



## **Welcome to The Smith Fund volunteer team!**

*“Smith believed in me when I was but seventeen and opened to me a whole new world of opportunities.*

*I am where I am largely due to Smith’s dedication to women’s education and the generosity of her alumnae.”*

*~ Waifong Liew Anton '81*

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This guide will supply you with some tips on connecting with classmates and understanding Smith Fund materials. It will also provide an overview of what to expect during the year. Please keep a copy for your reference. This guide and other materials can also be found on the web at [www.smith.edu/thefund](http://www.smith.edu/thefund).

We invite you to contact The Smith Fund staff whenever you have questions or comments about the materials you receive or your volunteer role.

We appreciate your service and look forward to working with you!

### **Contact us:**

(800) 241-2056 option #1

(413) 585-2014 (fax)

[www.smith.edu/thefund](http://www.smith.edu/thefund)

To join our Facebook Group, search for “Smith Fund Volunteers” or click [here](#).

Smith College Alumnae House  
33 Elm Street  
Northampton, MA 01063

## **Why support The Smith Fund?**

Thanks to Sophia Smith's bold ideals and transformative philanthropy, Smith College has always provided women the finest liberal arts education and prepared them for fulfilling lives.

Students are immersed in a learning environment that encourages self-confidence and builds the leadership skills needed to achieve their personal and professional goals.

At Smith, students form lifelong friendships and, upon graduation, join a network of successful alumnae. As many generations can proudly attest, Smith College is a place where women come first and do best.

Smith has always had the foresight to take great care with its mission. In 1912 Smith alumnae created a fund to provide financial flexibility for pressing needs. It was a wise initiative: The generosity of alumnae, parents and friends ensures that deserving students receive financial aid, that Smith's award-winning faculty garners research opportunities, and that our remarkable programs and physical spaces are renewed and sustained.

Like Ivy Day, gifts to The Smith Fund are a part of a time-honored tradition that underscores the college's distinctive intellectual profile. They offer vital resources to the academic community.

**Smith Fund gifts allow the college to keep pace with a rapidly changing world.** Smith is on the cutting-edge of higher education and its reputation for academic excellence is recognized both here and abroad. Guidance counselors, foundations, corporations, and other institutions are interested in Smith's innovative approach to the liberal arts and its striking achievements.

**Gifts to The Smith Fund help keep Smith relevant to new generations of students.**

- Each year more than 60% of Smith Students receive need-based college aid.
- The actual cost of educating each Smith student exceeds the comprehensive fee by more than 20%. Thanks to endowment earnings, philanthropic support, and generous financial aid, the average price paid for a Smith education is less than 46% of its actual cost.
- In 2015, *Forbes* listed Smith as one of America's 20 most entrepreneurial colleges.
- 38% of Smith students major in the natural sciences, double the national average of degrees conferred to women in these disciplines.
- *Black Enterprise* has ranked Smith at #15 among the country's "50 Top Colleges for African Americans".
- 19% of Smithies in the 2015-2016 school year are first generation college students; 34% are students of color.

Visit: [www.smith.edu/volunteer](http://www.smith.edu/volunteer) for more talking points about what makes Smith so special.



## **Why do Alumnae Support The Smith Fund?**

- To maintain the quality of education, from the excellent faculty to the outstanding libraries and facilities.
- Smith is innovative in education: unique programming like Praxis Internships and Smith's Picker Engineering Program help attract the best and brightest women.
- To offset the cost of a Smith education for every student.
- Keeping Smith strong enhances the value of our degrees.
- To take advantage of tax deductions. Also, planned giving can assist your personal financial planning.
- Smith educates women to lead in a global world.

"Smith gave me my start in the career world. Without the financial support from the college and local Smith club, I would never have been able to attend Smith. Neither my mother, who was a naturalized American citizen, nor my father were able to attend college, and I, as the eldest in a family of three, was the first to enter the professional world as a result of the excellent education Smith gave me. My four years at Smith were joyous ones and I want to help other aspiring students have a similar opportunity." ~ Lynn A. London '58

"I support Smith because education really is the magic bullet. The better an education the young of our society receive, the better off all of us will be. Because it is as important to educate our young women as it is to educate our young men. And because Smith has always made it a priority to give the best education to as wide a group of young women as possible, from all walks of life, with all kinds of dreams. Because I care." ~ Carol Clapper

"Smith opened for me a world of such riches: great literature, paintings, music, thought; and surrounded me with the beauties of nature and women's friendships. Although I have never made much money, I have such riches that money cannot buy, that no misfortune can ever take away from me. That is immeasurable, I will always be in debt to Smith." ~ Susan E. Brown '80

"I had such a wonderful experience at Smith. It is an amazing empowering place for women. The community at Smith is so strong—when I meet people from Smith—it's like we're family!" ~ Rachel Wallace-Brodeur '91

"Smith offers an excellent education that is rigorous and motivating at the same time. Such an education would be missing from the lives of so many deserving women who would otherwise choose another school due to financial limitations. I am one of those women who continues to benefit from Smith, its students, faculty, and environment—a world I wouldn't have known if I wasn't a recipient of gifts made by others." ~Mabel Dinga '00

## **Designations Within The Smith Fund:**

Although *all* gifts count toward class and participation goals, it is Smith Fund gifts which give the college the flexibility it needs each year to meet the emerging needs of students, faculty, programming, and physical spaces.

**Many donors like to give to a specific need. Please let your contacts know that their Smith Fund gifts can be directed to the following areas of need:**

**The Smith Fund (General):** The Smith Fund is a driving force on campus. A vital part of *Women for the World: The Campaign for Smith*, it sustains all that makes Smith exceptional and equips Smithies to realize their power for good. When you make a general donation to The Smith Fund, you powerfully and imminently impact Smith by helping us meet our most urgent needs.

**Essential Smith:** Being a Smithie means experiencing a thriving and diverse campus life. Donations to Essential Smith not only support the facilities and student organizations that make our community special, they fund the education of countless international, non-traditional, and financially disadvantaged students who make the Smith experience so meaningful. With your support, Smith's remarkable student body can continue to flourish on campus and beyond.

**Smart Smith:** At Smith, educating the 21<sup>st</sup> century mind happens in classrooms and throughout the world. Contributions to Smart Smith support our students' impassioned pursuit of knowledge and creativity by sustaining the experiential and integrated learning opportunities, curricular innovations, fine arts and humanities, and world-class faculty that set Smith's academics apart.

**Global Smith:** Smith women impact the world at home and abroad every single day. By funding Global Smith, you facilitate the unique learning opportunities and internationally focused programming that prepares Smithies to affect change wherever life takes them.

