MIDDLEBURY COLLEGE

Class Agent
PLANNING GUIDE
Thank you for volunteering!

One of the advantages of being a newcomer to Middlebury, seeing the College with fresh eyes, is that I don’t take what this institution has created for granted. I see the remarkable sense of connection to this place that all alumni seem to share, no matter how long ago they graduated, and I wonder what sustains their love and loyalty. Why are the ties to this community so enduring?

Part of the answer, I have decided, is simply Middlebury magic: a combination of the beauty of the place, the warmth of the community, and the power of the educational experience that shaped their lives. But another important part of the answer is you—the class agents whose personal outreach to engage your classmates strengthens their connection to the College and encourages them to support us, financially and in other ways.

I like to think about constructive engagement in terms of gifts of time, talent, and treasure. You are giving all three in great measure. On behalf of all of us at Middlebury, thank you!

Laurie L. Patton
President
You Make Middlebury Exceptional

The Annual Fund is at the heart of the Middlebury experience. Every year thousands of alumni make gifts that have immediate impact, contributing to everything Middlebury does and benefiting every student. As a class agent, you engage classmates and ask for their support, which makes this possible. We cannot do it without you!

YOUR ROLE

- Lead by example: make your gift to Middlebury by December 31.
- Contact 10 to 20 classmates about making their annual gift.
- Share Middlebury news.
- Relay feedback to the Annual Fund team.
- Thank everyone who makes a gift!

YOUR GOALS

- Be an ambassador for Middlebury.
- Connect classmates to each other and the College.
- Increase your class’ participation.
- Encourage gifts to the Annual Fund and financial aid.

MIDDLEBURY’S FUNDRAISING GOALS FOR FISCAL 2016

- $18.945 million in annual giving from all constituents, including:
  - $9.495 million from undergraduate alumni
  - $3.25 million from parents

ANNUAL GIVING BY THE NUMBERS

- 29,000 total undergraduate alumni
- 1,200 class agents and reunion volunteers
- 13,060 undergraduate alumni made a gift in Fiscal 2015
- 7,497 alumni assigned to class agents made a gift last year
- 84 percent of alumni have made a gift during the past 10 years
- $16.5 million in annual giving in Fiscal 2015 from all constituents
- $41.5 million received in total in Fiscal 2015 from all constituents
- 53 percent participation in Fiscal 2015

SNAPSHOT

NAME: Rufus Cushman ’50
MAJOR: Economics
HOME: Proctor, Vermont
VOLUNTEER ROLES: Reunion co-chair, class agent, Alumni Admissions Program volunteer, Cane Society representative
WHAT I LOVE ABOUT COLLEGE: At least 95 percent of people are curious, which makes for interesting and challenging conversations.
WHY I VOLUNTEER: A common touch point for my wife and me is education. An educated populous is essential for the survival of democracy. We got ours. Now it’s our turn to pass it on.
Why Giving Matters
Your gift helps us to teach exceptional young people how to understand the world and contribute to it. It’s an investment in today’s students and the world they will shape together. You make it possible for Middlebury to fulfill its mission.

THE ANNUAL FUND: CREATING THE MIDDLEBURY EXPERIENCE
Annual Fund gifts support every aspect of the Middlebury experience, providing opportunities for learning and discovery, and giving the College the flexibility to take advantage of emerging opportunities and to respond to unanticipated needs and challenges.

Because Annual Fund gifts are directed where the need is greatest and can be spent as they come in, they make an immediate difference in the lives of students and faculty. Annual Fund gifts also provide our new president with resources she can use to plan for Middlebury’s future and to ensure that the College remains an inclusive and intellectually dynamic community.

Annual Fund gifts are an important complement to the College’s endowment, which is invested for the long term and provides a stable source of income to fund College programs.

An Annual Fund gift of $5,000 has the same impact in any given year as a $100,000 endowment. That’s because Middlebury can only spend about 5 percent of the value of its endowment—or $5,000 in the case of a $100,000 endowment—whereas Annual Fund gifts can all be spent in the year they are received.

Here are some of the areas the Annual Fund supports:

- Financial aid
- Opportunities for students and faculty members to collaborate on independent research
- Internships and other opportunities for students to apply what they are learning to real-world issues
- Student organizations and varsity, club, and intramural sports, where students develop leadership and team-building skills

PASS IT ON
The Annual Fund enables each generation of Middlebury alumni to preserve what’s best about a Middlebury education, enhance it, and pass it on to the next. Year after year, the Annual Fund not only sustains Middlebury, but helps it to thrive.

IT ALL ADDS UP
Gifts of $250 or less added up to $843,759 last year. Gifts under $100 amounted to $461,759.

Through the pursuit of knowledge unconstrained by national or disciplinary boundaries, students who come to Middlebury learn to engage the world.

—From Middlebury’s Mission Statement
Support for Students: Changing Lives, Changing the World

There may be no deeper expression of our values as an institution than our commitment to admit the most qualified students without regard to their ability to pay. And no other investment pays greater dividends than supporting talented young people with the ability and motivation to make a positive difference wherever they go.

