MIDDLEBURY COLLEGE
CLASS AGENT
PLANNING GUIDE
2017–18
THANK YOU for volunteering!

Our class agents play such an important role in nurturing Middlebury’s strong alumni community. Every time you reach out to your classmates, you remind them that they are now and will always be part of Middlebury. Your phone calls, emails, and letters to your classmates provide regular and personal communication about the College. **All of your efforts are essential for us to have an active, engaged alumni community and enthusiastic alumni support.**

Since arriving at Middlebury last year, I’ve seen and felt the effects of your work. I’ve seen how many of your classmates give to the Annual Fund, their growing attendance at alumni events, how many emails and letters we receive from alumni, the increasing number of applications for admission, and the College’s excellent reputation and high standing among peer institutions.
Volunteers like you are essential to the success of Middlebury. **On behalf of all of us at the College, thank you!** I look forward to working with you and getting to know you over the coming months.

Colleen Fitzpatrick  
Vice President for Advancement

**THREE THINGS I’VE LEARNED AT MIDDLEBURY**

1. Middlebury connections last a lifetime.

2. Middlebury alumni are smart, authentic, and great fun to know.

3. Volunteers like you make Middlebury exceptional.
PARTNERS with MIDDLEBURY

Fundraising for Middlebury is a partnership between the College’s professional staff and our alumni volunteers. As a class agent, you play an essential role in that partnership.

There are two steps to your work as a class agent. First, you are a communicator, keeping your classmates informed and engaged. Second, you are a fundraiser, soliciting gifts and helping alumni to understand how important their support is to current students and to the College’s continued success.

STEP ONE: GENERATE EXCITEMENT ABOUT MIDDLEBURY AND STRENGTHEN CLASSMATES’ CONNECTIONS

YOUR ROLE:

Many of your classmates may not feel a strong sense of connection to Middlebury. Your role is to build that connection and to ask them to support Middlebury this year.

• Get in touch with your classmates using the contact information provided by the College. Make it personal. Use the appropriate channels for each classmate—calls, texts, mail, email, social media, or in-person visits.

• Track down “lost” classmates.

• Be an advocate for Middlebury. Share regular updates about the College throughout the year.

• Use social media to build community, reminisce about your time at Midd, and promote the College.
BE SOCIAL

CURATE YOUR CLASS FACEBOOK GROUP
One of the best ways to create a sense of community and excitement is through your class’s Facebook group. Post photos from then and now, ask questions about your time at Midd, or post a survey. Your classmates will respond in kind.

BECOME AN M-BASSADOR
Share your love of Middlebury as an M-Bassador, our social media ambassador effort. Promote Middlebury’s social media, and generate positive buzz about the College and Reunion. Earn points and win Midd gear! Learn more and sign up at go.middlebury.edu/mbassadors.

“Through my work as an agent, I have gotten to know classmates I never knew or barely knew at Middlebury. The Class of ’95 has some amazing people—smart, funny, talented, curious, creative. It’s truly a privilege to reach out to them each year and hear about their lives.”

—JANINE HETHERINGTON ’95

STAFF ROLES:

- Work with volunteers to develop and execute an outreach plan that best uses their talents and connections.
- Send regular communications to alumni, sharing reasons why they should support Middlebury and information on challenges and other opportunities.
- Provide regular conference calls, emails, and personal calls to help with planning and organization.
- Support M-Bassadors, Middlebury’s social media ambassadors program, and class Facebook groups.
- Ensure volunteers get the information they need to connect with classmates.
STEP TWO: ASK FOR SUPPORT

YOUR ROLE:
Every year, thousands of alumni make gifts to Middlebury. Your role is to help classmates understand the impact of alumni giving and to ask for their support for the class gift.

- Lead by example: make your gift to Middlebury by December 31.
- Choose the classmates you would like to solicit. Use the Middlebury volunteer portal to assign 10 to 20 classmates to yourself. See page 20 for more information.
- Contact your assignments. Encourage them to make a gift this year.
- Provide feedback on your progress, on classmate questions, and about contact information to Annual Fund staff.
- Keep donor information confidential.
- Thank everyone who makes a gift!

