Middlebury

CLASS AGENT
Planning Guide
Thank You for Volunteering as a Class Agent!

Middlebury fundraising efforts could not be successful without the work of our outstanding volunteers. Fiscal Year 2014 was a great success. With our help, the Office of Annual Giving raised $6,987,300 in expendable gifts from 55 percent of its undergraduate alumni. You played a pivotal role in making that happen!

This guide is meant to provide you with resources and tools necessary to do this important work for Middlebury. It includes sections on ways to make a gift, instructions on Middlebury’s online volunteer module—Agents in Action—and information on ways to stay up to date with what’s happening on campus, as well as some fast facts about Middlebury’s finances and current students.

As fellow volunteers and members of Middlebury’s Annual Fund Executive Committee, it’s our job to take an active role in ensuring that Middlebury meets its annual goals and commitments. We are here to help you, so please don’t hesitate to contact us with any questions or concerns.

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We Count on You

Class agents are key members of the Annual Fund team. Without your efforts, Middlebury would not be able to reach its participation and dollar goals. Alumni are far more likely to make a gift when asked to do so by a classmate than by the institution. Your personal outreach to engage classmates and to ask for their support is crucial to our success.

YOUR ROLE

You serve as the primary contact between the College and your classmates. The two key goals of our class agent program are to increase class participation and to keep individual classmates connected to each other and the College.

RESPONSIBILITIES

- **Lead** by example: make your gift to Middlebury by December 31.
- **Attend** the Alumni Leadership Conference at Homecoming in October.
- **Contact** 10 to 20 classmates about making their annual gift. There are two contact periods during the year: one in the fall and one in the spring.
- **Share** Middlebury news with your classmates.
- **Relay** feedback from classmates to the Annual Giving team.
- **Thank** those who make a gift! Every gift deserves a personal thank you.

OVERALL ANNUAL GIVING GOALS

- $11.6 million from alumni of all Middlebury programs, parents, and friends.
- $6.4 million from undergraduate alumni.
- 56 percent overall undergraduate alumni participation.

CLASS AGENT GOALS

- Increase class participation.
- Increase unrestricted gifts to the Annual Fund.
The Impact of Philanthropy at Middlebury

Since Gamaliel Painter left a bequest of $13,000 and his cane to the College in 1819, philanthropy has played a critical role in Middlebury’s development. Beginning in 1940, gifts to the Annual Fund have been an important source of institutional momentum. The fund’s success reflects the impact of shared alumni experience, as each generation preserves what’s best about a Middlebury education, enhances it, and passes it on to the next.

WHY GIVE TO THE ANNUAL FUND
Support for the Annual Fund is Middlebury’s highest priority. Since Annual Fund gifts are unrestricted and can be spent as they come in, they make a direct and immediate difference in the lives of current students and faculty. They enable Middlebury to provide extraordinary opportunities for learning and discovery, to offer financial aid to every student who needs it, and to respond to emerging needs and challenges. Annual Fund gifts help to create the environment that enables the individual and collective success of our students.

While our priority is unrestricted gifts, as they provide Middlebury with the most flexibility, if your classmates prefer to direct their annual gifts to specific purposes, they can support a number of different areas, including financial aid, experiential learning, faculty and academic programs, athletics, and student life.

REASONS TO GIVE
» The Annual Fund creates a diverse community by enabling Middlebury to offer financial aid to every student who needs it.
» It fosters intellectual curiosity by creating opportunities for students and faculty members to collaborate.
» Gifts to the fund provide opportunities for students to apply what they are learning in the classroom to real-world issues, developing skills that are essential to staying competitive in a global marketplace.
» The Annual Fund supports opportunities to develop leadership and team-building skills through student organizations and varsity, club, and intramural sports.
» Annual gifts enable the faculty to develop new courses and incorporate new technologies.
» Outside organizations, including foundations, view participation as one measure of the overall strength of the institution.

IT ALL ADDS UP
» Gifts of $250 or less added up to $881,443 last year. Gifts under $100 amounted to $461,759.
» It would take $100,000 in endowment to provide the same income and create the same impact as a $5,000 Annual Fund gift.
Making a Gift to Middlebury

There are many ways to support Middlebury. As a class agent, you can help classmates determine the best way to make a gift.

**INCREASING THE IMPACT OF A GIFT**
A few ways your classmates can make their gift go even further are listed below. Please contact your staff coordinator if you have questions or need more information.

**Recurring Gifts** are a great way to increase the size of your gift by spreading it out over a 12-month period. An outright 1800 Society gift might seem beyond reach, but a recurring gift of $150 per month might fit someone’s budget more readily. You can easily set up a recurring gift when you make your gift online, and know that you’ll never miss the end of the fiscal year again. We hope that you will consider setting up this type of gift, and that you’ll encourage your assignments to do so as well!