**Sustainable Smith:** Stewarding resources wisely is part of what it means to lead a life of distinction. Gifts directed to Sustainable Smith support our efforts to maintain and innovate green practices throughout campus so that our footprint remains small as our legacy grows even stronger.



## **The Importance of Participation:**

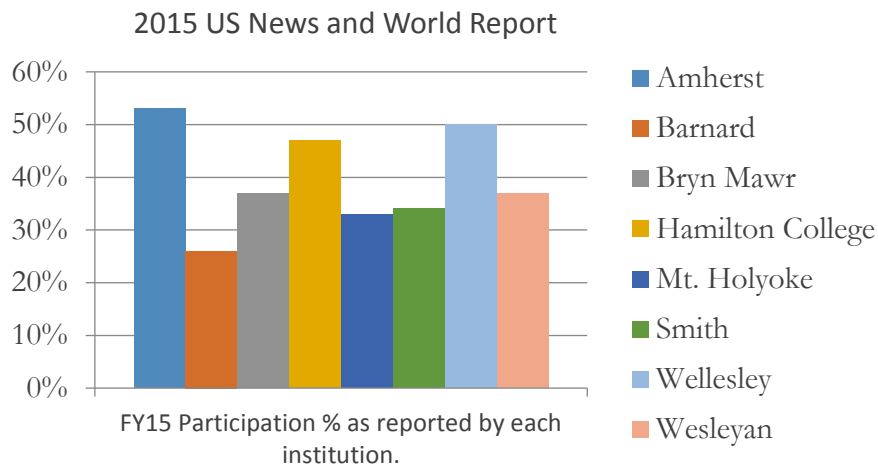
Annual support is viewed as a measure of satisfaction in an institution. Participation is taken into account by high school seniors and their families when evaluating colleges, by corporations and foundations when awarding grants, and by other donors when making their philanthropic decisions.

In its 2016 issue (published in fall 2015), Smith was ranked #15 in *US News and World Report's* college rankings.

It is important to find a balance in fundraising between gift size and participation. For some alumnae, the focus will be on bringing in a special gift. For others, a gift of any size will be most important. We remind everyone that each gift is personal, and a welcome indication of support for the College. We hope that every alumna will make a contribution to the Smith Fund at whatever level is comfortable for her.

## **How do we compare to our peers?**

Annual alumnae giving directly affects rankings by publications like *US News and World Report*. Of course, we all want Smith to be ranked #1! Let your prospects know that their annual gift **directly** affects our ranking.



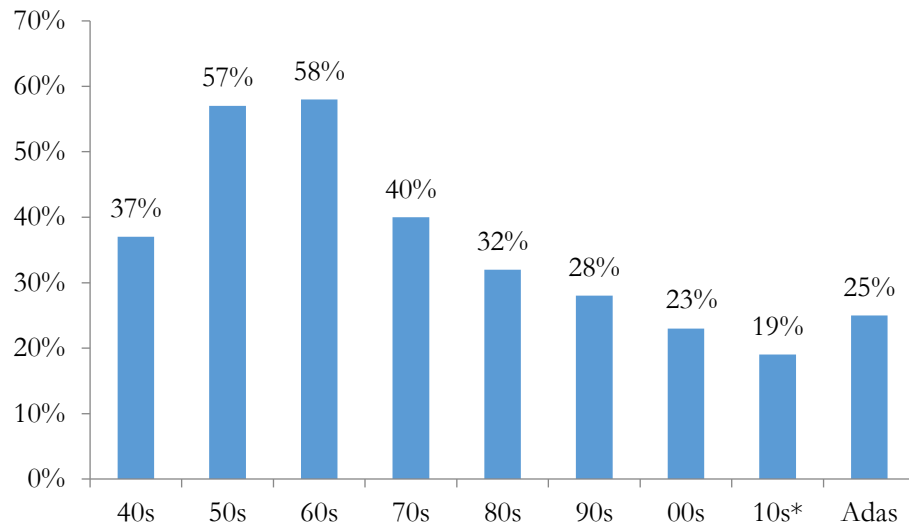
## **Every gift counts!**

Every gift made to Smith receives class credit and is part of your total class gift.

- All Smith Fund gifts count toward class goals.
- Gift annuities count toward class goals.
- Gifts for initiatives such as Praxis internships count toward class goals.
- Gifts to Friends groups count toward class goals.
- Gifts to create endowed funds count toward class goals.
- All gifts made by December 2016 count in *Women for the World: The Campaign for Smith*.

## How does my decade's participation compare to others?

FY15 Average Participation by Decade



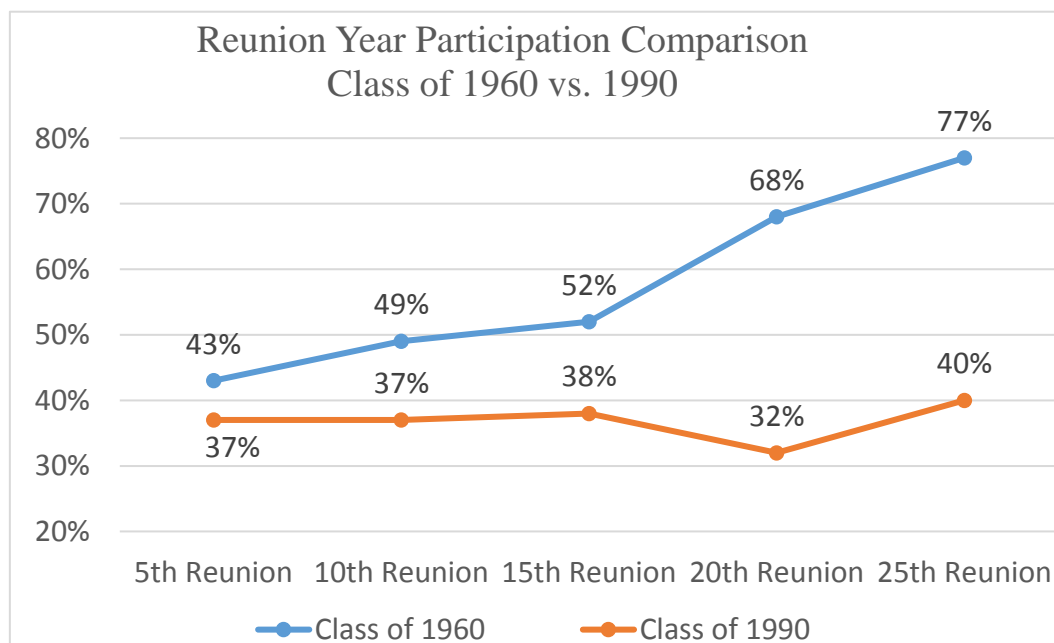
*\*Note: 10s participation does not include current students.*

These charts show that younger alumnae are giving at lower rates post-graduation than older classes were on the same timeline. When the class of 1960 was 5 years out from graduation they were giving at 43% and continued to climb, whereas the class of 1990 was giving at only 37% and began to decline\*\*.