YOUR GOALS
- Connect classmates to each other and the College.
- Achieve your class’s giving and participation goals.
- Increase your classmates’ connections to Middlebury.
STAFF ROLES:

• Develop a fundraising plan that leverages volunteers’ talents and connections.

• Coordinate progress through regular conference calls, emails, and visits.

• Make sure that volunteers can easily access giving and contact information for their outreach.

• Reinforce volunteer efforts through a program of print and online solicitations and campaigns.

ANNUAL GIVING BY THE NUMBERS

28,711 total undergraduate alumni

1,258 class agents and reunion volunteers

10,125 undergraduate alumni who made a gift in fiscal year 2016

60 percent of those were assigned to class agents (your calls produce results!)

79 percent of alumni have made a gift during the past 10 years

$35.6 million received in total in fiscal year 2017 from all constituents (includes annual, endowment, and capital gifts)

36 percent undergraduate alumni participation in fiscal year 2017
CLASS AGENT Checklist

OCTOBER 27–29
☐ Attend Alumni Leadership Conference

OCTOBER
☐ Select and confirm classmate assignments
☐ Prepare to solicit your assigned classmates

NOVEMBER
☐ Class agent letters mailed
☐ Start contacting classmates

DECEMBER
☐ Lead by example: make your gift
☐ Winter calling period opens; begin making your calls to classmates

DECEMBER 31
☐ End of tax year

MARCH
☐ Spring calling period begins; make more calls to classmates

JUNE
☐ Make final calls to assignments who have not yet given

JUNE 30
☐ Fiscal year-end
Why **GIVING MATTERS**

Your gift helps Middlebury to fulfill its mission of educating exceptional students from all backgrounds. It is an investment in today’s students and the world they will shape together tomorrow.

**THE ANNUAL FUND**
An Annual Fund gift supports every aspect of the Middlebury experience, helping to provide opportunities for learning and discovery and enabling the College to respond to emerging opportunities and challenges. Annual Fund gifts can be spent as they come in, making an immediate difference in the lives of students and faculty.

Among many other areas, your gift to the Annual Fund will support the following:

- Financial aid
- Faculty and academic programs
- Student-faculty collaboration on independent research
- Student internships and other opportunities to apply learning to real-world issues
- Student organizations and varsity, club, and intramural sports

**IMMEDIATE IMPACT**
Annual Fund gifts are an important complement to the endowment, which is invested for the long term and provides a stable source of income for 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 the College can only spend 5 percent of the value of its endowment—or $5,000 in the case of a $100,000 endowment—whereas every Annual Fund gift can be spent in the year it is received.

**FINANCIAL AID: FUNDING THE FUTURE**
Gifts to financial aid provide scholarships that allow Middlebury to enroll outstanding students, based on their potential to excel, not on their financial circumstances. All aid is awarded on the basis of need, and Middlebury promises to meet each student’s demonstrated financial need for all four years.
Supporting students brings different voices to our classrooms, residence halls, playing fields, and dining halls. This makes Middlebury a place for unexpected questions, diverse perspectives, and deeper discussions, and it enables talented young people to prepare for productive careers and lives of meaning and purpose.

**PARTICIPATION MATTERS: THE MULTIPLIER EFFECT**

Last year, gifts of $250 or less from alumni and parents totaled nearly $1 million. That million dollars means Middlebury can provide average grants of $44,452 to 22 students, or smaller scholarships to many, many more students. This is just one example of the impact smaller gifts can have.

**YOUR GIFTS AT WORK**

Last year Annual Fund gifts helped do the following:

- Provide financial aid to more than 1,000 students with an average grant of $44,452 for students across the four years.
- Enable more than 250 students to explore their interests through internships and get a jump start on careers.
- Fund research fellowships for 108 students.
- Achieve carbon neutrality.
- Attract 36 new faculty members who make teaching and mentoring a priority.
- Give 305 student athletes the opportunity to participate in training trips that equip them to compete at the highest level.
The ART of THE ASK

Asking your classmates for a gift is similar to any other invitation. They are flattered by the personal attention and will weigh their competing commitments before determining whether they can join you. The way you ask will depend on your relationship with your classmates and their relationship with the College. It will also depend on your style. Regardless of the specifics, successful giving conversations have some common elements. Weaving these elements in will increase your chances of a positive outcome at every gift level.

