class list is a valuable exercise that can either be conducted one-on-one with your class liaison, or as a group at your first gift committee meeting. During these discussions, you should:

- › Estimate what you believe an individual has the *potential* to give over five years, not what you think someone is *inclined* to give.
- › Identify only those you know personally, and suggest potential connections with other volunteers or classmates.
- › Indicate whether you are comfortable with soliciting certain classmates.



BUILDING AND MAINTAINING MOMENTUM

Consider how to create and maintain energy and enthusiasm throughout your reunion gift effort. While certain classes may be motivated by breaking long-standing College records, others might be inspired by a challenge that encourages and increases participation.

Such motivational tools, especially if they are wisely structured and well-timed (particularly in the last months of the reunion gift effort) can play a large role in the success of an effort. Discuss the possibility of creating a matching fund challenge specifically for your class.

Establishing a class project is another tactic for building momentum. In recent years, classes have named spaces after their beloved mentors and/or identified budget-relieving projects that helped rally their classmates. Gifts in support of these types of projects are part of the Holy Cross Fund.

Keep in mind that designation of the entire class gift to a restricted purpose runs counter to the mission of raising flexible gifts that can be used immediately by the College. Restricted funds cannot meet unanticipated needs or opportunities, which is why a variety of gift designations and types is so important.

SOLICITATION SUCCESS

The success of Holy Cross' fundraising depends on peer-to-peer outreach at every level. The role that you play, as both a volunteer and as a donor, in encouraging classmates to give cannot be overstated. By sharing what motivates you, may it inspire others to step up and do the same.

Everyone approaches solicitations differently. Some find it difficult, others enjoy the challenge and experience, which often makes it easier. Participation-level gifts are more transactional than leadership gifts. A donor decides quickly via a written appeal or phone call and completes the gift by the end of the fiscal year. This gift requires positive feelings for the College by the donor, but no close connections per se to the solicitor.

Leadership gifts take more thought and preparation. Relationships become important and several conversations (often involving classmates and/or Advancement staff at the college) may have to occur before a donor commits to a gift. The donor may fulfill a significant pledge over the course of several years, and the timing may or may not work with your reunion.

Your class liaison will provide guidance with leadership-level solicitations and help to align a donor's philanthropic goals with Holy Cross' priorities. When done well, engagement leads to commitment and enjoyment of philanthropy and each gift creates a baseline for future solicitations.

GUIDELINES FOR SOLICITING

MULTI-YEAR PLEDGES

Keep in mind that a donor can elect to make a pledge that is payable over as many as five years*. The full pledge will count toward the reunion gift total regardless of the amount that is paid on the pledge during the reunion year. Multi-year pledges are always stretch gifts. For example, a donor who typically makes a gift of \$5,000 to the Holy Cross Fund each year prior to the reunion, but has the capacity to make a six-figure, multi-year gift, should be asked to consider a comprehensive gift to the reunion. If the donor is interested in establishing a Loyola scholarship, their gift may look like this:

TOTAL GIFT = \$200,000 OR \$40,000 A YEAR FOR 5 YEARS

HOLY CROSS FUND GIFT = \$10,000 A YEAR FOR 5 YEARS TOTALING \$50,000

SCHOLARSHIP GIFT = \$30,000 A YEAR FOR 5 YEARS TOTALING \$150,000

** Please note that the minimum amount accepted by the College to pledge is \$1,000 per year.*

MAKE YOUR OWN GIFT FIRST.

Your own generous gift, and your belief in Holy Cross, is the very best preparation for seeking equally thoughtful gifts from others.

PREPARE FOR YOUR CALLS.

People may not like to be solicited, but they love to give! Keeping this simple piece of advice in mind is an important first step in being successful as a reunion gift committee member. As a gift committee member, your role is not necessarily to just solicit, but to give your classmates an opportunity to join you in making a gift by saying, *"I hope you will join me in making Holy Cross a priority this year, and that you might consider a gift of \$ _____. I also want to encourage you to attend reunion in June."*

ESTABLISH A CASE FOR GIVING.

Familiarize yourself on why it is important to support the College today (by giving an unrestricted gift to the Holy Cross Fund) and why it is important to support the College in the future by a five-year pledge or a planned gift such as a gift annuity or a bequest intention. Also, be sure to understand how each gift will impact your class' reunion goals.