The impact of a gift for financial aid begins with individuals and ripples outward through the entire Middlebury community and the communities our students will help to shape.

Scholarships bring new voices to the classrooms, dorms, playing fields, and dining halls. They create a community where students learn to challenge their assumptions and to see the world from new perspectives. They make Middlebury a place for unexpected questions, deeper discussions, and unanticipated insights. Because of this, all of our students live and work in a truly diverse environment. When they graduate, they have the power to change their communities by engaging the people and resources around them.

GIVING TO MIDD

You can help classmates determine the best way to make gifts. Listed below are a few ways to make a gift go even further.

- Multiyear pledges
- Corporate matching gifts
- Gifts of securities and mutual funds
- Gifts through your estate
- Gifts that return income

More information at www.middlebury.edu/giving/ways

RECURRING GIFTS

Set up a recurring gift online and you’ll never miss the end of a fiscal year again. Recurring gifts are also an easy way to increase gift size, because small monthly or quarterly deductions can add up to a larger annual gift. Learn more at go.middlebury.edu/recurringgift.

TALK TO US

Your Annual Fund staff coordinator is here to help. Call us at 888-367-6433 or email us at supportmiddlebury@middlebury.edu if you’d like more information on ways to give—or anything else about fundraising or Middlebury.

SNAPSHOT

NAME: Hallie Fox ’09
MAJOR: Political science
HOME: Oakland, California
OCCUPATION: Intervention coordinator and instructional coach at Leadership Public Schools Richmond in the San Francisco Bay area
VOLUNTEER ROLE: Lead class agent
WHAT I MISS MOST: Hard to choose just one! I miss running on the TAM (Trail Around Middlebury) and sunsets at Adirondack Circle. I also miss long brunches on Proctor terrace. And J-Term.
WHY I VOLUNTEER: I believe strongly in liberal arts education and the Middlebury tradition. I left Middlebury with a lifelong passion for learning, the belief I could make a difference in the world, the tools needed to do so, and a community of incredible, thoughtful alumni. I volunteer because I believe that with a Middlebury education, our current and future alums can and will make the world a better place.
Leading by Example
Middlebury honors its most committed alumni, parents, and friends through its donor recognition societies. Year after year, these generous donors not only sustain Middlebury but help it thrive.

GIVING SOCIETIES
The 1800 Society honors alumni who support Middlebury at a leadership level. Society members are invited to special events and are listed in the online Donor Honor Roll.

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

THE 1800 SOCIETY LEADERSHIP LEVELS
- Dean’s List: $2,500–$9,999
- College Luminaries: $10,000–$49,999
- Old Chapel Fellows: $50,000–$99,999
- President’s Circle: $100,000 and above

The Panther Society offers specific membership levels for young alumni (one to nine years post graduation) according to the number of years since graduation. One year post graduation is $100; two years is $200; and nine years post graduation is $900.

THE CANE SOCIETY
The Cane Society recognizes individuals who have demonstrated their commitment to Middlebury’s future by including the College in their estate plans. Members have included Middlebury in their wills, named the College to receive proceeds from life insurance policies and retirement plans, and established charitable life income gifts to benefit Middlebury.

All Cane Society members are invited to a special luncheon held during Reunion Weekend. To learn more, contact the Office of Gift Planning at 866-496-6433, email giftplanning@middlebury.edu, or visit go.middlebury.edu/giftplanning.

SNAPSHOT
NAME: Jeff Stauch ‘05
MAJOR: Political science
HOME: Middlebury, Vermont
VOLUNTEER ROLE: Class agent
WORK ROLE: Director of Annual Giving
FUN FACT: I have a pet rabbit
WHY I VOLUNTEER: I felt like I won the lottery from the moment I got my acceptance letter through the moment I graduated, and giving back to Middlebury is one of the ways I can help the next generation of students feel the same exact way during their four years here.
The Joy of the Ask
Asking your peers for a gift can be fun. Establish a rapport and treat the conversation as you would any other. Any successful giving conversation has some common elements. Weaving the following elements into your discussion will maximize your chances of a positive outcome at every gift level. Remember, this is just a conversation.

1. Introduction and rapport building: Say who you are. Find common ground. Ask what they’re up to. Mention Middlebury!

2. Purpose: Say why you’re calling. Explain your role as a class agent. Be friendly but also be up front.

3. The challenge and the need: Middlebury’s top fundraising priorities are the Annual Fund and financial aid.

4. Solution: Refer to pages five through eight for suggestions on how to talk about the Annual Fund and financial aid.

5. Urgency: The sooner you give, the sooner you can make an impact on campus. Be an early bird!

6. Ask: Don’t forget to ask for their support! Use the ask amounts the Annual Giving Office suggests and encourage them to join you in making a gift this year.