**Help us reverse this trend with younger alumnae by reminding them:**

**Their participation is important at any gift level.**

**Gifts of \$100 or less total \$500,000 each year!**



*\*\* The classes of 1960 and 1990 are representative of older and younger classes respectively.*



## **The Smith Fund Volunteer Job Descriptions:**

Duties of each volunteer role are outlined below. Please note that while many volunteers have different duties, all volunteers have their own distinct assigned classmates. Each volunteer is responsible for making the appropriate contacts with her own respective assignments.

### **Encouraging Support—even when you're not asking for a gift:**

- Take pride in Smith's history of fundraising—you and your classmates are part of a spirited tradition that is admired by many other institutions.
- Keep abreast of the challenges and major mailing schedules, and let your assigned classmates know when an appeal is on the way.
- Keep current contact information on your assigned classmates and share changes with your Smith Fund class liaison.
- Forward interesting Smith news on to classmates via phone calls, emails and postcards.
- Post Smith Fund news and challenge information on social media.



<b>Volunteer Role</b>	<b>Coordinate Fund Team</b>	<b>Recruit Volunteers</b>	<b>Build Relationships</b>	<b>Solicit Classmates</b>	<b>Thank Classmates</b>	<b>Encourage SF Giving</b>	<b>Donate to Smith Fund</b>
<b>Fund Team Coordinator</b>	X	X	X	X	X	X	X
<b>Special Gifts Chair (\$1,875 and up)</b>		X	X	X	X	X	X
<b>Class Fund Agent</b>		X	X	X	X	X	X
<b>Class Ambassador</b>			X		X	X	X
<b>Class Steward</b>					X		X
<b>Social Media Ambassador</b>			X			X	X



Fund Team Coordinator: A Fund Team Coordinator is selected by the class at reunion or may be appointed by The Smith Fund staff liaison based on extraordinary performance as a fund team member. She serves as the leader for the fund team and is the link between Smith and her team members. She will:

- Communicate regularly with Special Gift Chairs and Class Fund Agents.
- Coordinate the activities and communication of the fund team.
- Oversee the recruitment and solicitation process for team members.
- Contact and establish a relationship with all fund team members and key classmates.
- Solicit those classmates for gifts each fiscal year through reunion.
- Follow up with an appreciative thank you when gifts are received.
- Give consistently to The Smith Fund each year.

Special Gift Chair: A Special Gift Chair is responsible for coordinating efforts for classmates in the special gifts pool (typically alumnae who will be asked for a gift at or over \$1,875.) She will:

- Solicit Smith Fund gifts from her assigned classmates.
- Thank each donor for her gifts to Smith.
- With the staff liaison, recruit additional volunteers as needed.
- Engage in conversations and activities with classmates to strengthen their affiliation with Smith.
- Give a leadership gift to The Smith Fund each year.

Class Ambassador: Class Ambassadors participate in Smith's fundraising efforts without directly soliciting others.

- Contact and establish a relationship with an assigned group of classmates.
- Communicate with those classmates about Smith news and The Smith Fund needs.
- Encourage, but not directly solicit, those classmates for gifts each fiscal year (Smith Fund staff or student phonathon callers will assist with gift conversation.)
- Follow up with an appreciative thank you when gifts are received.
- Give consistently to The Smith Fund each year.

Class Steward: A Class Steward is a volunteer who wants to express the college's appreciation to classmates who give to The Smith Fund. She will:

- Maintain a relationship with a group of classmates by thanking them for their support every fiscal year when a gift is received.
- Give consistently to The Smith Fund each year.

Social Media Ambassador: A Social Media Ambassador will share regular Smith Fund related updates provided by the staff liaison her social media accounts, such as Facebook, Twitter, or LinkedIn.

## **Types of Gifts Accepted:**

For decades, the generosity and loyalty of Smith alumnae, parents, and friends have enabled the college to address the changing needs of Smith students. Smith Fund gifts fund the education of the young women who will shape our world's future.

The Smith Fund can accept:

- **Gifts by check or credit card:** Encourage your donors to make their gifts by credit card either over the phone or online (this is the most cost effective gift since there are no postage).
- **Pledges:** Let Smith know the amount. Donors have until fiscal year end (June 30<sup>th</sup>) to pay their pledges.
- **Securities.** Detailed guidelines and instructions for gifts of securities may be obtained by calling Gift Accounting at 413-585-2681 or 1-800-526-2023 option #5.
- **Matching Gifts:** More than 1,000 corporations, foundations and other organizations match their employees' charitable contributions dollar-for-dollar, two-to-one, or even three-to-one for each dollar given. To take advantage of this method of increasing the value of her/his gift to Smith, the donor must complete an online or paper form from her/his employer and submit it for processing. Visit [www.smith.edu/future/giving/match.php](http://www.smith.edu/future/giving/match.php) to learn more. Matching gifts count toward class totals.
- **Planned Gifts:** It's never too early—or too late—to plan for your future, and Smith's. Planned gifts use a variety of financial instruments that enable donors to make a contribution to Smith while creating income, obtaining certain tax advantages, and providing for loved ones. For additional information regarding giving vehicles, please contact Smith's Office of Planned Giving at 413-585-2035 or 1-800-241-2056 option #5 or email [planned\\_giving@smith.edu](mailto:planned_giving@smith.edu)



## **Donor Confidentiality:**

Alumnae names, addresses, and biographical information are entered into the Smith College database, where this information is protected and confidential. This information is released to class/club officers (or their designated representatives) only for the purpose of class/club activities.

Use of names, addresses, or other information released to a class/club volunteer (including, but not limited to, the preparation of envelopes or mailing labels) for any multiple group mailing without express written consent from a staff liaison is prohibited. Smith Fund materials should be shredded when no longer of use. Thank you for your attention to this important privacy issue.

## **Expense and Reimbursement Guidelines:**

Smith College has developed financial guidelines to ensure that volunteer expenditures are in accordance with standard practices and normal accounting procedures. Please contact your class liaison for more information on reimbursable expenses.