**Corporate Matching Gifts** Many companies will match charitable gifts. Find out if your employer has a matching program; it is a great way to double your impact. This is also a great question to ask your assignments.

**Gifts of Securities and Mutual Funds**
Often classmates find it easier to make a larger gift using appreciated securities, rather than cash.

**Multiyear Pledge**
Classmates who wish to make a larger commitment to Middlebury may pledge a specific amount per year over a three- to five-year period.

**Creative, Flexible Giving Options**
To find out more about trusts and annuities, gifts of real estate, and bequests, please visit go.middlebury.edu/giftplanning.

**WAYS TO GIVE**

online: go.middlebury.edu/give
phone: 888.367.6433 (toll free)
mail: Gift Administration, Middlebury College, 700 Exchange Street, Middlebury, VT 05753
Giving Societies

Your classmates may be interested in giving at levels that afford recognition and membership in one of these societies. Sharing recognition levels can raise sights and motivate classmates to make a larger gift than they might otherwise consider.

The True Blue Society recognizes Middlebury’s most loyal donors, who have made gifts consistently for at least the last three fiscal years. True Blue donors are the foundation of Middlebury’s annual giving program.

The 1800 Society recognizes alumni with the ability and desire to support Middlebury at a leadership level annually. Giving to the 1800 Society makes you a philanthropic leader in your class and an example to follow. The 1800 Society includes several different giving levels.

- Panther Society I (0–5 years out): $250 and above
- Panther Society II (6–10 years out): $750 and above
- Founders Associates: $1,800–$9,999
- Old Chapel Fellows: $10,000–$24,999
- President’s Circle: $25,000 and above

The Cane Society recognizes those individuals who have established life-income gifts, such as charitable gift annuities or charitable remainder trusts, or who have bequest intentions to benefit Middlebury.

To learn more, call 866.496.6433 or visit go.middlebury.edu/giftplanning.
The Ask

**FIRST STEP: PREPARE**
- **Make your own gift first.** Your classmates are more likely to join you in giving if you lead by example. Reflect on your own reasons for giving to Middlebury. Consider what Middlebury means to you and why you choose to give of your time and resources. Your ability to articulate why you support Middlebury will help you to persuade others.
- **Use Agents in Action** to find up-to-date giving and contact information.
- **Review your assignments’ giving histories.** Are they consistent donors?
- **Stay informed.** The more you know about what’s happening at Middlebury today, the easier your job will be. A list of resources can be found on pages 10–11.

**SECOND STEP: REACH OUT**
- **Make the contact.** Think about the most effective way to contact each individual. Some people respond better to a phone call, while others prefer email or a face-to-face visit.
- **Be up-front.** Let them know right away that you are working as a volunteer for Middlebury and inform them of the class fundraising goals. Ask if this is a good time to talk.
- **Find common ground.** What did your classmates cherish most about their Middlebury experience?
- **Encourage them** to attend Middlebury events. Suggest coming back for Alumni College or Homecoming. Let them know about lectures, social occasions, and other events in their region. People who attend events are more likely to support the College.
- **Be specific.** Use the suggested ask amount. (Example: Would you consider a gift of $____?)
- **Be confident.** Don’t underestimate your classmates’ responsiveness and willingness to be generous. Chances are good that others feel as strongly about Middlebury as you do.
- **Listen.** Don’t expect an immediate commitment for a large gift. Your classmate or peer may need time to think or consult with others.
- **Stress participation.** Let them know that their gift, whatever the size, truly does matter.
- **Ask about matching gifts.** Does their employer have a matching-gift program?
- **Check contact information.** Confirm mailing addresses, telephone numbers, and email addresses.
- **Remember, giving makes people feel good.** Enjoy yourself and have fun with your calls. Your enthusiasm will shine through.

**THIRD STEP: FOLLOW UP**

**Say thank you.** Whether or not your classmate makes a gift, thank the person for his or her time and support. You will receive an email notification from Agents in Action once a classmate assigned to you makes a gift. An email or handwritten note is always appreciated and encourages future philanthropy.
Using Middlebury’s Agents in Action Tool

Agents in Action (AIA) is an online reporting system designed for Middlebury College volunteers. It provides information to help class agents and reunion class agents do their work. In addition to your Annual Giving staff partner, who is always willing to answer questions and help get you what you need, this database is your primary source of information. Giving and contact information is updated nightly, so please use this for the most current data.

