Class Programs and Reunion Campaigns

Class Fundraising 101
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Presenters:

Meg Campbell
Paul Lanzone
Faith Ssebikindu

Class Programs and Reunion Campaigns Team
Agenda:
- Fundraising priorities and updates
- Impact of Volunteers
- What you need to know to make an ask
- Tools and resources
- Q & A
Fundraising Updates

Fundraising Priorities and Updates

$1.18 BILLION
GOAL: $1.5 BILLION
AS OF 9.30.13
Fundraising Updates

Campaign Pillars:

• $500 million to fund scholarships  
  (current total: $276,595,364)

• $500 million to invest in our faculty and academic excellence  
  (current total: $503,872,259)

• $200 million to enhance the student life and community experience  
  (current total: $160,235,370)

• $300 million to pursue transformative opportunities  
  (current total: $242,610,030)
Updates from Campus

The undergraduate Class of 2017 was selected from the largest and most diverse pool of applicants in Georgetown’s history.

Georgetown received the largest gift in its history to found the McCourt School of Public Policy.
Updates from Campus

The new Calcagnini Contemplative Center opened, providing a beautiful retreat space for Georgetown student groups.

Construction on the new Healey Family Student Center is underway.
Impact of Volunteers

37.2% Reunion 2013 overall participation rate

$59.4 Million Reunion 2013 dollars raised

96.64% Volunteer giving rate

69.7% Giving rate of Reunion 2013 attendees
Reunion Participation

Participation Rate (New Base Estimates)

Reunion 2008
Reunion 2009
Reunion 2010
Reunion 2011
Reunion 2012
Reunion 2013
Reunion Volunteer Participation

- Reunion 2008
- Reunion 2009
- Reunion 2010
- Reunion 2011
- Reunion 2012
- Reunion 2013
Reunion Attendee Participation

Participation Rate of Reunion Attendees in Reunion Year

- Reunion 2007: 50%
- Reunion 2008: 60%
- Reunion 2009: 55%
- Reunion 2010: 55%
- Reunion 2011: 60%
- Reunion 2012: 65%
- Reunion 2013: 70%
Class Fundraising 101

What you need to know to make an ask
Reunion Goals

Dollar Goal

• Five year cumulative total (July 1, 2009 – June 30, 2014)
• Setting the goal
• What counts?
  • All new commitments
  • All gifts to all areas of the university
  • Pledges unique to this reunion cycle
Reunion Goals

Participation Goal

• Giving percentage (donors / solicitable base) during current fiscal year
• Setting the goal
• What counts?
  • Cash gifts, including payments on pledges
  • New pledges will only count for participation if a cash payment is received before June 30, 2014
  • Nuances (credit, foundations, matching gifts)
### VITAL STATISTICS

<table>
<thead>
<tr>
<th>Description</th>
<th>Number</th>
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<tbody>
<tr>
<td>Class Size</td>
<td>1391</td>
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<tr>
<td>Given every year in reunion cycle</td>
<td>118</td>
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<td>Given at least once in 25th Reunion Cycle</td>
<td>569</td>
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<td>Last gift was 20th Reunion Year</td>
<td>48</td>
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<td>Last gift was before 20th Reunion Year</td>
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<td>Never Given</td>
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= 28 Alumni
Example: Class Breakdown

2012 REUNION GOAL
50% = 662 Donors

- Solicitable Base: 1243
- Reunion participation rate if all in first three categories make FY12 gift: 59%
- Reunion participation rate if all in first four categories make FY12 gift: 82%
- = 28 Alumni
Reunion Trophies

**President’s Cup:** Greatest % of donors during reunion year

**Reunion Cup:** Greatest % of classmates returning for Reunion Weekend

**Blue & Gray Cup:** Largest reunion giving total

**Loyalty Cup:** Greatest % of classmates who have given every year of 5-year reunion giving cycle

**Legacy Cup:** Greatest % of Legacy Society members
Retention Goals

Giving and Engagement in Non-Reunion Years

Every year matters! Leverage momentum from reunion to foster loyal annual donors

- Events and communications to keep up engagement
- A few smaller outreach campaigns