## **Donor Recognition: The Sophia Smith Leadership Society**



- **President's Circle Cum Laude** for annual donors of \$100,000 or more
- **President's Circle**, for annual donors of \$50,000 to \$99,999
- **Trustees' Circle**, for annual donors of \$25,000 to \$49,999
- **Dean's List**, for annual donors of \$10,000 to \$24,999
- **Paradise Club**, for annual donors of \$5,000 to \$9,999
- **1875 Founder's Society**, for annual donors of \$1,875 to \$4,999
- ★ **Smith Stars** ★ are donors of five or more consecutive years.

## **Connect to Smith!**

- Visit campus and attend reunions whenever possible—this is the best way to experience first-hand all that Smith has to offer current students and alumnae!
- Get Smith news every day by making [www.Smith.edu/gate](http://www.Smith.edu/gate) your home page.
- Attend local Smith focused events (hosted by clubs, the college, or just informal get-togethers)
- There are Smith Clubs in most major cities, and many smaller ones.
- Read your *Smith Alumnae Quarterly* magazine.
- Join our Smith Fund Volunteers Facebook group.
- Keep notes from your conversations with your assigned classmates for reference.
- Stay in touch with your Smith Fund staff liaison for regular Smith Fund updates and materials.
- Participate in class fund team conference calls and email discussions.

## **Important Online Resources:**

- [www.facebook.com](https://www.facebook.com) Search “Smith Fund Volunteers” and join our group.
- [www.smith.edu/thefund](http://www.smith.edu/thefund) Here is where you can direct donors to make their gift and see any updates about giving challenges or other news.
- [www.smith.edu/volunteers](http://www.smith.edu/volunteers) This page has tools for all volunteers including speaking points about Smith.

- [http://www.smith.edu/giving/fund\\_tools.php](http://www.smith.edu/giving/fund_tools.php) This page is specifically for Smith Fund volunteers and has links to resources like webinars, goals, and calendars.
- [www.alumnae.smith.edu](http://www.alumnae.smith.edu) Here you can find information on clubs, travel, events, and more.
- [www.smith.edu/news](http://www.smith.edu/news) Visit this page for current news about what's happening at Smith.

## **Solicitation Tips:**

### **Do:**

- Believe in your cause! Share your passion for Smith and your reasons for contributing.
- Make your own gift or pledge first—this makes it more comfortable to solicit others.
- Set aside at least two days for calls. Classmates may not be available on the first try.
- Send a note or email to classmates first to let them know to expect a call if you'd like.
- Jot down notes and talking points prior to the call. This can help you keep the conversation on track.
- Practice. Sometimes it helps to rehearse your key points with a friend.
- Make the contact. Just picking up the phone to make that first call will get the ball rolling.
- Ask open ended questions that allow your classmate to give you thoughtful answers rather than simply “yes” or “no”.
- Talk about your volunteer role, a recent visit to campus, or another positive experience.
- Ask for a specific gift amount. “Smith appreciates your consistent generosity. This year, we would like to ask you to show your support with a commitment of \$X.”
- Pause. Wait for your classmate to comment. She will tell you her thoughts on the ask amount. You can ask: “What amount would you like to contribute to the college?”
- Remind your classmate that she can break her gift into installments.
- Bring up the need for annual giving and the importance of widespread alumnae support.
- Thank your classmate for past giving, and note if she is a Smith Star.
- Remember that gifts of any size are indicators of support and investments in our future.
- Keep track of payment details. Confirm the amount and any requested payment schedule for pledges and/or appropriate credit card information.
- Thank your classmate before ending the conversation. Let her know how much her support is appreciated, and that her gift will count toward class totals. Inform her that you (and the college) will formally acknowledge her generosity.

### **Don't:**

- Apologize for asking. The generosity of alumnae is what allows Smith to continue offering the resources that make it one of the nation's top schools.
- Be afraid to start the gift conversation. Your classmate is expecting it!
- Do all the talking. Let your classmate ask questions and tell you about her experiences and what her philanthropic priorities are.
- Be afraid to ask “Why?” if your classmate is reluctant to give. Most will be happy to share their thoughts and experiences. Their comments can stimulate great discussions that will help them feel better about Smith. If you think that a classmate may benefit from staff contact, tell us—we are here to help support you in your efforts!
- Forget to thank a classmate for her time and consideration.

## **Follow up:**

- Return your contact sheets to your Smith Fund staff liaison as soon as possible, but please do not email credit card numbers!
- Write a thank you note to your classmates who have donated. Follow up with anybody who requested you call back at another time.

## **Sample Solicitation Call:**



*Hi, is Mary Jones available? I'm Sophia Smith, a classmate of hers from Smith College.*

*Hi, Mary, I'm an '87 classmate of yours from Smith, I'd like to talk to you about how you can join me in making a positive impact for current Smith students. (Find common experiences from college friends, your house, major, etc, or share recent experiences of being back on campus for reunion or conferences.)*

*I'd like to thank you on behalf of the college for your wonderful support of Smith in the past. Annual Fund gifts are particularly helpful, because they are used immediately each academic year for needs like scholarships and financial aid.*

*Would you consider joining me and other classmates by making a gift of \$500?*

*I understand. Congratulations on your daughter's wedding. This must be a tremendously exciting time*

*for you and your family! Would breaking this gift into a year of monthly installments at \$60 work better for you?*

*Is there a different amount you'd prefer to give this year? A gift or pledge right now will add you to our donor list and prevent you from receiving additional solicitations for the rest of the fiscal year.*

*Our participation is a very important focus for The Smith Fund this year. Alumnae donations are viewed as a kind of "vote of customer satisfaction" for the education you received. Corporations and foundations look at that when they decide where to give grants. Would you consider making a gift of \$250?*

*Thank you so much! I really appreciate your continued support! Did you know you can designate your gift to different areas within the Smith Fund? You can choose from Student Excellence, Teaching and Research, Innovative Programs or Emerging Needs.*

*Great! By supporting the Student Excellence fund you are helping meet the scholarship and financial aid needs of students. No? That's fine, your gift will be used right away where needed most.*

*May I put your gift of \$250 on your MasterCard, Visa, American Express or Discover? Making your gift with a credit or debit card allows more of your gift to go directly to Smith by reducing processing and paper costs.*

*The name on the card reads Mary P. Jones, we are putting your \$250 gift on your MasterCard, number 5500-xxxx-xxxx-xxxx, which expires on XX/XX. You'll get a formal receipt from Smith within the next few weeks.*

*By any chance do you, or a member of your family, have access to a matching gift program at work? These can often double your gift.*

*While I have you on the line, may I take a moment to update the college's records? Are you still living at 274 West Street in Cranberry, Pennsylvania? Still working at the Red Cross? Do you have an email address?*

*Thank you for your time today. It is great to be in touch with you and I hope to see you again on campus at our next reunion in May of \_\_\_\_.*

## **Stewarding Donors.**

- Any gift is a welcome vote of support for Smith. Please acknowledge every gift with sincere gratitude and recognition of the donor's generosity. Your timely note of thanks lets your classmate know that her gift was received and is appreciated.
- Review your Acknowledgement Report when you receive it (approximately every six weeks) and promptly send thank you notes to those classmates who have given to the college. If you can't get to them immediately, please prioritize notes to those women with the earliest gift dates and send these first.
- Annual gifts provide support for some of the most urgent needs of the college within the current fiscal year. Thank your classmates for choosing to provide this critical yearly support of Smith.
- Hand-write your thank you notes. Smith stationery is always available for you and is a welcome sight to your classmates, and your handwriting shows your personal attention to her gift.
- When writing your thank you notes, mention if the gift was an increase over the previous year's giving, or if it was greater than the current year ask amount. This information is available on the Acknowledgement Report (see sample on page 14), and shows that you recognize and appreciate your classmate's increased support.