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. Be friendly, but also be up-front. Tell them you’re calling to ask them to contribute to their class gift.

3. **The need:** Middlebury’s top fundraising priorities are the Annual Fund and financial aid. Refer to pages 10–11 for suggestions on how to talk about the Annual Fund and financial aid.

4. **Urgency:** The sooner you give, the sooner you can make an impact on campus.

5. **Kick-start your conversation.** Review the sample conversations in the volunteer portal at go.middlebury.edu/mvp.

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

7. **Say thanks:** Thank your classmates for speaking with you and for considering your request.
OTHER TIPS

- Email is good. Calling is better. **Face-to-face is the best.** (FaceTime and Skype are good options, too!)

- **Lead by example.** Make your own gift before reaching out to your classmates. Then ask them to join you in supporting the College.

- **Believe in your cause.** Share your love of Middlebury and your reasons for contributing.

- **It’s okay to be nervous.** Remember, the more relaxed you are, the more relaxed your classmate will be.

- **Let them know their gift will help to achieve your class goals:** Any gift they make between July 1, 2017, and June 30, 2018, will count toward the class gift, even if it is restricted for a department or other designation, or for an endowment. Planned gifts and estate gifts can be counted in the total beginning at the 50th reunion.

- **“No” does not have to be the end of the conversation.** If a classmate says “no” to giving a gift, it’s an opportunity to understand why and share that feedback with Middlebury staff. So ask why someone is saying no. Hear the person out. If your classmate doesn’t give a reason, ask why. Most are grateful for the opportunity to express their concerns. If you are not able to answer objections, please get in touch with us. We’re happy to provide additional resources or to be part of the conversation.

- **Don’t forget to say thank you.** The Annual Giving Office can provide you with thank you cards and templates.

- **Stay 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/classagent.
IN THEIR OWN WORDS

Find more photos of students saying thanks at go.middlebury.edu/aaw.
WAYS to GIVE

You can help classmates to determine the best way to make their gifts. Here are a few ways to make a gift go further.

MULTIYEAR PLEDGES
Classmates who want to recognize Middlebury with a significant gift often find they are able to make a bigger commitment to Middlebury through a gift spread out over two to five years. They will receive an income-tax deduction for the amount given each year. Learn more at go.middlebury.edu/multiyearpledge

CORPORATE MATCHING GIFTS
Many employers will match charitable contributions made by their employees, doubling or even tripling the original gift. Make sure to ask if your classmate works for a matching-gift company. go.middlebury.edu/matching.

RECURRING GIFTS
Encourage classmates to set up a recurring gift online. Recurring gifts are 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.

IRA ROLLOVER
The IRA Charitable Rollover is an excellent way to make a special gift starting with the 50th reunion. Anyone age 70½ or older is eligible to use assets in an IRA (individual retirement plan) to make a gift to Middlebury and potentially lower income taxes. Visit go.middlebury.edu/irarollover.

ESTATE AND PLANNED GIFTS
Gifts made through your will, retirement account, or other beneficiary designation are a meaningful testament to the College’s impact on your life. Planned gifts can provide income to you and your loved ones, while enabling you to have a significant impact on Middlebury. Learn more at go.middlebury.edu/giftplanning.

* Recurring gifts are a GREAT OPTION!
IN THEIR OWN WORDS

Find more photos of students saying thanks at go.middlebury.edu/aaw.
LEADING by EXAMPLE

We honor our most committed alumni, parents, and friends through Middlebury’s donor recognition societies. As a class leader, you’re encouraged to become a member of one or more of these societies and to invite classmates to join.

TRUE BLUE SOCIETY members are Middlebury’s most loyal donors, those who have made gifts consistently for the last three years or more. True Blue donors are the foundation of support for Middlebury and our students. Learn more at go.middlebury.edu/trueblue.

THE CANE SOCIETY recognizes individuals who have demonstrated their commitment to Middlebury’s future by including the College in their estate plans or establishing charitable life-income gifts to benefit Middlebury. All Cane Society members are invited to a special luncheon held during Reunion Weekend. Learn more at go.middlebury.edu/1800society.