Other Tips to Keep in Mind

- Email is good. Calling is better. **Face-to-face is the best.** (Skype and FaceTime are cool, too!)
- **Lead by example.** Make your own gift to the College before reaching out to your classmates. Then ask them to join you in supporting the College.
- **It’s okay to have the butterflies.** But remember, your classmate will be more relaxed the more relaxed you are. So relax!
- A no does not have to be the end of the conversation. Within every no, there’s an opportunity to understand where your classmate is coming from. So ask why someone is saying no. If someone tells you why he or she isn’t giving, stop and listen. Hear the person out. If your classmate doesn’t give a reason, be sure to ask why. Most are grateful for the opportunity to express their concerns, especially if the concerns are long held. (And remember, your classmates are not mad at you.) If you are not able to answer objections directly, please get in touch with us! We’re happy to provide you with additional resources or manage a difficult conversation.
- **Don’t forget to say thank you.** The Annual Giving Office can provide you with thank you cards and templates.
- **Be in touch with us.** The staff in the Office of Annual Giving, as well as members of the Annual Fund Executive Committee, are here to help you do this important work. You can also find information by visiting go.middlebury.edu/classagents.
AGENTS IN ACTION
Use Middlebury’s online volunteer database—Agents in Action—to make your outreach easier. Find it at go.middlebury.edu/aia.

Agents in Action lets you:
- Get a list of unassigned classmates from which you can choose assignments.
- View up-to-date giving and contact information for each person on your list.
- Receive an email notification when one of your assignments makes a gift.
- Keep track of your work and provide updates and contact notes to your staff coordinator.

STAY IN TOUCH
Middlebury Magazine
www.middmag.com

Middlebury News Room
www.middlebury.edu/newsroom

The Middlebury Campus
www.middleburycampus.com

Student Blog
www.middbeat.org

SOCIAL MEDIA
Help build excitement about the College. Like, share, comment, and/or retweet Middlebury’s posts. Check out your class’ Facebook page by searching for Middlebury College Class of ________.

Facebook
facebook.com/middalum
facebook.com/middleburycollege

The Space
www.facebook.com/groups/middannualgiving/

Instagram
www.instagram.com/middleburycollege

Twitter
www.twitter.com/middlebury

Resources for Volunteers
Middlebury’s website has extensive information for volunteers. You’ll find information about College priorities, talking points, fact sheets to download, stories about students and alumni, a link to the College’s volunteer database, and more. Visit go.middlebury.edu/classagent.

CALENDAR

October 16–18
Attend Alumni Leadership Conference.

End of October
Select and confirm assignments.

Early November
Class agent and reunion appeal letters mailed.

December
Winter calling period begins.

December 31
End of tax year
Lead by example; make your gift.

March
Spring calling period begins.

May 29
Commencement

June
Last chance to call your assignments!

June 30
End of Middlebury’s fiscal year.
Pat yourself on the back!
Middlebury Today
Middlebury College redefines liberal arts for the 21st century, with a reach that extends from the Green Mountains of central Vermont to nearly every corner of the world, and a rigorous and comprehensive curriculum that integrates vital opportunities for today’s graduates. From the sciences and humanities to social sciences and the arts, Middlebury’s intensive programming provides 2,450 undergraduates a breadth of experience across varied fields and disciplines, and encourages students to seek ways to make meaningful contributions in a world that is increasingly complex. For more information, visit www.middlebury.edu.

THE CLASS OF 2019
Applications: 8,892
Applicants admitted: 1,768
Applicants admitted: 19.9%
Target size for class: 680
States represented: 44 + Puerto Rico
Countries represented: 48
International students: 61 (9%)
U.S. students of color: 25%
Vermonters: 5%
First generation to attend college: 15%
Receiving financial aid: 48%
Average grant: $42,072

MIDDLEBURY’S FINANCES
Middlebury’s fiscal 2016 budget is $316,790,000 and includes the undergraduate college, Language Schools and Schools Abroad, Bread Loaf School of English and Writers’ Conference, and the Middlebury Institute of International Studies.

FISCAL 2016 REVENUE
- Student Fees 65%
- Endowment 19%
- Other Sources and Short-term Investments 2%
- Auxiliary 2%
- Reserves and Initiatives 3%
- Sponsored Activities 3%
- Current Use Gifts 6%

FISCAL 2016 EXPENSES
- Salaries, Wages, and Benefits 50%
- Financial Aid 18%
- Library Books 1%
- Contingency 1%
- Repairs and Maintenance 1%
- Tax and Insurance 1%
- Utilities 3%
- Capital 4%
- Debt Service 5%
- Travel, Food, Supplies 5%
- Contract Services 5%
- Other Expenses 6%
A Message from the Annual Fund Executive Committee

Before you set off to do the critical work of raising money on behalf of our alma mater, we wanted to thank you for your service to Middlebury and to remind you we are here as an additional resource. The Annual Fund Executive Committee (AFEC) is composed of fellow volunteers like you. Our job is both to solicit leadership-level annual gifts and to support your work.

We hope to meet you this year—either in person or virtually on one of the all-volunteer conference calls we hold throughout the year. In the meantime, please don’t hesitate to be in touch with any questions or concerns. We’re here for you!

Whether this is your first year volunteering or you’ve been at this for decades, our collective work as Middlebury representatives hugely affects our fundraising successes and directly benefits current students, faculty, and staff. Thank you for being a part of such a dedicated team!

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