- Consider keeping record of your assigned classmates loved ones or occasions of special importance. Your classmates will enjoy being remembered on their birthdays, or congratulated on an anniversary, promotion, or accomplishment of their children.
- Feel free to contact your Smith staff liaison for sample language or information for your notes.
- Know how much your thank you means to your classmates. Your stewardship lets them know that the college and their community of classmates have recognized their gift.



## **Written communication samples:**

### **Sample thank you note**

*Dear \_\_\_\_\_,*

*Thank you! I just received notice of your recent generous gift to the Smith Fund. Your gift certainly makes a difference as we reach for our class goal of \$####,###. Working with the Smith Fund has shown me how important our support is to Smith, and I hope you find that giving back helps you retain your connection to Smith as well.*

*It was wonderful to talk with you in person just a few weeks ago, and I want to wish you the best with your family's new adventure. Thank you again for your commitment to Smith and the class of 1987.*

*Best Regards,*

### **Gift Contact Sample**

*Dear \_\_\_\_\_,*

*It was so good to catch up with you last spring and to hear about the latest successes in your life. Did you remember that I am helping Smith with our class fundraising this year? Because of that, I am in close contact with staff there, and have learned of some amazing progress that is happening on Smith's campus. I would like to give you a call in the next two weeks to thank you in person for your generous gifts, to share news of the college and to hear your thoughts about Smith today.*

*If you would prefer I call at a different time, feel free to call or send an email to let me know what works for you. I now have a lifetime email at Smith at [ssmith@smith.alumnae.net](mailto:ssmith@smith.alumnae.net) or call me at home at ###-###-####. I am looking forward to talking with you soon.*

*Fondly,*

### **Ambassador Sample**

Dear \_\_\_\_\_,

*Can it be two years since we last saw each other at our reunion? I hope you are well! I am helping Smith with our class fundraising this year, and have learned of some amazing progress that is happening on campus. I would like to give you a call in the next two weeks to thank you in person for your generous gifts, to share news of the college and to hear your thoughts about Smith today.*

*I'm also in touch with how our class fundraising is going. After our amazing reunion gift, we are planning on keeping the momentum going with a class goal of \$x this year. The student phonathon is coming up in the next two weeks, so I hope you will support the college again this year: I know the student callers are so pleased to hear a friendly voice say "yes" to a gift.*

*I hope we have the chance to talk again very soon—give my best to your family, and have a wonderful fall.*

*Fondly,*

## Understanding Materials: Acknowledgment Reports:

- The Acknowledgement Report provides you with the information needed to thank your assigned classmates for their gifts to The Smith Fund. It lists gifts and pledges made by your classmate links during a reporting cycle.
- *Volunteers are only responsible for acknowledging gifts with a Smith Fund designation.* Information about gifts to other designations, such as the Botanic Gardens or Athletics, is provided for your information only.
- **The report is issued approximately every six weeks, and you will only receive it if at least one of your linked classmates has given during the gift entry period.** The gift entry period is the time between the last report you received and the current report, the date of each report can be found on the top right hand of the report.
- Please refer to the sample report on the following page, which shows a range of gifts to various designations, etc. The instructions on reading this report are broken out by column (Column 1, 2, 3, etc.) and subset (a, b, c) on page 3. Gift narratives of the gifts shown on the report are listed below (gifts A, B, C, D, E on the report).

### Gift Explanations (for gifts listed on sample report)

- A. **Rachel Jones:** This is a Pledge of \$200 for the 2016 Smith Fund made on March 23<sup>rd</sup> as a result of phonathon solicitation. There are no pledge payments yet. Last year she gave \$100 to The Smith Fund.
- B. **Nancy Smith:** There are two separate gifts for Nancy, both are 2016 Smith Fund gifts. The first is a \$10 gift made in memory of Sophia Smith on March 30th. The second is a \$50 pledge payment made by credit card on March 31st as a result of her 50th reunion class mailing.
- C. **Wendy Williams:** This is a \$10 gift made by check from The Hank & Wendy Williams Trust on behalf of Mrs. Williams to the 2016 Smith Fund in memory of Sophia Smith. Mrs. Williams will receive credit for the gift although the Trust is the legal donor.
- D. **Diana McDonald:** This is a \$250 2016 Smith Fund gift received by credit -card online. It was received through Give Campus as part of the March participation challenge (i.e. – Crowd Funding).
- E. **Victoria Samuels:** This is a \$150 outright gift to the Friends of the Museum. It is not a Smith Fund gift and she does not need to be thanked by you for this gift. However, if you look in column 2 at her current year Smith Fund Giving, you can see that she has made a \$250 Smith Fund gift.