MEMBERSHIP IN THE 1800 SOCIETY is offered to those who support Middlebury at a leadership level of $2,500 or more or at graduated levels for young alumni, beginning with $100 one year after graduation through $900 for those nine years postgraduation. Society members are invited to special events, including a reception at Reunion, and are listed in the online donor Honor Roll. Learn more at go.middlebury.edu/giftplanning.

PANTHER SOCIETY
Graduated levels for young alumni

DEAN’S LIST
$2,500–$9,999

COLLEGE LUMINARIES
$10,000–$49,999

OLD CHAPEL FELLOWS
$50,000–$99,999

PRESIDENTIAL CIRCLE
$100,000 and above
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 part of the world. Middlebury’s intensive programming provides 2,500 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 2021

Applicants .................................. 8,909
Total number of admitted students .......... 1,781
Applicants admitted ................. 19.9%
Target size for class ............... 710
(610 in September, 100 in February)
U.S. students of color ............... 28%
International students .......... 9%
Vermonters ............................... 3%
First generation to attend college ............. 13%
States represented .................. 42
(plus the District of Columbia)
Countries represented .......... 53
Average financial aid grant awarded .......... $45,991
Middlebury’s fiscal budget includes the undergraduate College, Language Schools and Schools Abroad, Bread Loaf School of English and Writers’ Conferences, and the Middlebury Institute of International Studies.
RESOURCES for VOLUNTEERS

Middlebury’s website has extensive information for volunteers. Here you’ll find answers to questions classmates might ask, as well as information about College priorities, stories about students and alumni, a link to the College’s volunteer database, and more. Visit go.middlebury.edu/classagent.

MIDDLEBURY VOLUNTEER PORTAL
Use the Middlebury volunteer portal (MVP), the College’s online volunteer database, to make your outreach easier. Find it at go.middlebury.edu/mvp.

MIDDLEBURY VOLUNTEER PORTAL TOOLS
- 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.
- Find templates for contacting classmates.
- 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.

USEFUL LINKS
You’ll find links to everything from answers to difficult questions and sample solicitation conversations to news and social media resources at the links below.

Middlebury Volunteer Portal
go.middlebury.edu/mvp

Answers to difficult questions
go.middlebury.edu/questions

Middlebury Magazine
middmag.com

Middlebury News Room
middlebury.edu/newsroom

Middlebury Campus
middleburycampus.com

Middlebury Online Community
onlinecommunity.middlebury.edu
IN THEIR OWN WORDS
Find more photos of students saying thanks at go.middlebury.edu/aaw.

Facebook
facebook.com/middalum
facebook.com/middleburycollege

Instagram
instagram.com/middalum
instagram.com/middleburycollege

Twitter
twitter.com/middalumni
twitter.com/middlebury
We’re **HERE TO HELP**

Advancement staff members, along with members of the Annual Fund Executive Committee, are here to help you in your work. Don’t hesitate to contact them with questions or concerns.

**MIDDLEBURY STAFF LIAISONS**

**Kitty Bartlett**
Director of Annual Giving
kittyb@middlebury.edu
802-443-5335

**Diana Hill**
Assistant Director of Annual Giving
dianah@middlebury.edu
802-443-5083

**Betsy Killorin**
Assistant Director of Annual Giving
ekillorin@middlebury.edu
802-443-5036

**Lauren Souder**
Annual Giving Administrative Coordinator
lsouder@middlebury.edu
802-443-2002

**ANNUAL FUND EXECUTIVE COMMITTEE**

**Bob Bourque ’75, P’16, Chair**
rabourque@mac.com

**Francie Alexandre ’12**
cfalexandre1219@gmail.com

**Pier LaFarge ’10.5**
lafargep@gmail.com

**T. R. Lazo ’89**
theolazo@gmail.com

**Jessica Murray ’06**
jessica.t.murray@gmail.com

**Tyler Newton ’95**
tyler@catalyst.com

**Elizabeth Eppes Winton ’84, P’13**
ewinton@mac.com

**Mashrib Zahid ’02**
mashrib@gmail.com