FAMILIARIZE YOURSELF WITH YOUR CLASSMATE BEFORE MAKING CONTACT.

Brush up on the background and interests of the classmates you will solicit. You will receive relevant available biographical information to facilitate your outreach.

DON'T UNDERESTIMATE.

Chances are good that your classmates feel as strongly about Holy Cross as you do. Be confident, you also do not have to have an answer for every question. Questions posed by donors often help you understand their philanthropic interests. Further, your class liaison will help answer any questions that may arise.

MAKE THE APPOINTMENT.

Call or email your assigned classmates to arrange a time when it would be convenient to talk, either in person or over the phone. They will probably know something about the reunion gift effort and will be expecting a call. By arranging a time for a conversation, you will be able to make your case more easily.

LISTEN.

Don't expect an immediate commitment for a large gift. Your classmate may need time to think about what you've asked or may want to consult with others.

SET THE STAGE.

Pace the conversation thoughtfully and agree on next steps. Remember that early decisions encourage others to give. If a donor requests a significant time to make a decision, you may want to ask, "Would you be willing to name an initial figure now?"

INQUIRE ABOUT MATCHING GIFTS.

If a classmate qualifies for a corporate matching program, larger commitments may be reasonable. Donors will receive credit for both their pledge and the corporate match.

FOLLOW THROUGH.

Also, thank your classmate. Send a thank you note, naming any figure pledged or proposed. This will help move the process forward. You also will want to maintain any necessary additional contact. Many solicitations, especially at the major gift levels, will require more than one discussion with a classmate.

FOLLOW THROUGH. (CONT.)

Afterwards, promptly report any outcomes to your class liaison. Be sure to capture gift amounts and terms of payment accurately if a multi-year pledge is involved. If the gift is designated to a specific area, or if it involves a corporate match, be sure to report that as well.

Donors making pledges will receive confirmation of pledge details from the College as well as periodic payment reminders. It may be helpful to let classmates know this when you thank them.

ACKNOWLEDGEMENTS

Remember to send a note of thanks following each completed solicitation. Further, it's important for you to know that the College will acknowledge any gift and pledge. Leadership gifts may receive a letter of thanks from the Vice President of Advancement or from the College's President.

SAMPLE: INTRODUCTORY LETTER OR EMAIL

Dear _____,

On behalf of our class reunion gift committee, I hope to have the opportunity to talk with you about our class gift to Holy Cross on the occasion of our ____ reunion.

I have given a great deal of thought about why I give back to Holy Cross, and I would like to share these reasons with you. I will give you a call next week and look forward to setting up a time to meet or talk that would be convenient with you.

Best wishes,

SAMPLE: THANK YOU LETTER OR EMAIL

Dear _____,

It was wonderful to reconnect and to talk about our time on the Hill. Thank you again for your very generous response to my call regarding our reunion gift. We are truly grateful for your pledge of _____. Your (unrestricted) gift helps Holy Cross remain strong by enabling it to meet significant commitments and respond to unexpected needs. (or Your gift to _____ will strengthen Holy Cross resources to support _____.) You will receive confirmation and thanks from the College as well.

I look forward to seeing you (at reunion) (sometime soon).

Best wishes,



GIFT GUIDELINES

COMPREHENSIVE GIFTS

All gifts, regardless of their designation, count as part of the class' giving total and the reunion gift to the College. A comprehensive gift can be partially designated as current-use, while a portion may go to a specific purpose, such as athletics. For those celebrating their 35th Reunion and beyond, a life income gift (e.g., gift annuity) would also be part of a comprehensive gift. For those celebrating their 50th Reunion and beyond, bequest intentions would be part of a comprehensive gift. Donors who are asked for a comprehensive reunion gift are asked to consider increasing their gift to the Holy Cross Fund and other current-use funds in addition to their designated gift. In nearly all cases, a comprehensive gift involves a multi-year pledge of up to five years.

CURRENT-USE GIFTS

Gifts to the Holy Cross Fund are unrestricted and support the annual budget of the College. Historically, gifts to the annual fund represent more than seven percent of the College's annual budget. As part of the Holy Cross Fund, a gift can be designated to financial aid or faculty resources. All gifts make it possible for Holy Cross to support student programs, enable the College to offer financial aid to deserving and talented students, and provide the means to recruit and retain the most talented faculty.