### What's in each column?

1. **ID Name:** Contact and other basic information about the donor. (Note: SCAL = Smith College Alumna, SCND = Smith College Alumna No Degree. These codes are for internal use only. )
2. **Smith Fund Ask Amount and Giving:** Summary of ask amount and recent Smith Fund giving.
  - a. *Ask Amount:* FYI only
  - b. *Last Year Smith Fund:* Total amount of Smith Fund credit to alumna last fiscal year (7/1 – 6/30) can be gifts, pledges, matching gifts, or gifts made on behalf of the alumna.
  - c. *Current Year Smith Fund:* Total amount of Smith Fund credit to alumna *this* fiscal year (7/1 – 6/30) can be gifts, pledges, matching gifts, or gifts made on behalf of the alumna.
3. **Pledge No / Gift No:** Internal use only for identifying gifts.
4. **Category / Type:** Describes which kind of commitment the gift is.
  - a. *Category:* Indicates which kind of gift it is (pledge, gift, soft credit, etc.)
  - b. *Type:* Indicates how it was received (cash, online, check, etc.)
5. **Gift, Pledge & Entry Dates:** Tells you when we received and entered gifts.
  - a. *Gift/Pldg Date:* Date gift received
  - b. *Entry Date:* Date gift entered into database
6. **Designation and Campaign:** Gives more detail about where the gift will be used and counted.
  - a. *Designation and Campaign:* The year, 16, 17,18, etc. indicates which fiscal year the gift/pledge is credited in. The six digit code in the middle is for internal use. AFXX or CCXX indicates whether the gift/pledge is an AF (Smith Annual Fund) or CC (any other giving). For example in gift A, “AF16 0251000 The Smith Fund Solicitation” indicates that this gift is a Smith Fund Gift counted in the 2016 Fiscal year.
  - b. *Solicitation:* The communication to which the donor is responding (for example, a mailed appeal, online giving challenge, or student phonathon call)
  - c. IMO and IHO: Indicates if the gift is in honor or memory of anybody.
7. **Pledge:** Indicates any amount pledged.
8. **Pldg Payment:** Indicates pledge payments (full or partial payment).
9. **3<sup>rd</sup> Party Pldg Payment:** Indicates if a pledge was made on behalf of the alumna by another individual or an organization.
10. **Outright Gift:** A gift that is not a pledge and is not made by a third party on behalf of the alumna (for example, a check directly from an alumna is an outright gift).
11. **Soft Credit:** An outright gift made by another person, foundation, or organization on behalf of the alumna.
12. **Donor:** If another organization or individual made a gift on behalf of the alumna (3<sup>rd</sup> party pledge payment or soft credit), the name of that person/organization appears here. This person is the legal donor to Smith but the alumna will receive credit in class totals.

Smith College Advancement Division  
SF Acknowledgement Report

Selections: Gift Date: Mar 22, 2016 to Apr 4, 2016  
Donor Code(s): Alumna, Alumna - No Degree  
Class(es): 1966

Apr 4, 2016 1:42:46 PM  
Class: 1966

Volunteer: VOLUNTEER NAME HERE

Gift	ID Name	Smith Fund Ask Amount and Giving	Pledge No	Category	Gift/Pldg Date	Designation and Campaign		Pledge	Pldg Payment	3rd Party Pldg Payment	Outright Gift	Soft Credit	Donor
			Gift No	Type	Entry Date	Solicitation	IMO and IHO						
A	990000001 Rachel Jones	Ask Amt:\$1,000.00	2084164	Pledge	Mar 23, 2016	AF-16 025100 The Smith Fund		\$200.00					
	(A) 1966 SCAL	Last Year Smith Fund\$100.00				Smith Fund Phonathon							
	Salutation: Rachel Jones	Current Year Smith Fund\$200.00											
	1 Main Street Boston, MA Rachel123@smith.edu												
B	990100000 Nancy Smith	Ask Amt:\$2,500.00	0000000	Gift	Mar 30, 2016	AF-16 025100 The Smith Fund					\$10.00		
	(A) 1966 SCAL	Last Year Smith Fund\$120.00	2486127	Check	Mar 30, 2016	AF-Gif, Non-Smith Env							
	Salutation: Ms. Smith	Current Year Smith Fund\$560.00				IMO Sophia Smith							
	33 Elm Street Northampton, MA nancy.smith@smith.edu												
C	990200001 Wendy Williams	Ask Amt:\$5,000.00	2081405	Pledge Payment	Mar 30, 2016	AF-16 025100 The Smith Fund			\$50.00				
	(A) 1966 SCAL	Last Year Smith Fund\$100.00	2486389	Credit Card	Mar 31, 2016	AF 50th Reunion Class Mailing							
	Salutation: Mrs. Williams	Current Year Smith Fund\$10.00	0000000	Soft Credit Receiv	Mar 30, 2016	AF-16 025100 The Smith Fund					\$10.00		The Hank & Wendy Williams Trust
	2 Maple Street Boston, MA williams@smith.edu		2486139	Check	Mar 30, 2016	Trust, Foundation, Donor Advis							
D	990010004 Diana McDonald	Ask Amt:\$500.00	0000000	Gift	Mar 22, 2016	AF-16 025100 The Smith Fund					\$250.00		
	(A) 1966 SCAL	Last Year Smith Fund:	2486711	Credit Card Onlin	Mar 28, 2016	Gifts through CrowdFunding							
	Salutation: Mrs. McDonald	Current Year Smith Fund\$250.00											
	1 Palm Street Miami, FL												
E	9900010001 Victoria Samuels	Ask Amt:\$2,500.00	0000000	Gift	Mar 29, 2016	CC-16 441840 Friends of the Museum					\$150.00		
	(A) 1966 SCAL	Last Year Smith Fund\$11,000.00	2486350	Credit Card	Mar 31, 2016	Museum New Member Campaign							
	Salutation: Vicky	Current Year Smith Fund\$250.00											
	17 W. 65th St New York, NY vicky_samuels@smith.edu												

Column 1 2 3 4 5 6 7 8 9 10 11 12

## **Understanding Materials: Contact Forms:**

Contact forms are sent to volunteers who will be calling (or in some cases emailing) their linked classmates. These forms provide contact and biographical information as well as giving history for classmates, and allow volunteers to communicate with the college about gifts and donor information.

### **Biographical Info**

Please note any changes to address, email, marital status, employment, etc. next to the appropriate category on the top section of the form.

### **Gifts and Pledges**

Please enter all gift or pledge information in the “Call Results” section of the form. Many alumnae are choosing to make their gifts via credit or debit cards. Please offer this option to classmates who wish to support Smith as this is the most efficient and cost effective method of making a gift to the college. No need for an envelope, stamp, or writing a check—and the donor can even set her own payment schedule by noting the month(s) in which to charge the gift.

### **Contact Notes**

Use this area of the form to make notes regarding your conversation with your classmate. Additional notes may be recorded on the back of the form.

### **Pledge Slip**

The lowest quarter of the form is a reminder slip for classmates who make a pledge. If your classmate makes a pledge, please enter the amount of her commitment, add a personal note of thanks, and sign on the “Caller Name” line. When you return your phone forms to your Smith staff liaison, this slip will be sent to the pledger with a return envelope. The back of the slip provides information about giving to the Fund and provides the pledger with the opportunity to make her gift by credit card.

### **Matching Gifts**

Your classmate may have the option of matching her gift through her company, her partner or spouse’s company, or as a retiree.