WHAT CAN AIA DO FOR YOU?
- Generate a list of unassigned classmates from which you can choose assignments.
- Provide up-to-date contact and giving information for each of your assignments.
- Send you an email notification when one of your assignments has made a gift.

TO LOG IN AS A RETURNING USER:
- Type go.middlebury.edu/aia into your web browser.
- Enter your user ID and PIN. Your user ID is your Middlebury ID number (available from your staff coordinator or by calling 802.443.2002). Your PIN is the 6-digit password you chose during your initial login.
- Click on Web for Advancement tab at the top of the screen.
- Select Agents or Lead Agents from the list provided.

NOTE FOR NEW USERS:
- The screen will prompt you to use your birthday in MMDDYY format as your PIN. If this does not work, try the last six digits of your College ID or 010101. If none of these PINs works, please call the Middlebury Help Desk at 802.443.2200 and they will happily assist.
- The first time you log in successfully, the system will tell you that your PIN has expired and ask you to choose a new PIN. Please re-enter the PIN you used on the first page, then choose a new 6-digit PIN and enter it twice (as shown in screenshot).
- At the next prompt, please set a security question.

ONCE IN THE SYSTEM, THERE ARE FOUR OPTIONS AVAILABLE TO EVERYONE:
- View My Current Solicitation Assignments Check the progress of your assignments and find contact information (view addresses, etc., by clicking on your assignment’s name).
- View All Unassigned Contacts View a list of classmates who have not yet been assigned to an agent. To add someone to your list, click the box next to his or her name and press submit. You will receive confirmation of your selection within one business day.
- Get Contact Information for Other Class Agents Find the information you need to reach out to your fellow volunteers.
- Resources for Volunteers Find links to useful information on the Middlebury website, as well as templates that you can customize to aid in your outreach.
Timeline of Events and Action Items

October 17–19
Alumni Leadership Conference
Join fellow volunteers for a weekend of planning.

October
Select and confirm list of assignments by end of October.

October 24–26
Fall Family Weekend
Fall reunion letters mailed.

December
Winter calling period begins. Initiate contact with your assignments and encourage them to come to reunion.

December 31
End of Tax Year
Lead by example; make your gift.

February 13–15
Winter Carnival
Spring reunion letter mailed.

May 24
Commencement
Finalize your spring calls.

June
Last chance to call your assignments!

June 30
End of Middlebury’s fiscal year.

Helpful Resources

WHERE TO GET INFORMATION
Class Agent Resources
go.middlebury.edu/classagent

Middlebury Magazine
www.middmag.com

Middlebury on Twitter
twitter.com/middlebury

Middlebury on Facebook
facebook.com/middalumni
facebook.com/middleburycollege

Middlebury News Room
www.middlebury.edu/newsroom

SOCIAL MEDIA
One way you can help build excitement around what’s happening at Middlebury, as well as support the College’s fundraising efforts, is by raising Middlebury’s profile through social media. Here are some suggestions on how to do that.

TWITTER
Follow middalumni. Retweet from @middalumni. Use Middlebury hashtags from go.middlebury.edu/hashtag.

FACEBOOK

Check out your class page on Facebook by searching for “Middlebury College Class of ____.”
Middlebury Today

MIDDLEBURY’S FINANCES
Middlebury’s budget is $299,854,000 and includes the undergraduate college, Language Schools and Schools Abroad, Bread Loaf School of English and Writers’ Conference, and Monterey Institute of International Studies, soon to be Middlebury Institute of International Studies at Monterey.

FY15 REVENUE

FY15 EXPENSES

CLASS OF 2018 PROFILE

Applications ........................................ 8,196
Number of Admitted Students .............. 1,564
Applicants Admitted .......................... 19.1%
Target Size for Class ......................... 660 (575 Sept., 85 Feb.)
States Represented ......................... 44 + D.C.
Countries Represented .................... 53
International Students ....................... 11.6%
U.S. Students of Color ....................... 26%
Vermonters ....................................... 3%
Non New England Residents .............. 72%
First Generation to Attend College ........ 14%
Average Financial Aid Grant Award ...... $40,859
Testing Profile of Enrolling Students
SAT 1 Mid-50% Range ..................... 1940–2200
ACT Mid-50% Range ....................... 30–33
Annual Giving Staff

OFFICE OF ANNUAL GIVING
Middlebury College
Middlebury, Vermont 05753
802.443.2002
888.367.6433
go.middlebury.edu/give

DIRECTOR OF ANNUAL GIVING
Jeff Stauch ’05
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General volunteer information

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Classes from 1994 through 1985

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Classes from 1984 through 1940

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Social media and direct marketing

Middlebury