GIFTS OF SECURITIES

Gifts of appreciated securities can provide attractive tax advantages that may enable some donors to consider a larger gift. Donors of appreciated stock save capital gains taxes while earning a charitable deduction.

MATCHING GIFTS

Matching gifts often give a donor an opportunity to double and occasionally triple their gift to the College and the match counts in the class reunion gift total. Your class liaison can help identify the classmates who may be eligible for matching gift programs. The College regularly solicits matching gifts from eligible donors. For more information on matching gifts, call (508) 793-2421 or visit the website holycross.edu/matchinggifts.

PLANNED GIVING

Planned gifts create extraordinary opportunities to provide for future resources to Holy Cross. For some donors a planned gift, such as a life-income gift arrangement, allows donors to support Holy Cross while receiving financial benefits from their gift. For others, a bequest enables donors to make a larger gift than they could otherwise make during their lifetime.

Planned giving offers donors creative and strategic ways to use a variety of assets such as appreciated securities, real estate, and interests in business enterprises to maximize their giving to Holy Cross while also minimizing income and estate tax liabilities.

Most planned gifts to Holy Cross are life-income gifts, such as charitable remainder unitrusts and charitable gift annuities, and bequests.

Donors in their 35th reunion year and above receive credit for the face value of irrevocable life-income gifts. Documented bequest intentions are counted in the 50th reunion year and above.

For more information, please contact the Office of Gift Planning:

Karen S. Turpin, Director
508-793-2379
giftplanning@holycross.edu
www.holycross.giftplans.org

ABOUT THE 1843 SOCIETY



Created to honor the spirit of philanthropy that has nurtured and sustained Holy Cross for more than 170 years, the 1843 Society recognizes those individuals who have thoughtfully included a gift to the College in their estate plans through a will, trust, retirement plan, life insurance policy, or life-income gift such as a charitable gift annuity or charitable remainder trust.

Membership is entirely voluntary, and there is no immediate gift, minimum gift level, or minimum age required to become a member. Simply notify the Office of Gift Planning of your gift intentions so that we can warmly welcome you and extend an invitation to our annual celebratory events.

By joining the 1843 Society, you become part of the Holy Cross legacy and will help to inspire others to support the College with future gifts.

For members who are 70 years of age or older, providing simple documentation of a gift intention will allow that future gift to be counted in your current Reunion Class Gift totals.

If you haven't already, we encourage you to consider your own legacy and contact the Office of Gift Planning to discover how you can realize your philanthropic goals.

Ken Padgett '66

Barbara Richardson '78

Matt Donovan '99

Co-Chairs for the 1843 Society



REUNION COUNTING RULES

5TH, 10TH, 15TH, 20TH AND 30TH REUNIONS

- › All gifts to Holy Cross received during the Reunion year and
- › All multi-year pledges made in writing and received by June 30, which are to be fulfilled within the next five years and
- › The remaining balances on multi-year pledges that are made before the reunion year began

35TH, 40TH AND 45TH REUNIONS

- › All gifts to Holy Cross received during the Reunion year and
- › All multi-year pledges made in writing and received by June 30, which are to be fulfilled within the next five years and
- › The remaining balances on multi-year pledges that are made before the reunion year began and
- › The sum of all life income gifts

25TH REUNION

- › All gifts to Holy Cross received in the 21st-25th year, excluding pledge payments on multi-year pledges made during the 20th Reunion and
- › All multi-year pledges made in writing and received by June 30, which are to be fulfilled within the next five years and
- › Multi-year pledges made after the 20th Reunion year ends

50TH REUNION

- › All gifts to Holy Cross received in the 46th-50th year, excluding pledge payments on multi-year pledges made during the 45th Reunion and
- › All multi-year pledges made in writing and received by June 30, which are to be fulfilled within the next five years and
- › Multi-year pledges made after the 45th Reunion year ends and
- › The sum of all documented bequest intentions and life income gifts received

55TH AND 60TH REUNION

- › All gifts to Holy Cross received during the Reunion year and
- › All multi-year pledges made in writing and received by June 30, which are to be fulfilled within the next five years and
- › The remaining balances of multi-year pledges made before the reunion year began and
- › The sum of all documented bequest intentions and life income gifts received

For more information, please contact your class liaison, or

Christene Riendeau
Director, Reunion Fundraising and Class-based Giving
(508) 793-2707
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