## The Smith Fund Alumnae Constituents Contact Form

Volunteer: Dorothy Pond 990 [REDACTED]

990 [REDACTED] / 6FPCF

Jean [REDACTED]

9 [REDACTED]  
Kittery Point, ME 03905

Preferred Phone: (207) [REDACTED]:

Ask Amount: \$500.00

Salutation: Jean

Email: [REDACTED]

Spouse/Partner: [REDACTED]

S/P Business: Counselor/Lay Minister  
given

No employer

Business: Viola Player

Employer: Portland Symphony Orchestra

Portland Symphony Orchestra  
Portland, ME 04104

Work Phone:

Smith Major: Music

Senior House: Lawrence House

Smith Activities and Volunteer Positions:

2009 Reunion 2009  
2004 Reunion 2004  
2003 Maine CTC welcome 7/16/03

Campaign Year	Gifts/Pledges to Annual Campaign	Gifts/Pledges to other Campaigns
2016	\$0.00	\$0.00
2015	\$500.00	\$0.00
2014	\$100.00	\$0.00
2013	\$200.00	\$0.00
2012	\$100.00	\$0.00

- Most recent gift  
Date: 12/5/14 Amount: \$500.00

### Call Results

990 [REDACTED] / Jean [REDACTED] 1944 6FPCF

☐ YES, made a specific pledge or gift (fill out information below)

1. Credit/Debit Card Gift of \$ (amount)

AND/OR Bill credit card for \$ in months of

Credit Card Information: ☐ Visa ☐ MasterCard ☐ Discover ☐ American  
Express

Name on Card Exp. Date

Card #:

2. Pledge of \$ (amount)

3. Expect matching gift of \$ Matching gift company:

### Other Responses:

☐ Will give this fiscal year, but would not specify amount

☐ Already sent gift

☐ Number disconnected/wrong (note details at phone above)

☐ No (note reason in contact notes)

Contact notes (more space available on back):

### The Smith Fund

33 Elm Street \* Northampton, MA 01063 \* 800-241-2056

Make your gift online at [www.smith.edu/thefund](http://www.smith.edu/thefund)

6FPCF [REDACTED]

Jean [REDACTED]  
9 [REDACTED]  
Kittery Point, ME 03905

Thank you for your commitment of \$

Caller Name and Class Year

## **Frequently Asked Questions:**



- Q. *Can I take credit card information from a classmate?*
- A. YES! You are authorized to do so, and this is a great way for Smith to receive support, and save on paperwork.
- Q. *Should I bother returning phone forms that are blank?*
- A. YES! It is very helpful for the college to know about your progress contacting classmates. You can email, call, or mail information, but please do stay in touch!
- Q. *There's no phone number listed. What should I do?*
- A. Please do online research, or contact mutual friends to find a classmate's phone number. If you find a phone number and confirm that it is correct, please note the number on your form. If you can't find a number, you might consider writing that classmate a note instead.
- Q. *Why didn't I receive forms for all of my assigned classmates?*
- A. You will not receive forms for your linked classmates who have already made a Smith Fund gift or pledge, who have indicated that they will not make a gift this year, who have asked not to be solicited, or who have asked not to be solicited by phone.
- Q. *What if my classmate already made a gift to another designation?*
- A. Many alumnae give to both The Smith Fund and other designations. Please make note of her other gift and ask if she'll support The Smith Fund too.

## **Glossary of Terms:**

**Class Manager:** The staff person in The Smith Fund who is assigned to your class year and is your staff point person in your volunteer efforts. Class managers will reach out to you regularly with information, updates, and materials. You can contact your Class Manager with any questions you have about The Smith Fund.

**Fiscal Year:** We solicit gifts based on a fiscal year rather than on the calendar year. Smith's fiscal year runs from July 1 - June 30.

**Link:** Your “links” are those classmates to whom you are assigned. The term “links” comes from the concept of Smith alumnae being links in the Ivy Chain. Volunteers usually choose between 15 and 25 names, and may choose friends, classmates from their senior house, regular donors, or other groups. Volunteers receive reports with updates on the giving activity of this specific group of classmates.

**LYBUNT:** LYBUNT is an acronym for a classmate who gave “last year but unfortunately not this” year—yet! Smith relies on these alumnae who know the importance of giving to maintain and increase our donor participation rate. Classmates who have recently given are often happy to contribute to Smith again, and contact from a volunteer can make a wonderful difference. Thousands of alumnae gave a gift to Smith last year: with your encouragement, we hope they will choose to support the college again this year.

**Smith Stars:** Smith Stars are the bedrock of Smith donors: they are those classmates who have supported the college for five or more consecutive years. They also make up *close to half* of our donor base each year. These loyal and dedicated alumnae have a great impact on Smith.

**Staff Liaison:** This is the staff person in The Smith Fund who is assigned to your efforts and your staff point person. Your staff liaison will reach out to you regularly with information, updates, and materials. Contact your staff liaison with any questions you have about The Smith Fund.

**SYBUNT:** SYBUNT is an acronym for a classmate who gave “some years but unfortunately not this” year—yet! These alumnae have given in the past and are likely to give again if asked in a personal, meaningful way.









**Initiatives:** Initiatives are the programs, renovations or services that have been earmarked by Smith as critical areas for financial support. Some initiatives are for new programs, such as the Conway Innovation Center program. Others represent improvements on existing facilities, such as the renovation of the Alumnae House. The Smith Fund is a top priority each year.

**Designation:** The designation of a gift is the program to which it is directed. As a Smith Fund Team volunteer, you are helping to raise gifts designated to the Smith Fund. *While gifts to all Smith designations count towards class dollar and participation totals, not every gift to the college is a “Smith Fund gift.”* The Fund is a specific gift designation, just like the Friends of the Botanic Gardens is a specific designation.

**Class Dues/Club Dues:** Class dues are fees set by each class, solicited by the Treasurer, and used to fund class activities and defray the cost of reunion. Smith Club dues are fees set by each club, and are typically solicited annually to cover the club’s activities and mailings. Both of these fees support Alumnae Association programs and are not gifts to the college.