Fiscal Year 2013

<table>
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<th>Decades</th>
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<td>3's and 4's</td>
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<tr>
<td>2's and 3's</td>
<td>30%</td>
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<td>1's and 2's</td>
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Various ways to make a gift:

• Check
• Credit card online (giving.georgetown.edu)
• Recurring gifts
• Pledges/multi-year pledges
• Matching gifts
• Investments and bequests
The Georgetown Fund

• Supports university’s highest priorities
• Currently, 100% of undesignated Georgetown Fund gifts support the 1789 Scholarship Imperative
  • Gifts of any size count
  • Gifts are bundled into $25,000 scholarships
Planned Giving

- Includes estate, trust and bequest planning
- Counts in dollar totals for alumni 65+ with gift plans on record
- Office of Planned Giving: (800) 347-8067
Georgetown Giving FAQs

The Loyalty Society
- Honors donors who have given 2+ consecutive years
- Benefits increase with number of years of given
- Can “buy back” during a Reunion year ($25/year)

The Legacy Society
- Honors donors who have made a planned gift
- Receive a pin as a memento of your gift
Outreach Talking Points

• Introduction
• Share reunion details
• Ask if they plan to attend reunion
• Thank (if applicable) for past generosity
• Ask that they consider making a gift to support Georgetown
• Share university priorities/class goals
• Follow up
Class Ambassador Workshop

Tools and Resources
Resources and Support

- Sample emails, scripts, Facebook content
- Consistent updates on class progress
- Major gift strategy (with Development Officers)
- Talking points
- Classmate information
- University updates
- Webinars and trainings
1. Organize and recruit class ambassadors
2. Develop and implement fundraising strategies
3. Reference Georgetown giving information
4. Communicate strategically with classmates
A web-based volunteer outreach and fundraising tool, providing class ambassadors the following benefits:

1. View updated data in a fast and secure manner
2. Record alumni-to-alumni correspondence and contact information
3. Submit classmates’ pledge information electronically
4. Capture and demonstrate the important work of class ambassadors

*Do you have your active NetID and password?*
Volunteer Relationship Management

Selecting prospects:

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<tr>
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<th>Prospect Name</th>
<th>GUSY</th>
<th>Spouse Name</th>
<th>District</th>
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<tr>
<td></td>
<td>David E. Agnew, Esq.</td>
<td>C'87</td>
<td></td>
<td>CA - Los Angeles</td>
<td>Walt Disney Records/Disney Music Group</td>
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<td></td>
<td>Mr. Max L. Aguilar</td>
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<td></td>
<td>Mr. Ramon Ricardo Arias</td>
<td>C'87</td>
<td></td>
<td></td>
<td>GALINDO, ARIAS &amp; LOPEZ</td>
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Prospect Details:
- Prospect ID: 0000071927
- Name: David E. Agnew, Esq.
- Maiden Name: Agnew
- City: Los Angeles
- State: CA
- Country: USA
- Company: Walt Disney Records/Disney Music Group
- Title: President/EVP & GM
- GUSY: C'87
- Schools: College (Undergrad)
- Major: Philosophy
- Dorm/Residence: New South Dorm
- Activities/Interests: Amnesty Intl. Program Board, Student Library Workers
- Sports: No Affinity Listed
- Job Description: No Affinity Listed
- Journal: No Affinity Listed
- Clinics: No Affinity Listed
1. Class Websites

2. Broadcast e-mails sent at your convenience

3. Event registration forms

4. Synchronization with Class Notes and Events Calendar

5. E-mail and event reporting
The Impact of Reunion at Georgetown

Manage class website content.

Harris Connect Tool
Sample Facebook page/group
Questions?