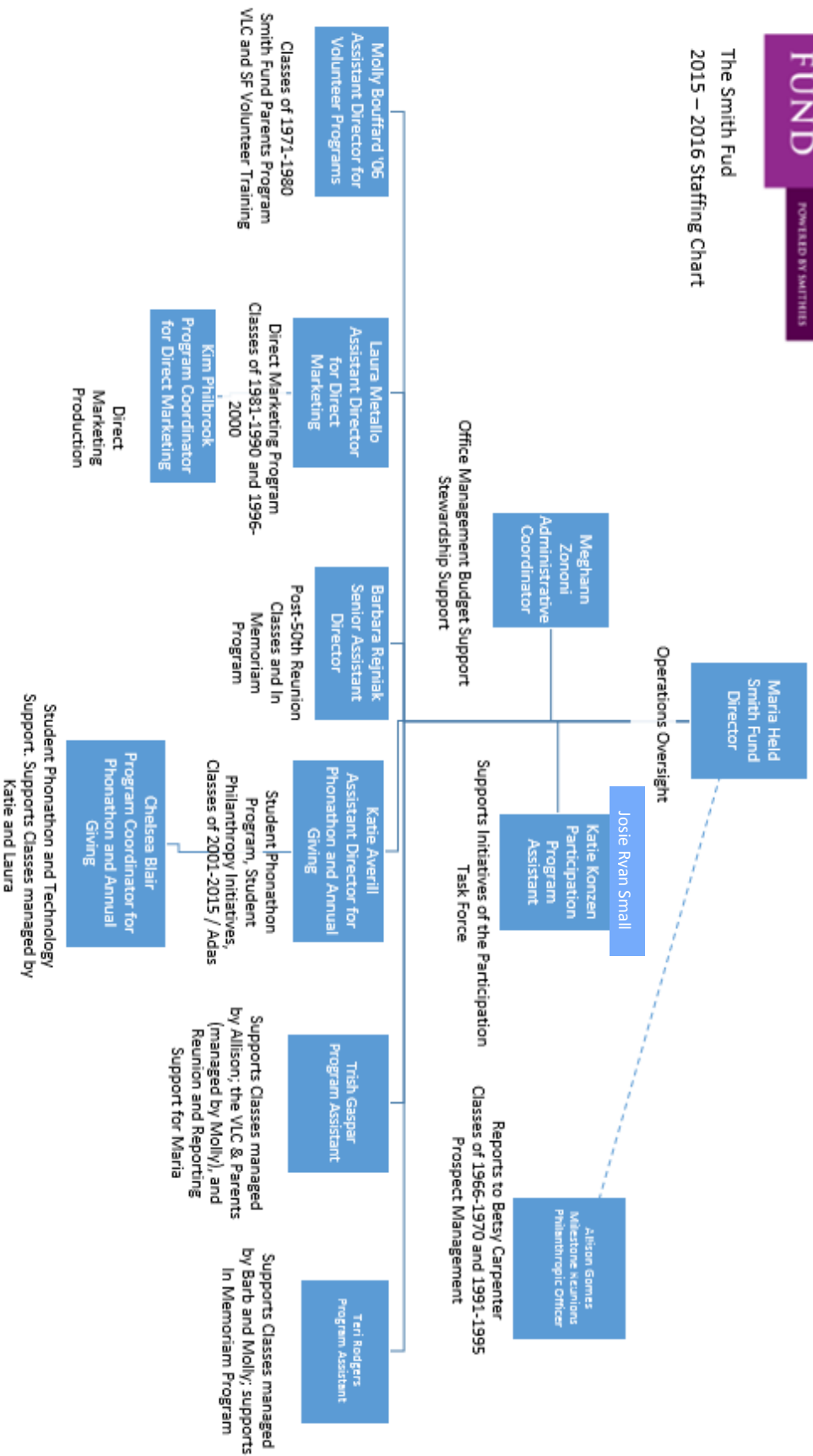


## FY 2015 - 2016 Volunteer Calendar

MONTH	WHAT CAN I DO?	WHAT'S THE SMITH FUND STAFF DOING?
Any Time	<p>Check out <a href="#">The Smith Fund Volunteers Calendar</a> resource to learn about college related events near you. Think about how you might use these to encourage donations and participation.</p> <p>Visit <a href="#">Smith's news site</a> so that you can share up-to-date college information with your contacts.</p> <p>Outreach to assigned contacts.</p> <p>Use <a href="#">social media</a> to promote any Smith Fund news or giving challenges.</p>	Thinking of creative ways to reach donors, boost participation, and help our volunteers succeed.
Thank anybody who's given so far.		
September - November		
	Outreach to assigned contacts.	<p>Mailing appeals to non-donor alumnae</p> <p>Special outreach to reunion years.</p> <p>Student phonathon.</p>
December		
	Use the upcoming tax- year-end as an inspiration for your contacts who haven't given yet.	Mailing calendar year-end appeals in mail and email.
January		
	Revisit your list of contacts. Reach out to people who haven't given yet.	Thank you e-mails to donors, Reunion Class appeals.
February		
	We love our donors. Call up to say "thanks" to people who've given!	Mailed appeal to non-donors.
	Look over your updated contact sheets and start connecting to non-donors.	Student phonathon.
March - April		
	Prime time for reunion fundraising! Especially those who've registered but not yet given.	Reunion, reunion, reunion! Student phonathon continues.
	Keep connecting with non-reunion non-donors too.	
May		
	Prime time for reunion fundraising! Especially those who've registered but not yet given.	"Last chance" mailed appeal to non-reunion alumnae. Reunion mailing for reunion years.
June		
	Use social media to promote any Smith Fund news or giving challenges.	Fiscal year end, mostly e-mail appeals.
	Help Smith Fund staff follow up with anyone who's pledged but not yet paid.	Phone calls to non-donors. Following up with pledgers who haven't paid yet.
July		
	Thank all your donors and share your results!	Communicate year end results and reports to donors.



# The Smith Fund 2015 – 2016 Staffing Chart



## **Your Class Managers & Program Assistants for 2015-2016 are:**

<b>Class</b>	<b>Class Manager</b>	<b>Program Assistant</b>
<b>1938-1965</b>	<b>Barbara Rejniak</b> brejniak@smith.edu (413) 585-2063	<b>Teri (Serteria) Rodgers</b> srodgers@smith.edu (413) 585-2656
<b>1966-1970 &amp; 1991-1995</b>	<b>Allison Gomes</b> agomes@smith.edu (413) 585-2661	<b>Trish (Patricia) Gaspar</b> pgaspar@smith.edu (413) 585-2057
<b>1971-1980</b>	<b>Molly Bouffard</b> mbouffard@smith.edu (413) 585-2068	<b>Teri (Serteria) Rodgers</b> srodgers@smith.edu (413) 585-2656
<b>1981-1990 &amp; 1996-2000</b>	<b>Laura Metallo</b> lmetallo@smith.edu (413) 585-2097	<b>Chelsea Blair</b> cblair@smith.edu (413) 585-2039
<b>2001-2015, Adas &amp; Senior Class</b>	<b>Katie Averill</b> kaverill@smith.edu (413) 585-2698	<b>Chelsea Blair</b> cblair@smith.edu (413) 585-2039
<b>Smith Fund Director</b>	<b>Maria Held</b> mheld2@smith.edu (413) 585-2044	